

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](#) (for example: Under 2, Over 2)

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

- Incoming and outgoing email accounts

2 Drop-in Setup

In iCare Admin go to *Children* >> [Drop-in](#) and do only what you need from the following:

- Billing Rates (See [KB article 1448](#)): In Drop-in form go to *Setup* and set [rates based on](#)
 - Programs
 - Number of children present
 - Maximum charge per day
 - Special day and time (say Friday nights)
 - Minimum hours
- Attendance options: Set how attendance hours are rounded through *Setup* >> *Advanced Setup* >> *Time Clock/Attendance Options*.
- Point of sale: Set up the following as indicated:
 - [Receipt printer](#): Go to *Children* >> *Drop-in* >> *Enter Payment* >> *Default Printer*.
 - Cash drawer: Go to *Setup* >> *Hardware Setup* >> [Cash Drawer](#). If connected to the receipt printer, select Printer Fired and enter the name of the printer.
 - Check-in ticket option: Go to *Setup* >> *Hardware Setup* >> [iCare Lobby](#). Set [Print Check In and Check-Out Ticket](#) and the printer for it.
 - Self-check-out option: Go to *Setup* >> *Hardware Setup* >> [iCare Lobby](#). Set Self-Check-Out options.
- [Prepaid Money Packages](#) (see [KB article 1450](#)): Go to *Children* >> *Drop-in*. Click on Package button and then on [+] next to Create a Package. Add packages.
- [Prepaid Hours Packages](#) (see [KB article 1457](#)): Go to *Children* >> *Drop-in*. Click on Prepaid Hours button and in the drop-down for Rate Name select Add/Edit Items; add packages. To tell parents about their balance when checking in, go to *Setup* >> *Hardware Setup* >> [iCare Lobby](#) and set [Prepaid Hours Validation](#).
- [Billable Hours option](#): For billing the extra hours of drop-in care for preschool children see [KB article 1236](#). This lets scheduled hours be taken off from drop-in charges.

3 Invite Parents to the Parent Portal

Add the link for [Parent Portal](#) 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](#)

4 Enroll Children and Staff

Recommended: Ask the parents to enroll and enter contact data through Parent Portal.

Alternatively: Do it yourself in iCare Admin. Enter child/[family data](#) through *Children >> Drop-in >> Enrollment icon >> Add*. You can now invite parents to the Parent Portal via [email from iCare](#).

Enter staff through [Staff >> Data](#) >> Add.

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](#).
- Automatically print [check-in ticket](#) or a label when a child is checked in.
- Have parents do self-check-out – [process the charges and pay](#) – when checking out.

6 Set Up Electronic Payment Processing

Set up a Merchant Account for credit card and ACH processing. (The payment processing company will contact you.)

Everyday Things

Self-check-out by Parents through iCare Lobby

If self-check-out is set, ask parents to complete their transaction and pay with a credit card.

Bill, Enter Payment and Sell a Package and Other Items

Do the following through the [Drop-in](#) Services form (*Children >> Drop-in*):

- Bill drop-in charges (if not using self-check-out). Check Time In, Time Out, Rate and Amount in the Attendance grid and the Drop-in Service Total. Click on Bill.
- Enter payment (if not using self-check-out). Click on Enter Payment. Select Type of Payment and other transaction details. Click on Accept Payment.
 - Click on Open Cash Drawer to complete cash transactions.
 - Click on Print 3" Receipt to print the receipt.
- Sell a Prepaid Money Package. Click on the Package button and add the package.
- Sell a Prepaid Hours Package. Click on the Prepaid Hours button and add the package.
- Sell other items, such as, meal, shirt and movie pass click on *Accounting >> Account Register*. Enter transaction in last (yellow) row and click on Save and Post.

Enter Children's Daily Activities and Development Notes

- Enter children's activities and development notes. (*Children >> Drop-in >> [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.

Routine Checks

Do the following routine checks through the [Drop-in](#) Services form (*Children >> Drop-in*):

- Check account balance, prepaid balance (if using prepaid-hours) and other totals for a family in the *yellow notification area*.
- Check if attendance has billed and paid (*Accounting >> [Check If Attendance was Billed](#)*).
- Cash reconciliation and to open or close the cash register for a cashier's shift (*Accounting >> [View Daily Cash Drawer](#)*).

Quick Tips

Lobby Questions when Parents Check-in

Get parents' answers to questions and options of the day. Create the 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?
- What time will you pick-up today?

SMS/Email

- Send SMS text messages or emails through *Children >> Drop-in >> [SMS/Email](#)*.
- From any report or the *Left Search Panel*, right-click on a child or adult name and choose *Send SMS or Email*.

Reports

Commonly Used Reports

- **Children's Schedule Report (i.e. Reservations)** (*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*)
- **Children's Attendance Trends:**(*Graphs >> Historical*)
- **Staff Attendance Report** (*Staff >> Attendance Drop-Down >> Attendance Payroll Hours Report*)
- **Payments Received** (*Accounting*)

Report Tips

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- **Modify Filter**: Allows you to filter the time period or any column in the report.
- **Excel**: Export all data directly to Excel.
- **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.