

Setup (One-time actions)

1 Center Setup

In iCare Admin go to *Setup* >> [Get Started](#) and fill the following tabs:

- General Information and Center Hours
- [Rooms/Programs](#) (Examples: Infants, Toddlers and PreK; or, KG, Grade1 and Grade2)
- [Offered Schedules](#) (Examples: 5 Full Days, 3 Days AM and 5 Half Days)
- [Recurring Billing](#)
- [Business Model](#)

In iCare Admin go to *Setup* >> [Parent Portal Setup](#) and set up:

- Incoming and outgoing email addresses
- Your preferences for the parents

2 Invite Parents to the Parent Portal

Give the URL for [Parent Portal](#) to all the parents. Additionally, display the link on your website.

On the Parent Portal parents can:

- Enter [child and family data](#)
- [Schedule children](#) in your programs
- [Pay online](#)
- Read and respond to notes and [messages from teachers](#)

3 Invite Teachers to the Teacher Portal

Give the URL for Teacher Portal to all the teachers. On the portal teachers can:

- Check children's [roster, schedule and attendance](#)
- Write children's [activity and development notes](#) and respond to parents
- Check their schedule

4 Enroll Children and Staff

For each child, perform the following tasks:

- Enter child and family data
- Place child into a Program/Room
- Place child into an Offered Schedule or enter a Custom Schedule

Recommended: Ask the parents to do all of the above online through Parent Portal.

Alternatively: You can manually do this in iCare Admin. Enter child/family data and choose a Program/Room from *Children* >> [Family Data](#) >> *Add*. Then, choose the child's Schedule from

Children >> [Fee and Schedule](#). You can now invite parents to the Parent Portal via [email from iCare](#).

Enter all staff in iCare Admin through [Staff >> Data](#) >> *Add*. Assign each staff to a Program/Room.

By Data Transfer: Family data can also be imported through an Excel sheet (see KB 1208)

5 Set Up iCare Lobby for Parents and Staff

Set up an [iCare Lobby](#) kiosk using a PC, Mac, laptop or tablet in the lobby. You can use it for the following:

- Have parents and staff [check-in and out](#).
- [Read messages](#) and answer [RSVP questions](#).

You can also create [lobby passwords](#) for [batch check-in](#) for *programs, classes* and *busses*.

6 Set Up Payment Processing

Set up a Merchant Account, and ask parents to view their account statements and make payments through Parent Portal.

Everyday Things

Check Bills and Enter Payments

- Check family and subsidy account statements to see if recurring bills are populating as expected. (*Accounting* >> [Accounts](#))
- If not using Parent Portal for online payments, then enter payments through the single or batch payment entry forms. (*Accounting* >> [Payments](#)) (*Accounting* >> *Payments Drop-Down* >> [Enter Batch Payments](#))
- Enter Miscellaneous Charges or Credits through *Accounting* >> *Account Register*.

Enter Children's Daily Activities and Development Notes

- Enter children's activities and development notes. (*Children* >> *Family Data* >> [Child Notes](#) link in the footer) (*Left Panel Child List* >> *Right-click* >> [Enter Note...](#))
- Note: parents can read the notes and respond to messages through the Parent Portal.

Check Teacher-Child Ratios

- Check live Teacher-Child Ratios through *Windows* >> [Teacher-Child Ratio Ticker](#)
- Check historical trends and compliancy ratios through *Staff* >> *Attendance Drop-Down* >> [Trends and Summaries](#) >> *Ratio Compliance Report*

Quick Tips

Lobby Questions

Electronically ask parents and teachers questions when they check-in to the Lobby Interface. Create questions through *Message Center >> Lobby Questions >> [Create Questions](#)*. Check the responses through *Message Center >> Lobby Questions >> Responses Report*.

Examples:

- What do you want for lunch today?
- Do you approve this field trip?
- Which cubby are you using today?

SMS/Email

- Send SMS text messages or emails through *Left Panel Child List >> Right-Click >> [Send SMS or Email](#)*
- From any report, right-click on a child or family member and choose *Send SMS or Email*

Alerts and Notifications

- **Automatic Alerts to Parents or Administrators:** Set automated alerts – like overdue balance, immunization shots or last physical – to be sent by SMS or email. (*Message Center >> [Alerts Setup](#)*)
- **Parent Portal Notifications:** Get notified when parents enroll children or update schedules online through Parent Portal (*Setup >> [Parent Portal Setup](#)*)

Additional Records

- **Immunization Records:** Enter immunization dates and iCare will automatically notify the parent when the next immunization dose is needed. (*Children >> Records >> [Immunizations](#)*)
- **Medical Records:** Enter Allergies, Health Insurance and Doctors. Update annual physical exams, vision tests, hearing tests and other medical requirements and iCare will automatically notify the parent when a requirement is needed. (*Children >> Records >> [Medical](#)*)
- **Permissions Records:** Track parental permission for emergency care, field trips, pictures, etc. (*Children >> Records >> [Permissions](#)*)
- **Electronic Document Records:** Store scanned copies of signed documents, enrollment applications, etc. (*Children >> Records >> [Electronic Documents](#)*)

Reports

Commonly Used Reports

- **Child Enrollment List** (*Children >> Family Data Drop-Down >> Child Lists >> Child Enrollment List*)
- **Children's Fee Report** (*Children >> Fee and Schedule Drop-Down >> Fee Report*)
- **Children's Schedule Report** (*Children >> Fee and Schedule Drop-Down >> Weekly Scheduling Reports >> Weekly Schedule Report*)
- **Staff Schedule Report** (*Staff >> Schedules Drop-Down >> Weekly Schedule Report*)

- **Children's Attendance Report:**(*Children >> Attendance Drop-Down >> Attendance Reports >> Attendance Report*)
- **Staff Attendance Report** (*Staff >> Attendance Drop-Down >> Attendance Payroll Hours Report*)
- **Account Balances** (*Accounting >> Accounts Drop-Down >> Account Balances*)

Report Tips

- **[Modify Filter](#):** Allows you to filter the time period or any column in the report.
- **[Excel](#):** Export all data directly to Excel.
- **[Related Reports](#):** Allows you to quickly find related reports.
- **[Views](#):** Use the tabs to switch between Working View and Printer View.
- **[Right-Click](#):** Right-Click on any cell in the Working View for Accounting, Messaging or Mathematical actions

Advanced Setup

Attendance Options

- Set up how attendance hours are rounded through *Setup >> Advanced Setup >> Time Clock/Attendance Options*
- Set up whether you have a day operation or an over-night operation through *Setup >> Advanced Setup >> Time Clock/Attendance Options*
- Set up the start day for staff payroll and children's scheduling and billing through *Setup >> Advanced Setup >> Time Clock/Attendance Options*

Meal timings for CACFP Reporting

- Set up the meal times for each meal and each room through *Advanced Setup >> [Meal Times for Programs](#)*

Advanced Billing

Configure the following billing options through *Setup >> Advanced Setup >> [Billing Options](#)*:

- Whether unscheduled attendance hours should be billed
- Whether hourly and daily rates are billed by schedules or by attendance
- Whether billing is prorated for during weekly and monthly billing cycles
- Whether late fees are charged when children are picked up after the school closing time