

Setup (One-time actions)

1 Setup

In iCare Admin do the following:

Set up basics

- Set your business model: go to *Setup* >> [Get Started](#) and fill the [Business Model](#) tab.
- Set your scheduling/billing options: go to *Children* >> *Fee and Sch.* [Click on the \[+\] icon](#) in Weekly Schedule Details and set your options.
- To automatically convert clocked (real-time) attendance to your scheduling/billing options: go to *Setup* >> *Advanced Setup* and the [Afterschool Care Options](#) tab. Check the box, Auto-fill (FTPT) attendance through dayending using time-clock data.

Set up subsidies, providers and drivers

- [Enroll providers](#): go to *Payables/GL* >> *Vendors Add or Edit* and add your providers. Set *Vendor Type* = Provider and click on *Make Provider*.
- [Enroll drivers](#): go to *Payables/GL* >> *Vendors Add or Edit* and add your providers. Set *Vendor Type* = Driver and check *Is Driver*.
- Set subsidy rates: go to *children* >> *Fee and Sch.* In *Setup* click on [Tuition Fee Chart](#). Fill your subsidy rate chart (see KB article 1474).
- Set provider rates: go to *Payables/GL* >> *Vendors Add or Edit*. Select *Vendor Type* = Provider and click on [Provider Rate Chart](#) icon. Set your rates.
- Set driver rates: go to *Payables/GL* >> *Vendors Add or Edit*. Select *Vendor Type* = Driver and click on [Driver Rate Chart](#) icon. Set your rates.

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](#)
- [Pay online](#)
- Read and respond to notes and [messages from providers](#)

3 Invite Providers to the Teacher Portal

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

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

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 Sch.](#)

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

5 Set Up Lobby Interface to Record Attendance

Set up an [iCare Lobby](#) on tablets and have parents and staff clock-in and out at the provider homes or buses. You can use it for the following:

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

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

Enter Vouchers

In iCare Admin go to *Children >> Fee and Sch.*

- Enter one or multiple [vouchers](#) per child including voucher start and end date, subsidy rate and parent's copay amounts.
- Enter driver info.

Generate Invoices

In iCare admin, go to *Accounting >> Account Register* ▼ >> [Custom Batch Billing](#).

- For subsidies and parents (AR side billing): Select the *FDC [Subsidy-Parent Billing – Attendance Based \(AR Side\)](#)* option. Choose a date from the month you want to invoice and click on the *Refresh Grid* icon. Click on the printer icon to [preview the invoice](#). When ready, click on Bill Subsidy Now and Bill Parents Now to post the invoice. (For most types of rates both subsidy or parent bills can be automated through the Dayending process.)
- For providers (AP side billing): Select the *FDC [Provider Billing \(AP Side\)](#)* option. Choose a date from the month you want to invoice and click on the *Refresh Grid* icon. Click on the printer icon to [preview the invoice](#). When ready, click on Bill Now to post the invoice.

- For drivers (AP side billing): Select the *FDC [Driver Billing](#) (AP Side)* option. Choose a date from the month you want to invoice and click on the *Refresh Grid* icon. Click on the printer icon to [preview the invoice](#). When ready, click on Bill Now to post the invoice.

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

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](#)*)

iCare FDC Agencies – Getting Started

- **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 Document](#)*)

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*)
- **Vendor Account Report:**(*Payables/GL >> Vendor Account Report*)
- **Vendor Account Statement:**(*Payables/GL >> Vendor Account Statement*)
- **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