

# Getting Started with Parent Portal

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## 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.

The screenshot shows the top navigation bar with the logo, "Demo Daycare Center Parent Portal", and "Register" and "Log in" buttons. The main content area is titled "Welcome to Parent Portal" and is divided into two columns. The left column has two sections: "Current Parents" with links for "Login Here", "Start Here", and "Request Access"; and "New Parents" with links for "Enroll Your Child Now" (highlighted with a red arrow) and "Start Here". The right column is titled "What does Parent Portal allow me to do?" and lists several actions: "Update my contact details", "Update my child's information", "Update emergency contact details", "Check my balance (Coming Soon)", "Make payments (Coming Soon)", and "Enroll or Unenroll in Auto-pay (Coming Soon)".

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

The screenshot shows the registration page with the same top navigation bar. The main heading is "Please Register". A light blue box contains the text: "First, we need a way to identify you. Please register below by entering your email and choosing a password. Alternatively, we can identify you using a third party login. These services will not be used by us for any other purpose. If you have already registered: Log In". Below this, there are two sections: "Create a new account." and "Use another service to log in.". The "Create a new account." section has three input fields for "Email", "Password", and "Confirm password", followed by a "Register" button. The "Use another service to log in." section has two buttons: "Sign in with Google" and "Sign in with Microsoft".

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.



**Demo Daycare Center**  
Parent Portal

Hello [demoenrollment@demodaycare.com](mailto:demoenrollment@demodaycare.com)! [Log off](#)

## Please Confirm Your Email Address

---

We sent an email to [demoenrollment@demodaycare.com](mailto:demoenrollment@demodaycare.com) to confirm that your email address is correct.

Please click the link inside the email to confirm your address.

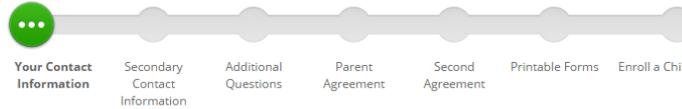
After confirming your email, [Try Again](#).

If you did not receive the confirmation email or the link no longer works, [Click Here](#) to resend it.

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.



## Enrollment



**Name Information**

First  MI  Last

**Address Information**

Address

Address Line 2

City  State  Zip

**Contact Information**

Email  Confirm Email

Home Phone  Cell Phone

My cell phone is able to receive text messages

**Employer Information**

Employer Name

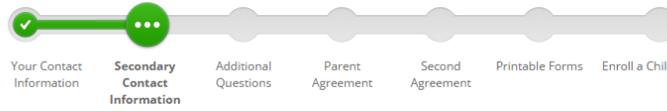
Work Phone  Ext

[Next >](#)

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



[Skip Secondary Contact](#) ▶▶

Name Information

First	<input type="text"/>	MI	<input type="text"/>	Last	<input type="text"/>
Relationship to Child	<input type="text"/>				

Address Information

Address	<input type="text" value="123 Main st"/>				
Address Line 2	<input type="text"/>				
City	<input type="text" value="Medford"/>	State	<input type="text" value="OR"/>	Zip	<input type="text" value="97535"/>

Contact Information

Email	<input type="text"/>	Confirm Email	<input type="text"/>
Home Phone	<input type="text"/>	Cell Phone	<input type="text"/>
<input checked="" type="checkbox"/> My cell phone is able to receive text messages			

Employer Information

Employer Name	<input type="text"/>		
Work Phone	<input type="text"/>	Ext	<input type="text"/>

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.

# Enrollment



You may now enroll a child using the Enrollment Dashboard

[Continue to the Enrollment Dashboard](#)

[← Previous](#)

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

The screenshot shows the 'Enrollment Dashboard' for 'Demo Daycare Center Parent Portal'. At the top right, it says 'Hello demoenrollment@demodaycare.com! Log off'. A green notification banner at the top reads: 'Welcome to the Enrollment Dashboard. The next step is to enroll a child. **Enroll a Child Now**'. Below this are sections for 'Primary Contact' (with an 'Edit' button) and 'Secondary Contact' (with an 'Edit' button'). The 'Primary Contact' section shows 'John Doe, 123 Main st, Medford OR 97535, demoenrollment@demodaycare.com'. There is an 'Additional Contacts' section with a '+ Add Contact' button and a table with columns for 'First Name' and 'Last Name'. At the bottom is an 'Enrolled Children' section with a '+ Enroll New Child' button and a table with columns for 'First Name', 'Last Name', and 'Status'. Two red arrows point to the 'Enroll a Child Now' link in the notification and the '+ Enroll New Child' button.

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.



## Child Enrollment

[Back to Enrollment Dashboard](#)



Name Information

First	<input type="text"/>	MI	<input type="text"/>	Last	<input type="text"/>
-------	----------------------	----	----------------------	------	----------------------

Other Information

Gender    Male    Female

Date of Birth    /  /

[← Previous](#)

[Next →](#)

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

# Child Enrollment

[Back to Enrollment Dashboard](#)



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.



## Child Enrollment

[Back to Enrollment Dashboard](#)



Congratulations, you are done enrolling this child.

[Continue to the Enrollment Dashboard](#)

[← Previous](#)

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



## 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](mailto:demoenrollment@demodaycare.com)

### Secondary Contact Edit

### Additional Contacts + Add Contact

First Name	Last Name		

### Enrolled Children + Enroll New Child

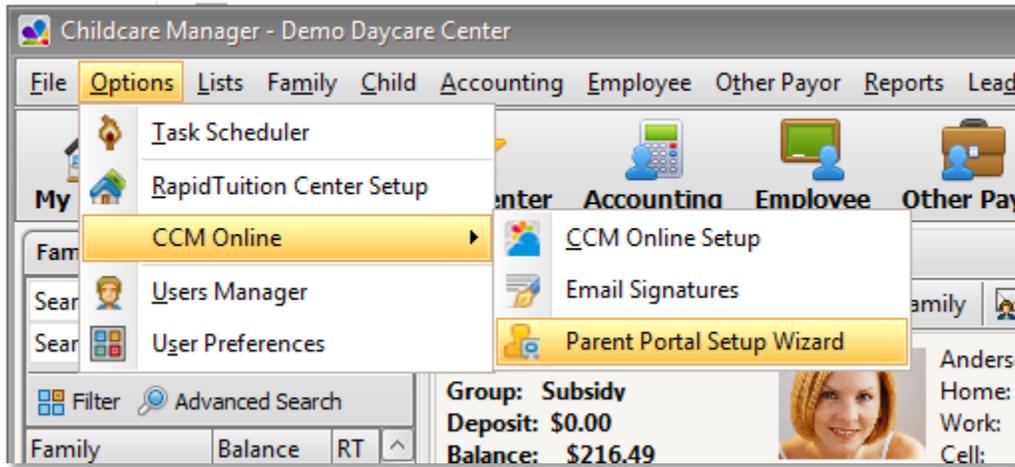
First Name	Last Name	Status		
Little	Doe	Pending	<span>Edit</span>	<span>Delete</span>

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.

Parent Portal Setup Wizard

Family Statuses  
Categorize your family statuses

Each status must be assigned to one of the three status groups before continuing.

Status Name	Status Group
Active	Active
Deactive	Other / Not Enrolled
Potential	Other / Not Enrolled
Waiting	Waiting
Inactive	Other / Not Enrolled
Prospect	Other / Not Enrolled
Withdrawn	Other / Not Enrolled
Pre-Registered	Waiting

Back Next Cancel

This picture shows example statuses assigned to categories

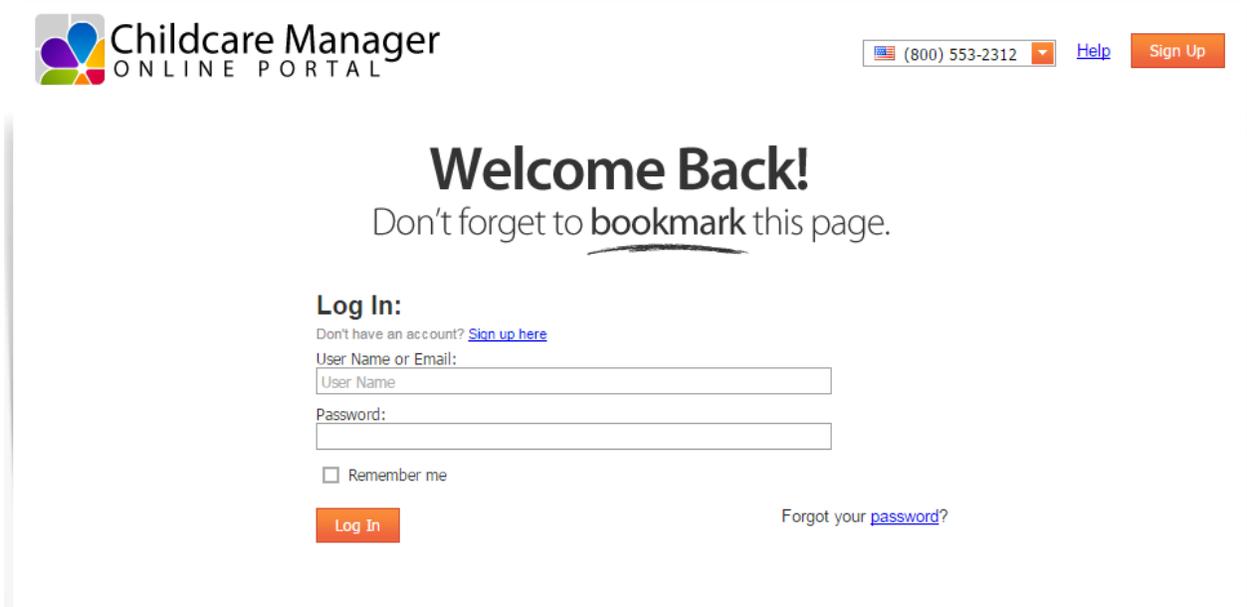
After you have finished assigned family statuses to categories, click next. The next screen should look very similar. This screen is your **child** statuses instead of your **family** statuses. You should repeat the same procedure that was done with the family statuses, then click next.

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>



**Childcare Manager**  
ONLINE PORTAL

(800) 553-2312 Help Sign Up

# Welcome Back!

Don't forget to bookmark this page.

**Log In:**  
Don't have an account? [Sign up here](#)

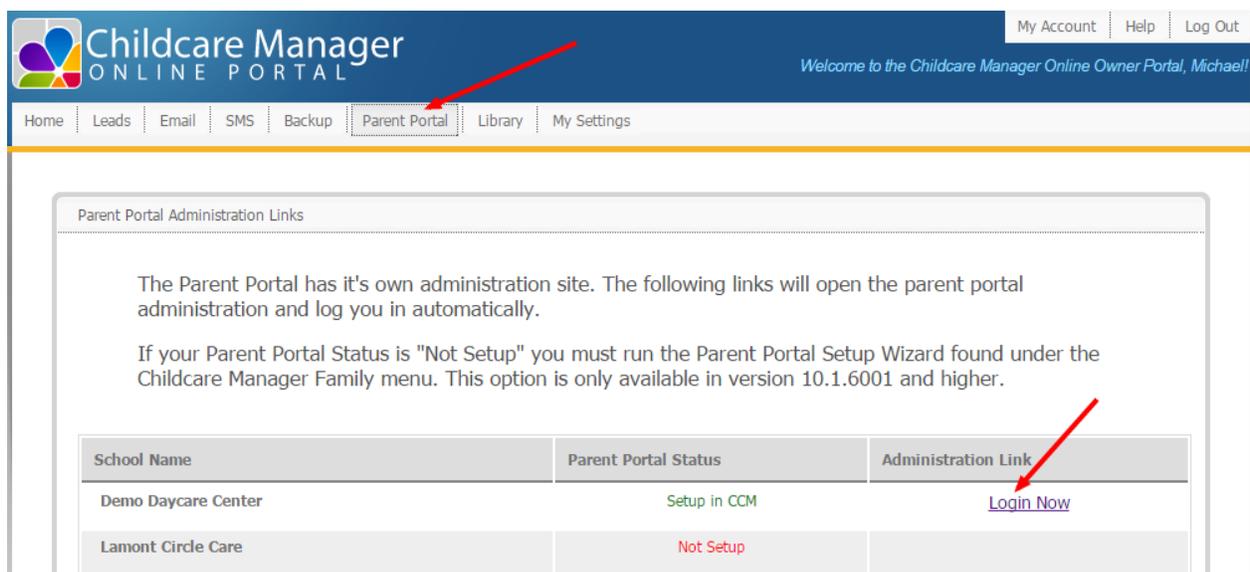
User Name or Email:

Password:

Remember me

[Log In](#) [Forgot your password?](#)

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



Childcare Manager ONLINE PORTAL

My Account Help Log Out

Welcome to the Childcare Manager Online Owner Portal, Michael!

Home Leads Email SMS Backup **Parent Portal** Library My Settings

Parent Portal Administration Links

The Parent Portal has it's own administration site. The following links will open the parent portal administration and log you in automatically.

If your Parent Portal Status is "Not Setup" you must run the Parent Portal Setup Wizard found under the Childcare Manager Family menu. This option is only available in version 10.1.6001 and higher.

School Name	Parent Portal Status	Administration Link
Demo Daycare Center	Setup in CCM	<a href="#">Login Now</a>
Lamont Circle Care	Not Setup	

# Understanding Enrollment Options

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

**Demo Daycare Center**  
Parent Portal Administration

Hello demo@demodaycarecenter.com! [Log off](#)

Current School: Demo Daycare Center

Home | Look and Feel | Custom Text & Email | Current Parents | **Parent Enrollment** | Child Enrollment | Preview

**Parent Enrollment Settings** | Form Customization | Custom Questions | Agreement Steps | Printable Forms

## Parent Enrollment Settings

**External Logins**  Allow registration with external logins  
If this is checked, parents will have the option of registering using their Google or Facebook account so they do not need to remember a special password for Parent Portal.

**Open Enrollment**  Allow Open Enrollment and Registration  
If this is checked, parents will be able to create an account and start enrollment without first receiving a special invitation code.

**Invitation Link**  Display Invitation Registration Link on Parent Portal Home Page  
If this is checked, there will be a link for parents who have received an invitation code to enroll. Parents can still enroll using the link in the invitation email, even if this is turned off.

**Access Requests**  Allow Parent Portal Access Requests  
If this is checked, existing parents will be able to request access to parent portal using a link on your Parent Portal home page.

**Automatic Access**  Automatically Grant Access if the Parent Confirms an Email That Exists in Childcare Manager  
If this is checked, parents who register with and confirm an email that is assigned to a family in Childcare Manager will receive access to that family's account automatically.

[Save Settings](#)

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 option 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

The screenshot shows the 'Demo Daycare Center Parent Portal Administration' interface. The top navigation bar includes 'Home', 'Look and Feel', 'Custom Text & Email', 'Current Parents', 'Parent Enrollment', 'Child Enrollment', and 'Preview'. The 'Look and Feel' tab is selected. Below the navigation bar, there is a 'Keyword' field, a 'Log' button, and a 'Theme' dropdown. The main content area is titled 'Edit Logo' and contains three main sections: 'Current Logo' showing a default logo with dimensions '55 X 54', 'Upload New Logo' with an 'Image File' label, a 'Choose File' button, and an 'Upload' button. A 'Logo Guidelines' box on the right lists requirements: the logo must be a PNG, JPG, or GIF file; a PNG with a transparent background is recommended; the logo will be resized proportionally if it is wider than 250 pixels or taller than 125 pixels; and the logo can be changed an unlimited number of times. Red arrows point to the 'Look and Feel' tab, the 'Log' button, the 'Choose File' button, and the 'Upload' button.

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](http://www.ccmparent.com/keyword). For example, if you chose the keyword "MyCenter" your parent portal may be accessed from [www.ccmparent.com/MyCenter](http://www.ccmparent.com/MyCenter).

The screenshot shows the 'Demo Daycare Center Parent Portal Administration' interface. At the top, there is a navigation bar with tabs for 'Home', 'Look and Feel', 'Custom Text & Email', 'Current Parents', 'Parent Enrollment', 'Child Enrollment', and 'Preview'. Below this, there is a sub-navigation bar with 'Keyword', 'Logo', and 'Theme' tabs. The 'Keyword' tab is selected. The main content area is titled 'Keyword Selection' and contains a form with a text input field labeled 'Keyword' and a 'Set Keyword' button. To the right of the form is a section titled 'About Keyword Selection' which explains the keyword's role in the URL and provides a list of restrictions.

**Keyword Selection**

Select a Keyword

Keyword

Type your desired keyword here.

**Set Keyword**

**About Keyword Selection**

The keyword is the part of the URL that parents use to access your parent portal. For example, if you choose the keyword **DemoDaycareCenter**, the URL to your school parent portal will be:

**<https://www.ccmparent.com/DemoDaycareCenter>**

Keep the following important restriction in mind when choosing your keyword:

- **Once a keyword is chosen, it cannot be changed.**
- Keywords can't contain spaces or punctuation other than the dash (-)
- Keywords are not case sensitive. They may be advertised or linked to using any combination of capitalization.

**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.

The screenshot shows the 'Demo Daycare Center Parent Portal Administration' interface. At the top, there is a navigation bar with the following items: Home, Look and Feel, Custom Text & Email, Current Parents, Parent Enrollment (highlighted with a red arrow), Child Enrollment, and Preview. Below this is a sub-navigation bar with: Parent Enrollment Settings, Form Customization (highlighted with a red arrow), Custom Questions, Agreement Steps, and Printable Forms. The main content area is titled 'Contact Information' and has three tabs: Primary Contact (highlighted with a red arrow), Secondary Contact, and Additional Contacts. The 'Primary Contact' tab is active, showing a 'Name Information' section with fields for First, MI, Last, and Relationship to Child. Each field has 'Required' and 'Visible' checkboxes and a 'Reset' button. The 'Address Information' section below has fields for Address, Address Line 2, City, State, and Zip, also with 'Required' and 'Visible' checkboxes and 'Reset' buttons.

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.

This screenshot is similar to the one above, showing the 'Contact Information' form for 'Primary Contact'. In this version, the 'Last' field in the 'Name Information' section has been renamed to 'Sir Name', as indicated by a red arrow pointing to the field's label. The 'Required' and 'Visible' checkboxes for this field are checked, and a 'Reset' button is present next to it. The other fields and their settings remain the same as in the previous screenshot.

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**



Demo Daycare Center  
Parent Portal Administration

Hello demo@demodaycarecenter.com! Log off

Current School Demo Daycare Center

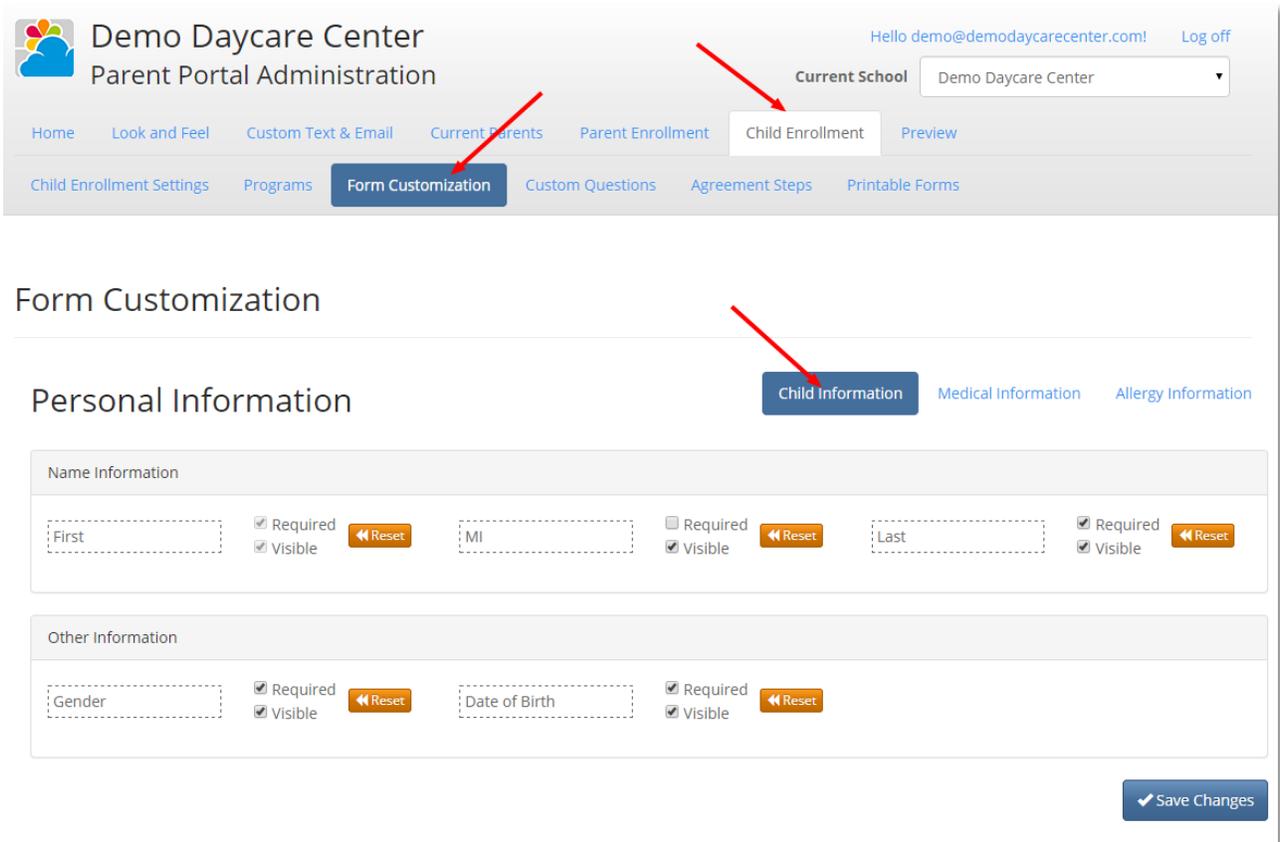
Home Look and Feel Custom Text & Email Current Parents **Parent Enrollment** Child Enrollment Preview

Parent Enrollment Settings **Form Customization** Custom Questions Agreement Steps Printable Forms

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.



Demo Daycare Center  
Parent Portal Administration

Hello demo@demodaycarecenter.com! Log off

Current School Demo Daycare Center

Home Look and Feel Custom Text & Email Current Parents Parent Enrollment **Child Enrollment** Preview

Child Enrollment Settings Programs **Form Customization** Custom Questions Agreement Steps Printable Forms

## Form Customization

Personal Information **Child Information** Medical Information Allergy Information

Name Information

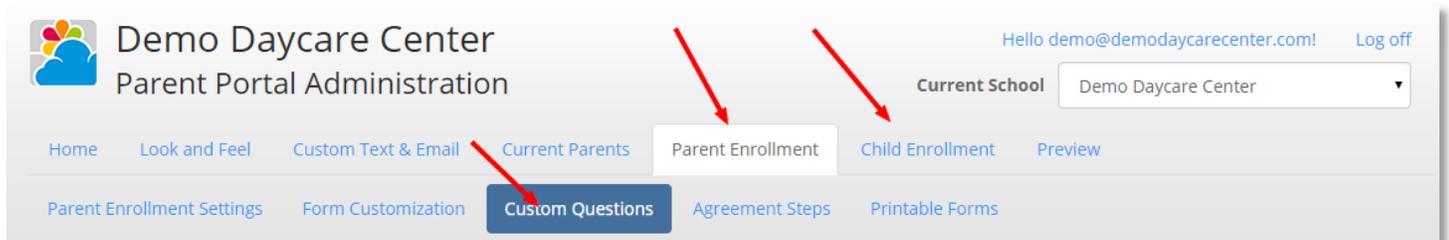
First  Required  Visible  MI  Required  Visible  Last  Required  Visible

Other Information

Gender  Required  Visible  Date of Birth  Required  Visible

## 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.



Demo Daycare Center  
Parent Portal Administration

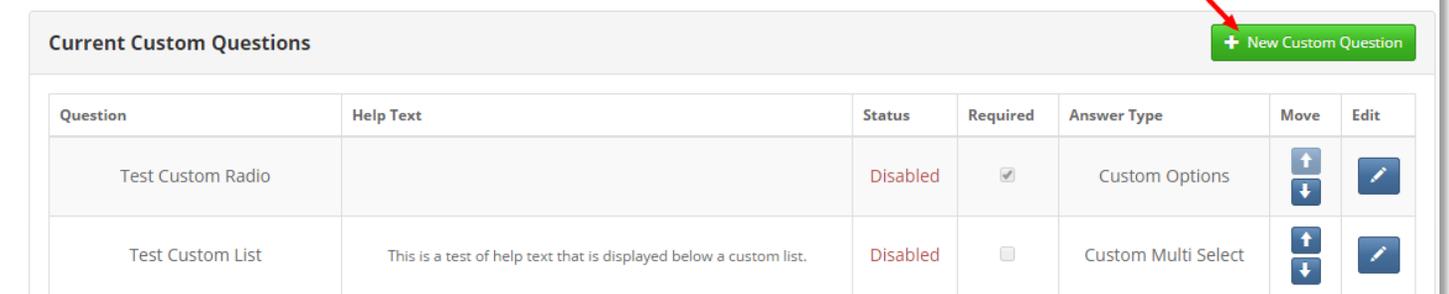
Hello demo@demodaycarecenter.com! Log off

Current School: Demo Daycare Center

Home | Look and Feel | Custom Text & Email | Current Parents | Parent Enrollment | Child Enrollment | Preview

Parent Enrollment Settings | Form Customization | Custom Questions | Agreement Steps | Printable Forms

## Custom Questions



Current Custom Questions + New Custom Question

Question	Help Text	Status	Required	Answer Type	Move	Edit
Test Custom Radio		Disabled	<input checked="" type="checkbox"/>	Custom Options	<input type="button" value="↑"/> <input type="button" value="↓"/>	<input type="button" value="✎"/>
Test Custom List	This is a test of help text that is displayed below a custom list.	Disabled	<input type="checkbox"/>	Custom Multi Select	<input type="button" value="↑"/> <input type="button" value="↓"/>	<input type="button" value="✎"/>

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.

Home Look and Feel Custom Text & Email Current Parents Parent Enrollment Child Enrollment Preview

Parent Enrollment Settings Form Customization Custom Questions Agreement Steps Printable Forms

## Add Custom Question

**Question Text**  This is displayed to the left, like "Question Text" in this field.

**Status**  Set this to disabled if you no longer want this question to appear.

**Help Text**  The help text is displayed below the question like this.

**Answer Type**

**Please Select a Custom List**

Click "Edit Custom Lists" to add or change options for this question. Click "Refresh" after returning to this page.

**Required**

- This Question is Never Required
- This Question is Always Required
- This Question May be Required Depending on Another Question

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.

**Add Custom List**

**List Name**  
Color Drop Down

**New List Item**  
Aqua + Add

**Current List Items**

List Items			
Blue	↑ ↓	<span style="background-color: green; color: white; padding: 2px 5px;">✎</span>	<span style="background-color: red; color: white; padding: 2px 5px;">✕</span>
Green	↑ ↓	<span style="background-color: green; color: white; padding: 2px 5px;">✎</span>	<span style="background-color: red; color: white; padding: 2px 5px;">✕</span>
Indigo	↑ ↓	<span style="background-color: green; color: white; padding: 2px 5px;">✎</span>	<span style="background-color: red; color: white; padding: 2px 5px;">✕</span>
Canary Yellow	↑ ↓	<span style="background-color: green; color: white; padding: 2px 5px;">✎</span>	<span style="background-color: red; color: white; padding: 2px 5px;">✕</span>

✕ Cancel ✔ Save Changes

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.

Custom Drop Down List

**Please Select a Custom List** Color Drop Down ▼ ✎ E

Click "Edit Custom Lists" to add or change options for this question. Click "Refresh" after returning to this page.

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:

The screenshot shows the 'Demo Daycare Center Parent Portal Administration' interface. The top navigation bar includes 'Home', 'Look and Feel', 'Custom Text & Email', 'Current Parents', 'Parent Enrollment', 'Child Enrollment', and 'Preview'. Below this, there are sub-tabs: 'Parent Enrollment Settings', 'Form Customization', 'Custom Questions', 'Agreement Steps', and 'Printable Forms'. The 'Agreement Steps' sub-tab is highlighted. A red arrow points to the 'Parent Enrollment' tab, another to the 'Child Enrollment' tab, and a third to the 'Agreement Steps' sub-tab. The 'Current School' dropdown menu is set to 'Demo Daycare Center'. The user is logged in as 'demo@demodaycarecenter.com!'. Below the navigation, the 'Agreement Steps' section is displayed. It features a table titled 'Current Agreement Steps' with a '+ New Agreement Step' button. The table has columns for 'Form Title', 'Form Description', 'Status', 'Need to Agree', 'Move', and 'Edit'. A red arrow points to the '+ New Agreement Step' button. The table contains one entry: 'Parent Agreement' with a description of 'test', status 'Active', and a checked 'Need to Agree' box. The 'Move' column has up and down arrows, and the 'Edit' column has an edit icon.

Form Title	Form Description	Status	Need to Agree	Move	Edit
Parent Agreement	test	Active	<input checked="" type="checkbox"/>	<input type="button" value="↑"/> <input type="button" value="↓"/>	<input type="button" value="✎"/>

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



## 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

The screenshot shows the 'Demo Daycare Center Parent Portal Administration' interface. The top navigation bar includes 'Home', 'Look and Feel', 'Custom Text & Email', 'Current Parents', 'Parent Enrollment', 'Child Enrollment', and 'Preview'. The 'Parent Enrollment' sub-tab is active, and 'Printable Forms' is selected. The 'Current School' dropdown is set to 'Demo Daycare Center'. The main content area is titled 'Add Printable Form' and contains a 'Upload New Form' section. This section has a light blue instruction box: 'To upload a new PDF, choose a file from your computer then press the upload button.' To the right of this box is a file selection area with a 'Choose File' button, the text 'No file chosen', and an 'Upload' button. A 'Cancel' button is located at the bottom right. Two red arrows point from the top of the page to the 'Choose File' and 'Upload' buttons respectively.

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.

No file chosen

Pdf Information

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

Form Settings

**Status**

**Title**

**Description**

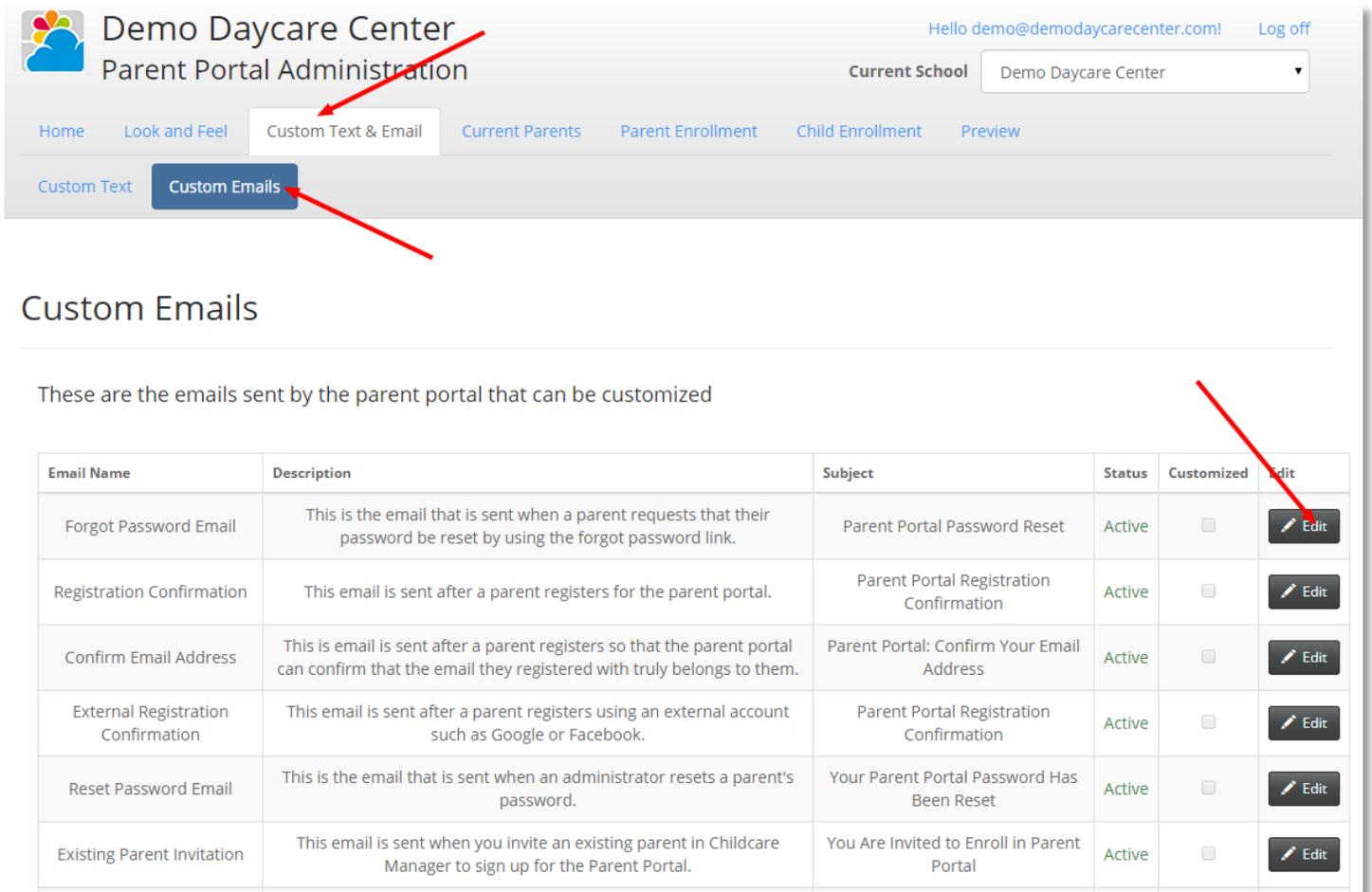
**Form Fill Mode** Not Supported for This PDF

Does the parent need to sign and return this form?

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.



These are the emails sent by the parent portal that can be customized

Email Name	Description	Subject	Status	Customized	Edit
Forgot Password Email	This is the email that is sent when a parent requests that their password be reset by using the forgot password link.	Parent Portal Password Reset	Active	<input type="checkbox"/>	<a href="#">Edit</a>
Registration Confirmation	This email is sent after a parent registers for the parent portal.	Parent Portal Registration Confirmation	Active	<input type="checkbox"/>	<a href="#">Edit</a>
Confirm Email Address	This is email is sent after a parent registers so that the parent portal can confirm that the email they registered with truly belongs to them.	Parent Portal: Confirm Your Email Address	Active	<input type="checkbox"/>	<a href="#">Edit</a>
External Registration Confirmation	This email is sent after a parent registers using an external account such as Google or Facebook.	Parent Portal Registration Confirmation	Active	<input type="checkbox"/>	<a href="#">Edit</a>
Reset Password Email	This is the email that is sent when an administrator resets a parent's password.	Your Parent Portal Password Has Been Reset	Active	<input type="checkbox"/>	<a href="#">Edit</a>
Existing Parent Invitation	This email is sent when you invite an existing parent in Childcare Manager to sign up for the Parent Portal.	You Are Invited to Enroll in Parent Portal	Active	<input type="checkbox"/>	<a href="#">Edit</a>

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



### Insert Merge Field

<b>Reset Password Link</b> <i>*This merge field is required</i>	This merge field will be replaced with a link that allows the user to reset their password. <div style="border: 1px solid black; padding: 5px;">Example Please reset your password by clicking <a href="#">here</a></div>	<input type="button" value="Insert"/>
<b>Center Address Line 1</b>	The first address line of your center. <div style="border: 1px solid black; padding: 5px;">Example 123 Main St.</div>	<input type="button" value="Insert"/>
<b>Center Address Line 2</b>	The second line of your center address. <div style="border: 1px solid black; padding: 5px;">Example STE 3B</div>	<input type="button" value="Insert"/>
<b>Center City</b>	The city of your center address. <div style="border: 1px solid black; padding: 5px;">Example Medford</div>	<input type="button" value="Insert"/>
<b>Center Email</b>	The email address of your center. <div style="border: 1px solid black; padding: 5px;">Example director@demodaycarecenter.com</div>	<input type="button" value="Insert"/>

The link below will allow you to reset your password.

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 full, you have the option of not allowing additional enrollments or, alternatively, warning parents that they may be placed on a waiting list.

Demo Daycare Center  
Parent Portal Administration

Hello demo@demodaycarecenter.com! Log off

Current School Demo Daycare Center

Home Look and Feel Custom Text & Email Current Parents Parent Enrollment **Child Enrollment** Preview

Child Enrollment Settings **Programs** Form Customization Custom Questions Agreement Steps Printable Forms

### Programs

These are the programs that have been synchronized from Childcare Manager. You can change when and if each program is available for registering parents to select.

Program Name	Status	Enrollment Counts	Customized	Edit	Move
Drop-In	Active	Capacity 30 Active 0 Waiting 1 Pending 0	<input checked="" type="checkbox"/>		
After School	Active	Capacity 30 Active 2 Waiting 1 Pending 1	<input checked="" type="checkbox"/>		
Before & After Care	Active	Capacity 30 Active 8 Waiting 1 Pending 0	<input checked="" type="checkbox"/>		

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

Program Status

**Program Name** Drop-In

**Status**

Set this to disabled if this program should never be shown to registering parents

**Always Display**  This program should always be shown as available  
This option will override the program display restrictions listed below. If checked, the program will always be displayed.

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

Display Settings

**Display Name**

This is the name of the program that is displayed to parents

**Description**

File Edit Insert View Format

← → **B** *I* U ~~S~~ **A** Formats Paragraph ☰ ☷ 🔗 🔗 👁

p

This is the description of the program displayed to parents. You can include important information like eligible ages and cost here.

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	
<b>Enrollment Start Date</b>	<input type="text" value="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.
<b>Enrollment Stop Date</b>	<input type="text" value="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	
<b>Explanation</b>	<p>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.</p> <p>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.</p> <p><b>Disabled</b> Parents can always enroll, regardless of capacity</p> <p><b>Show Programs as Full</b> Parents will be shown the program but it will indicate that it is full and not be selectable</p> <p><b>Do Not Show Full Programs</b> Parents will be not be shown full programs</p> <p><b>Waitlist Enrollment</b> 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.</p> <p><b>Waitlist Enrollmen With Position</b> This is the same as the option above except the parents will be shown how many children are waiting before them.</p>
<b>Capacity Mode</b>	<input type="text" value="Show Programs As Full"/> This sets how or if Parent Portal takes the capacity of your program into account when displaying the program selection
<b>Program Capacity</b>	<input type="text" value="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

Age Settings  Use Age Restriction

**Explanation** If you decide to use this option, the parent will be prompted for the child's date of birth before selecting a program. The parent will only be shown those programs that their child's age qualifies them for. If you enter a program start date, the child's age at the start of the program will be used.

---

**Program Start Date**   
If this is set, the child's age will be calculated based on the program start date.

<b>Minimum Age</b>	<b>Years</b>	<input type="text" value="0"/>	<b>Months</b>	<input type="text" value="0"/>	<b>Days</b>	<input type="text" value="0"/>
<b>Maximum Age</b>	<b>Years</b>	<input type="text" value="0"/>	<b>Months</b>	<input type="text" value="0"/>	<b>Days</b>	<input type="text" value="0"/>

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.**

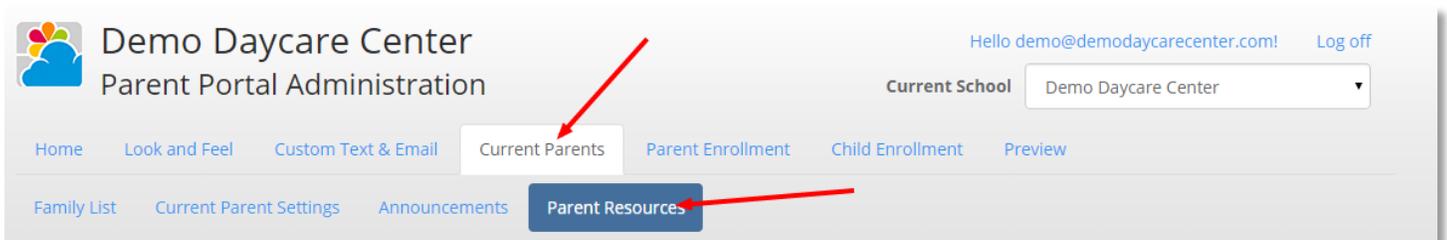
## Disabling Program Selection

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.



Demo Daycare Center  
Parent Portal Administration

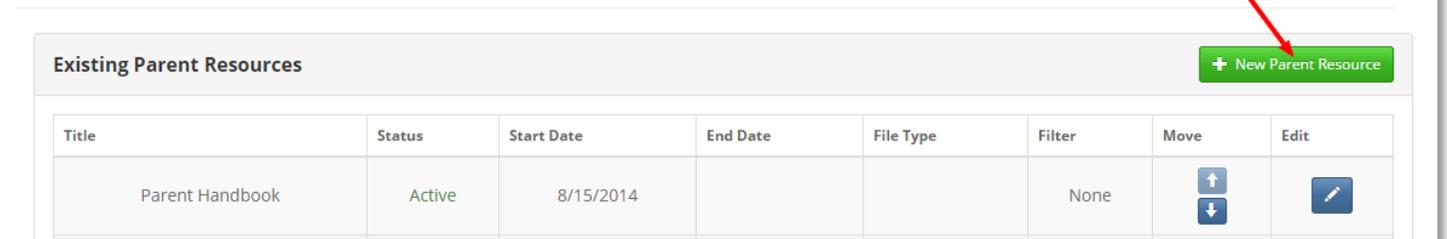
Hello demo@demodaycarecenter.com! Log off

Current School Demo Daycare Center

Home Look and Feel Custom Text & Email **Current Parents** Parent Enrollment Child Enrollment Preview

Family List Current Parent Settings Announcements **Parent Resources**

## Parent Resources

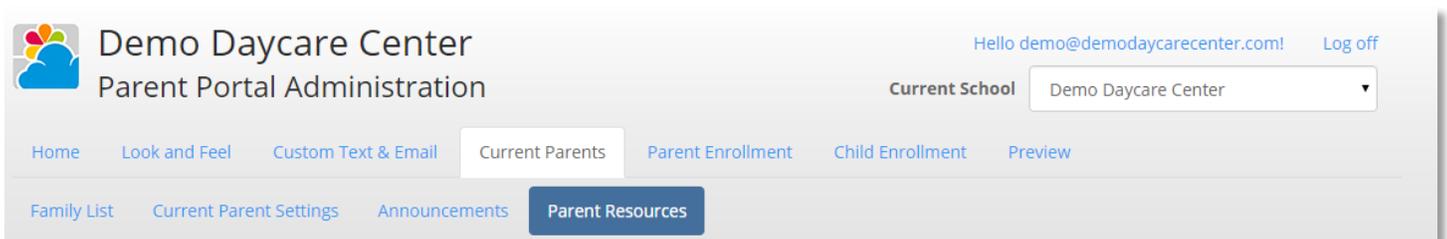


Existing Parent Resources + New Parent Resource

Title	Status	Start Date	End Date	File Type	Filter	Move	Edit
Parent Handbook	Active	8/15/2014			None	↑ ↓	✎

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



Demo Daycare Center  
Parent Portal Administration

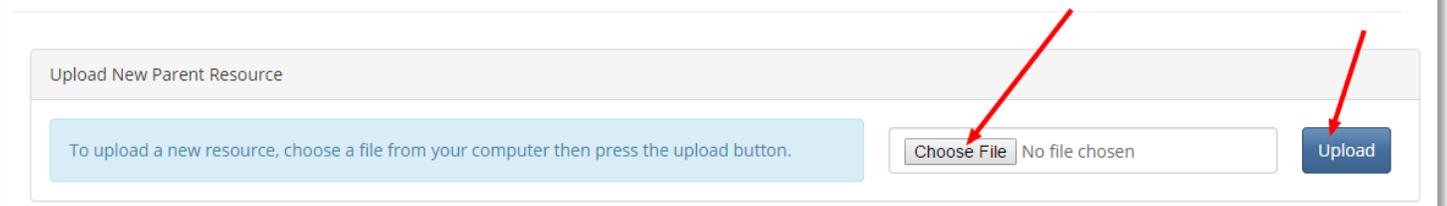
Hello demo@demodaycarecenter.com! Log off

Current School Demo Daycare Center

Home Look and Feel Custom Text & Email Current Parents Parent Enrollment Child Enrollment Preview

Family List Current Parent Settings Announcements **Parent Resources**

## Add Parent Resource



Upload New Parent Resource

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

Choose File No file chosen Upload

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

<b>Filename</b>	LS33600.pdf
<b>Size</b>	454.66KB
<b>Date Uploaded</b>	11/18/2014
<b>Download</b>	<input type="button" value="Download File"/> <input type="button" value="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**  ▼  
Set this to disabled if you no longer want this resource to appear

**Start Date**  **End Date**   
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

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.

The screenshot shows the 'Demo Daycare Center Parent Portal Administration' interface. The top navigation bar includes links for Home, Look and Feel, Custom Text & Email, Current Parents, Parent Enrollment, Child Enrollment, and Preview (which is highlighted). The current school is set to 'Demo Daycare Center'. The user is logged in as 'demo@testuser.com'. The main content area is titled 'Preview' and contains the following information:

### Your Current Admin Login is Also a Parent Account

Your current admin login is associated with a fake parent account that you may use to test the enrollment process.

Use the links below to preview different areas of your parent portal. Some links may be disabled because they require other items to be completed before they become available.

Current Parent Login Status	
<b>User Email:</b>	demo@testuser.com
<b>Enrollment Status:</b>	Enrollment Not Started
<b>Reset User Account</b>	This button will reset the enrollment process for your preview account. It will also erase any enrollment data you have entered.
<b>Accept Enrollment</b>	This button will accept the enrollment of your preview parent. The option is only available after the enrollment has been submitted.

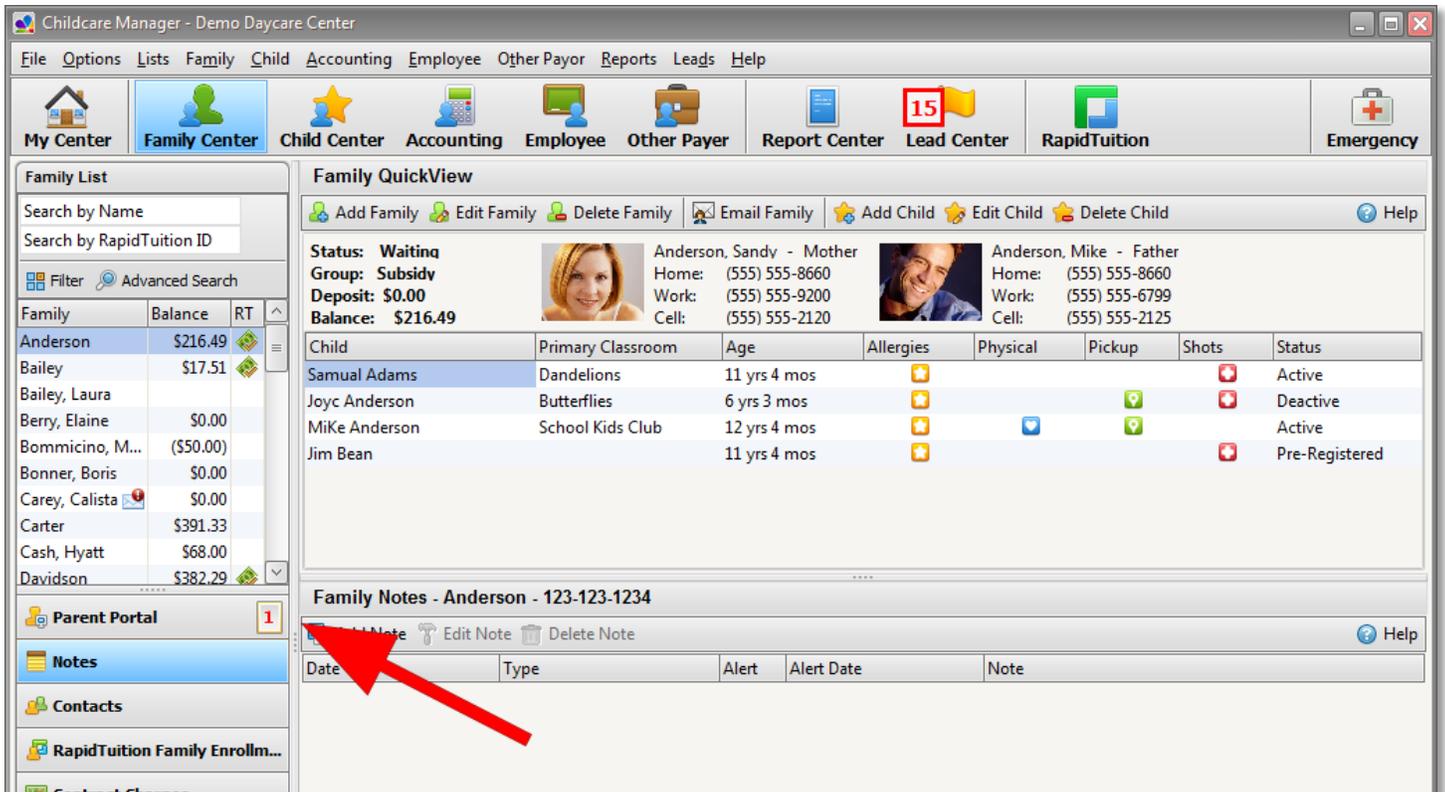
Preview Links	
<a href="#">Parent Portal Home Page</a>	
<a href="#">Enrollment Form</a>	
<a href="#">Enrollment Dashboard</a>	
<a href="#">Current Parent Information</a>	

Red arrows in the original image point to the 'Parent Portal Home Page', 'Enrollment Form', and 'Enrollment Dashboard' links in the Preview Links section.

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.



The screenshot shows the Childcare Manager software interface. The top navigation bar includes tabs for My Center, Family Center, Child Center, Accounting, Employee, Other Payer, Report Center, Lead Center, RapidTuition, and Emergency. The Family Center tab is active, and a red badge with the number '15' is visible on the Lead Center tab. The Family List table on the left shows a list of families with their balances. The Family QuickView section displays details for the Anderson family, including contact information for the mother and father, and a table of children with their enrollment details. The Family Notes section is also visible, showing a table with columns for Date, Type, Alert, Alert Date, and Note. A red arrow points to the Parent Portal tab in the left sidebar, which has a red badge with the number '1' next to it.

Family	Balance	RT
Anderson	\$216.49	
Bailey	\$17.51	
Bailey, Laura		
Berry, Elaine	\$0.00	
Bommicino, M...	(\$50.00)	
Bonner, Boris	\$0.00	
Carey, Calista	\$0.00	
Carter	\$391.33	
Cash, Hyatt	\$68.00	
Davidson	\$382.29	

Child	Primary Classroom	Age	Allergies	Physical	Pickup	Shots	Status
Samual Adams	Dandelions	11 yrs 4 mos	+			+	Active
Joyc Anderson	Butterflies	6 yrs 3 mos	+		+	+	Deactive
Mike Anderson	School Kids Club	12 yrs 4 mos	+	+	+		Active
Jim Bean		11 yrs 4 mos	+			+	Pre-Registered

Date	Type	Alert	Alert Date	Note
------	------	-------	------------	------

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”

The screenshot displays the Parent Portal interface. On the left is a sidebar with navigation options: Parent Portal (1), Notes, Contacts, RapidTuition Family Enrollm..., Contract Charges, Batch Bill..., Batch Email..., Receive Payments..., Make Deposits..., Receivables, and Send Group Text Message... The main content area is titled 'Parent Portal Notifications' and shows a notification for a 'New Parent Enrollment' dated 11/18/2014 5:40:06 PM. The notification includes details for the Primary Sponsor (Demo Parent) and Secondary Sponsor. A table lists the child 'Test Child' with an age of '9 years, 4 months' and a program of 'After School'. A red arrow points to the 'Review Enrollment' link. The bottom status bar shows 'User:', 'Last Backup: 11/13/14', 'Unfiltered', and '42 families'.

Name	Age	Program
Test Child	9 years, 4 months	After School

This will open the Review Parent Portal Enrollment dialog

Review Parent Portal Enrollment

Please view the family data card, each contact, and each child. Fill in any additional required fields.

**Primary Sponsor:**  
**Demo Parent**  
Home: 7701234567  
Work: x  
Cell: 7704561234  
Email: demo@testuser.com

**Secondary Sponsor:**  
Home:  
Work:  
Cell:  
Email:

View/Edit Family Data Card

First Name	Last Name	Relationship	Accepted
Other	Contact	Grandmother	<input type="checkbox"/>

View/Edit Contact

First Name	Last Name	Date of Birth	Program	Accepted
Test	Child	7/11/2005	After School	<input type="checkbox"/>

View/Edit Child

Note For	Note Type	Note
Child: Test Child	Parent Portal Questions	Question: Additional Notes
Child: Test Child	Allergy Notes	Allergy: Peanuts
Family	Parent Portal Questions	Question: Test Yes Or No

View Note

View On Parent Portal Accept Enrollment Cancel

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 fields
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.

The screenshot displays the 'Childcare Manager - Demo Daycare Center' application. The 'Family Center' tab is active, showing a 'Parent Portal QuickView' for a family. The notification section, titled 'Information Change', is dated 11/18/2014 6:19:25 PM and lists the following changes:

Change	Action	
Family: Parent, Demo	Select Family	
Primary Sponsor: Demo Parent		
Changes For Contact Information	View Family Data Card	
Name: Demo Parent		
First changed from "Demo" to "Test"		Accept All Changes
MI changed from "" to "D"		
Home Phone changed from "7701234567" to "5415358085"		
Employer Name changed from "" to "Personalized Software"		
Work Phone changed from "" to "5415358085"	Review Changes	

Red arrows point from the notification table to the 'Accept All Changes' and 'Review Changes' links. The interface also includes a 'Family List' on the left, a 'Parent Portal' section with various options, and a status bar at the bottom showing 'User:', 'Last Backup: 11/13/14', 'Unfiltered', and '43 families'.

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.

Review Parent Portal Changes

**Changes To:** Contact Information  
**For:** Demo Parent

Field Name	Old Value	New Value	Accept	Reject
First	Demo	Test	<input checked="" type="checkbox"/>	<input type="checkbox"/>
MI		D	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Home Phone	7701234567	5415358085	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Employer Name		Personalized Software	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Work Phone		5415358085	<input checked="" type="checkbox"/>	<input type="checkbox"/>

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 manager their contact information and access parent resources.

The screenshot shows the 'Childcare Manager - Demo Daycare Center' application. The 'Family Center' tab is active. The 'Parent Portal QuickView' for the family 'Nieves, Evelyn' is displayed. The status is 'Active', and the enrollment status is 'Not Enrolled'. The 'Invite Family' button is highlighted with a red arrow. The notification area shows 'Last Updated: 11/18/2014 7:33:51 PM' and 'There are no new notifications'. A second red arrow points to the 'Parent Portal Enrollment Status: Not Enrolled' text.

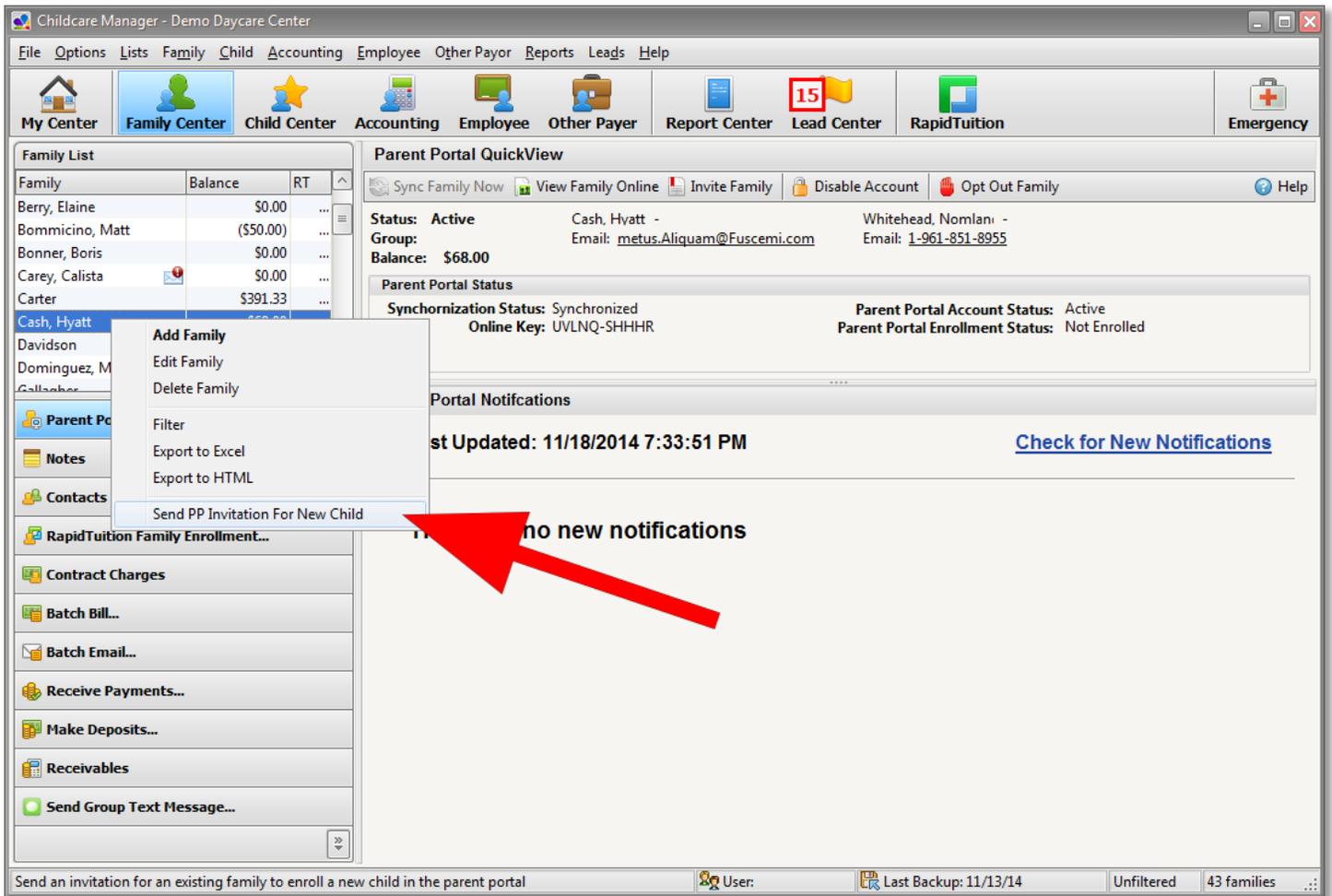
Family	Balance	RT
Anderson	\$216.49	
Bailey	\$17.51	
Bailey, Laura		
Berry, Elaine	\$0.00	
Bommicino, Matt	(\$50.00)	
Bonner, Boris	\$0.00	
Carey, Calista	\$0.00	
Carter	\$391.33	
Cash, Matt	\$68.00	

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.



The screenshot shows the 'Childcare Manager - Demo Daycare Center' interface. The 'Family Center' tab is active, displaying a 'Family List' table and a 'Parent Portal QuickView' for the selected family, 'Cash, Hyatt'. A right-click context menu is open over the family name, with the option 'Send PP Invitation For New Child' highlighted. A red arrow points to this option. The status bar at the bottom indicates 'Send an invitation for an existing family to enroll a new child in the parent portal'.

Family	Balance	RT
Berry, Elaine	\$0.00	...
Bommicino, Matt	(\$50.00)	...
Bonner, Boris	\$0.00	...
Carey, Calista	\$0.00	...
Carter	\$391.33	...
Cash, Hyatt	\$68.00	...
Davidson		
Dominguez, M		
Galbraith		

**Parent Portal QuickView**  
Sync Family Now | View Family Online | Invite Family | Disable Account | Opt Out Family | Help

Status: Active | Cash, Hyatt - | Whitehead, Nomlan: -  
Group: | Email: metus.Aliquam@Fuscemi.com | Email: 1-961-851-8955  
Balance: \$68.00

**Parent Portal Status**  
Synchronization Status: Synchronized | Parent Portal Account Status: Active  
Online Key: UVLNQ-SHHHR | Parent Portal Enrollment Status: Not Enrolled

**Portal Notifications**  
Last Updated: 11/18/2014 7:33:51 PM | [Check for New Notifications](#)

no new notifications

Send an invitation for an existing family to enroll a new child in the parent portal | User: | Last Backup: 11/13/14 | Unfiltered | 43 families

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.

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Programs

Restrict Program Choices

After School

Before & After Care

Before School

Child Care

Drop-In

Elementary

Infant

Infant Day 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.

The screenshot displays the Childcare Manager software interface. The top navigation bar includes 'My Center', 'Family Center', 'Child Center', 'Accounting', 'Employee', 'Other Payer', 'Report Center', 'Lead Center', 'RapidTuition', and 'Emergency'. The 'Lead Center' is active, showing a 'Lead List' on the left and a 'Lead QuickView' on the right. A red arrow points to the 'Send Enrollment Invitation' button in the 'Lead QuickView' section.

**Lead List**

Lead	Status	Status Date
Hess, Xaviera	Tour Completed	2/4/2013
Gutierrez, Travis	Tour Completed	2/3/2013
Bernard, Seth	Tour Completed	1/21/2013
Wise, Hedda	Tour Completed	2/8/2013
Delacruz, Kennedy	Tour Completed	2/1/2013
Noble, Hollee	Tour Completed	1/25/2013
Richmond, Penelope	Tour Completed	2/3/2013

**Lead QuickView**

Convert Lead **Send Enrollment Invitation** Add Lead Edit Lead Delete Lead

Email Lead Add Child Edit Child Delete Child Help

**Status:** Tour Completed **Hess, Xaviera** **Mathis, Yardley**  
**Date:** 2/4/2013 Home: 1-174-... Home: 1-417-319-3354  
**Source:** Referral Cell: ... Cell: ...  
Work: 1-432-328-8121 Work: Fax: ...  
lectus.pede.et@interdumliber... ui.ca ipsum.porta@fermentum.com

Child: Zaida Age: 10 years 9 months Days Requested: Mon, Tue, ... Times Requested: ...

**Dashboard**

Print Save as BMP

Lead Status Summary Lead Source Summary Future Revenue

**Active Lead Summary**

Lead Status	Percentage
Pending	15.15 %
New	34.34 %
Tour Scheduled	12.12 %
Invitation Sent	9.09 %
Waiting	7.07 %
Tour Completed	3.03 %
Invitation Sent	3.03 %

Legend:

- 15 Pending
- 34 New
- 16 Contacted
- 12 Tour Scheduled
- 3 No Show
- 7 Tour Completed
- 3 Invitation Sent
- 9 Waiting

User: Last Backup: 11/13/14 Filtered 8 Leads

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.

1

Programs

Restrict Program Choices

After School

Before & After Care

Before School

Child Care

Drop-In

Elementary

Infant

Infant Day 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

The screenshot shows the 'Childcare Manager - Demo Daycare Center' interface. The 'Family Center' tab is active. On the left, the 'Family List' table shows the following data:

Family	Balance	RT
Anderson	\$216.49	
Bailey	\$17.51	
Bailey, Laura		
Berry, Elaine	\$0.00	
Bommicino, M...	(\$50.00)	
Bonner, Boris	\$0.00	
Carey, Calista	\$0.00	
Carter	\$391.33	
Cash, Hvatt	\$68.00	

The 'Parent Portal QuickView' for the selected family (Bailey, Laura) shows the following details:

- Status: Active
- Group: Bailey, Laura -
- Balance: Bailey, Jeff - Father
- Parent Portal Status: Synchronization Status: Synchronized, Online Key: QNMNY-LKVXC
- Parent Portal Account Status: Active
- Parent Portal Enrollment Status: Enrolled

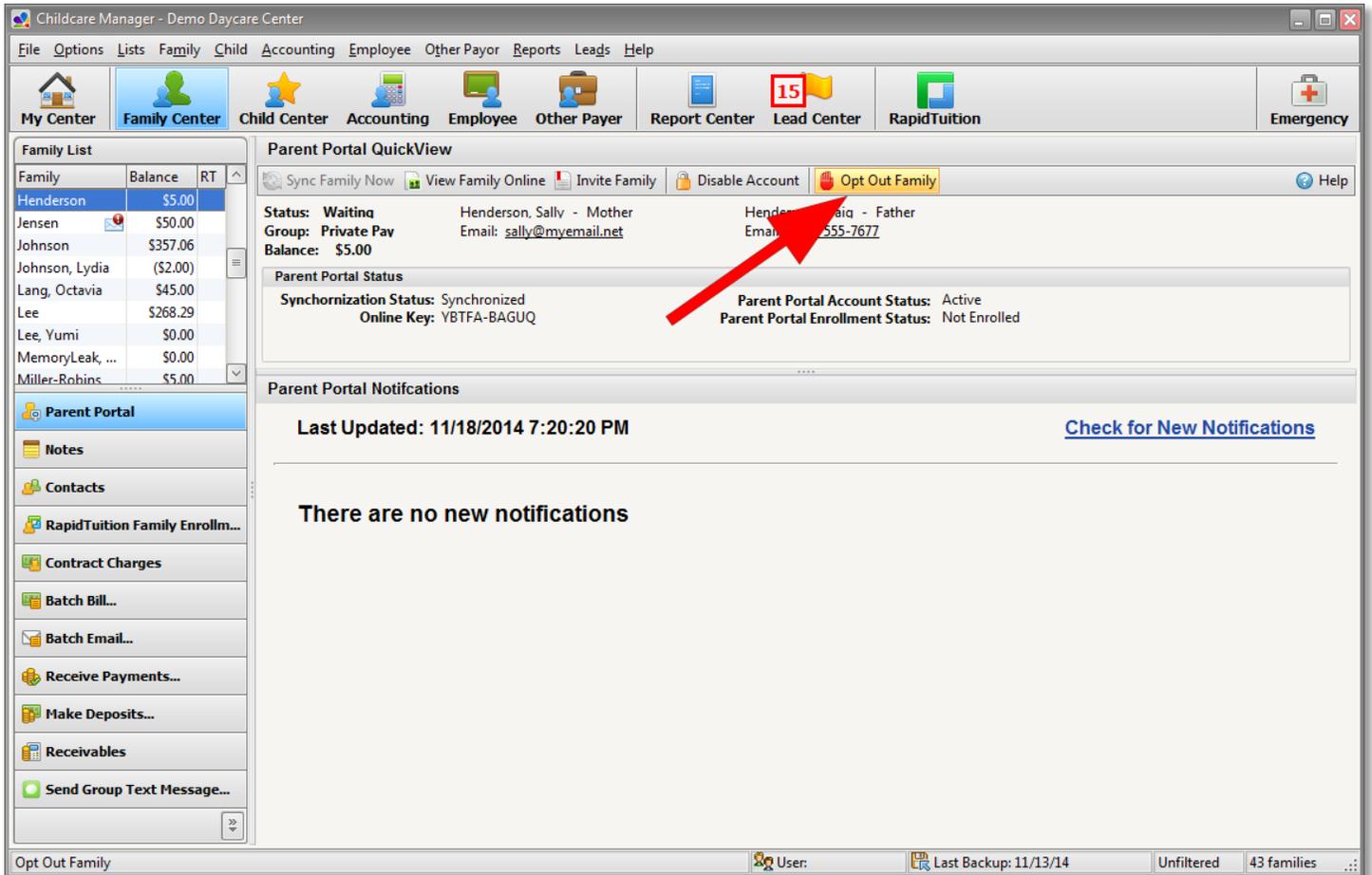
The 'Disable Account' button is highlighted with a red arrow. The 'Parent Portal Notifications' section shows 'Last Updated: 11/18/2014 6:35:49 PM' and 'There are no new notifications'.

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, their information will no longer synchronize. In addition, any information currently on the parent portal will be deleted.



The screenshot shows the 'Childcare Manager - Demo Daycare Center' interface. The 'Family Center' tab is active, displaying a 'Family List' on the left and a 'Parent Portal QuickView' for the selected 'Henderson' family on the right. The 'Opt Out Family' button is highlighted with a red arrow.

Family	Balance	RT
Henderson	\$5.00	
Jensen	\$50.00	
Johnson	\$357.06	
Johnson, Lydia	(\$2.00)	
Lang, Octavia	\$45.00	
Lee	\$268.29	
Lee, Yumi	\$0.00	
MemoryLeak, ...	\$0.00	
Miller-Robins	\$5.00	

**Parent Portal QuickView**

Sync Family Now View Family Online Invite Family Disable Account **Opt Out Family** Help

Status: **Waiting** Henderson, Sally - Mother Henderson, Maia - Father  
Group: **Private Pay** Email: [sally@myemail.net](mailto:sally@myemail.net) Email: [maia@myemail.net](mailto:maia@myemail.net)  
Balance: **\$5.00** Email: [555-7677](tel:555-7677)

**Parent Portal Status**

Synchronization Status: Synchronized Parent Portal Account Status: Active  
Online Key: YBTFA-BAGUQ Parent Portal Enrollment Status: Not Enrolled

**Parent Portal Notifications**

Last Updated: 11/18/2014 7:20:20 PM [Check for New Notifications](#)

There are no new notifications

Opt Out Family User: Last Backup: 11/13/14 Unfiltered 43 families

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.