Welcome

We are pleased you have chosen to partner with us to help you easily manage the day-to-day business of your childcare center. Our intention is to save you time on the business side so that you have more time with the children you care for.

This guide will help you implement your Smartcare Center App and get to know some of the features that will help you easily manage your center. If you need assistance for any reason, we’re here to support you!

Support

Through the Support function, you can access user guides, FAQs, and instructions on how to install the Smartcare Kiosk.

Access the User Guide

1. Tap the menu icon at the top left of the screen and select User Guide.

Add the Software Release Notes Widget

This widget gives you easy access to Smartcare software release updates with dates and details.

1. Swipe left on the Dashboard until you reach the Edit Live Widgets screen.
3. Tap the plus icon next to the Release Notes widget to add it to the Dashboard.

Report a Problem

1. Shake your iPad to initiate Instabug.
2. Select either Report a problem or Suggest an improvement.
3. Follow the prompts to submit a ticket or provide feedback.

Submit Feedback and Include Attachments

1. Tap the menu icon at the top left of the screen and select Support.
2. Tap the note icon at the top right of the screen. The Submit Ticket window opens.
3. Enter your message.
4. Enter your name and email and tap Submit at the top right.

Contact Us

Phone: 1-844-SMARTER
Email: support@smartcare.com
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Getting Started

System Requirements

Smartcare Center App works with iPad devices installed with iOS 10 or higher:

- iPad Pro 12.9-inch
- iPad Pro 9.7-inch
- iPad Air 2
- iPad Air
- iPad 4th generation
- iPad Mini 4
- iPad Mini 3
- iPad Mini 2

Download the Application

Smartcare Center App is for use with Apple iPad.

1. On your iPad, open up a browser and enter: https://my.smartcare.com/downloads/#/
2. Locate Center App – iOS and tap DOWNLOAD.
3. Follow the prompts to install the application. You may be prompted to enter your Apple ID and password.
Log Into the Application

1. Tap on the app to open it.
2. Enter your email and password.
3. Tap **Login**. The Dashboard displays your current teacher/student ratios.

**Note:** The first time you open the app, you may receive a pop-up message “Untrusted Enterprise Developer.” To set the app to “trusted,” do the following:

a. Open your iPad System Settings.
b. Tap **General**.
c. Scroll down and tap **Device Management**.
d. Tap **SmartCareOS, LLC**.
e. Tap **Trust “SmartCareOS, LLC.”**
f. Tap **Trust** at the prompt and exit out of System Settings.
g. Tap on the app to open it.
Reset Your Password

1. On the Login screen, tap **Forgot Password?**
2. Follow the prompts to reset your password.

Change Password (Settings)

1. Tap the menu icon at the top left of the screen and select **Settings**. The Settings Dashboard opens.
2. Tap **Change Password** at the bottom.
3. Enter your old password.
4. Enter a new password and enter again to confirm.
5. Tap **Save**.
6. Tap the **X** at the top right to exit out of the screen.

Log Out

1. Tap the menu icon at the top left of the screen and select **Log Out**.

Menus
**Menu Screen**

Tap to access functions

**Detail Screen**

“Three dots” menu icon

Menu tabs
Search

You can easily search for a child, family or employee record using the search function.

1. Tap the menu icon in the top left of the screen and select **Search**.
2. You can search for someone in the following ways:
   a. Tap the Employees, Adults or Children tab, then tap a letter to narrow your search.
   b. Tap in the Type to Search field at the top and begin typing a name.
3. Tap the name to open the profile.
Set Up My Center

The My Center settings houses the settings and preferences for your center. You can add buildings, rooms and classes, set up meal plans, billing and payroll, and view schedules for children and employees.

Add or Edit Center Information

1. Tap the menu icon in the top left corner of the screen and select **My Center**.
2. Tap the three dots at the top right and select **Edit**.
3. Enter the information for your center.
4. Enter Federal and State Tax ID if desired. This information will display on any tax statements that you generate and send out through Smartcare.

Set Up Buildings

You can set up or make changes to the buildings associated with your center through the My Center settings.

1. Tap the menu icon in the top left corner of the screen and select **My Center**.
2. Tap the **Building Settings** tab at the top. The Building Settings screen opens.

**Add Rooms**

Rooms are physical spaces like classrooms.

1. Tap the three dots at the top right and select **Add Another Room**.
2. Enter the room name or number and the capacity.
3. Tap the X in the top right when finished.

**Add Spaces**

Spaces are physical spaces like playgrounds.

1. Tap the three dots at the top right and select **Add Another Space**.
2. Enter a name for the space.
3. Tap the X at the top right when finished.

**Remove a Room or Space**

1. Tap the trash icon next to the room or space you want to remove.
2. Tap **Yes** to confirm.
Set Up Classes
Classes are associated with groups of children. You can set up or make changes to the classes associated with your center through the My Center settings.

1. Tap the menu icon in the top left corner of the screen and select My Center.
2. Tap the Classes tab at the top. The Classes screen opens.
3. Tap the three dots at the top right and select Add Class.
4. Enter the class information: class name, age range, ratio of students to teachers, a desired ratio, the maximum class size, and a room assignment.
5. Tap Save when finished.

Set Up Schools
Schools can be set up to associate with child profiles and also when adding transportation or bus run information. A school can be any location and does not have to be an actual school.

1. Press and hold the Classes tab at the bottom of the My Center screen and select Schools. The Schools screen opens.
2. Tap the three dots at the top right and select Add New School.
3. Enter the school name and tap Save when finished. See also Assign a School to a Child and Add Transportation or Bus Run to a Child’s Profile.

Set Up Meal Plans
If your center works with meal programs, such as IEF or FDA, you can set those up through My Center settings.

1. Tap the menu icon in the top left corner of the screen and select My Center.
2. Tap the Center Settings tab at the bottom. The Center Settings screen opens.
3. Select the Meal Settings tab at the top.
4. Tap the circle next to the meal times that apply to the programs for your center.
5. Tap the clipboard icon next to each meal time to edit the start and end times if desired.
6. Tap the X in the top right when finished. See also Add a Food Program to a Child’s Profile.
Set Up User Roles

User roles determine the user permissions for each of your staff. Generally, you will only need these three roles: Director, Teacher, Admin. See table below for data access.

1. Tap the menu icon in the top left corner of the screen and select *My Center*.
2. Tap the *Users* tab at the bottom. The Users screen opens.
3. Select the *User Roles* tab at the top.
4. Tap the three dots at the top right and select *Add User Role*.
5. Enter a name for the role and tap *Save*.
6. Tap on the role you just created to select the data access for this role. Check only the sections you wish the role to have access to and select either *View* or *Edit*.
   a. **View**: Allows the user to view only.
   b. **Edit**: Allows the user to make changes to data. When you select Edit, View is automatically selected.
   c. **No Selection**: The function is hidden from the user.
7. Tap *Save* at the bottom.

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<td>o  Create Assessments</td>
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Manage Custom Fields

You can create custom data fields for a child, family, adult, and an employee record. Custom fields are created under My Center and are then displayed under the following sections of the individual record:

- Children: Profile/Custom Fields
- Families: Custom Fields / Tags
- Adults: Profile/Custom Fields
- Employees: Profile/Custom Fields

Create a Custom Field

1. Tap the menu icon in the top left of the screen and select My Center.
2. Tap the Center Settings tab at the bottom of the screen. The Center Settings screen opens.
3. Tap the Custom Fields/Tags tab at the top.
4. Tap on a category under the Custom Fields section to open a list of custom fields on the right for that record type. (This will be blank if you haven’t created any.)
5. Tap the three dots and select Add Custom Field. The custom field is automatically marked “Active.”
6. Enter the Field name. This name will appear on the record.
7. Enter a description if desired.
8. Tap on the Type field to select a data type.
   Note: Selecting “Options” enables you to create a list with multiple values.
9. Tap Save.
Edit a Custom Field
1. Tap the menu icon in the top left of the screen and select My Center.
2. Tap the Center Settings tab at the bottom of the screen. The Center Settings screen opens.
3. Tap the Custom Fields/Tags tab at the top.
4. Tap on a category under the Custom Fields section to open a list of custom fields for that category.
5. Tap on a custom field in the list you want to edit.
6. Make your changes and tap Save.

Deactivate a Custom Field
1. Tap the menu icon in the top left of the screen and select My Center.
2. Tap the Center Settings tab at the bottom of the screen. The Center Settings screen opens.
3. Tap the Custom Fields/Tags tab at the top.
4. Tap on a category under the Custom Fields section to open a list of custom fields for that category.
5. Tap on a custom field in the list you want to deactivate.
6. Tap “Is Active” to uncheck.
7. Tap Save.
Manage Tags

Tags give you the ability to identify groups of children, families, employees, leads or people (anyone related to families) based on a specific tag. Tags are created under My Center and can then be used with various records, bulk updates, filtering, messaging or even reporting.

Create a Tag

1. Tap the menu icon in the top left of the screen and select My Center.
2. Tap the Center Settings tab at the bottom of the screen. The Center Settings screen opens.
3. Tap the Custom Fields/Tags tab at the top.
4. Tap View Tags under the Tags category.
5. Tap the three dots and select Add New Tag.
6. Enter a Tag name of your choice.
7. Select one or more data sets (children, families, employees, leads, people) where you want to make the tag available.

For example, if you select “children,” then this tag will be available when working with children profiles, filtering, reporting, or bulk updates.

Note: You can change the data set selection at any time by checking or unchecking a data set.
8. Tap Save Tag.

Edit a Tag Name

1. Tap the menu icon in the top left of the screen and select My Center.
2. Tap the Center Settings tab at the bottom of the screen. The Center Settings screen opens.
3. Tap the Custom Fields/Tags tab at the top.
4. Tap View Tags under the Tags category.
5. Tap on the Tag name under the Tags section that you want to edit.
6. Make changes to the Tag name and tap Save Tag.
Delete a Tag

1. Tap the menu icon in the top left of the screen and select My Center.
2. Tap the Center Settings tab at the bottom of the screen. The Center Settings screen opens.
3. Tap the Custom Fields/Tags tab at the top.

1. Tap View Tags under the Tags category.
2. Tap on the Tag name under the Tags section that you want to delete.
3. Tap the three dots and select Delete.
4. Tap Yes to confirm.
Center Settings

Through Center Settings, you can select general preferences related to your center as described below.

1. Tap the menu icon in the top left of the screen and select **My Center**.
2. Tap the **Center Settings** tab at the bottom of the screen.
3. Tap the checkboxes to select or de-select the options for your center.
   - **Children**: Automatically sign in children to their default class.
   - **Teachers**: Automatically sign in teachers to their default class; Allow teachers to see parents’ contact information; Allow teachers to clock in / out using Parent App.
   - **Timeline Approval**: Allow directors to approve or reject timeline entries.
   - **Timeline Allow Multiple Contributors**: Allow teachers to see and edit timeline entries created by other teachers.
   - **My Center Info URL**: Enable your center’s information page to be visible in the Smartcare Parent app.
   - **Assessments**: Enable assessments.
   - **Kiosk, Enable Just Visiting option**: This option must be enabled at the enterprise level in order to set it at the center level. Allows employees and parents to access your center without clocking/signing in.
   - **Kiosk, Enable 4 Digit PINs**: When this is enabled, parents and employees can clock/sign in using a 4-digit PIN instead of 8. The 4-digit PIN is the first four numbers of a person’s 8-digit PIN.
   - **Kiosk, Enable electronic signature for parents**: You can enable this feature when your state or local agency requires parents to sign their name when checking their child in and out of your center. These electronic signatures are captured in the Child Attendance List report.
   - **Auto Sign-Out**: Set the default time for automatic daily sign-out for children and employees. Tap “Move classes back to default rooms at auto sign-out time” if desired.
   - **Health Checks**: Tap this option to enable a health check questionnaire at check-in. See Set Up Health Check Questionnaire.
Set Child Statuses

You can create various child enrollment statuses for your center, such as Enrolled, Unenrolled, Maternity Leave, and then mark a child’s profile with the appropriate status.

1. Tap the menu icon in the top left of the screen and select My Center.
2. Tap the Center Settings tab at the bottom of the screen.
3. Tap Child Statuses at the top.
4. Tap the three dots at the top right and select Add New Child Status.
5. Enter a name for the Child Status and tap Save. See also Select the Child Status on a Child’s Profile.

Delete Child Status

When you choose to delete a child status, note that you can only delete child statuses that are not assigned to one or more children.

You can run the Current Enrollment Status report through the Smartcare Center web portal to view a list of enrollment statuses and their assignment, and then assign a different child status to any children that have the enrollment status that you want to delete.

1. Tap the menu icon in the top left of the screen and select My Center.
2. Tap the Center Settings tab at the bottom of the screen.
3. Tap Child Statuses at the top.
4. Swipe left on the enrollment status you want to delete.
5. Tap Delete on the right.
6. Tap Yes to confirm.
Touchless Check In/Out

The Touchless Check In/Out options enable you to give parents the ability to check their child in or out without having to touch the Kiosk. With these options you can enable the touchless check in/out, require a parent signature, set a time to refresh the QR code, and create printable QR codes for multiple drop-off/pickup locations.

1. Tap the menu icon in the top left of the screen and select My Center.
2. Tap the Center Settings tab at the bottom.
3. Tap Touchless Check In / Out at the top menu.
4. Tap options to enable/disable.
   - **Allow parents to self check in / out their child(ren):** This enables Touchless Check In/Out. Your Kiosk will display a QR code and parents will have a scanner enabled through the Smartcare Parent App that will read the QR code. From there, parents check a child in or out directly from their mobile device. Parents can still use their key tag or PIN to sign in.
   - **Require parent signature to confirm their child(ren) check in/out:** After scanning the QR code and checking a child in or out, parents will be prompted to provide a signature.
   - **Set refresh time for Kiosk QR Code:** For extra security, allows you to set a time in minutes for when the QR code refreshes.

Create Printable QR Codes

1. Under the Printable QR Codes section, tap **Create New Printable QR Code** to the right of the screen.
2. Enter a name for the QR code.
3. Set the expiration date and time.
4. Tap **Save**.
5. Tap **Print QR Code**.

Disable QR Code

1. Under the Printable QR Codes section, locate the QR code you want to disable.
2. Tap **Disable QR Code**.
Set Up Health Check Questionnaire

You can set up one or more health check questionnaires to coincide with touchless check-in.

Note: See Center Settings on how to enable health check questionnaires. Health Check Questionnaire must be enabled before you can add a new one.

1. Tap the menu icon in the top left of the screen and select My Center.
2. Tap Health Checks at the top menu.
3. Tap the three dots at the top right and select Add New Questionnaire.
4. Enter the Questionnaire Name.
5. Enter a Disclaimer describing what the questionnaire is for.
6. Tap Add New Question to enter the first question.
7. Type the question and select the answer type.
   a. Text: User can type a text response.
   b. Number: User can select a number.
   c. Options: User can select a response from a list, such as Yes or No. Type an option and tap Done on the keypad to add it. Repeat to display additional options.
   d. Date: User can choose a date.
   e. Date & Time: User can choose a date and time.
8. Tap Save.
9. Tap Add New Question to add another one.
10. Tap Save Questionnaire at the top right when finished.

Edit Health Check Questionnaire

1. Tap the menu icon in the top left of the screen and select My Center.
2. Tap Health Checks at the top menu.
3. Locate the questionnaire you want to edit and tap Edit on the right.
4. Make your changes and tap Save Questionnaire at the top.

Delete Health Check Questionnaire

1. Tap the menu icon in the top left of the screen and select My Center.
2. Tap Health Checks at the top menu.
3. Locate the questionnaire you want to edit and tap Delete on the right.
4. Tap Confirm.
Dashboard

When you log into Smartcare, the default screen is your Dashboard. Swipe left on the Dashboard to view widgets that display snapshots of data for your center. The Dashboard can be customized to display the widgets you find most helpful and in the order you prefer.

Current Ratios

Displays the current child/teacher ratio for each class and is color-coded. See Set Up Classes about defining ratios. This screen updates in real time as children and teachers check in and check out.

Tap on a bubble to view the list of children in that class.

a. Green: Class is at desired ratio (if defined), or at the legal ratio (if no desired ratio has been defined) or no one has checked into the class
b. Blue: Class is under the desired ratio (if defined), or under the legal ratio (if no legal ratio has been defined)
c. Yellow: Class is over the desired ratio but at or under the legal ratio
d. Red: Class is over the legal ratio
Birthdays This Week
Displays the week’s birthdays. Tap on a child displayed to view that child’s profile.

Total Enrollment
Displays the total FTEs (Full Time Enrollments) based on children’s schedules entered.
Auto-Pay Summary
Displays a snapshot of the percentage of parents currently set up on auto-pay.

Accounting Summary
Displays a snapshot of the total payments received in the current month.
Customize Dashboard Widgets

The Dashboard can be customized to display the widgets you find most helpful. Widgets can be added, removed, or you can change the order in which they display when swiping.

1. Swipe left on the Dashboard until you reach the Edit Live Widgets screen.
2. Tap **Edit Live Widgets**. The Edit Live Widgets screen opens.
   a. **Add a widget**: Tap the plus icon next to the widget to add it to the Dashboard. Tap Preview to see how the widget looks.
   b. **Delete a widget**: Tap the minus icon to remove it from the Dashboard.
   c. **Move the order a widget**: Tap and hold the three lines to the right of the widget name and move it up or down.

Example of live widgets available:
Manage Child & Family Data

Import Families From Your Childcare CRM

If you are using Childcare CRM to manage the sales process of your childcare center, you can sync and import family data into the Smartcare Center App.

1. Tap the menu icon at the top left of the screen and select My Center.
2. Select the Integrations tab at the bottom.
3. Enter your login credentials for your CRM and tap Connect.
4. Tap the three dots in the lower left and select My Center.
5. Select the Integrations tab again.
6. For each family, select them and tap Enroll.
7. Tap the X at the top right to exit out of the screen.

Manage Families

Search and Sort Families List

1. Tap the menu icon at the top left of the screen and select Families. Your list of families opens.
   a. Tap the sort icon to view and select sorting options.

   ![Sorting Families Example]

   - Sort by: Account Owner Last Name: A-Z (Default)
   - Sort by: Account Owner Last Name: Z-A
   - Sort by: Account Owner First Name: A-Z
   - Sort by: Account Owner First Name: Z-A
Add a Family

1. Tap the menu icon at the top left of the screen and select **Families**.
2. Tap the three dots at the top right and select **Add Family**.
3. Enter the information for the primary parent or guardian. To get started:
   a. Enter the First Name.
   b. Enter the Last Name and tap the Phone Number field. Wait until Smartcare does a system search for any matches to avoid duplicates. You will see “Searching for matches…”

   If a possible match is found, you will be prompted with a pop-up and prompted to use that person. Tap **Use This Person**.

   If no matches are found, you will see “No matches found” and can continue.
   c. Enter an email address. The email address must be unique to that person. Smartcare does not allow an email address to be assigned to more than one person.
4. Tap **Add Photo** to upload a photo if desired.
5. Under Roles, select the options that apply to this person. If this person is responsible for payment, be sure to select **Create a billing account for this person**. This will set them as the primary account holder.

   **Note:** If the person does not have an email address, do not select “Provide this person with app access.”
6. Tap **Add Another Parent/Guardian** to add another person if applicable. This person will be set as the secondary account holder.
7. Enter the information for the child.
8. Select **Is this child enrolled in the center?** and select the enrollment date if applicable.
9. Tap **Add Another Child** again to add another child if applicable.
10. Tap **Add This Family** to save.
Add a Parent or Guardian as a Pickup Person

1. Tap the menu icon at the top left of the screen and select **Families**. Your list of families opens.
2. Select family. The Family profile opens.
3. Select the **People** tab at the bottom of the screen.
4. Tap the three dots in the top right and select **Add Adult**.
5. Enter the information for the adult.
6. Under Roles, select **Add this person as an authorized pickup person**.
7. Tap **Save** when finished.

Manage Family Notes

Add a Family Note

1. Tap the menu icon at the top left of the screen and select **Families**.
2. Select a family from the list. The family’s record opens.
3. Select the **Notes** tab at the top.
4. Tap the three dots at the top right and select **Add a new Note**.
5. Select the date and enter the note.
6. Tap **Save**.

**Note:** Notes can only be edited or deleted by the original user who created the note in the profile.
Edit a Family Note
1. Tap the Notes tab at the bottom of the family’s profile page.
2. Tap on the note you want to edit.
3. Make your edits and tap Save.

Delete a Family Note
1. Tap the Notes tab at the bottom of the family’s profile page.
2. Swipe left on the note you want to delete.
3. Tap Delete.
4. Tap Yes to confirm.

View Documents on a Family’s Profile
1. Tap the menu icon at the top left of the screen and select Families.
2. Select a family from the list. The family’s record opens.
3. Tap the Documents tab at the top.
4. Tap on a document to open and view it.

Archive a Family Record
When you archive a family record, note that all financial and billing history will be deleted, but payment history will be maintained on tax statements.
1. Tap the menu icon at the top left of the screen and select Families.
2. Select a family from the list. The family’s record opens.
3. Tap the three dots at the top right and select Archive Family.
4. Tap Archive Family to archive the family record.

Restore an Employee Record from the Archive
1. Tap the menu icon at the top left of the screen and select Families.
2. Tap the three dots at the top right and select Show Archived Families.
3. Tap on the family you want to restore.
4. Tap Un-Archive Family at the prompt.
Children

Search and Sort Children List

1. Tap the menu icon at the top left of the screen and select **Children**. Your list of children opens.

   ![Children list screenshot]

   a. Tap the **sort** icon to view and select sorting options.
   
b. Tap the **filter** icon to narrow down your search using specific names, terms or fields.

**Note:** If you are integrating KinderConnect with Smartcare, you will see a KinderConnect view displaying the Sync Status/Date and KinderConnect ID.
Perform Bulk Actions Using Children List

With the Bulk Actions function, you can select multiple children based on specific criteria that you select using filtering and can then perform the following tasks:

- Check In/Out of Center
- Check In/Out of Class
- Move Class
- Default Class Assignment
- Add a Tuition Plan
- Remove a Tuition Plan
- Add Charge (including Invoice Now)
- Add Credit
- Archive
- Update Enrollment Status

1. Tap the menu icon at the top left of the screen and select Children. Your list of children opens.
2. Tap the three dots at the top right of the screen and select Bulk Update.
   
   Or:

   Tap the filter icon and select one or more filters to determine the list of children to be included in the bulk action. Filters selected display in the Filters bar. Tap on the trash icon to remove a filter if desired.

3. Tap the three dots on the Bulk Update Preview screen and select an action from the list.
4. Select any additional options and enter any information related to the bulk action.
5. Tap Save.
View Bulk Actions

When actions are performed using the Bulk Actions function, you can view a list of these actions including details such as who performed the bulk action, the date and the status of that bulk action.

1. Tap the menu icon at the top left of the screen and select Children. Your list of children opens.

2. Tap the three dots next the filter icon and select View Bulk Actions History. Your list of bulk actions opens.

   a. A green status circle indicates all actions were successful in the bulk action.
   
   b. A green and red status circle indicates that some actions were successful and some were not in the bulk action.
   
   c. A red status circle indicates that all actions were unsuccessful in the bulk action.
   
   d. Tap on a bulk action to view additional information about which actions were successful and which failed, if any. Refer to the Notes column to view the reason for the failed action.

Add a Child

1. Tap the menu icon at the top left of the screen and select Children. Your list of children opens.

2. Tap the three dots at the top right of the screen and select Add a New Child.

3. Enter the basic information for the child.

4. Tap Add Photo to include a photo with the child’s profile.

5. Select Is this child enrolled in the center? and select the enrollment date.

6. Tap Add This Child when finished.
Add Personal Information to a Child’s Profile

1. Tap the menu icon at the top left of the screen and select Children. Your list of children opens.
2. Select a child from the list. The child’s Profile screen opens.
3. Select the Profile tab at the bottom of the screen. The Personal Information screen opens.
4. Enter information as desired.
5. Tap the X at the top right to exit out of the screen.

Add a Photo to a Child Profile

1. Tap the menu icon at the top left of the screen and select Children. Your list of children opens.
2. Select a child from the list. The child’s Profile screen opens.
3. Select the Profile tab at the bottom of the screen. The Personal Information screen opens.
4. Tap the child icon to upload a photo.
Assign a Classroom to a Child

1. Tap the menu icon at the top left of the screen and select Children. Your list of children opens.
2. Select a child from the list. The child’s Profile screen opens.
3. Select the Profile tab at the bottom of the screen. The Personal Information screen opens.
4. Under Classroom/School/Transportation, select a default class assignment from the drop-down list. See also Set Up Buildings.
5. Tap the X at the top right to exit out of the screen.

Assign a School to a Child

1. Tap the menu icon at the top left of the screen and select Children. Your list of children opens.
2. Select a child from the list. The child’s Profile screen opens.
3. Select the Profile tab at the bottom of the screen. The Personal Information screen opens.
4. Under Classroom/School/Transportation, select a school from the drop-down list. See also Set Up Schools.
5. Tap the X at the top right to exit out of the screen.
View, Add or Edit Attendance for a Child

If you need to view attendance for a child or add/edit their time in and out, you can do so through the Attendance function. Note that Smartcare will automatically sign out anyone not yet signed out by 11:59pm. See Center Settings to set your own default sign-out time.

If you want to edit the time in/out for multiple children, see Perform Bulk Actions Using Children List.

View Attendance

1. Tap the menu icon at the top left of the screen and select Children. Your list of children opens.
2. Select a child from the list. The child’s record opens.
3. Select the Attendance box. The Attendance window opens displaying:
   a. In / Out Time
   b. Date
   c. Drop-off / Pick-up Person
   d. Signed In / Out By: This is the name of the parent or employee who physically took the action of signing the child in or out of the center through either the Kiosk, Center Web Portal, Center App (iOS), or Teacher Web Portal.

   Note: When the Signed In/Out By column displays “System,” it means the child was signed out by the auto sign-out function. It can be edited to display an actual person.
Add Attendance

1. Tap the three dots at the top right and select **Add Time** on the Attendance screen. The Add Time screen opens.
2. Select the date.
3. Select the drop-off person from the drop-down list.
4. Select the pick-up person, if applicable.
5. The Signed In By field is automatically populated by the employee who is adding attendance.
6. Tap **Add This Entry**.

![Add Attendance Screen](image)

Edit Attendance

1. Tap on a time slot on the Attendance screen. The Edit this entry screen opens.
2. Enter the adjusted time in and out.
3. Tap **Save These Changes**.

**Notes:** The Signed In / Out By will not be editable in scenarios where an actual person took the action.

You can adjust the time on closed billing periods for Attendance-Based billing plans. A confirmation pop-up will appear upon saving changes to recommend a charge or credit amount. This suggested amount will not automatically be applied to the account. You will have to manually add this charge or credit to the account if desired.
Add Transportation or Bus Run to a Child’s Profile

1. Tap the menu icon at the top left of the screen and select Children. Your list of children opens.
2. Select a child from the list. The child’s Profile screen opens.
3. Select the Profile tab at the bottom of the screen. The Personal Information screen opens.
4. Tap the three dots at the top right and select Edit.
5. Under School, select a school from the drop-down list. See also Set Up Schools.
6. Under Transportation, select the pick-up and drop-off schedule for the child.
7. Tap Save when finished.

Add a Food Program to a Child’s Profile

1. Tap the menu icon at the top left of the screen and select Children. Your list of children opens.
2. Select a child from the list. The child’s Profile screen opens.
3. Select the Profile tab at the bottom of the screen. The Personal Information screen opens.
4. Select the USDA Food Program from the drop-down list. See also Set Up Meal Plans.
5. Tap the X at the top right to exit out of the screen.
Add a Child’s Schedule

1. Tap the menu icon at the top left of the screen and select Children. Your list of children opens.
2. Select a child from the list. The child’s Profile screen opens.
4. Tap the three dots at the top right and select Add a Schedule.
5. Tap on each field to select the date, start and end times, if the schedule repeats, and the class. Tap the back arrow to save each selection.
6. Tap the check mark to save.

Example of a repeating weekly schedule
Edit a Child’s Schedule

1. Tap the menu icon at the top left of the screen and select Children. Your list of children opens.
2. Select a child from the list. The child’s Profile screen opens.
3. Select the Scheduling tab at the bottom of the screen. The Child's Schedule screen opens.
4. Tap on the event you want to edit.
5. Make your changes and tap the back arrow to save your edits.
6. Tap the check mark when finished. If the event is recurring, you will be prompted to tap Update all repeating days or Update only this day.

Delete a Child’s Schedule

1. Tap the menu icon at the top left of the screen and select Children. Your list of children opens.
2. Select a child from the list. The child’s Profile screen opens.
3. Select the Scheduling tab at the bottom of the screen. The Child's Schedule screen opens.
4. Tap on the event you want to delete.
7. Tap Delete This Schedule.
8. Tap Yes to confirm. If the event is recurring, you will be prompted to tap Delete all repeating days or Delete only this day.

Enter a Child’s Check-up Information

1. Tap the menu icon at the top left of the screen and select Children. Your list of children opens.
2. Select a child from the list. The child’s Profile screen opens.
3. Select the Medical tab at the bottom of the screen. If you don’t see the Medical tab, press and hold the Allergies or Shots tab to see it. The Child’s Medical screen opens.
4. Enter the check-up information.
5. Tap the three dots in the top right and select Add A Doctor or Add Another Doctor.
6. Enter the doctor information and tap Save when finished.
Enter a Child’s Immunizations

Before you can enter immunizations for a child, you must first set them up in your center. Immunization setup is done through the Smartcare Center Web Portal.

1. Tap the menu icon at the top left of the screen and select Children. Your list of children opens.
2. Select a child from the list. The child’s Profile screen opens.
3. Press and hold the Medical tab, then select Shots. The Immunization screen opens. Overdue immunizations are prominently displayed with red color-coding.
4. Tap a circle next to an immunization to enter the new date of immunization. Note that immunizations can be entered in any order (regardless of date) and the system will automatically sort by date once you save the entries.
5. Tap the X at the top right to exit out of the screen.
**Edit a Child's Immunization**

1. Tap the menu icon at the top left of the screen and select **Children**. Your list of children opens.
2. Select a child from the list. The child’s Profile screen opens.
3. Press and hold the **Medical** tab, then select **Shots**.
4. Tap the three dots to the right of the immunization and select **Edit**.
5. Make your changes and tap **Save**.

**Deactivate a Child's Immunization**

1. Tap the menu icon at the top left of the screen and select **Children**. Your list of children opens.
2. Select a child from the list. The child’s Profile screen opens.
3. Press and hold the **Medical** tab, then select **Shots**.
4. Tap the three dots to the right of the immunization and select **Disable**.

**Enter a Child’s Allergies**

1. Tap the menu icon at the top left of the screen and select **Children**. Your list of children opens.
2. Select a child from the list. The child’s Profile screen opens.
3. Press and hold the **Medical** tab, then select **Allergies**. The Allergies screen opens.
4. Tap the three dots at the top right and select **Add Allergy**.
5. Enter the allergy information.
6. Tap **Add a Treatment Step** to enter a treatment for the allergy.
7. Tap **Save Allergy** when finished.

**Select the Child Status on a Child’s Profile**

1. Tap the menu icon at the top left of the screen and select **Children**. Your list of children opens.
2. Select a child from the list. The child’s record opens.
3. Tap the **Profile** tab at the bottom. The Profile screen opens.
4. Under Child Status, tap **Change Child Status**.
5. Select a status from the drop-down list.
6. Select the Effective Date.
7. Enter any notes if desired.
8. Tap **Save**.
Add Emergency Contact

1. Tap the menu icon at the top left of the screen and select **Children**. Your list of children opens.
2. Select a child from the list. The child’s record opens.
3. Tap the **Emergency** tab at the bottom. The Emergency Contact screen opens.
4. Tap **Edit** and then tap the **Plus icon**.
5. Tap **Add New Person**.
6. Enter the information for the person.
7. Under Roles, tap “Add this person as an emergency contact.”
8. Tap **Save**.

View and Send Assessments

1. Tap the menu icon at the top left of the screen and select **Children**. Your list of children opens.
2. Select a child from the list. The child’s record opens.
3. Tap the **Assessments** tab at the bottom (or tap and hold the Attendance tab to see Assessments). The Assessments screen opens.
4. You can either view or send the assessment to the parent. Note that an assessment must have a “completed” status in order to be able to download or send.
   a. **To View Assessment:** Tap on the assessment row. The Assessment displays.
   b. **To Send Assessment to Parent:** Tap the **Email** icon to the right of the assessment.
Manage Child Notes

Add a Child Note

1. Tap the menu icon at the top left of the screen and select Children.
2. Select a child from the list. The child’s record opens.
3. Tap the Profile tab at the bottom.
4. Tap the Notes tab.
5. Tap the three dots at the top right and select Add a new Note.
6. Select the date and enter the note.
7. Tap Save.

Note: Notes can only be edited or deleted by the original user who created the Note in the profile.

Edit a Child Note

1. Tap the Notes tab at the bottom of the child’s profile page.
2. Tap on the note you want to edit.
3. Make your edits and tap Save.

Delete a Child Note

1. Tap the Notes tab at the bottom of the child’s profile page.
2. Swipe left on the note you want to delete.
3. Tap Delete.
4. Tap Yes to confirm.

View Documents on a Child’s Profile

1. Tap the menu icon at the top left of the screen and select Children.
2. Select a child from the list. The child’s record opens.
3. Tap the Profile tab at the bottom.
4. Tap the Documents tab.
5. Tap on a document to open and view it.
Archive a Child’s Record

When you archive a child’s record, you must first unenroll them.

1. Tap the menu icon at the top left of the screen and select Children. Your list of children opens.
2. Select a child from the list. The child’s record opens.
3. Select the Profile box. The Profile screen opens.
4. Under Enrollment Status, tap Change Enrollment Status and select Unenrolled from the drop-down list.
5. Select the Effective Date.
6. Select a Reason from the drop-down list.
7. Tap Save.
8. Tap Continue to confirm.
9. Tap the X at the top to get back to the main record.
10. Tap the three dots at the top right and select Archive Child.
11. Tap Archive Child to confirm.

Restore a Child Record from the Archive

1. Tap the menu icon at the top left of the screen and select Children.
2. Tap the three dots at the top right and select Show Archived Children.
3. Tap on the child you want to restore.
4. Tap Un-Archive Child at the prompt.

Adults

Update Parent / Guardian Email

1. Tap the menu icon at the top left of the screen and select Adults. Your list of account holders opens.
2. Tap on the person you want to update the email address for.
4. Enter the new email address.
5. Tap Save and Send Registration Code.
Resend Registration Code to a Parent/Guardian

The Registration Code function is used to verify the user by validating the email address and prompting the user to create their Smartcare email and password for login. Users who have not yet created their login credentials are noted on the App Access screen as “Unregistered.”

1. Tap the menu icon at the top left of the screen and select **Adults**. Your list of account holders opens.
2. Tap on the person you want to resend the registration code to.
3. Select the **App Access** tab at the bottom of the screen. The App Access screen opens.
4. Enter an email address if none has been added.
5. Tap **Save & Send Registration Code**.

Reset Password for a Parent/Guardian

1. Tap the menu icon at the top left of the screen and select **Adults**. Your list of account holders opens.
2. Tap on the person you want to reset the password for.
3. Select the **App Access** tab at the bottom of the screen. The App Access screen opens.
4. Under the email address, tap **Send Reset Password Email**.

Reset PIN for a Parent/Guardian

1. Tap the menu icon at the top left of the screen and select **Adults**. Your list of account holders opens.
2. Tap on the person you want to resend the registration code to.
3. Select the **App Access** tab at the bottom of the screen. The App Access screen opens.
4. Tap **Reset PIN Code**.
Add a Key Tag to a Parent/Guardian Profile

If you use key tags in your center, you can add a key tag to a parent or guardian profile.

1. Tap the menu icon at the top left of the screen and select Adults. Your list of adults opens.
2. Select a parent/guardian from the list.
4. Tap the three dots at the top right and select Add a Key Tag. You may be asked to allow Smartcare to access your camera.
5. Scan the key tag over the iPad screen.
6. Tap the X at the top right to exit out of the screen.

Resend Registration Email to a Parent/Guardian

1. Tap the menu icon at the top left of the screen and select Adults. Your list of adults opens.
2. Select a parent/guardian from the list.
4. Tap Send Registration Code.
5. Tap the X at the top right to exit out of the screen.

Enter Payment Method For Parent/Guardian

1. Tap the menu icon at the top left of the screen and select Adults. Your list of adults opens.
2. Select a parent/guardian from the list.
3. Select the Payment Settings tab at the bottom of the screen. The Payment Settings screen opens.
4. Tap the three dots at the top left and select the desired payment method.
5. Enter the payment information and tap Save when finished.
Enable Autopay

When you use the Autopay feature, note that whenever a scheduled payment fails, both the center director and the account holder will receive a failed payment email alert. The payment will not be processed again and autopay will be disabled for the account holder until valid payment information is provided.

1. Tap the menu icon at the top left of the screen and select Adults. Your list of adults opens.
2. Select a parent/guardian from the list.
3. Select the Payment Settings tab at the bottom of the screen. The Payment Settings screen opens.
4. Tap Enable Autopay next to the desired payment method. A payment method must be set up in order to see this option.
Change Secondary Account Owner to Primary

Changing an account owner from secondary to primary is done in multiple steps. You must first remove the secondary account owner assignment and then assign them as the primary account owner. See additional notes provided after the steps below.

**Step 1: Remove Secondary Account Owner Assignment**

1. Tap the menu icon at the top left of the screen and select **Accounting**.
2. Select the **Accounts** tab at the bottom of the screen. Your list of accounts opens.
3. Select the account holders from the list.
4. Tap the three dots at the top right and select **Remove the secondary account owner**.
5. Tap **Yes** to confirm.

**Step 2: Assign the New Primary Account Owner**

1. Tap the menu icon at the top left of the screen and select **Families**. Your list of Families opens.
2. Tap on the Family to open the family record.
3. Select the **People** tab at the bottom of the screen.
4. Under the Family Account Owner column, select the new primary account owner.

**Note:** If you have already assigned a tuition plan to the child, you will need to change the account holder on the plan prior to closing the billing account in the next step.
a. Go to the child’s profile and select the **Billing** tab.
b. Tap on the Tuition Plan.
c. Tap on the Account field and search for the new primary account holder.
d. Tap **Save This Tuition Plan**.

### Step 3: Close Previous Primary Account Holder’s Billing Account:

1. Tap the menu icon at the top left of the screen and select **Adults**.
2. Locate the former primary account holder and tap on the name to open the record.
3. Select the **Billing** tab at the bottom of the screen.
4. Tap the three dots in the top right and select **Delete This Account**.
5. Tap **Continue** to confirm.

### Notes and Recommendations

- If desired, you can now assign the previous primary account holder to secondary. To do this, you must first close that person’s account. An account can only be closed as long as they have a zero balance. See **Close a Billing Account**. If there is a negative balance on the account (credit), you can transfer that as a credit to the new primary account holder. If there is an outstanding balance, it will need to be added to the new primary account holder as a manual charge.

- Please note that once the billing account has been closed, any historical billing data will be lost, and therefore a best practice is to re-send the statements to the former primary account owner.

- The Payments by Payer report and the Standard Customer Statement report are also helpful documents to send to the former primary account holder.

A parent can also log into the Smartcare Parent Web Portal to print their statements from the Billing section.
Scheduling

View Schedule

Through Smartcare’s Scheduling feature you can view your center’s schedule for teachers and children, as well as add, edit, delete schedules, view class details, and create schedule templates.

1. Tap the menu icon at the top left of the screen and select Scheduling. Your center’s calendar opens to the current month.
2. Tap on a day to view the schedule details for the day.
3. Tap on a class to view the schedules for the class.

Class View

a. Tap the forward and backward arrows to navigate between months.
b. Tap the filter icon to filter by children only or teacher only.
c. Tap on the information icon to view a breakdown of the ratios for the class.
d. Tap the three dots to add a child or teacher schedule.
e. Color-coding:
   Red – The ratio for that class is out of balance for at least some part of the day.
   Blue – The class is at ratio but there’s opportunity to add more children to the
         class if desired.
   Green – The class is at your desired ratio.

f. Tap on a schedule to view details and to edit or delete (see below). Events that are
   past or current cannot be edited and are color-coded grey.

Add a Schedule

1. Tap the menu icon at the top left of the screen and select Scheduling. Your
   center’s calendar opens to the current month.
2. Tap on a date.
3. Tap on a class.
4. Tap the three dots and select either Add Child Schedule or Add Teacher
   Schedule.
5. Complete the details and tap the check mark at the top left to save. See also
   Add a Child’s Schedule or Add an Employee Schedule.

Edit a Schedule

1. Tap the menu icon at the top left of the screen and select Scheduling. Your
   center’s calendar opens to the current month.
2. Tap a date and then the class row.
3. Locate the schedule you want to edit and tap on it.
4. Make your changes and tap the back arrow to save your edits.
5. Tap the check mark when finished. If the event is recurring, you will be prompted
   to tap Update all repeating days or Update only this day.
Delete a Schedule

1. Tap the menu icon at the top left of the screen and select *Scheduling*. Your center’s calendar opens to the current month.
2. Tap a date and then the class row.
3. Locate the schedule you want to delete and tap on it.
4. Tap *Delete This Schedule*.
5. Tap *Yes* to confirm. If the event is recurring, you will be prompted to tap *Delete all repeating days* or *Delete only this day*.

Scheduling Templates

Scheduling Templates enables you to create custom schedules for bulk scheduling.

Add a Schedule Template

1. Tap the menu icon at the top left of the screen and select *Scheduling*. Your center’s calendar opens to the current month.
2. Tap the *Templates* tab at the bottom of the screen.
3. Tap the three dots at the top right and select *Add new template*.
4. Tap the *Active* circle to make the template active or leave unchecked if you are not ready to actively use it.
5. Enter a name for the template.
6. Select if the template is for a child or for an employee schedule in the Type field.
7. Select the days and the start and end times.
8. Tap *Save*. 
Add Children to a Schedule Template

1. Tap the menu icon at the top left of the screen and select **Scheduling**. Your center’s calendar opens to the current month.
2. Tap the **Templates** tab at the bottom of the screen.
3. Tap on a child template to open.
4. Tap the three dots at the top right and select **Add/Edit Children**.
5. Tap **Add More Children** and select one or more children from the list (or tap **Select All**).
6. Tap the check mark at the top to save.
7. Tap **Close** when finished.

Add Employees to a Schedule Template

1. Tap the menu icon at the top left of the screen and select **Scheduling**. Your center’s calendar opens to the current month.
2. Tap the **Templates** tab at the bottom of the screen.
3. Tap on an employee template to open.
4. Tap the three dots at the top right and select **Add/Edit Employees**.
5. Tap **Add Employee**.
6. Select the employee and the position (only active positions for the employee will be available for selection).
7. Select the type of event: Regular Hours, Time Off, Sick/Doctor.
8. Optional: Select the length of a break, if desired.
9. Tap **Save**.
10. Tap **Close** when finished.

Edit a Schedule Template

1. Tap the menu icon at the top left of the screen and select **Scheduling**. Your center’s calendar opens to the current month.
2. Tap the **Templates** tab at the bottom of the screen.
3. Tap on template you want to edit.
4. Tap the three dots at the top right and select **Edit**.
5. Make your changes and tap **Save**.
Delete a Schedule Template

1. Tap the menu icon at the top left of the screen and select **Scheduling**. Your center's calendar opens to the current month.
2. Tap the **Templates** tab at the bottom of the screen.
3. Tap on template you want to delete.
4. Tap the three dots at the top right and select **Delete**.
5. Tap **Delete Template**.
Timeline

Through the Timeline feature, you can track notes, meals, incidents and other daily activities of your children and providers. Timeline entries are communicated with each child’s parents. Timeline activity is entered by providers through the Teacher Web App.

View the Timeline

1. Tap the menu icon at the top left of the screen and select **Timeline**. The Timeline opens.

   a. Scroll to view all entries.
   
   b. If Timeline Approval is enabled, status boxes display at the top. Tap on a box to refine the entries displayed in the timeline.
   
   c. Tap on an entry to view more details.

2. Tap the **X** at the top right to exit out of the screen.
View a Child’s Timeline

1. Tap the menu icon at the top left of the screen and select **Timeline**. The Timeline opens.
2. Tap the Children tab at the bottom of the screen. Your list of children opens.
3. Select a child from the list. The child’s timeline opens.
4. Tap on an entry to view more details.
5. Tap the X at the top right to exit out of the screen.

View a Teacher’s Timeline

1. Tap the menu icon at the top left of the screen and select **Timeline**. The Timeline opens.
2. Tap the Teachers tab at the bottom of the screen. Your list of providers opens.
3. Select a provider from the list. The provider’s timeline opens.
4. Tap on an entry to view more details.
5. Tap the X at the top right to exit out of the screen.

Approve or Reject a Timeline Entry

1. Tap the menu icon at the top left of the screen and select **Timeline**. The Timeline opens.
2. Tap the first box “New Entries Pending Approval.” A list of entries for your review opens.
3. Tap the check mark to approve or the X to reject it. Tap on an entry to view more details.
Messaging

Smartcare’s messaging system enables you to send both individual and group emails to either families or your staff.

Send a Message To Specific Individuals

1. Tap the menu icon at the top left of the screen and select **Messaging**. The Messaging screen opens.
2. Tap + and select **Send Email** to create a new email message.
3. In the To field, begin typing the name of the recipient. When the name comes up, tap on it to add. Repeat to include additional recipients.
4. Select the Plus icon to the right of the To field to select the recipients.
5. Tap the drop-down arrows to select the filters to apply to the group of recipients. Tap the check mark at the top right when finished selecting.
6. Enter a subject.
7. Tap the Plus icon in the Attachments field to add an image if desired.
8. Enter the message and tap the check mark at the top left to send.
Send a Message To a Group

1. Tap the menu icon at the top left of the screen and select **Messaging**. The Messaging screen opens.

2. Tap + and select **Send Email** to create a new email message.

3. Select the Plus icon to the right of the To field to select the recipients.

4. Tap the drop-down arrows to select the filters to apply to the group of recipients. Tap the check mark at the top right when finished selecting.

   Tap on a group in the To field to review the recipient list if desired. Tap the X next to a name to remove it from the list.

5. Enter a subject.

6. Tap the Plus icon in the Attachments field to add an image if desired.

7. Enter the message and tap the check mark at the top left to send.
Send a Text Message To Specific Individuals

You can send a text message to specific individuals through the Center Web Portal.

When you send a text, note that there is a fee and your center will be invoiced for text messaging along with your Smartcare subscription. The fee schedule for sending text messages is as follows:

- Less than 160 characters = $.04 per recipient
- Less than 320 characters and greater than 160 characters = $.08 per recipient
- Greater than 320 characters and less than 480 characters = $.12 per recipient

1. Tap the menu icon at the top left of the screen and select Messaging. The Messaging screen opens.

2. Tap + and select Send SMS (text) to create a new text message.

3. In the To field, begin typing the name of the recipient. When the name comes up, tap on it to add. Repeat to include additional recipients.

4. Type your message in the Message field. A character count displays in the lower left corner of the message field, and the cost per recipient is displayed in the lower right corner. The cost will adjust based on the fee schedule above.

5. Tap the check mark at the top left to send.
Send a Text Message To a Group

You can send a text message to groups of people and filter by employees, families and leads.

When you send a text, note that there is a fee and your center will be invoiced for text messaging along with your Smartcare subscription. The fee schedule for sending text messages is as follows:

- Less than 160 characters = $.04 per recipient
- Less than 320 characters and greater than 160 characters = $.08 per recipient
- Greater than 320 characters and less than 480 characters = $.12 per recipient

1. Tap the menu icon at the top left of the screen and select Messaging. The Messaging screen opens.
2. Tap + and select Send SMS (text) to create a new text message.
3. Tap the drop-down arrows to select the filters to apply to the group of recipients. Tap the check mark at the top right when finished selecting.

   Tap on a group in the To field to review the recipient list if desired. Tap the X next to a name to remove it from the list.
4. Type your message in the Message field. A character count displays in the lower left corner of the message field, and the cost per recipient is displayed in the lower right corner. The cost will adjust based on the fee schedule above.
5. Tap the check mark at the top left to send.

View Sent Text Messages

1. Tap the menu icon at the top left of the screen and select Messaging. The Messaging screen opens.
2. Tap the SMS (text) tab at the top.
3. Tap on a message to view details.
Manage Employees

Search and Sort Employee List

1. Tap the menu icon at the top left of the screen and select Employees. Your list of employees opens.

   a. Tap on the sort icon to view and select sorting options.

   b. Tap on the filter icon to narrow down your search using specific names, terms or fields.

   **Note:** It is important that you do not edit, delete or archive the Smartcare Admin in your employee list. The Smartcare Admin is necessary for Smartcare support agents and account managers to assist you when you have questions about your account. The Smartcare Admin “employee” will look something like this:

   ![Smartcare Admin - DO NOT EDIT OR DELETE](image)

Add an Employee

1. Tap the menu icon at the top left of the screen and select Employees. Your list of employees opens.

2. Tap the three dots at the top right and select Add Employee.

3. Enter the employee information.

4. Select the Smartcare User Role from the drop-down menu.

5. Tap Add This Employee to save.
Add a Key Tag to an Employee Profile

If you use key tags in your center, you can add a key tag to an employee profile.

1. Tap the menu icon at the top left of the screen and select Employees. Your list of employees opens.
2. Select an employee from the list.
3. Select the User Role tab at the bottom of the screen. The User Role screen opens.
4. Tap the three dots at the top right and select Add a Key Tag. You may be asked to allow Smartcare to access your camera.
5. Scan the key tag over the iPad screen.
6. Tap the X at the top right to exit out of the screen.

Resend Registration Email to an Employee

1. Tap the menu icon at the top left of the screen and select Employees. Your list of employees opens.
2. Select an employee from the list.
4. Tap Send Forgot Credentials Email.
5. Tap the X at the top right to exit out of the screen.
Add a Position to an Employee Record

1. Tap the menu icon at the top left of the screen and select Employees. Your list of employees opens.
2. Select an employee from the list. The employee’s Profile screen opens.
3. Select the Positions tab at the bottom of the screen. The Position screen opens.
4. Tap the three dots at the top right and select Add Employee Position.
5. Select the Employee Position from the drop-down list.
6. Select the compensation status: Hourly or Salary.
7. Select the employment Type from the drop-down list.
8. Enter the compensation rate for hourly or an annual salary.
9. Select the Start Date (and End Date if applicable).
10. Tap the “Active” box if this position is currently active.
11. Enter the maximum and minimum hours required per week.
12. Enter a Custom ID if desired.
13. Select the Class assignment.
14. Tap Save.

Add Medical Information to an Employee Record

1. Tap the menu icon at the top left of the screen and select Employees. Your list of employees opens.
2. Select an employee from the list. The employee’s Profile screen opens.
3. Select the Medical tab at the bottom of the screen. The Medical screen opens.
4. Tap the three dots at the top right and select Edit.
5. Enter the name of the employee’s doctor and the doctor’s phone number.
6. Select the Blood Type from the drop-down list.
7. Enter the name of the Insurance and the Policy number.
8. Select the date of the last physical if applicable.
9. Select the date of the next physical appointment if applicable.
10. Enter any notes if desired.
11. Tap Save.
Add an Employee Schedule

1. Tap the menu icon at the top left of the screen and select **Employees**. Your list of employees opens.

2. Select an employee from the list. The employee’s Profile screen opens.

3. Select the **Scheduling** tab at the bottom of the screen. The Employee Schedule screen opens.

4. Tap the three dots at the top right and select **Add a Schedule**.

5. Tap on each field to select the date, start and end times, and if the schedule repeats. Tap the back arrow each time to save your selection.

6. Select the position (only active positions for the employee will be available for selection).

7. Select the type of event: Regular Hours, Time Off, Sick/Doctor.

8. Optional: Select the length of a break, if desired.

9. Tap the check mark to save.

Example of a repeating weekly schedule
Edit an Employee Schedule

1. Tap the menu icon at the top left of the screen and select Employees. Your list of employees opens.
2. Select an employee from the list. The employee’s Profile screen opens.
3. Select the Scheduling tab at the bottom of the screen. The Employee Schedule screen opens.
4. Tap on the event you want to edit.
5. Make your changes and tap the back arrow to save your edits.
6. Tap the check mark when finished. If the event is recurring, you will be prompted to tap Update all repeating days or Update only this day.

Delete an Employee Schedule

1. Tap the menu icon at the top left of the screen and select Employees. Your list of employees opens.
2. Select an employee from the list. The employee’s Profile screen opens.
3. Select the Scheduling tab at the bottom of the screen. The Employee Schedule screen opens.
4. Tap on the event you want to delete.
5. Tap Delete This Schedule.
6. Tap Yes to confirm. If the event is recurring, you will be prompted to tap Delete all repeating days or Delete only this day.

Add or Change a User Role on an Employee Record

1. Tap the menu icon at the top left of the screen and select Employees. Your list of employees opens.
2. Select an employee from the list. The employee’s Profile screen opens.
3. Select the User Role tab at the bottom of the screen. The User Role screen opens.
4. Select the user role from drop-down list. See also Set Up User Roles.
5. Tap Set Role to save.
Manage Employee Time Off

The Manage Employee Time Off feature enables you to track your employees’ time off and even define the time off options that best fit your payroll system.

It also gives you the ability to automate some time off tracking such as setting default values for each time off option, determining when the default value resets (such as yearly PTO), and selecting automatic time off deductions from employee schedules.

Add Time Off Option

1. Tap the menu icon at the top left of the screen and select My Center. The My Center screen opens.
2. Press and hold the Billing tab at the bottom of the My Center screen and select Time Off. The Time Off screen opens.
3. Tap the three dots at the top right and select Add New Time Off.
4. Enter a name for the option.
5. Select the time off type.
6. Enter a default value for the time off, if desired. This will populate the employee’s time off amount when this option is used.
   
   Tap the “Reset Default Value” box, if desired. Enter the values to automatically reset the time off amount.
7. Tap Save Time Off Option.

Edit Time Off Option

1. Tap the menu icon at the top left of the screen and select My Center. The My Center screen opens.
2. Press and hold the Billing tab at the bottom of the My Center screen and select Time Off. The Time Off screen opens.
3. Tap on a time off option in the list you want to edit.
4. Enter your edits and tap Save Time Off Option.
Delete Time Off Option

1. Tap the menu icon at the top left of the screen and select My Center. The My Center screen opens.
2. Press and hold the Billing tab at the bottom of the My Center screen and select Time Off. The Time Off screen opens.
3. Tap on a time off option in the list you want to delete.
4. Tap on the three dots at the top right and select Delete.
5. Tap Confirm to delete.

Manually Add / Remove Time Off on Employee Time Sheet

1. Tap the menu icon at the top left of the screen and select Employees. Your list of employees opens.
2. Select an employee from the list.
3. Select the Time Sheet tab at the bottom. The Time sheet screen opens.
4. Tap the Time Off tab at the bottom.
5. Tap on a time off item in the list and enter a new value.
6. Tap Save.
Add a Time Off Event to an Employee Schedule

When you add a time off event to an employee’s schedule, the hours will automatically be deducted from the employee’s time off after the event occurs.

1. Tap the menu icon at the top left of the screen and select **Employees**. Your list of employees opens.
2. Select an employee from the list.
3. Select the **Scheduling** tab at the bottom. The Employee Schedule screen opens.
4. Tap on the three dots at the top right and select Add a Schedule.
5. Complete the details and tap the check mark at the top left to save.

**Note:** Time off events that conflict with an employee’s work schedule display a red line.
View or Edit Time Sheet for an Employee

If you need to adjust the Time Sheet for an employee, you can do so through the Time Sheet function. You can also perform a bulk clock in/out for multiple employees. Note that Smartcare will automatically sign out anyone not yet signed out by 11:59pm.

View Time Sheet

1. Tap the menu icon at the top left of the screen and select Employees. Your list of employees opens.
2. Select an employee from the list.
3. Select the Time Sheet tab at the bottom of the screen. The Time Sheet screen opens displaying the time in and out for the employee.

Edit Time Sheet (Clock In/Out)

1. Tap the three dots at the top right and select Add Time.
2. Select the date.
3. Select the time in and out.
4. Select the role from the drop-down list.
5. Tap Add This Entry.

Perform Bulk Clock In/Out for Multiple Employees

1. Tap the menu icon at the top left of the screen and select Employees. Your list of employees opens.
2. Tap the three at the top right and select Bulk Update.
3. Select the employees by tapping on the right (or Select All/Deselect All at the bottom).
4. Tap the three dots at the top and select Clock In or Clock Out.
5. Enter the time.
6. Tap Save.
Manage Employee Notes

Add an Employee Note

1. Tap the menu icon at the top left of the screen and select Employees.
2. Select an employee from the list. The employee’s record opens.
3. Select the Notes tab at the bottom.
4. Tap the three dots at the top right and select Add a new Note.
5. Select the date and enter the note.
6. Tap Save.

Note: Notes can only be edited or deleted by the original user who created the note in the profile.

Edit an Employee Note

1. Tap the Notes tab at the bottom of the employee’s profile page.
2. Tap on the note you want to edit.
3. Make your edits and tap Save.

Delete an Employee Note

1. Tap the Notes tab at the bottom of the employee’s profile page.
2. Swipe left on the note you want to delete.
3. Tap Delete.
4. Tap Yes to confirm.

View Documents on an Employee’s Profile

1. Tap the menu icon at the top left of the screen and select Employees.
2. Select an employee from the list. The employee’s record opens.
3. Tap the Documents tab at the bottom (or tap and hold Notes to select Documents).
4. Tap on a document to open and view it.
Archive an Employee Record

1. Tap the menu icon at the top left of the screen and select Employees.
2. Select an employee from the list. The employee’s record opens.
3. Tap the three dots at the top right and select Archive Employee.
4. Tap Archive Employee to archive the employee record.

Restore an Employee Record from the Archive

1. Tap the menu icon at the top left of the screen and select Employees.
2. Tap the three dots at the top right and select Show Archived Employees.
3. Tap on the employee you want to restore.
4. Tap Un-Archive Employee at the prompt.
Billing

Billing settings enable you to set up accounting codes, billing schedules, tuition plans, subsidy/agency accounts, and create split billing. You can access Billing through the My Center settings.

Set Up Accounting Codes

When setting up your accounting codes, you can include a “default amount.” This is helpful when you have specific accounting codes that you use for manual credits or charges that are almost always the same amount.

1. Tap the menu icon at the top left of the screen and select My Center. The My Center screen opens.
2. Select the Accounting tab at the bottom of the screen.
3. Tap Accounting Codes. The Accounting Codes screen opens.
4. Tap the three dots at the top right and select Add a New Code.
5. Enter the code name, the GL Account and select the code type.
6. Enter a default amount for the code, if desired.
7. Tap the checkbox to mark this code Active.
8. Tap Save.

Note: You can add default amounts to accounting codes already created. Simply tap on the accounting code, tap on the three dots and select Edit. Add the amount in the Default Amount field and tap Save.

Edit Accounting Codes

1. Tap the menu icon at the top left of the screen and select My Center. The My Center screen opens.
2. Select the Accounting tab at the bottom of the screen.
3. Tap Accounting Codes. The Accounting Codes screen opens.
4. Tap on an accounting code you want to edit.
5. Tap the three dots at the top right and select Edit.
6. Make your changes and tap Save.
Set Up the Billing Schedule

1. Tap the menu icon at the top left of the screen and select **My Center**. The My Center screen opens.
2. Select the **Billing** tab at the bottom of the screen. The Billing Settings screen opens.
3. Tap the three dots at the top right and select a billing schedule you want to set up.
4. Enter information for the billing schedule.

   a. Enter a name for the billing schedule.
   
   b. **Billing period ends on**: No changes can be made to current cycle after this day.
   
   c. **Charges placed on parents’ accounts**: You can make edits or delete these charges from this day until the period ends.
   
   d. **Payments are due on**: Statements and auto-pay will automatically run on this day.
   
5. Tap **Save** when finished.
Once you set up your billing schedules, you can modify them as needed. However, Smartcare has built-in validation rules to ensure that any modifications do not adversely affect the schedule such as skipped billing or duplicate charges. If you try to edit a billing schedule and one of the below Validation Rules applies, you will receive an error message with an explanation.

**Validation Rules**

- If the billing schedule end date is today, you cannot edit. Ensures tuition charges are applied during the billing period.
- Billing Schedule Type can only be changed for an inactive Billing Schedule. Avoids charges being missed from being applied or applied twice during a billing period.
- If tuition charges have already been placed on an account, you cannot edit. Avoids duplicate charges from being placed on an account.
Set Up Tuition Plans

Set Up Flat Fee Tuition Plan

1. Tap the menu icon at the top left of the screen and select My Center. The My Center screen opens.
2. Select the Billing tab at the bottom of the screen. The Billing Settings screen opens.
4. Tap the three dots at the top right and select Add a Tuition Plan.
5. Enter information for the Flat Fee tuition plan.
   a. Name: Type a plan name of your choice.
   b. Type: Select Flat Fee.
   c. Billing Schedule: Select when you want billing to occur.
   d. Billing Code: Select the billing code.
   e. Plan Rate: Type the amount to be charged.
   f. Start Date: Select a start date. The Tuition Plan must be active before a cycle can be added to parent/guardian accounts.
   g. For future rate increases, tap + and enter a new rate and start date. The tuition plan will automatically update on the start date.
6. Tap Add a Tuition Plan.
Set Up Attendance-Based Billing Plan

1. Tap the menu icon at the top left of the screen and select My Center. The My Center screen opens.
2. Select the Billing tab at the bottom of the screen. The Billing Settings screen opens.
4. Tap the three dots at the top right and select Add a Tuition Plan.
5. Enter information for the Attendance-Based tuition plan.
   a. **Name:** Type a plan name of your choice.
   b. **Type:** Select Attendance-based.
   c. **Billing Schedule:** Select when you want billing to occur.
   d. **Billing Code:** Select the billing code.
   e. **Charged Every:** Select the frequency for the charge.
   f. **Plan Rate:** Type the amount to be charged.
   g. **Start Date:** Select a start date. The Tuition Plan must be active before a cycle can be added to parent/guardian accounts.
   h. **Apply charges at end of the billing period:** Select in order to utilize the “dollar amount tuition plan splits” functionality.
   i. **Calculate time increments at end of the billing period:** Select if desired. Available when “Apply charges at end of the billing period” is checked.
   j. For future rate increases, tap + and enter a new rate and start date. The tuition plan will automatically update on the start date.
6. Tap Add a Tuition Plan.

Change Tuition Rate

1. Tap the menu icon at the top left of the screen and select My Center. The My Center screen opens.
2. Select the Billing tab at the bottom of the screen. The Billing Settings screen opens.
4. Tap on the name of a Tuition Plan.
5. Tap the three dots at the top right and select Edit.
6. Enter the new Plan Rate and tap Save Tuition Plan.
Add New Tuition Rate for Future Billing Cycle

1. Tap the menu icon at the top left of the screen and select My Center. The My Center screen opens.
2. Select the Billing tab at the bottom of the screen. The Billing Settings screen opens.
4. Tap on the name of a Tuition Plan.
5. Tap the three dots at the top right and select Edit.
6. Tap the plus icon to the right of the Start Date.
7. Enter the new Plan Rate and select the Start Date.
   **Note:** The Start Date should be 1 day prior to the day that charges will post for your new tuition rates. For example: If your tuition charges post on a Thursday then the start date should be the Wednesday prior to the effective date.
8. Tap Save Tuition Plan.

Delete a Tuition Plan

When you choose to delete a Tuition Plan, note that you can only delete Tuition Plans that are not assigned to one or more children.

You can run the Child Tuition Plan report in the Smartcare Center web portal to view a list of Tuition Plans and their assignment, and then assign a different Tuition Plan to any children that have the Tuition Plan that you want to delete.

1. Tap the menu icon at the top left of the screen and select My Center.
2. Select the Billing tab at the bottom of the screen. The Billing Settings screen opens.
4. Tap on the tuition plan you want to delete.
5. Tap the three dots at the top right and select Delete.
6. Tap Yes to confirm.
Change a Tuition Plan On a Child’s Profile

1. Tap the menu icon at the top left of the screen and select Accounting.
3. Scroll to locate the child.
4. Under the Plan column, tap the drop-down arrow and select another plan from the list.

Remove a Tuition Plan from a Child’s Profile

1. Tap the menu icon at the top left of the screen and select Accounting.
3. Scroll to locate the child and tap on the wheel icon to the right to open the billing profile.
4. Swipe left on the plan you want to delete and tap Delete.
5. Tap Yes to confirm.

Set Up Child Billing Plan

1. Tap the menu icon at the top left of the screen and select Children. Your list of children opens.
2. Select a child from the list. The child’s Profile screen opens.
3. Tap the three dots at the top right and select Add a Tuition Plan.
4. Select the desired plan from the list. See also Set Up Tuition Plans.
5. Tap Save This Tuition Plan.
Add a Subsidy / Agency Account

1. Tap the menu icon at the top left of the screen and select My Center. The My Center screen opens.
2. Select the Billing tab at the bottom of the screen. The Billing Settings screen opens.
3. Select the Agencies tab at the bottom. The Agencies screen opens.
4. Tap the three dots at the top right of the screen and select Add an Agency.
5. Type the agency’s name.
6. Tap Add Agency to save.

Add Agency Billing to a Child’s Profile

1. Tap the menu icon at the top left of the screen and select Children. Your list of children opens.
2. Select a child from the list. The child’s Profile screen opens.
3. Select the appropriate Tuition Plan.
4. Tap the three dots at the top right and select Edit Plan Allocation.
5. Tap the three dots at the top right again and select Add a Split.
6. Select the appropriate agency from the Account drop-down list. See also Add a Subsidy / Agency Account.
7. Enter the amount that the agency pays.
8. Tap the X at the top right to exit out of the screen.
Add Split Billing to a Child’s Profile

1. Tap the menu icon at the top left of the screen and select Children. Your list of children opens.
2. Select a child from the list. The child’s Profile screen opens.
4. Select the appropriate Tuition Plan.
5. Tap the three dots at the top right and select Edit Plan Allocation.
6. Tap the three dots at the top right again and select Add a Split.
7. Select an account from the drop-down list. See also Add a Subsidy / Agency Account.
8. Enter the amount and type (dollar or percentage) the primary account pays. The secondary account will automatically be assigned the remainder of the amount.
9. Repeat the above three steps to add additional splits if desired.

To change which account is primary for the plan, tap the arrow next to the account name to move it up or down. The account at the top is primary for the plan.
10. Tap Save This Tuition Plan when finished.
Add Dollar Amount Split for Attendance-Based Billing Plan

1. Tap the menu icon at the top left of the screen and select Children. Your list of children opens.
2. Select a child from the list. The child’s Profile screen opens.
4. Select an Attendance-Based Billing Plan from the list (see Set Up Attendance-Based Billing Plan).
5. Tap the three dots at the top right and select Edit Plan Allocation.
6. Tap the three dots at the top right again and select Add a Split.
7. Select an account from the drop-down list.
8. Enter the amount the primary account pays and select dollar ($) for the Type. The secondary account will automatically be assigned the remainder of the amount.
9. Repeat the above three steps to add additional splits if desired.

To change which account is primary for the plan, tap the arrow next to the account name to move it up or down. The account at the top is primary for the plan.

10. Tap Save This Tuition Plan when finished.

Set Up Recurring Discounts

1. Tap the menu icon at the top left of the screen and select My Center. The My Center screen opens.
2. Select the Billing tab at the bottom of the screen. The Billing Settings screen opens.
3. Scroll down and select Recurring Discounts.
4. Tap the three dots at the top right of the screen and select Add New Discount.
5. Enter the name and amount for the discount.
6. Select the Billing Code from the drop-down menu. See also Set Up Account Codes.
7. Select the discount type from the drop-down menu. This will treat the discount amount you entered as either a percentage or fixed amount.
8. Tap Save when finished.
Apply Recurring Discounts

You can add one or more discounts to a Tuition Plan. Note that discounts are always applied to the original tuition amount.

1. Tap the menu icon at the top left of the screen and select Children. Your list of children opens.
2. Select a child from the list. The child’s Profile screen opens.
4. Select the appropriate tuition plan.
5. Under Allocations, tap the Discount drop-down menu.
6. Tap the Discount field to select the discount type from the list. Tap the plus icon to add another if desired.
7. Tap the checkmark to apply the discount(s).
8. Tap Save This Tuition Plan.
9. Tap the X at the top right to exit out of the screen.

Set Up Conditional Billing

Set Up Early Drop Off Fee

1. Tap the menu icon at the top left of the screen and select My Center. The My Center screen opens.
2. Select the Billing tab at the bottom of the screen. The Billing Settings screen opens.
3. Scroll down and select Early Drop Off Fee.
4. Select an Accounting Code from the drop-down menu.
5. Select the Bill By from the drop-down menu:
   a. Schedule: For use when you use the Smartcare Center App. Fees are calculated by an individual child’s schedule.
   b. Fixed Time: For use if you prefer to set a fixed time or when you don’t use the Smartcare Center App. When you choose this option, enter the time.
6. Select the Fee Type from the drop-down menu and enter the amount.
7. Optional: Select a grace period if desired.
8. Optional: Enter a maximum to be charged if desired.
9. Tap Save.
Set Up Late Pickup Fee

1. Tap the menu icon at the top left of the screen and select **My Center**. The My Center screen opens.

2. Select the **Billing** tab at the bottom of the screen. The Billing Settings screen opens.

3. Scroll down and select **Late Pickup Fee**.

4. Select an Accounting Code from the drop-down menu.

5. Select the Bill By from the drop-down menu:
   a. **Schedule**: For use when you use the Smartcare Center App. Fees are calculated by an individual child’s schedule.
   b. **Fixed Time**: For use if you prefer to set a fixed time or when you don’t use the Smartcare Center App. When you choose this option, enter the time.

6. Select the Fee Type from the drop-down menu and enter the amount.

7. Optional: Select a grace period if desired.

8. Optional: Enter a maximum to be charged if desired.

9. Tap **Save**.

Set Up Late Payment Fee

1. Tap the menu icon at the top left of the screen and select **My Center**. The My Center screen opens.

2. Select the **Billing** tab at the bottom of the screen. The Billing Settings screen opens.

3. Scroll down and select **Late Payment Fee**.

4. Select an Accounting Code from the drop-down menu.

5. Select the number of days past due for when an account owner is to be charged.

6. Enter the amount to be charged.

7. Select the amount type from the drop-down menu. This will treat the amount you entered in the previous step as either a percentage or fixed amount.

8. Tap **Save**.
Accounting

Search and Sort Accounts List

1. Tap the menu icon at the top left of the screen and select Accounting.
2. Select the Accounts tab at the bottom of the screen. Your list of accounts opens.
   a. Tap the sort icon and select a sort option: first or last name, current balance, or balance due. The list will automatically sort as soon as you make a selection.

View Transaction Activity

1. Tap the menu icon at the top left of the screen and select Accounting.
2. Select the Accounts tab at the bottom of the screen. Your list of accounts opens.
3. Tap on an account to view a list of transactions.
Donations

Your center can receive donations from parents using the Donations feature in their Smartcare for Parents app.

On the Billing screen for parents, a “Make a Donation” button allows parents to make a payment even if they don’t have any payments outstanding.

You can view and manage donations from the Donations tab under the Accounting screen.

1. Tap the menu icon at the top left of the screen and select Accounting. The Accounting screen opens.
2. Select the Donations tab at the bottom. The Donations screen opens.
3. Tap View Account Details to the right of the parent’s name to apply the donation.
Require Auto-Pay

As a center, you can require all accounts to participate in Auto-Pay. Once you enable this function, any primary account holder who has not entered payment information for auto-pay will see a notification upon logging in to the Parent App and cannot continue until payment information is completed. If necessary, you can also add account holders as exceptions when Auto-Pay is enabled.

For secondary account holders, if payment information has not yet been entered, they can navigate to all features except “Pay Now.”

1. Tap the menu icon at the top left of the screen and select My Center. The My Center screen opens.

2. Select the Accounting tab at the bottom of the screen (or tap and hold the Billing tab to view the Accounting option). The Accounting Settings screen opens.

3. Under Auto-Pay, tap the “Auto-pay required for all accounts” checkbox. All account holders will now be prompted to add payment information upon logging in to the Parent App.
**Add Exceptions to Auto-Pay**

If you need to add exceptions when Auto-Pay is enabled, you can do so at any time. If Auto-Pay is already enabled, adding an exception immediately removes the auto-pay requirement from that person’s account. The account holder will receive an email that they have been removed from Auto-Pay.

1. Tap the menu icon at the top left of the screen and select **My Center**. The My Center screen opens.
2. Select the **Accounting** tab at the bottom of the screen (or tap and hold the Billing tab to view the Accounting option). The Accounting Settings screen opens.
3. Under Auto-Pay, tap **Auto-pay Exceptions**.
4. Tap the **plus** icon at the top to add an exception. Begin typing the name of the account holder or scroll through the list to select.

---

**Remove an Exception from Auto-Pay**

If you remove an account holder from the exceptions list, that person will see a notification to add payment information the next time they log in to the Parent App.

1. Tap the menu icon at the top left of the screen and select **My Center**. The My Center screen opens.
2. Select the **Accounting** tab at the bottom of the screen (or tap and hold the Billing tab to view the Accounting option). The Accounting Settings screen opens.
3. Under Auto-Pay, tap **Auto-pay Exceptions**.
4. Tap the **trash** icon next to the account holder you want to remove from the list.
Enter a Manual Charge

1. Tap the menu icon at the top left of the screen and select Accounting. The Accounting screen opens.
2. Select the Accounts tab at the bottom of the screen. Your list of parent/guardian accounts opens.
3. Select a parent/guardian from the list.
4. Tap the three dots at the top right and select Add Charge.
5. Enter the charge information and tap Complete when finished.

Assign a Manual Charge as Tuition

This feature gives you the flexibility to assign a manual charge for unique billing scenarios. For example, when you are unable to add a tuition plan to a child’s account prior to billing running, or the child enrolled mid-month so you want to bill them for partial tuition.

1. Tap the menu icon at the top left of the screen and select Accounting. The Accounting screen opens.
2. Select the Accounts tab at the bottom of the screen. Your list of parent/guardian accounts opens.
3. Select a parent/guardian from the list.
4. Tap the three dots at the top right and select Add Charge.
5. Select the child from the drop-down list.
6. Tap the Tuition charge option and enter the charge information.
7. Tap Complete when finished.

Assign a Manual Charge to Children

1. Tap the menu icon at the top left of the screen and select Accounting. The Accounting screen opens.
2. Select the Accounts tab at the bottom of the screen. Your list of parent/guardian accounts opens.
3. Select a parent/guardian from the list.
4. Tap the three dots at the top right and select Add Charge.
5. Select the child from the drop-down list.
6. Enter the charge information.
7. Tap Complete when finished.
Initiate an Invoice Now

The Invoice Now feature enables you to add a charge to a parent’s account and bill them immediately without having to wait for the statement period to close. If you want to use Invoice Now to bill multiple accounts, see Perform Bulk Actions Using Children List.

1. Tap the menu icon at the top left of the screen and select Accounting. The Accounting screen opens.
2. Select the Accounts tab at the bottom of the screen. Your list of parent/guardian accounts opens.
3. Select the parent/guardian from the list.
4. Tap the three dots at the top right and select Add Charge.
   a. Enter the charge information.
   b. Enter any notes if desired.
   c. Select the Invoice now checkbox.
   d. Select the payment due date. By default, the due date is one day in the future.
5. Tap Complete. If you have set up Late Payment Fees, you will be prompted to apply any late payment fees to this charge.

When completed, the account holder will receive an email with the invoice amount, charge description and payment due date.
Enter a Manual Credit

1. Tap the menu icon at the top left of the screen and select Accounting. The Accounting screen opens.
2. Select the Accounts tab at the bottom of the screen. Your list of parent/guardian accounts opens.
3. Select a parent/guardian from the list.
4. Tap the three dots at the top right and select Add Credit.
5. Enter the credit information and tap Complete when finished.

Allocate a Credit Manually

By default, Smartcare applies credits to the oldest service charge with a balance. However, if you want to choose how to allocate the credit, you can do so manually.

1. Tap the menu icon at the top left of the screen and select Accounting. The Accounting screen opens.
2. Select the Accounts tab at the bottom of the screen. Your list of parent/guardian accounts opens.
3. Select a parent/guardian from the list.
4. Tap the three dots at the top right and select Add Credit.
5. Enter the credit information and select the Manually allocate credit checkbox.
6. Tap Continue. The Allocate Credit screen opens. By default, charges with a balance only are displayed. Tap Only show charges with a balance at the top to uncheck it and view a list of all charges.
7. Tap on a line item to enter the credit amount to the charge and any notes if desired.

Alternatively, you can select “Show system allocation” to allocate the amount to the oldest date of service with an outstanding balance.
8. Tap Save. When you apply the full credit amount, the banner at the top will turn from red to green.
9. Tap Save Changes at the top right and then tap Add Credit to finish.
Resend a Statement

1. Tap the menu icon at the top left of the screen and select Accounting. The Accounting screen opens.
2. Select the Accounts tab at the bottom of the screen. Your list of parent/guardian accounts opens.
3. Select a parent/guardian from the list.
4. Locate the statement you want to resend and tap on it to open.
5. Tap the three dots at the top right and select Resend this statement.
Agency Ledgers

View Agency Ledgers

1. Tap the menu icon at the top left of the screen and select Accounting. The Accounting screen opens.
2. Select the Agency Ledgers tab at the bottom of the screen. The list of agencies tied to child records opens.
3. Tap on an agency to view the list of children tied to the agency.
4. Tap on a child to view the balance and transaction history or initiate a charge, credit, transfer or void.
5. Tap the three dots at the top right and tap "Select entries date range" to filter the list of transactions.

Add a Charge to an Agency Ledger

1. Tap the menu icon at the top left of the screen and select Accounting. The Accounting screen opens.
2. Select the Agency Ledgers tab at the bottom of the screen. The list of agencies tied to child records opens.
3. Tap on an agency to view the list of children tied to the agency.
4. Tap on the child to open the balance and transaction history.
5. Tap the three dots at the top right and select Add a charge.
6. Enter the charge information and tap Save.

a. Indicates the full amount has been allocated.
b. Indicates the amount has been partially allocated.
Add Credit to a Charge on an Agency Ledger

1. Tap the menu icon at the top left of the screen and select Accounting. The Accounting screen opens.
2. Select the Agency Ledgers tab at the bottom of the screen. The list of agencies tied to child records opens.
3. Tap on an agency to view the list of children tied to the agency.
4. Tap on the child to open the balance and transaction history.
5. Locate the line item. Tap the three dots to the right and select Add a credit.
6. Enter the credit information and tap Save.

Transfer a Balance From an Agency Ledger

1. Tap the menu icon at the top left of the screen and select Accounting. The Accounting screen opens.
2. Select the Agency Ledgers tab at the bottom of the screen. The list of agencies tied to child records opens.
3. Tap on an agency to view the list of children tied to the agency.
4. Tap on the child to open the balance and transaction history.
5. Locate the line item. Tap the three dots to the right and select Transfer a balance.
6. Enter the transfer balance information and tap Save.
7. Tap Transfer to finalize the balance transfer.
Modify Revenue Date for Agency Payment

1. Tap the menu icon at the top left of the screen and select Accounting. The Accounting screen opens.

2. Select the Agency Ledgers tab at the bottom of the screen. The list of agencies tied to child records opens.

3. Tap on an agency to view the list of children tied to the agency.

4. Tap the Remittances tab at the bottom of the screen. Your list of remittances opens. Tap the filter icon to narrow your search when looking for a specific remittance.

5. Tap on a remittance in the list.

6. Locate the child or tap “click here to show all accounts”

7. Locate the specific charge and tap on it to open.

8. Select a new date under the Revenue Date column.

9. Tap the checkmark at the top right and select Process Remittance to complete the action.
Process a Refund

**Note:** The refund feature in Smartcare is currently disabled. Please see below for information on processing a refund.

We know that the timing of receiving a refund is important. To ensure a parent receives funds as quickly as possible, the fastest way to process a refund is to issue a check or initiate a direct ACH transfer from your bank to the parent’s bank, and then enter a charge in Smartcare for the refund amount. See Applying Charges and Credits. This also ensures that balances in Smartcare are accurate.

If you prefer to process this refund through Smartcare, please follow the steps below.

1. Email Smartcare at Smartcare Transactions with the following information:
   a. The name of your center.
   b. A list of refunds to be processed.
   c. The deposit amount totaling the amount of refunds.

2. Send the total deposit amount to:
   Wire ABA Routing number: 042000314
   Account number: 1830038717
   
   Fifth Third Bank
   38 Fountain Square Plaza,
   Cincinnati, OH  45263

   Once your total deposit amount and refunds list has been received and processed, the option to process refunds through Smartcare will become temporarily available. The deposit amount will be held in your Smartcare account and used to process refunds for your parents.

**Note:** The refund feature is enabled through Smartcare after the above steps are completed. Refunds can be processed for credit card and ACH payments made within the past 12 months. See the table below for refund processing times.

1. Tap the menu icon at the top left of the screen and select Accounting. The Accounting screen opens.
2. Select the Accounts tab at the bottom of the screen. Your list of parent/guardian accounts opens.
3. Locate the parent/guardian from the list and tap on it to open.
4. Tap the three dots at the top right and select Refund or void a payment.
5. Locate the transaction to be refunded. Tap the Refund (money) icon to initiate the refund. **Note:** If you do not see the Refund icon, it indicates the transaction is not eligible for the refund function.
6. Enter the refund amount if different than the default total indicated.
7. Tap Confirm to finalize the refund.
## Processing Times for Refunded Payments

### ACH Payments

<table>
<thead>
<tr>
<th>5 Business Days</th>
<th>Daily Cut-Off Time: 4:50pm PST</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- Smartcare sends ACH transactions for processing once per business day at 4:50pm PST*
- Refund requests received after the daily cut-off time will be processed the next business day at 4:50pm PST
- ACH refunds are a direct credit to the parent’s bank account

* Processing does not start immediately from the time the user selects “Refund” in Smartcare

**Example #1**

If your center submits an ACH refund in Smartcare on Wednesday at 2:30pm PST, this refund will begin processing the same day (Wednesday) at 4:50pm PST. The funds should be received in the parent’s bank account by the following Tuesday (5 business days).

**Example #2**

If your center submits an ACH refund in Smartcare on Wednesday at 5:10pm PST, this refund will begin processing the next day (Thursday) at 4:50pm PST since it is after the cut-off time. The funds should be received in the parent’s bank account by the following Wednesday.

### Credit Card Payments

<table>
<thead>
<tr>
<th>5 Business Days*</th>
<th>Daily Cut-Off Time: 7pm PST</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

* Processing includes direct credit to the parent’s bank account
Processing Times for Refunded Payments

- Credit card refunds are sent in real-time to a third-party credit card payment processor, Vantiv.
- Vantiv then works directly with the cardholder’s bank to refund the payment back to the original card per the bank’s processing times.*
- Refund processing begins immediately from the time the user selects “Refund” in Smartcare.

* Processing times vary by bank so it may take more than 5 business days for the refund to post to the parent’s bank account (check pending items in the account).

Example

If your center submits a credit card refund in Smartcare on Friday at 7:30am PST, this refund will begin processing immediately since there are no cutoff times for credit cards. The funds should be received on the parent’s credit card by the following Thursday (5 business days).

FAQs

Why are the credit card processing times so long?
Due to refund processing times varying by bank, the processing times depend on when the issuing bank puts the funds back into the cardholder’s account.

Why are some payments not yet eligible for a refund?
If you see an error message that a payment is not yet eligible for a refund, it means that the original transaction has not yet settled. Settling transactions takes between 24-48 hours, therefore, check back after 48 hours from the original payment date/time and you should be able to refund the payment.

Will the original transaction fee be refunded to the parent too?
Yes, if your center has the parent pay the transaction fees (ACH or credit card), then the original transaction fee amount will also be refunded to the parent’s bank account or credit card.

What should I do if my parent does not receive their refund within the processing times stipulated (5 business days for ACH and credit cards)?
Processing Times for Refunded Payments

Parents should contact the banking institution directly first to validate if the bank has record of the refund transaction.
If not, please contact Smartcare Support at (844)-SMARTER or email support@smartcare.com.

Void a Payment

Voids can be processed for charges or for payments made with check, cash, credit card or money order within the past 12 months.

1. Tap the menu icon at the top left of the screen and select Accounting. The Accounting screen opens.
2. Select the Accounts tab at the bottom of the screen. Your list of parent/guardian accounts opens.
3. Locate the parent/guardian from the list and tap on it to open.
4. Tap the three dots at the top right and select Refund or void a payment.
5. Locate the transaction to be voided. Tap the Void (trash can) icon to initiate the void.
   Note: If you do not see the Void icon, it indicates the transaction is not eligible for the void function.
6. Tap Confirm to void the payment.
Payments

Process a Payment

1. Tap the menu icon at the top left of the screen and select Payments. The Payments screen opens.
2. Tap Accept Payment. Your list of parent/guardian accounts opens.
3. Select a parent/guardian from the list. The payment processing screen opens.
4. Enter the amount being paid.
5. Enter a note if desired.
6. Select a payment method:
   a. Cash: Select a receipt option, Email or No Receipt.
   b. Credit Card: Tap Enter Credit Card Info. Enter the credit card information. You can choose to save the credit card information to the parent/guardian profile. Tap Continue. Select a receipt option, Email or No Receipt.
   c. Check / Money Order: Enter the check number and tap Continue. Select a receipt option, Email or No Receipt.
   d. ACH: Tap Enter Bank Account Info. Enter the bank account information. You can choose to save the bank account information to the parent/guardian profile. Tap Continue. Select a receipt option, Email or No Receipt.
   a. Other: For use with non-traditional payment methods (i.e., payroll deduction)
Allocate a Payment Manually

By default, Smartcare applies payment to the oldest service charge with a balance. However, if you want to choose how to allocate the payment, you can do so manually.

1. Tap the menu icon at the top left of the screen and select Payments. The Payments screen opens.
2. Tap Accept Payment. Your list of parent/guardian accounts opens.
3. Select a parent/guardian from the list. The payment processing screen opens.
4. Enter payment information, and any notes if desired.
5. Select the Manually Allocate Payment checkbox.
6. Choose the payment method and enter any payment details as required.
7. Select a receipt option, Email or No Receipt.
8. Tap Continue to allocation. The Allocate Payment screen opens. By default, charges with a balance only are displayed. Tap the blue checkmark to view a list of all charges.
   Alternatively, you can select “Show System Allocation” to allocate the amount to the oldest date of service with an outstanding balance.
9. Locate the charge and tap on it.
10. Enter the amount for the allocation.
11. Add any additional notes if desired and tap Save. When you apply the full payment amount, the banner at the top will turn from red to green.
12. Tap the checkmark at the top right and select Process Payment to finish.