Getting Started with Parent Portal

Contents

About Parent Portal

Parent Portal allows new parents enrolling in your center to fill out their information online. This reduces errors and eliminates paper. Parent Portal also allows you to enroll parents on a first come first serve basis based on your capacity for certain programs. In addition, Parent Portal allows current parents to make information changes online and to download resources that you make available to them.

This guide will get you started with customizing the Parent Portal enrollment experience.

The Parent Enrollment Experience

This section will briefly familiarize you with the parent experience while enrolling so that the customization options presented in this guide make more sense. You should test the enrollment process yourself after reviewing this guide and customizing your parent portal.

This is the parent portal home page. It is the screen that parents will see when they first visit your parent portal.

The parent is asked to create an account before proceeding to any function within the parent portal. They may do so by entering their email address and creating a password. If you have the option enabled, they may also use an external service to identify themselves to the parent portal.

After registering, parents are asked to confirm their email address by clicking a link in an email sent to them. This step happens whether or not they choose to register with an external account.

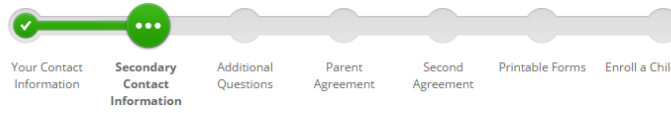After the parent confirms their email, they are taken to the requested page. In this case, we clicked the "Enroll Your Child Now" button before registering, so the Enrollment screen appears. The parent is asked to fill in information that mirrors the fields presented in Childcare Manager. The above screenshot is an example. The particular fields that are displayed and the number of steps is customizable.

Enrollment

Demo Daycare Center
Parent Portal

Your Contact Information — Secondary Contact Information — Additional Questions — Parent Agreement — Second Agreement — Printable Forms — Enroll a Child

Skip Secondary Contact ▶▶

Name Information

First		MI		Last	

Relationship to Child [▼]

Address Information

Address 123 Main st

Address Line 2

City Medford   **State** OR   **Zip** 97535

Contact Information

Email [   ]   **Confirm Email** [   ]

Home Phone [   ]   **Cell Phone** [   ]

☑ My cell phone is able to receive text messages

Employer Information

Employer Name [   ]

Work Phone [   ]   **Ext** [   ]

Note: If you close this window, your progress will be saved. You may come back and finish at any time.   ×

◀ Previous   **Next ▶**

When the parent presses the next button, they are taken to the next information screen. In this case, they are taken to the secondary contact screen. The parent presses the next button until they get to the end of the form.

When the parent reaches the end of the parent information forms, they are asked to continue to enrollment dashboard to enroll a child.

At the enrollment dashboard, the parent is prompted to begin enrolling a child. They may do so by clicking the "Enroll New Child" button, or by clicking the link in the hint displayed at the top of the page.

The child enrollment process is similar to the parent enrollment process. The parent continues until they reach the end of the form.

Child Enrollment

Program Selection — Personal Information — Medical Information — **Allergy Information** — Additional Questions — Finish
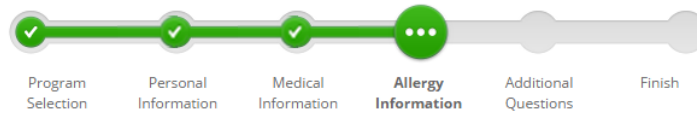
To proceed to the next page, either fill in the information below and click "Save Allergy", or, if your child has no allergies, press the "My Child Has No Known Allergies" button.

My Child Has No Known Allergies ❯

Add an Allergy

Allergy [▼]   Severity [▼]

Treatment [   ]

Additional Notes [   ]

Save Allergy

Current Allergies

Allergy	Severity	Treatment	Note		

❮ Previous   Next ❯

When the parent reaches the optional allergy page, the "Next" button is greyed out. The parent must either click the button labeled "My Child Has No Known Allergies" or they must add an allergy. If they add an allergy, the "Next" button will become enabled. This approach ensures that each parent directly answers this important question.

When the parent reaches the end of the child enrollment form, they are asked to continue to the enrollment dashboard.

Demo Daycare Center
Parent Portal

Enrollment Dashboard

You have successfully enrolled a child. You may make changes, enroll another child or, if you are finished, **submit your enrollment now**.   ×

Primary Contact   ✏ Edit

John Doe
123 Main st
Medford OR 97535
demoenrollment@demodaycare.com

Secondary Contact   ✏ Edit

Additional Contacts   + Add Contact

First Name	Last Name		

Enrolled Children   + Enroll New Child

First Name	Last Name	Status		
Little	Doe	Pending	✏ Edit	✖ Delete

If you are finished enrolling   **Submit Your Enrollment Now**

At this point all required enrollment processes are complete. The parent may submit this enrollment and it will become available in Childcare Manager. If the parent chooses, they may enroll a second child or provide additional contacts before submitting their enrollment. After the enrollment is submitted, no changes can be made until the enrollment is accepted in Childcare Manager.

Run the Parent Portal Setup Wizard

Before signing into the Parent Portal Administration area, you must run the Parent Portal Setup Wizard in Childcare Manager. The setup wizard will synchronize your family and child statuses, your allergy type, your relation types, and do the initial synchronization of active families.
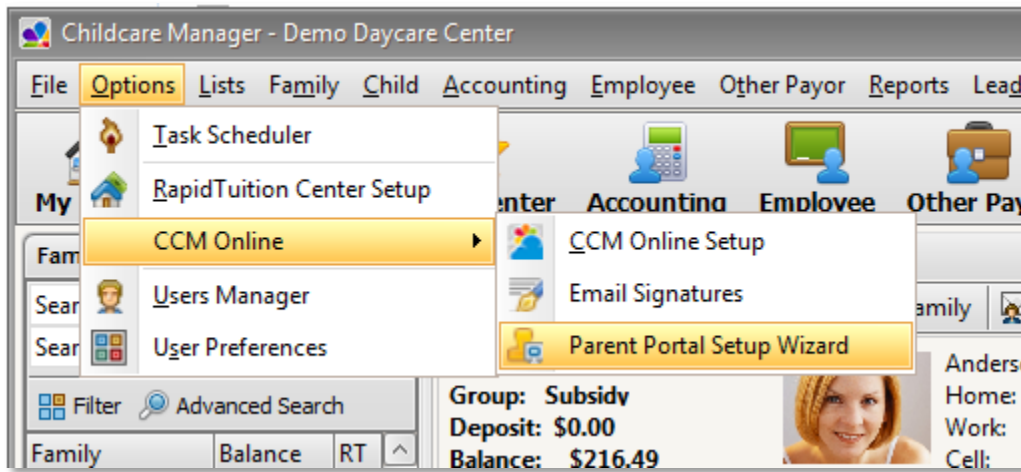
The Parent Portal Setup Wizard can be found in the CCM Online sub menu under the Options menu.

The setup wizard will first check your account status to make sure it is setup properly. The first interactive wizard screen will require you to categorize your family statuses. Each status should be active, waiting, or other. The active group includes families which have children who are actively enrolled in your center. The waiting group is for families who are currently waiting for an available opening. The other group should include all other statuses of families that are not enrolled in your center. The other group should include prospective statuses and statuses that represent families who no longer have children enrolled in your center.

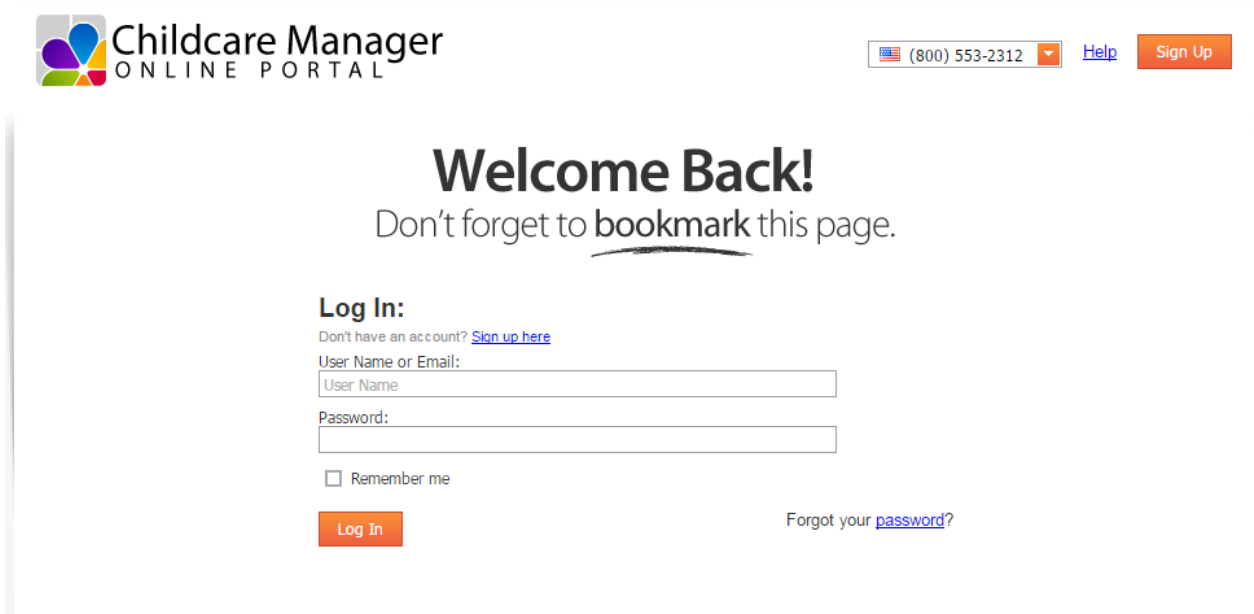This pictures shows example statuses assigned to categories

After you have finished assigned family statuses to categories, click next. The next screen should look very similar. This screen is your **child** statuses instead of your **family** statuses. You should repeat the same procedure that was done with the family statuses, then click next.

After you finish categorizing your statuses, continue through the wizard until it is complete, then click finish.

Signing Into Parent Portal Administration

After completing the Parent Portal Setup Wizard, you may sign into Parent Portal Administration. Parent Portal Administration will allow you to customize the look and function of your parent portal. You should first sign into Childcare Manager Online by visiting
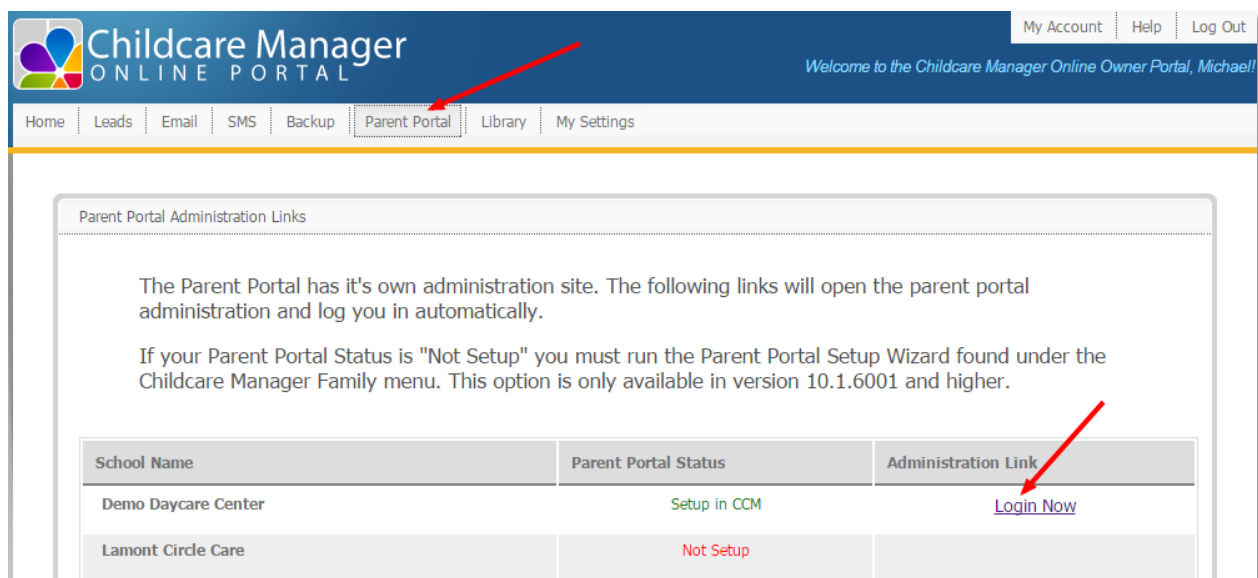
https://www.childcaremanageronline.com/Account/SignIn.aspx

After signing in, select the Parent Portal Tab, then click the "Login Now" link next to the school you would like to customize.

Understanding Enrollment Options

It is important that you decide how several key features of Parent Portal will be configured.

To configure your enrollment settings:

1. Login to Parent Portal Administration (described in the previous step)
2. Click the "Parent Enrollment" tab
3. Click the "Parent Enrollment Settings" tab
4. Review the descriptions below to decide if you would like to use each feature
5. If you make any changes, be sure to click the "Save Settings" button at the bottom

External Logins

If this options is enabled, parents will be able to use their existing login with several other providers (such as Google and Microsoft) to identify themselves to the Parent Portal. External logins allow the parent to avoid creating an account and

having to remember another password. If a parent enrolls using an external login, they can still create a local account later by using the "forgot password" function.

Open Enrollment

If this option is checked, parents will have the ability to visit your parent portal and enroll without being invited. If this option is not checked, parents can only enroll using one of the invitation options described later in this document.

Invitation Link

This option controls whether the invitation function is advertised on the home page of your parent portal. When you invite a parent to enroll in the parent portal, they will receive an email that has both a code and a link. If this option is enabled, they can go to your parent portal, click the invitation entry link, then copy and paste the code. Alternatively, they can simply click the link in the email. If you uncheck this option, they will only be able to use the link in the email. You should only uncheck this option if you don't want to advertise the availability of enrollment invitations.

Access Requests

If this option is enabled, existing parents will be able to visit your parent portal and submit an access request. An access request is an information form that a parent fills out to gain access to their parent portal account. Once the parent submits an access request, a notification will appear in Childcare Manager. You may then compare the information submitted with the information you have in Childcare Manager. You should always contact the parent before granting access.

Automatic Access

When a new registrant enters an email address, they are asked to confirm that address by clicking a link in an email sent to that address. If this option is checked, existing parents will automatically be given access to their account if they enter and confirm an email address that matches the email address you have on file for them in Childcare Manager. They must be the only family that has that email address in Childcare Manager.

Upload Your Logo to Parent Portal

After logging into Parent Portal Administration, it is a good to start with uploading your logo. If you do not have your logo available, you may move onto to other steps. If you do not upload your logo, your parent portal will display the default logo shown above.

To upload your logo:

1. Choose the "Look and Feel" tab
2. Choose the "Logo" sub tab
3. Click the "Choose File" button
4. Locate a suitable logo file on your computer. Square logos look best. Be sure to take note of the logo guidelines displayed on the logo screen.
5. After choosing the file, press the "Upload" button.
6. Your logo should now be shown in the Current Logo box.

Choose Your Parent Portal Keyword

Choosing your Parent Portal Keyword allows you to customize the URL which parents use to access your parent portal. The location of your parent portal will be www.ccmparent.com/keyword. For example, if you chose the keyword "MyCenter" your parent portal may be accessed from www.ccmparent.com/MyCenter.

Important: Make sure you choose your keyword carefully. It may only be done once.

To choose a keyword:

1. Click the "Look and Feel" tab
2. Click the "Keyword" sub tab
3. Type your desired keyword in the keyword box
4. Click the "Set Keyword" button

Note: Although choosing a keyword makes your parent portal easier to locate, the best way to help parents reach your parent portal is to include a link on your center's webpage.

Customize Enrollment Forms

For your convenience, we have provided a set of default enrollment forms that mirror the fields that are available in Childcare Manager. However, it is likely that you will want to change which fields are required and/or visible.

To start customizing forms, click the "Parent Enrollment" tab, then click the "Form Customization" sub tab. Take note of the form that is selected to the right of the page title. In the screenshot above, "Primary Contact" is selected. You may change whether a field is required by checking or unchecking the required check box next to that field. You can make a field invisible by unchecking the visible checkbox next to that field. If you press the "Reset" button next to a field, it will be reset to the default options.

Hint: By clicking inside the dashed lines, you can change the name of the field that is displayed to the parent. In the screenshot above, the "Last" field was changed to "Sir Name"

Important: When you are done making changes to a form, make sure to scroll to the bottom of the page and click "Save Changes"

HINT
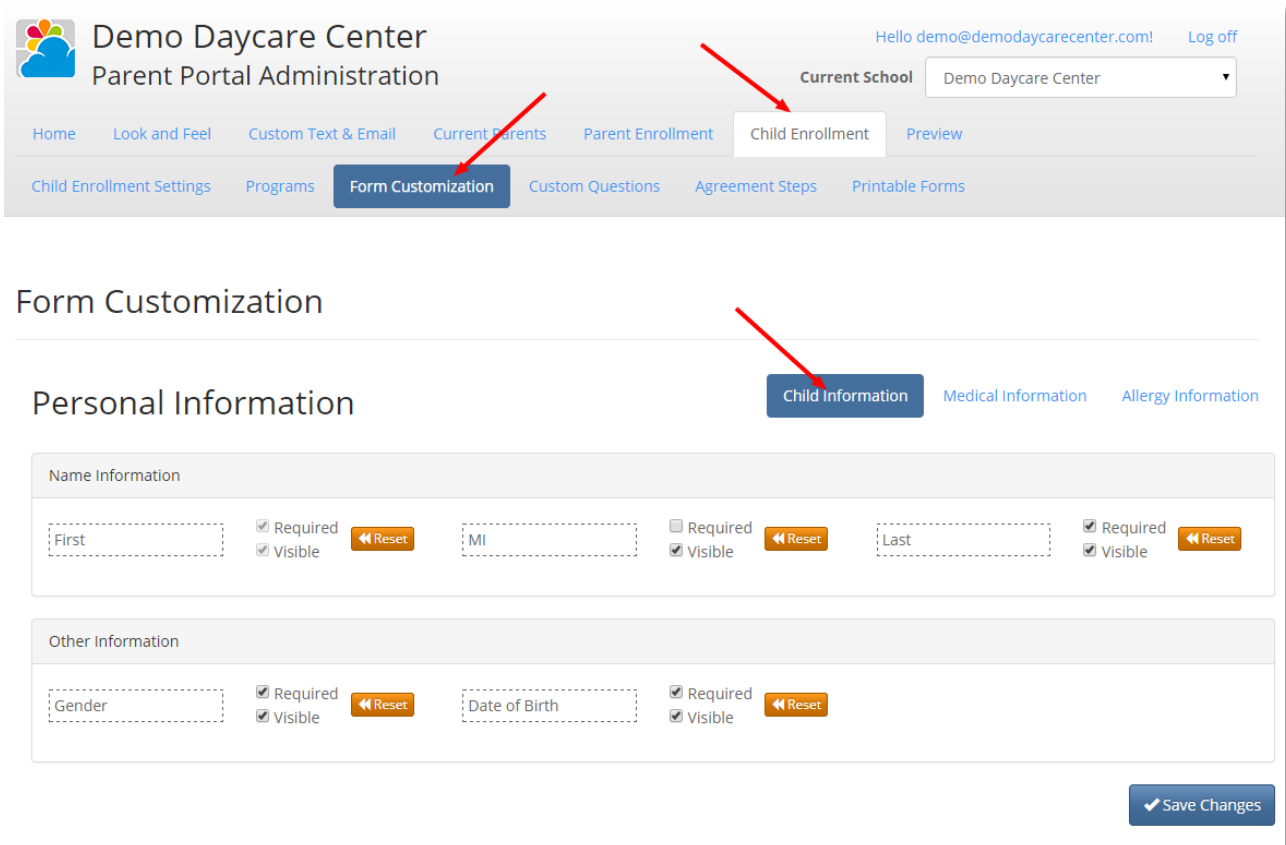
All of the options and settings found under the **Parent Enrollment** tab control the part of enrollment where information is collected about the family such as parent contact information. This information is only collected once per family enrollment.

All of the options and settings found under the **Child Enrollment** tab control the part of enrollment where information is collected about each child that will be enrolling. This information is collected separately for each child that is enrolling.

Once you are done customizing parent enrollment forms, you can move on to customizing child enrollment forms. These forms are different, but the customization process is exactly the same.

Add Custom Questions

You may want to request additional information that is not included on the standard parent portal forms. You can request this information using the "Custom Questions" section that is found under both the Parent Enrollment and Child Enrollment sections.

To Add a New Custom Question:

1. Click the "Parent Enrollment" tab or the "Child Enrollment" tab
2. Click "Custom Questions" sub tab
3. Click the "New Custom Question" button

As an example, we will create a custom question that allows the parent to answer with a drop down list.

1. Enter the title of the question in the box labeled "Question Text"
2. Enter help text, this will appear underneath the questions and should provide guidance about answering the question
3. Select "Custom Drop Down List" from the "Answer Type" drop down
4. Click "Add List" to create a new list which will specify the options available in the drop down. This will pop a new window.

5. Enter a name that you will call your list. In our example we entered "Color Drop Down". This name is only for your reference.

6. Enter the first item that should appear in the list into the box labeled "New List Item". In the example screenshot, we entered "Blue"

7. Click the add button to add the item you just typed into the list

8. Repeat the previous two steps for each item that you would like to appear in the list

9. Click save changes when all items have been added

10. The name of the new lists should appear in the "Please Select a Custom List" field.
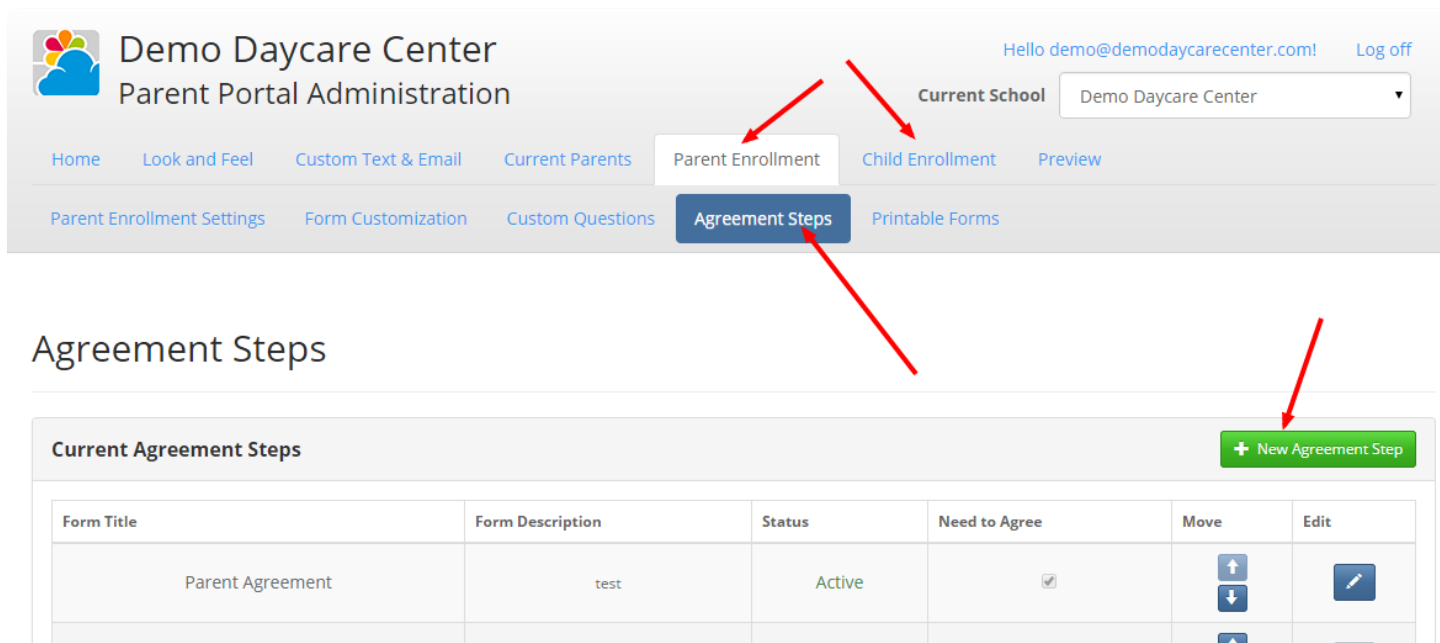
11. Select whether the question should be required or not. If you mark the question as required. The parent must answer the question before moving forward with the enrollment. If the question is not required, it may be skipped.

12. Click the "Save Changes" button

13. This question will now be included as part of your enrollment process

Setup Parent and/or Child Agreements

The agreement function allows you to include text that the parent read. The parent must type their name to agree before proceeding. You can include an unlimited number of agreements as part of the parent enrollment process or as part of the enrollment for each child.

To add a new agreement step:

1. Click the "Parent Enrollment" tab or the "Child Enrollment" tab
2. Click the "Agreement Steps" sub tab
3. Click the "New Agreement Step" button
4. You should now be at the Add an Agreement Step screen

Add an Agreement Step

Title

Description

☐ Parent must type their name to agree

Status Active ▼

Agreement Text

File ▾ Edit ▾ Insert ▾ View ▾ Format ▾ Table ▾ Tools ▾

B *I* U S ≡ ≡ ≡ ≡ Formats ▾ Paragraph ▾ Font Family ▾ 12pt ▾

Pellentesque laoreet felis nec rhoncus mollis. Vestibulum gravida ligula non massa varius, nec consectetur eros congue. Ut porta mauris velit. In ligula lorem, porta vitae ante quis, suscipit bibendum neque. Morbi venenatis nunc sit amet erat interdum cursus. Nullam lobortis lorem vel mi sollicitudin rutrum. Phasellus nec felis ut libero euismod placerat quis id ligula. Proin pellentesque purus ac ullamcorper bibendum. Nullam placerat semper semper. Quisque in massa at dui gravida blandit. Vivamus volutpat tortor quam, eget fringilla velit pretium quis. Pellentesque maximus suscipit odio.

p » span

✖ Cancel   ✔ Save Changes

1. First, enter a title for your agreement step. This title will be visible to the parent as part of the enrollment process
2. Enter a description for your agreement. This description is for internal reference purposes.
3. If you would like to require that the parent type their name to agree, check the box next to "Parent must type their name to agree". If you do not check this box, the agreement will be for display only and no action will be required to proceed.
4. Click inside the agreement text and start typing. This will be displayed as the text of your agreement. You may format this text and/or add pictures as required.
5. When you are finished editing this agreement, click the "Save Changes" button.
6. Your agreement will appear as part of the enrollment process.

HINT

Agreement Text

File ▾ Edit ▾ Insert ▾ View ▾ Format ▾

B *I*

↶ Undo   Ctrl+Z   Form
↷ Redo   Ctrl+Y

Pellent
congue   ✂ Cut   Ctrl+X   us mol
nunc si   📋 Copy   Ctrl+C   ula lor
euismo   📋 Paste   Ctrl+V   Nulla
sempe   n pelle
Pellent   **Paste as text**   avida

p » span   Select all   Ctrl+A

If you are copying your agreement text from a word processor, open the edit menu and choose "Paste as Text". After the text has been pasted in, you can format it for the web using the provided toolbar functions.

Upload Forms for Parents to Sign

The printable forms function allows you to upload forms that parent can print out and sign. If you have forms that must be physically signed or filled out, this feature allows you to provide those forms to parents before they come to your center for the first time.

To upload a form:

1. Choose the "Parent Enrollment" tab or the "Child Enrollment" tab
2. Click the "Printable Forms" sub tab
3. Click the "New Form" button
4. You should now be at the Add Printable Form screen

1. Click the "Choose File" button
2. Select the PDF file from your computer that you would like to upload
3. After selecting the file, click the "Upload" button
4. Wait for the file to finish uploading, do not click "Upload" a second time
5. You should now see a new screen that allows you to edit the title and description of the form

Edit Printable Form

Upload New Form

To upload a new PDF, choose a file from your computer then press the upload button.

Choose File | No file chosen   Upload

Pdf Information

Filename	Form For Parent.pdf
Size	14.83KB
Title	Report
Author	Michael Lange
Modified Date	11/14/2014 10:13:10 AM
Number of Pages	1

Form Settings

Status [Active ▾]
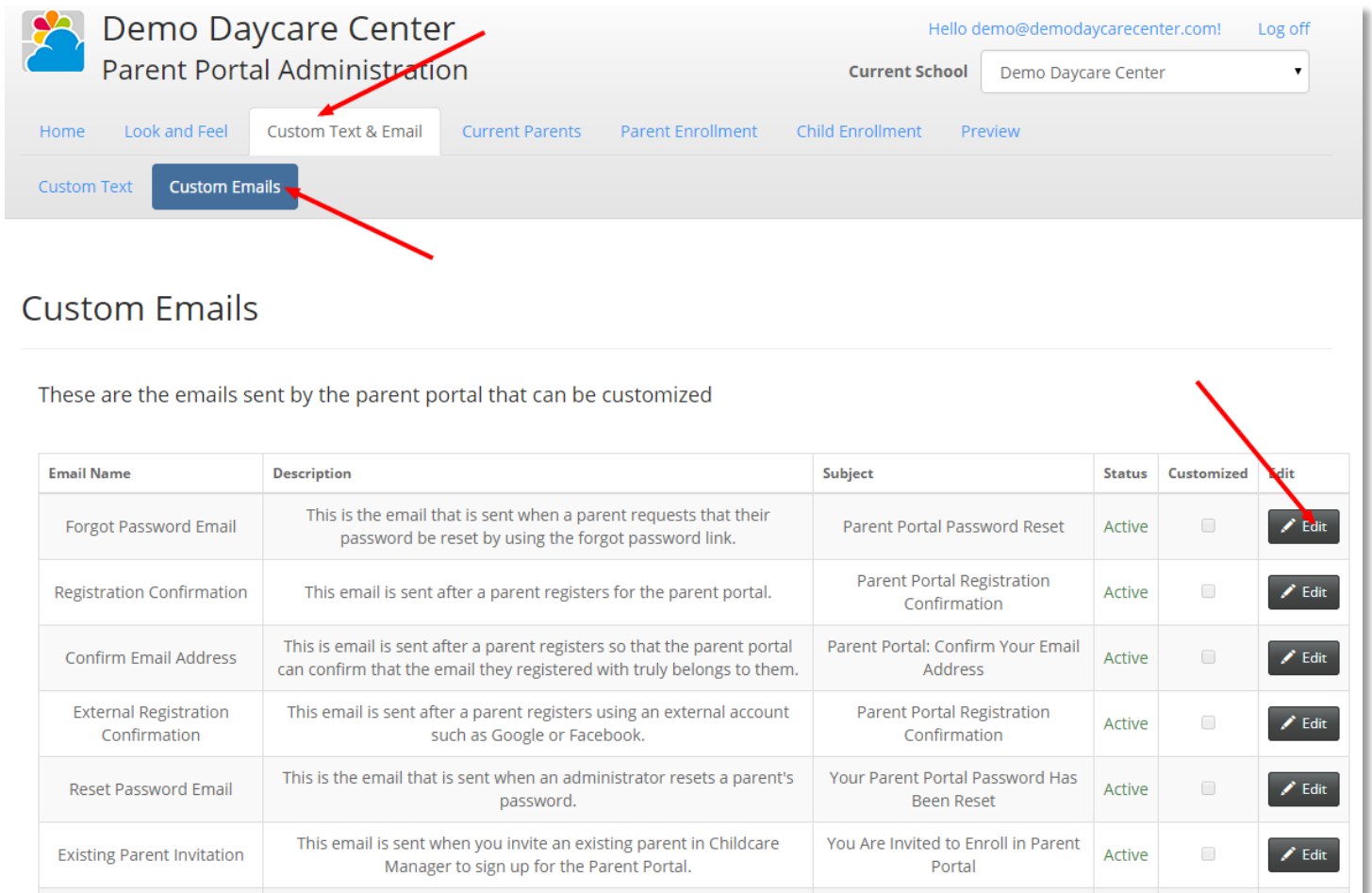
Title [   ]

Description [   ]

Form Fill Mode Not Supported for This PDF

☐ Does the parent need to sign and return this form?

✖ Cancel   ✔ Save

1. Fill out the Title of the form, this will be visible to parents
2. Fill out the description of the form, this will be visible to parents
3. Check the box if the parent needs to sign this form. If you check this box, there will be a message indicating that the form needs to be signed when it is presented for download.
4. When you are finished, click the "Save" button.

Customize Parent Portal Emails

The parent portal sends various email when certain events occur. Examples include, enrollment acceptance and site registration. You may change the content of these emails.

To customize an email:

1. Click the "Custom Text & Email" tab
2. Click the "Custom Emails" sub tab
3. Locate the email you would like to edit
4. Press the "Edit" button next to that email
5. You should now be at the Edit Custom Email screen

Edit Custom Email
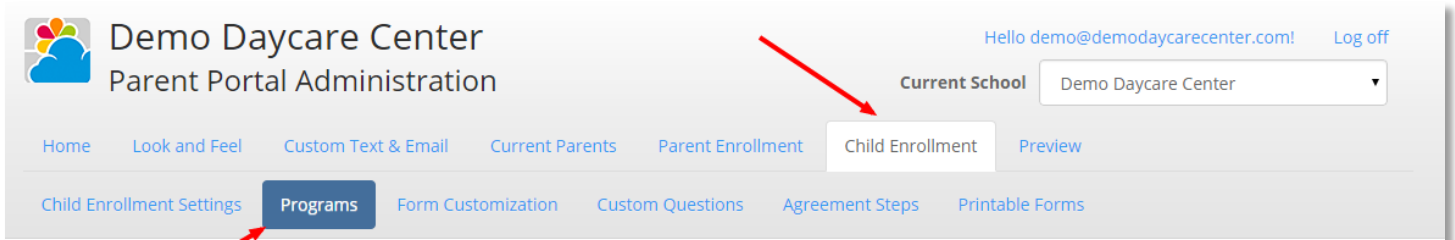
Email Name	Forgot Password Email
Description	This is the email that is sent when a parent requests that their password be reset by using the forgot password link.
From	[dropdown]
	Choose one of your verified email addresses
Reply To	[text field]
	Where should the email be directed if the parent replies?
Subject	Parent Portal Password Reset
	Enter the subject of the email
Email Body	

File ▾   Edit ▾   Insert ▾   View ▾   Format ▾   Table ▾   Tools ▾

B *I* <u>U</u> S̶ | Formats ▾ | Paragraph ▾ | Font Family ▾ | A ▾ A ▾

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Demo Daycare Center
Parent Portal   **Reset Password**

We are sorry about the trouble you are having while logging in.
The link below will allow you to reset your password.

[{ResetPasswordLink}]

Here, you can edit the content of the email. Alternatively, you can disable the email by choosing "Disabled" from the "Status" drop down menu, then clicking "Save Changes" at the bottom of the page. Some emails, such as the Reset Password email, may not be disabled.

Some emails require special merge fields. For example, the reset password email must include a reset password link somewhere in the body of the email. If you receive an error message stating that a merge field is required, complete the following steps:

1. Place the cursor where the merge field should go
2. Press the "Merge" button on the toolbar
3. The Insert Merge Field window will appear
4. Click the "Insert" button next to the field you would like to insert

Insert Merge Field ✕

Reset Password Link **This merge field is required*	This merge field will be replaced with a link that allows the user to reset their password. Example Please reset your password by clicking here	Insert
Center Address Line 1	The first address line of your center. Example 123 Main St.	Insert
Center Address Line 2	The second line of your center address. Example STE 3B	Insert
Center City	The city of your center address. Example Medford	Insert
Center Email	The email address of your center. Example director@demodaycarecenter.com	Insert

When you have finished editing your custom email, make sure to press the "Save Changes" button at the bottom of the page.

Setup Programs and Availability

Parent portal allows you to limit child enrollment in programs based on availability. If a program is a full, you have the option of not allowing additional enrollments or, alternatively, warning parents that they may be placed on a waiting list.

To change program settings:

1. Click the "Child Enrollment" tab
2. Click the "Programs" sub tab
3. Take note of the capacity setting as well as the counts that have been synchronized from Childcare Manager
4. Click the "Edit" button next to the program you would like to change
5. You should now be at the Edit Program Settings screen. This screen contains many options.

Program Status

Set the status to disabled if the program is no longer used or should only be used in Childcare Manager. This will prevent the program from being shown as an option to the enrolling parent. Alternatively, click the "Always Display" check box if the program should always be shown. The always display option will override all other settings and ensure that the program is always displayed.

Display Settings

The program name displayed to parents defaults to the name of the program in Childcare Manager. You can customize the display name here. You should also add a brief description about the program so enrolling parents feel confident that they are selecting the correct one. You can also add important eligibility and cost information in the description area.

When to Display

When to Display	
Enrollment Start Date	09/11/2014
	This program will not be available for parents to select until this date. If you leave this blank, it will be available immediately.
Enrollment Stop Date	09/26/2014
	This program will not be available for parents to select after this date. If you leave this blank, it will always be available.

The enrollment start and stop dates control when a program is available for potential parents to select. The program will only be shown when between these dates. If you prefer not to use this option, leave either or both fields blank.

Capacity Settings

Capacity Settings	
Explanation	If you set the capacity mode to an option other than disabled, parents will only be able to enroll in programs that have sufficient capacity. Capacity is calculated based on the number of active children in a program plus the number of children currently being enrolled in the program using Parent Portal.
	All options allow the parent to enroll their child normally if there is capacity. This option specifies what will happen if there is not capacity.
	Disabled Parents can always enroll, regardless of capacity **Show Programs as Full** Parents will be shown the program but it will indicate that it is full and not be selectable **Do Not Show Full Programs** Parents will be not be shown full programs **Waitlist Enrollment** Parents will be notified that the program is full but will still be able to enroll. They will be notified that they will be placed on a waiting list. **Waitlist Enrollmen With Position** This is the same as the option above except the parents will be shown how many children are waiting before them.
Capcity Mode	Show Programs As Full ▾
	This sets how or if Parent Portal takes the capacity of your program into account when displaying the program selection
Program Capacity	30
	Use this field to override the capacity set in Childcare Manager

The program capacity settings control what happens when programs are full. By default, program capacity mirrors what is entered in Childcare Manager but you may override that setting by entering a different number here. The capacity mode setting determines what happens If the number of children enrolled and waiting for a program is equal to or greater than the program capacity.

Age Settings

If you check the "Use Age Restriction" box and fill out the age settings box, the program will only be displayed to parents enrolling children whose age, on the program start date, is between the ages you specify. If you do not specify a program start date, the child's age and eligibility will be calculated at the time of enrollment.

If any of your active programs use the age restriction feature, the parent will be prompted to enter a birth date for the child at the very beginning of the child enrollment process.

Important: After setting up your program, make sure to scroll to the bottom of the page and click the "Save Changes" button.
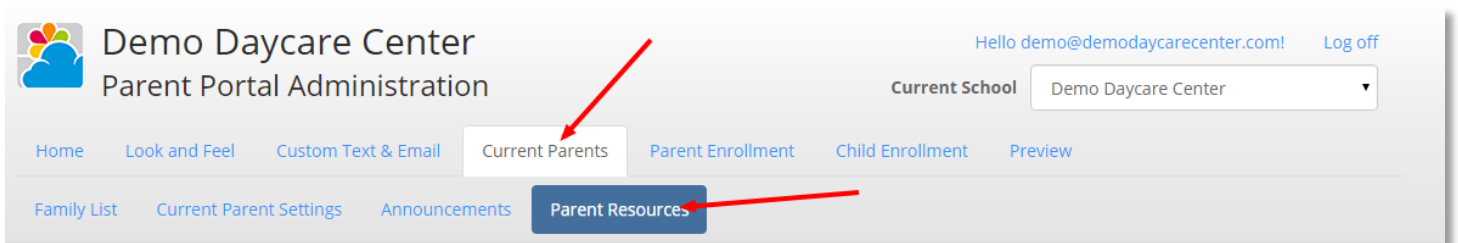
Disabling Program Selection

You may decide to allow parents to enroll, then select the best program for them manually in Childcare Manager. You may disable parent program selection entirely. To disable online program selection:

1. Click the "Child Enrollment" tab
2. Click the "Child Enrollment Settings" sub tab
3. Uncheck the "Program Choice" box
4. Click the "Save Settings" button at the bottom of the screen.

Upload Parent Resources

The parent resources screen allows you to upload files for download by your enrolled parent. Here, you can make documents, such as a parent handbook, available to parents.
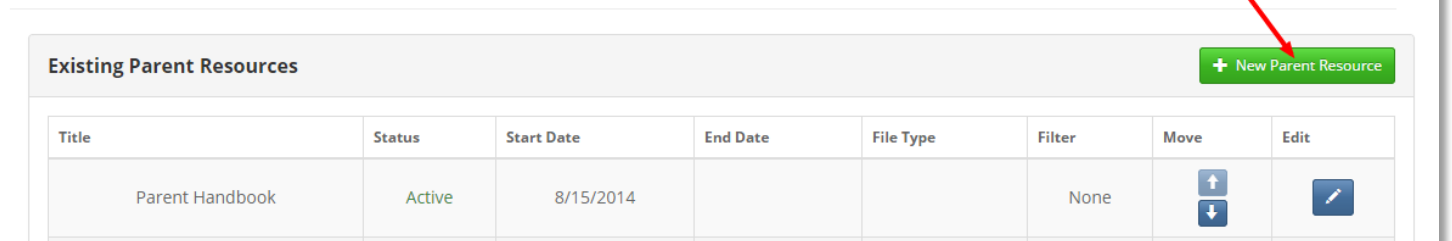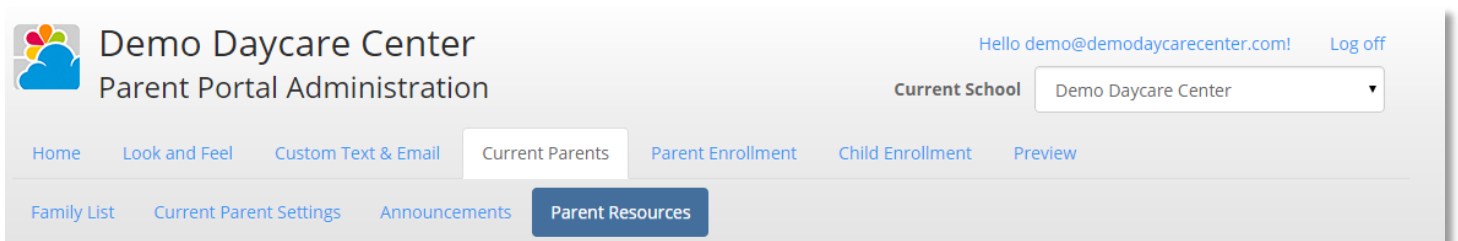
To upload a new document for parents:

1. Click the "Current Parents" tab
2. Click the "Parent Resources" sub tab
3. Click the "New Parent Resource" button
4. You should now be at the Add Parent Resource screen

1. Click the "Choose File" button
2. Select the file from your computer that you would like to upload
3. After selecting the file, click the "Upload" button

4. Wait for the file to finish uploading, do not click "Upload" a second time
5. You should now see a new screen that allows you to edit the title and description of the form

File Information

Filename	LS33600.pdf
Size	454.66KB
Date Uploaded	11/18/2014
Download	[Download File] [View File]

Resource Settings

Title

This is the title of the resource

Description

This a description of the resource that will be displayed to the parent

Status Active

Set this to disabled if you no longer want this resource to appear

Start Date 11/18/2014   **End Date** mm/dd/yyyy

This is the date the resource should become available   This is the date the resource should expire (stop being shown)

Parent Filter ☐ Child Status Type:

☐ Child Status: ☐ Active ☐ Deactive ☐ Potential ☐ Waiting ☐ Pre-Registered ☐ Inactive ☐ Prospect
☐ Withdrawn

☐ Child Program: ☐ After School ☐ Before & After Care ☐ Before School ☐ Child Care ☐ Infant ☐ Drop-In
☐ Preschool ☐ Summer Program ☐ Toddler ☐ Elementary ☐ Toddler Part-Time
☐ Preschool Part-Time ☐ Infant Part-Time

[✖ Cancel]   [✔ Save Changes]

The title and description of the resource will be displayed to parents.

The start and end dates allow you to control when the resource is available to your enrolled parents. If you prefer not to use this option, leave one or both of these fields blank.

The parent filter allows you to control which parents the resource is available to. For example, if you upload a document called "After School Parent Handbook" and, it should only be available to parents with children in the "After School" program, click the "Child Program" check box, then click the "After School" check box. Use this feature to make sure that each parent sees only the documents that are relevant to them.

Test Your Enrollment Process

Now that you have setup the basics of your enrollment process, you may test it to make sure it conforms to your expectations. You may enroll as a parent by visiting the location described in the Keyword Selection section of this document. If you choose this option, make sure to sign out of Parent Portal Administration first.

Another way to test your enrollment process is to use the built in test account. You can reach the test account by click the "Preview" tab.

You can see what your Parent Portal looks like from the prospective of the parent by clicking one of the Preview Links. The test the enrollment process, click the enrollment form link.

Receiving Parent Portal Alerts in Childcare Manager

After running the Parent Portal Setup Wizard a new Parent Portal tab should appear under the family center. When a new notification is received, such as a new enrollment, a badge with a red number will appear on this tab. Click the tab to receive your notification.

Childcare Manager checks for new notifications approximately every ten minutes. If you would like to check for notifications immediately, click the Parent Portal tab, then click the "Check for New Notifications" link.

Downloading a New Enrollment into Childcare Manager

Once you have received your enrollment notification and visited the Parent Portal tab, click "Review Enrollment"

This will open the Review Parent Portal Enrollment dialog

Before accepting the enrollment, you must do the following:

1. Click the View/Edit Family Data Card button and fill in any additional required fields.
2. Click the View/Edit Contact button **for each contact,** review the information and fill in any additional required fields
3. Click the View/Edit Child button **for each child,** review the information and fill in any additional required
4. Custom questions and allergy notes from the Parent Portal are downloaded into Childcare Manager as notes. You should review these notes before accepting the enrollment.
5. When you are done reviewing the enrollment, click "Accept Enrollment"
6. A new family with the listed contacts and children will automatically be added to Childcare Manager

Reviewing Parent Information Changes

When a parent logs in and changes their personal information, this information is not automatically updated in Childcare Manager. You must review and accept or deny these changes. These changes are synchronized with Childcare Manager the same way that new enrollments are. You will receive a parent portal notification in the Family Center.

If the changes look fine, you may click "Accept All Changes" right from the notification screen. If you would like fine grained control of each change, click the "Review Changes" link instead.

Field Name	Old Value	New Value	Accept	Reject
First	Demo	Test	☑	☐
MI		D	☑	☐
Home Phone	7701234567	5415358085	☑	☐
Employer Name		Personalized Software	☑	☐
Work Phone		5415358085	☑	☐

Review Parent Portal Changes

Changes To: Contact Information

For: Demo Parent

Accept All   Reject All   Save Changes   Cancel

In the review changes dialog, click the Accept check box or the Reject check box for each change. When you are done, click "Save Changes"

Inviting an Existing Parent to the Parent Portal

You may send invitations to your existing parent's so that they can manage their contact information and access parent resources.
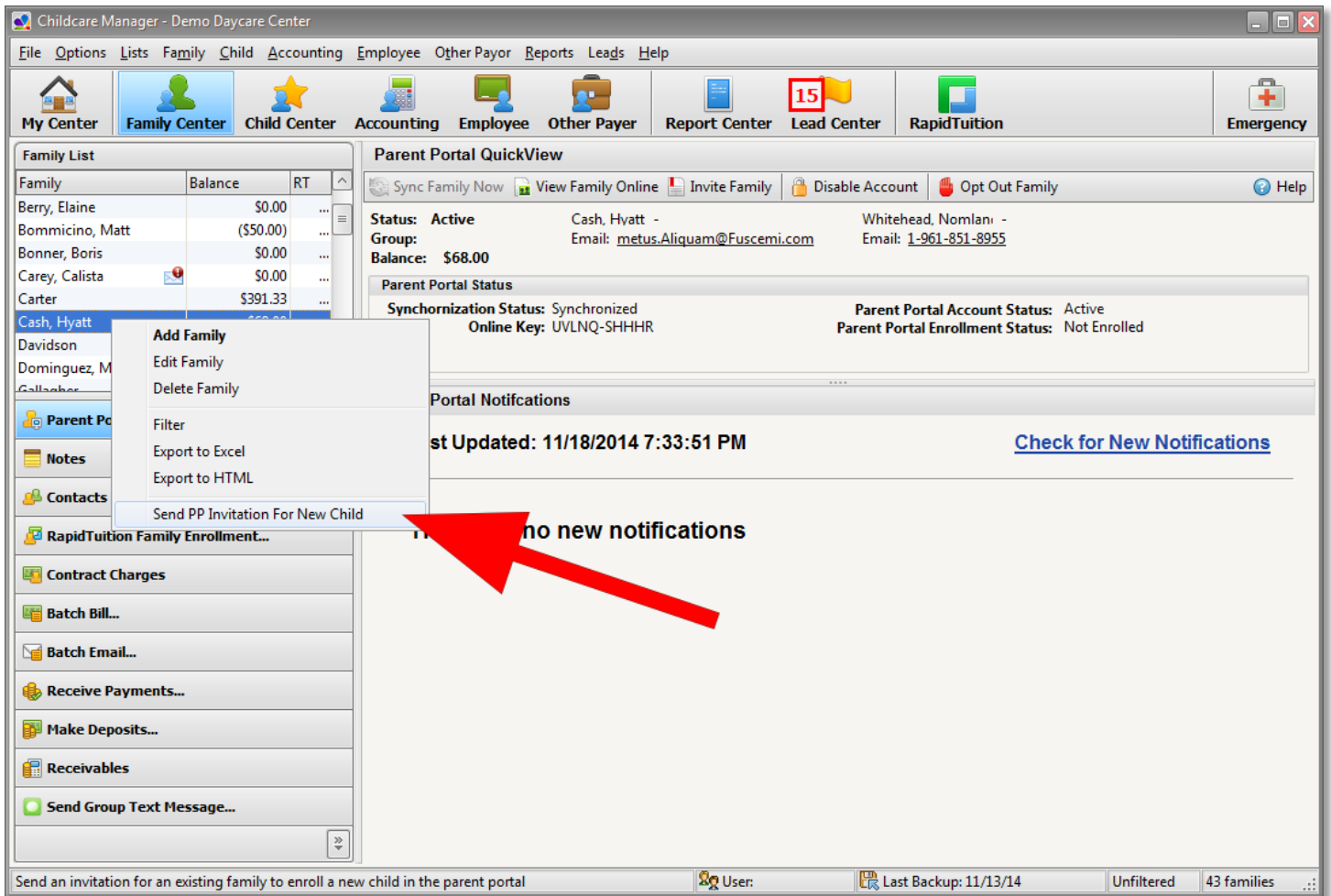
To invite an existing family to Parent Portal:

1. Go to the Family Center
2. Click the Parent Portal tab
3. Ensure that the family is not already enrolled in Parent Portal, note that, in the screenshot above, the enrollment status is "Not Enrolled"
4. Click the "Invite Family" button on the toolbar

Inviting an Existing Family to Enroll a New Child

There may be times when an existing family has a child enrolled at your center, then that families wants to enroll a new child. In these situations, you should use the Send Invitation for New Child function. The family does not need to have a Parent Portal account for this feature to work.

To invite a new child:

1. Go to the Family Center
2. Click the Parent Portal tab
3. Select the family to invite
4. Right click the family name
5. Select "Send PP Invitation For New Child" from the popup menu
6. The Invite new child dialog should now appear

Send New Child Enrollment Invitation

Family to Invite:

Cash, Hyatt

☑ Also Send Invitation to Secondary Contact

Number of Children

Choose the number of children that this invitation should allow enrollment for. If your Parent Portal is configured for open enrollment, this setting has no effect.

1

Programs

☑ Restrict Program Choices

☐ After School
☐ Before & After Care
☐ Before School
☑ Child Care
☐ Drop-In
☐ Elementary
☐ Infant
☐ Infant Part Time

[Send Invitation]   [Cancel]

7. Enter the number of new children to invite. This number is only relevant if you choose not to use open enrollment.

8. If you are using program selection, click the "Restrict Program Choices" check box

9. Check each box next to each program that the parents should be able to choose for their child or children

10. Click the "Send Invitation" button

Sending a Parent Portal Invitation to a Lead

After a lead indicates that they would like to enroll in your center, you may streamline this process by sending them a Parent Portal invitation link.

To invite a lead to Parent Portal:

1. Go to Lead Center
2. Highlight the Lead you would like to invite
3. Click the "Send Enrollment Invitation" button
4. You should now see the invite lead dialog

Send Lead Enrollment Invitation ✕

Lead To Invite:

Hess, Xaviera

☑ Also Send Invitation to Secondary Contact

Number of Children

Choose the number of children that this invitation should allow enrollment for. If your Parent Portal is configured for open enrollment, this setting has no effect.

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Programs

☑ Restrict Program Choices

☐ After School
☑ Before & After Care
☐ Before School
☐ Child Care
☐ Drop-In
☐ Elementary
☐ Infant
☐ Infant Part-Time

[Send Invitation]   [Cancel]

5. Enter the number of new children to invite. This number is only relevant if you choose not to use open enrollment.

6. If you are using program selection, click the "Restrict Program Choices" check box

7. Check each box next to each program that the parent's should be able to choose from for their child or children

8. Click the "Send Invitation" button

Disable a Parent's Account from Childcare Manager

If you would like to disable a parent's access to parent portal:

1. Go to Family Center
2. Click the Parent Portal tab
3. Select the family in the list. In the screenshot above, "Bailey, Laura" is selected. Note that the Parent Portal Account Status is "Active".
4. Click the Disable Account button highlighted in the screenshot above
5. The selected family will no longer be able to log into Parent Portal

Opting a Family out of Parent Portal

Parent Portal does not synchronize social security numbers. Even so, some families may occasionally object to having any information synchronize with the cloud. For these families, Childcare Manager has an opt-out feature. When you opt a family out of parent portal, there information will no longer synchronize. In addition, any information currently on the parent portal will be deleted.

To opt a family out of parent portal:

1. Go to Family Center
2. Click the Parent Portal tab
3. Select the family in the list. In the screenshot above, "Henderson" is selected
4. Click the "Opt Out Family" button highlighted in the screenshot above
5. The selected family will no longer be able to log into Parent Portal, any information will be deleted from Parent Portal, and their information will not be synchronized again.