Alpha Cares
User Manual - Version 2.5

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Contents

1 - Introduction

What's the best way to get started?

Alpha Cares Portal is a highly versatile software package and a powerful tool for the Child Care Administrator. If you are just getting started, you may want to read the "Getting Started" guide, as well as utilize the Getting Started video tutorial. This user's manual is meant to be an exhaustive guide into details of each function and feature.

Common Conventions used throughout Alpha Cares Portal

Record Maintenance

⊕ Add record

📝 Edit-update record

🗑 Delete record

User Action

✉ Send Email

📄 Print record

Navigation

❌ Closes current popup window

Online Help

❓ Ask question

ⓘ Help guide for this screen

By clicking on the "Ask question" icon, you will be presented with a form that is part of the SmartFAQ module. You may want to look through SmartFAQ before asking your question, as you will find the answers to many commonly asked questions.

The online "Help Guide" contains the online version of this user's manual. Although it is not as thorough, it can be very useful, especially when you're in a pinch for an answer.

2 - Family Data

Main Menu -> Family Data

Introduction

The Family Data module is the heart of the Alpha Cares Portal. All data-related information is stored and managed in this module. Here you can add or edit Family records, including children medical records.

Adult-guardian Record

Feature Highlights of Family Data

- View the entire family unit on one screen, including adult-guardians.
- Track children's medical records and Immunization schedules.
- Access a vaccination template for quickly adding a child's immunization records.
- Print all Family Data as a desk-side reference with address and contact information.
- Export family data into a spreadsheet for future data retrieval.

Step Guide - Family Data

Main Menu -> Family Data -> Family Record

- **Highlights:** Introduce Family Data module. Add an entire family unit to the Family Data address book.
- **Advantages:** Address book maintains all pertinent records for the children's family and extended family. From this module you can easily compose and send an e-mail to any adult-guardian.
- **Results:** Easily view the entire family unit's address book record, complete with pictures, all on one page.

Example data used: Sanford Family. Head_of_Family is the father, George Sanford. Mother is Sarah Sanford. Child is Lucas Sanford.

⚠ **Note:** - Help guide conventions used:

⊕	Used throughout the system to denote **adding** new records.
Owner Last Name *	**Mandatory** fields in data entry forms are always denoted with an asterisk. When entering new information, filling in the mandatory fields is the minimum requirement for that form.
Head of Family:	When adding a new family; start with the head of family. This is the adult who is financially responsible for the payment of the child's tuition fees. The person need not necessarily be the father or mother; for example, he or she could be the manager at a children's home; an uncle, etc.

Step 1:

Click on the "Add New Family" button to add new Head_of_Family. Family Name: "Sanford". Fill out all other mandatory fields. A picture of the Head_of_Family is optional. Click on the Add button at the bottom of the form to save the record. This takes you back to the main Family Data screen.

⚠ **Note:** "Add New Family" starts with adding the family name, and the (adult) head of family.

Step 2:
Notice that the starting record for this family appears. Click on "Family Record" to continue.

Step 3:

From the Sanford Family Record page, click on the Add button for Adult-Guardians to fill out the mother's (Sarah Sanford) details. Notice that there is an option for entering a new address (in a case of divorced parents, for example) or simply select "Same as Head_of_Family" and details are filled in for you. Click on the Add button at the bottom of the form to save the record. You will see "The new Adult record was successfully added" at the top of the main Family record page.

Step 4:

Click on the Add Children button to add the child's (Lucas Sanford) details. Click on the Add button at the bottom of the screen to save this information. You will see "This new child's record was successfully added" the top of the main Family record page.

Step 5:

To add this child's medical record, click on the red-cross button . The records can be entered and updated at any time after this child's address book record has been created. Here you can view recommended immunization schedules for two different age groups as well as a Catch-up schedule. Click on Add Medical record to enter specific medical records – notice that as you type to enter records the system may suggest and auto-complete the record for you.

⭐ **Tips:**
Email Parent-Guardian – simply click on the adult photo. If you have not setup their email, simply enter it and click update button. Once their email is setup, when you click on the photo again, the link shows up – click on the link and the compose-send email popup window appears.

Adult addresses easy access – by hovering your mouse over the adult name, the address is displayed.

The Notes Tab – This section can store up to 65,000 characters. (a short novel!) By using the "Paste MS-Word" button, you can cut-and-paste from a formatted MS-Word document directly into the Notes Tab.

⚠ **Note:**
Total number of children in database and Total number of adults in database:

At the bottom of the main Family Records screen, you will see "Total number of children in database" and "Total number of adults in database". The allowed maximums correspond to the subscription plan you purchased. To see what these maximums are for your chosen plan, log into the Payment Portal – **Plan Selection** page.

Child Medical Records

Main Menu -> Family Data -> Family Record -> ✚

- **Highlights:** Easily maintain each child's medical records. Setup alerts-reminders for immunization or other medical visit schedules.
- **Advantages:** Once entered, the system will optionally remind you of immunization or other medical visit schedules.
- **Results:** Easily track each child's medical disposition; or **print** complete medical history. System provides schedule reminders.

Add Child Medical Record

From the Family Record page, click on the red-cross button ✚ to access this child's medical records. Click on "Add" button ⊕ to add a new medical record. The date showing is defaulted to today's date.

To change simply click in the field or click the calendar icon. 📅

Action Field

complete	This medical event is completed and noted for historical purposes.
scheduled	This medical event is scheduled for a future date. No need for a system reminder.
remind	This medical event is scheduled for a future date. Allow the system to remind by placing an alert notice in the **Dashboard module.**

Quick Add Medical Vaccinations

The "**Quick Add**" function allows you to check and record the vaccinations for this child with the appropriate action and date. Please remember to click on the Update button to record the changes you make!

Barcodes and Keycodes

Main Menu -> Family Data -> Manage Barcode IDs

⚠ **Note:**

The Barcodes and Keycodes feature is only available to **Center Edition** customers. User must enable "**timeclock**" in the **System Settings** – Attendance Format option.

- **Center Edition:** Users can select, print and manage barcodes and keycode IDs only if the Attendance Format in **System Settings** is set to "**timeclock**".
- From the Family Data module, access the Barcodes and Keycodes option by clicking on the "**Manage Barcode IDs**" located at the top navigation bar.
- Alpha Cares provides an inexpensive and practical way to manage each attendee and staff member's keycode. The section "Print Barcodes IDs to Avery 5371 template" allows you to print barcoded IDs for each child and staff member onto the Avery 5371 pre-perforated card stock paper. This can be purchased at online or at your local Staples or Office Depot.

Unique Keycode

Alpha Cares uses a method for generating keycodes for children and staff that identifies each one uniquely to the system.
Alpha Cares generates a 4-digit PIN number keycode for each new child, and a 5-digit PIN number keycode for each new staff member, at the time they are added to the system. You can then choose to change this keycode afterwards. However, it will not change this method of keycode assignment for new record additions. If you are manually entering keycodes, it can be a combination of alphabets and numbers (alphanumeric).

⭐ **Tips:**

- Use the "Print Keycodes Report" to help you identify keycodes for each attendee and staff member. Alternatively, from the **Manage Classes** module, print the class report to view keycodes of each member, by class.
- To modify an individual keycode go the "**Children Edit**" (Family Data module) or "**Staff Edit**" (Staff module) section, you will notice a keycode icon. Click on this icon and you can then modify this individual's keycode as desired.

Report of all assigned keycodes

Main Menu -> Family Data -> Manage Barcode IDs -> Print Keycodes Report

- The option: "**Print Keycodes Report**" is particularly useful – you will want to print this report "Report of all Assigned Keycodes – Staff and Children" and place it with the receptionist next to the Attendance Station so that you can provide keycodes to parents who have forgotten to bring their barcoded IDs.

3 - Staff

Main Menu -> Staff

The staff module works identically to the Family Data Address Book. The familiar Add / Edit / Delete functions are easily identified. To send a personal email to a staff member, simply click on the photo. If an email has not been recorded, a popup form with the email prompt will appear. After updating this email field, the next time you click on the photo and clicking on the email will result in a popup window with a form where you can type your message. Click on the "Send" button to deliver your message to this staff member.

Keycode button

⚠ **Note:** This feature is available to customers of Center Edition and higher only.

This icon 🔑 will only be seen if you have selected the Attendance "Time-clock" method. By clicking on either option, you can reassign a keycode to this staff member. You can also type in your own unique keycode number (alphanumeric).

Refer to the Attendance section to get details on how unique keycodes are used within the Attendance Time-clock method.

4 - Manage Classes

Main Menu -> Manage Classes

⚠ **Note:** This module is available to customers of Center Edition and higher only.

Defining a class and managing it has never been so easy and fun! After you have input all names of children under Family Data and Staff members, you can then Add, Edit and manage your classes.

▪ A class can be simply thought of as a group of selected children and staff. For example, you can define a Class as a group of all staff members. Or you can define a traditional class by selecting all 4-year olds, plus the staff members who work with them. Creating a class (or group) is entirely flexible, so you can be creative in the way you want to manage your groups!

⚠ **Note:** Each member can be a part of multiple groups. In event a child or staff member is deleted, he or she is also automatically removed from the class or group.

The left-hand side of the popup window lists children and staff members currently in your database. The "Ready Groups" section (on the left-hand side) is there only if you have children in the database who are 6 years old, and under. By clicking each link, the members in that group (for example: all the 2-year-olds) are added to the class you are adding or editing. If there is a duplicate member, then an error will be displayed at the bottom of this screen. **Remove All** button removes all members in the currently selected class set. If you click on the **Cancel** button, everything you have done to this point is ignored.

Viewing Class Attendance

- Once these groups are defined, you can then easily view attendance by clicking on this icon. The report that is displayed can be further changed by selecting a date range for the selected group report.
- In the future, you will be able to email all members of the group. If the member is a child, then that family's head-of-household, as well as adult-guardians will receive the email.

5 – Accounts

Main Menu -> Accounts

Introduction

The Accounts module contains many time-saving features including **"Auto-invoice™"**, Mass Payments, and Mass Invoicing; which allows you to build pre-recorded Invoice Templates, and post to multiple ledgers with minimum number of clicks. From the Accounts module you will find:

- **Setup**
  - Transaction Codes
  - Service & Rate Plans
- **Receivables**
  - Family Accounts Ledger
  - Agency Accounts Ledger
  - M-Payments (Mass Payments)
  - M-Invoicing (Mass Invoicing)
    - Setup Invoice Template
    - Auto-Invoice™
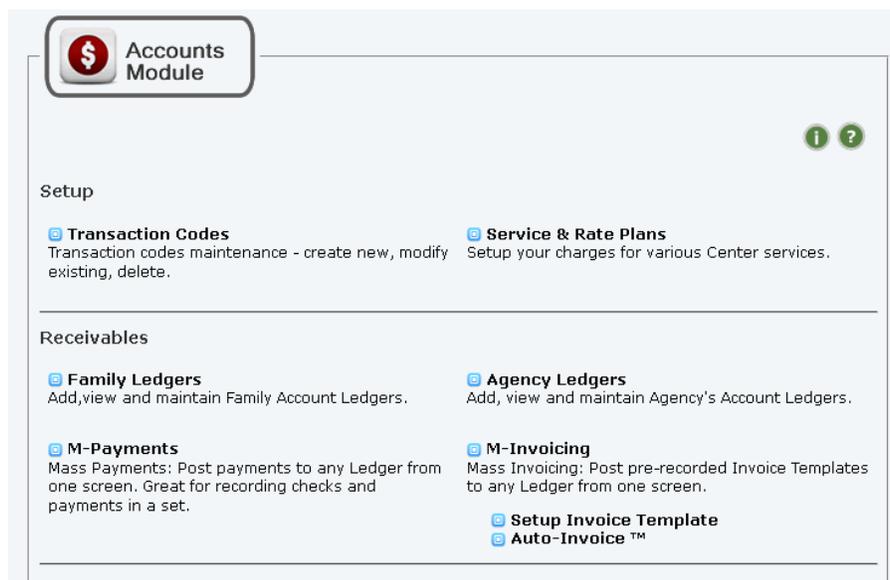
Guide to Accounts Module

- **Highlights:** Alpha Cares Accounts allows you systematic and easy tracking of payments; provides up-to-date balances with a click of the button. Overdue payments are displayed at-a-glance on the Dashboard.

- **Advantages:** Auto-invoice automates repetitive tasks like invoicing weekly and calculates hourly tuition fees; will also deliver invoices to each family's account ledger automatically.
- **Results:** You can easily track all family accounts and payments, and focus on accounts with out-standing balances.

Accounts Module Security

⚠ **Note:** This feature is available to customers of Center Edition and higher only.

When entering the Accounts Module for the first time for this session, you will prompted for your **password** again. This is an added security feature for Center Edition users. Each time you log out and back into Alpha Cares Portal, the system counts it as a fresh login session, but you only be prompted once for your password **for each session.**

Accounts Module Overview

- **One Adult – One Ledger:** Each adult created under a Family Name can have a ledger. This means you can easily create and setup individual ledgers for separated parents, (one for mom and another for dad) as an example.
- **Ledger Balances At-a-glance:** Balances are calculated year-to-date, and automatically displays at the top of each ledger.
- **Track by Adult or Child:** Easily take spilt payments. Reporting can be by adult or by child.
- **3 ways to Invoice:** You can create an ad hoc invoice, setup an automated invoice (see Auto-Invoice) or create an invoice template, and post invoices in a batch - you choose which method suits you best! The option to automatically send the invoice by email is also available.
- **2 ways to take Payments:** You can create an ad-hoc payment receipt, or perform a batch posting of payments, checks or credit card payments.

Accounts Setup - Transaction Codes

Main Menu -> Accounts -> Transaction Codes
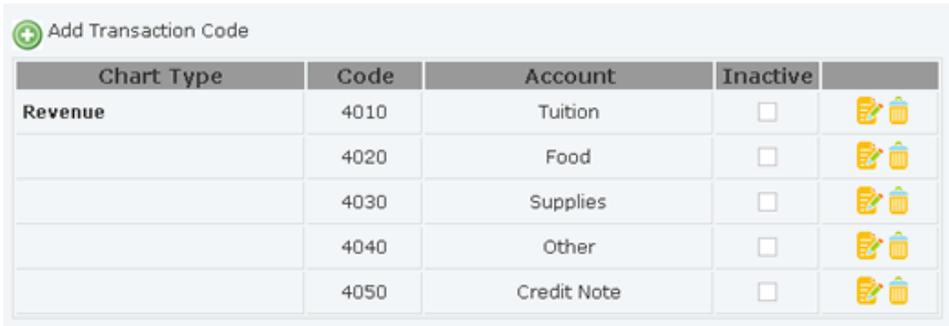
Chart Type	Code	Account	Inactive	
Revenue	4010	Tuition	☐	
	4020	Food	☐	
	4030	Supplies	☐	
	4040	Other	☐	
	4050	Credit Note	☐	

Transaction codes are similar to "Chart of Accounts" in an accounting software package. A starter set (displayed here) of values was installed when you setup your Alpha Cares account. You are

encouraged to utilize these values when first beginning to learn Alpha Cares. Modify, add, and delete transaction codes only after you have gained a thorough understanding of the system. The goal of incorporating this sub-module is to provide *Income Statement* capability in the near future. This would allow you to track your expenses and revenues at a click of a report button.

⚠ **Note:**

- Chart Type values are fixed and cannot be changed. These are industry standard values. If you have a specific request, please let your Alpha Cares representative know.
- When *adding* a new Account Code, make sure it is unique.
- Account codes cannot be *edited.* They must be deleted, and then created as a new item.
- The system will not allow you to *delete* an Account code if it is still in use.
- Only the **"Revenue"** Chart Type is in use for now (Account Receivable drop-down menu)

Accounts Setup - Service & Rate Plans

Main Menu -> Accounts -> Service & Rate Plans

The Service and Rate Plans sub-module is where you setup descriptions and amounts of your Center's specific billable service plans and rates. At the time you create an invoice, these items will be presented in an "Autofill" drop-down menu field. By selecting an item, it will automatically fill the **Memo and Amount** sections of your invoice. This will save you much time from repetitious keystrokes when creating invoices of your service and rate plans!

Memo	Amount	Inactive	
Monthly Infant (5 day)	1682.45	☐	📝🗑
Weekly Breakfast Mon-Fri	34.5	☐	📝🗑
Weekly Full Day (6 days)	650	☐	📝🗑
Weekly Part-Day Preschool 3-day	180	☐	📝🗑
Weekly Part-Day Preschool 5-day	250	☐	📝🗑

⚠ **Note:** A starter set (displayed here) of values was installed when you setup your Alpha Cares account. This set is merely an example, and should be deleted. The memo and amount fields can also be entered individually since there is no need to utilize this function when creating a fresh invoice. By taking the time to create these entries here, you will greatly minimize the amount of work when creating invoices.

Family Accounts Ledger

User Menu -> Accounts -> Family Ledger

Cell Phone	operations
➝	[Family Ledger]

Family Accounts are first setup via the Family Data module. To enter invoices and payments for this family, click on the link "Family Ledger".

Add Invoice

Add Invoice
Create invoice for either child-related or non-child related item.
⦿ Child-related   ○ Non-child related   ← ①

Child-related

* Child's Name: Sandra Foreman   ← ②
* Date: 02/02/2013
* Trans Code: 4010 Tuition   ← ③
Auto Fill: Monthly Infant…Amount:$550   ← ④
* Memo: Monthly Infant
250 characters
* Invoice Amt: 550
E.g. 150.75

[Add Child Invoice]   [Cancel]

1 Invoices must be child or non-child related
2 One invoice per child, allows reporting on revenues per child
3 New Transaction Codes lookup, can modify. Allows reporting on revenues by code
4 Create your Service Rate Plans and easily select them – saves keystrokes!

- Invoices can be manually entered or automatically generated via Auto-Invoice. To manually enter an invoice, click on "Add Invoice".
- The names drop-down selection will contain all children for this family unit. This list will reflect new children to this family as they are added through the Family Data address book.
- To change the date, simply click on the date field or the calendar icon.
- "Trans code" is short for Transaction code.

Add Payment

1 Payments must be child or non-child related

2 New Transaction Codes lookup. Can modify. Allows reporting on revenues by code.

3 Easily record split payments, saves keystrokes!

- Payment entries can be recorded for one or multiple children; thus saving time.
- **Credit Note:** a credit note is made when you want to issue a credit against their family ledger account.
  E.g. the Sanford's referred their neighbors to your child care center and you want to give them a $50 referral bonus. Add a payment of type "credit note"; this then reduces their outstanding balance by this amount.
- To enter **split payments**, simply fill in the amounts in each of the children's amount fields. You may also enter a single amount.

Export Accounts

- This is a handy way of exporting your family accounts ledger to third party packages like "Quick Books".
- Select your start and end dates by clicking into the date fields.

Secure Accounts for Center Level and higher level subscriptions

- If you have subscribed to Center level and higher plans, the Accounts and Dashboard Modules are secured by your password. This is to avoid accounts and other sensitive information being viewed on a publicly located computer terminal.

Mass Invoicing

Main Menu -> Accounts -> M-Invoicing

Three Ways to Invoice

1. **Add Invoice - Ad hoc Invoicing:** done through the Family Accounts Ledger sub-module
2. **Mass Invoicing:** Post to multiple Ledgers at once (this sub-module)
3. **Auto-Invoice™:** Allow Alpha Cares to automate repeated (Monthly, Weekly) invoices

In order to post multiple (mass) invoices at once, you will firstly have to Setup and Invoice Template**.** Invoice Templates are pre-recorded invoices that you can then select to post from the Mass Invoicing sub-module.

From the M-Invoicing page, click on the "Setup Invoice Template" button to create and maintain Invoice Templates.

Notice the screen looks identical to the Add Invoice ad hoc invoicing – this was done so that you will quickly be comfortable with using it!

Mass Payments

Main Menu -> Accounts -> M-Payments

Two Ways to Post Payments

1. **Add Payment - Ad hoc Payments:** done through the Family Accounts Ledger sub-module
2. **Mass Payments:** Post to multiple Ledgers at once, ideal for batch processing (this sub-module)

From the M-Payments page, simply click on the selected **Ledger Name**, enter payment fields, click *Add* then go to the next payment. The entry is posted to the adult's ledger immediately.

As each payment is entered, the system records and displays the payments you have processed so that you can print a record of the payment entries posted during the session. To start on a new batch of say checks instead of cash payments, click on the "Clear" button and the system will start recording payment numbers afresh.

Setup Invoice Template

Main Menu -> Accounts -> M-Invoicing -> Setup Invoice Template

Creating an Invoice Template allows you to perform the Mass Invoicing function. By pre-recording invoices that you post regularly, parents can be invoiced according to a schedule of your choice! We refer to this as the DIY (do-it-yourself) invoicing method instead of Auto-Invoice™, where the Alpha Cares system performs automatic invoicing for you in the background. In both cases, invoices templates are created beforehand.

From the Setup Invoice Template page, simply click on the **Ledger Name**, then click on the plus sign "Add Invoice Template". The Add popup screen is identical to the Ad hoc invoice screen, minus the calendar-date selection because you will be using this invoice template to mass post invoices. It's that simple!

Auto-invoice™

Main Menu -> Accounts -> M-Invoicing -> Auto-Invoice

The Auto-Invoice™ sub-module allows you to automate your invoicing to parents. Here are the key components:

- **Main Auto-Invoice Switch:** By setting this switch to "Enable" or "Disable" you can effectively turn this feature on or off for all auto-invoice accounts setup. This overrides individual account settings.
- **Current Auto-Invoices:** This is a display-only screen that shows all Auto-invoices that have been setup for individual Account Ledgers.
- **Setup Auto-Invoices:** Maintain / add / delete Auto-invoices for existing Ledgers.

Main Auto-Invoice Switch

Auto-invoicing allows you to send your invoice via email, as well as make automatic entries into an individual's Accounts Ledger. Changing this setting causes auto-invoicing to change **system-wide.**

Enable: Automatically inserts Monthly, Weekly or Hourly payments into each adult's accounts ledger.

Disable: Causes Auto-invoicing feature to be turned OFF for the whole system. This overrides individual auto-invoice adult ledger settings (active or inactive)

> ⚠ **Note:** Be careful when using this setting. If you intend to have the auto-invoicing feature for certain children, leave this system-wide setting to **"Enable"**. You can then set a particular adult Accounts Ledger to **Active** or **Inactive** as desired.

Setup Auto-Invoices

Main Menu -> Accounts -> M-Invoicing -> Auto-Invoice -> Setup Auto-Invoice
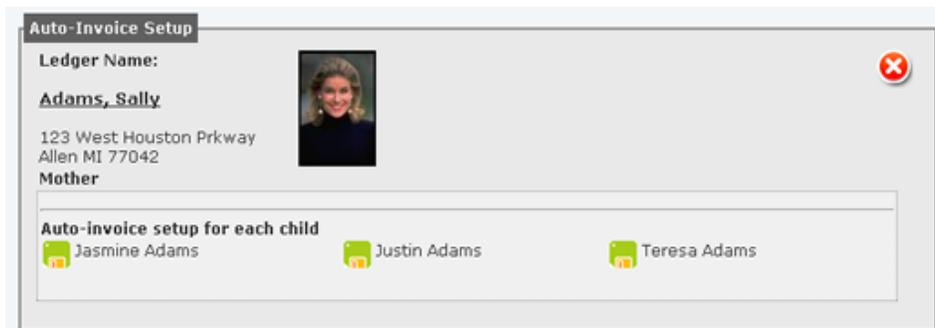
To add or change the auto-invoice setting, click on the icon for that child.

Notice the screen looks identical to the Add Invoice ad hoc invoicing – this was done so that you will quickly be comfortable with using it!

ARHOUR	Auto-invoice generated for attendance hours incurred in the past week. E.g. child attends 2 hours on Tuesday, 3.5 hours on Wednesday and 4 hours on Friday. An auto-invoice is generated for total of 9.5 hours for that week's attendance at the stated rate. **ARHOUR** auto-invoices are generated Sundays at 1AM Eastern Time for the previous week.
AHWEEK	Auto-invoice generated for weekly "pay ahead" tuition fees. E.g. two children attend the child care center – one child's rate is $120 per week and the second is $100 ($20 sibling discount) Each child should have auto-invoice setup with **AHWEEK** as contract cycle. **AHWEEK** auto-invoices are generated Fridays at 1AM Eastern time for the week ahead.
AHMONTH	Auto-invoice generated for monthly "pay ahead" fees. This can be for tuition, food, supplies or other category. **AHMONTH** auto-invoices are generated 3 days from the 1st of the next month.

⚠️ **Note:**

ARHOUR hourly billed Auto-invoice calculations

- In the setup of an ARHOUR auto-invoice, the amount is the hourly rate.
- In cases where the attendance entry was **"mass updated"** i.e. 6:00am till TIMECLOSE (this is the setting you selected in the Accounts Optional Setting section) then ARHOUR assumes the full number of hours (NUMHRSDAY) in calculating the cost for the day. The rate used is specified in the Auto-invoice setup for this child.

  i.e. NUMHRSDAY * Rate-specified = charge-for-day
- In cases where the check-out time was not specified, then TIMECLOSE will be used in calculations.
- Calculations are made to the nearest 7 minutes on-the-clock. See below for how calculations are made.

0 – 7 mins	No charge	0.0 h
8 – 15 mins	Quarter hour	0.25 h
15 – 22 mins	Quarter hour	0.25 h
23 – 30 mins	Half hour	0.50 h
31 – 38 mins	Half hour	0.50 h
39 – 45 mins	Three-quarter hour	0.75 h
46 – 53 mins	Three-quarter hour	0.75 h
54 – 60 mins	Hour	1.0 h

⭐ **Tip: Understanding how auto-invoice can work for you**

You can setup a test of each of these auto-invoice contract cycles just to see how they work. Simply add a (fictitious) family (which later can be removed entirely) E.g. "Head_of_Family", with two children. Set one child with **AHWEEK** and the other for **ARHOUR**. During that week, don't forget to include some attendance time by logging attendance for the child set with **ARHOUR**. You might also want to "mass update" an entry or two – just to see how the calculations are made for you. On the following Monday you will see this family's ledger include entries that are automatically inserted. Examples look like this:

ARHOUR:	[For week: Sun 10-31 to Sat 11-06] 10-31: 7 hrs, 11-01: 7 hrs, 11-02: 7 hrs, 11-03: 7.5 hrs, 11-04: 8.5 hrs, 11-05: 7 hrs, total: 44 hrs.	11-10-2010	T	$176.00
AHWEEK:	Tuition Fees [Period: Sun 11-14 to Sat 11-20]	11-09-2010	T	$120.75
AHMONTH:	Thank you for your payment [Payment - for month: Aug-2011]	07-29-2011	T	$450.00

AHMONTH: is harder to test since the entry is inserted 3 days before the 1st of the next month.

You can activate up to 2 auto-invoices per child of any combination of contract cycles.. E.g. you can have 2 weekly charges – one for tuition and another for say weekly diaper charges. Or perhaps one ARHOUR, and another AHMONTH charge.

Removing an Auto-invoice Entry

Main Menu -> Accounts -> M-Invoicing -> Auto-Invoice -> Setup Auto-Invoice

Auto-invoices are removed by inactivating the entry. From the Auto-Invoice Page, click on "Setup Auto-Invoice", navigate to the Family / Adult Ledger Name, select the child's name so that the Child Account Setup window pops up. Notice there are 2 option checkboxes for Auto-invoice. By un-checking either checkbox, the Auto-invoice becomes inactivated.

6 – Attendance Tracking

Main Menu -> Attendance

Introduction

Attendance tracking in Alpha Cares Portal is the most versatile of all modules – there are different versions for Home vs. Center Editions. The two methods:

- **One-click** method (also known as "alpha-search")
- **Time-clock** method (only for Center Edition)

Guide to Attendance Module

- **Highlights:** Easily track and maintain each child's attendance. Provides an easy **One-click** attendance taking feature. Center Edition users can switch to the professional grade **Time-clock** multiple entry capable setting.

- **Advantages:** Parents simply have to click once to mark attendance as they enter and leave your center. Alpha Cares also has an Attendance Toolkit for **"Mass Updates"** which is time saving! For hourly-billed children, this module provides information to the Accounts Module so that it can automatically calculate and generate invoices.

- **Results:** Accurate and easily maintained attendance records. Minimize time spent on billing for hourly-billed children.

One Click Attendance

Click on the [check mark icon] check mark icon to indicate check-in or check-out. Times recorded follow your computer's system clock.

To **Delete** Entry: Simply click on the [green check mark icon] green check mark icon on the check-in column to delete this entry.

Home Edition: all staff and children are presented on one screen.

Center Edition: staff and children are organized alphabetically by last name. (This is the "alphasrch" method) ⚠ **NOTE:** This feature is seen and available to customers of Center Edition and higher only.

Attendance Station

- This feature allows the Attendance main page to run in a stand-alone window without the rest of the system's menu items. Use this option to place your Attendance Check-in and check-out function on a computer where parents drop off and pickup their children.
- To set up, simply click the "Display Attendance Station" button to run the Attendance main page in a separate window, and close [X] the main window.

⚠️ **Note:** <u>Do not Log Out</u>, as this would terminate the session in all Portal windows.

- You can monitor attendance from another (remote or office) computer by periodically refreshing your main window [F5 key] to view the latest check-ins or check-outs.

⭐ **Tips:**
- **Touch Screen:** Utilize a touch screen LCD panel for your attendance taking – then parents need only touch the screen to mark their attendance. This makes the check-in and check–out process faster and smoother.
- **Computer system clock:** If your computer's system clock is out of sync, your attendance taking will be affected. If this becomes a problem, you may have to get your computer technician to change the computer's battery or upgrade to a newer computer.
- **Touch Screen Computer-all-in-one:** We recommend this type of computer unit for your attendance- taking; these units are priced at about $450 each.
- **Small Notebook Computers:** A basic computer is all that is needed to perform the function of Attendance Station, and run all of Alpha Cares. These days, mini notebook computers are inexpensively priced from just $250.

From the Main Menu, click on the Attendance module. Notice that two sub-menus show up beneath Attendance – "**Update Attendance**" and "**Attendance Reports**".

Update Attendance - mass update function

Main Menu -> Attendance -> Update Attendance -> Mass Update Attendance FixTool

- This allows you to easily mass update and maintain your attendance records. By clicking the column down arrow ⬇ all children in the column will have their attendance checked. Clicking on the ☑ check mark to the right will update the attendance for that particular child for that week (Mon through Fri).
- The slider at the top allows for a 5-week rolling lookup window.
- The system defaults attendance times to: 6:00am for check-ins, and **TIMECLOSE** for check-outs on mass update entries. (see note below)
- Each checked entry will delete all entries for that day in the database and replace it with a *full day* attendance.
- Each checked entry will delete all entries for that day in the database and replace it with a *full day* attendance.
- **TIMECLOSE:** is optional setting which can be changed from the **System Settings** -> Time of Closing option. See System Settings module for more details.

⚠️ **Note:** remember to **save** your changes by clicking on the **"Update"** button.

Update Attendance – Fixing Single-Day Entries

Main Menu -> Attendance -> Update Attendance -> Attendance Single-Day FixTool

- The Single-day FixTool gives you great flexibility in adjusting time stamps of your attendance records.
- You can add / delete / edit any attendance record within the 5-week rolling window.
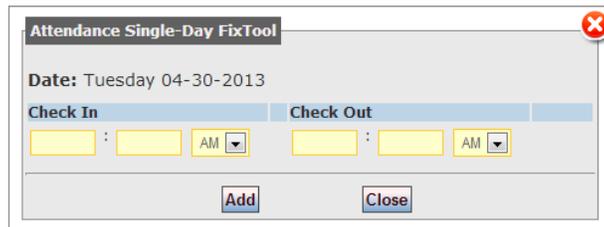
- By adding a second check-in and out entry for say a child who comes for breakfast and then again the after-school care program – the Attendance Report will correctly show two entries, and the Attendance hours report will total the two entries.

Center Edition Attendance

- For Center Edition customers, Alpha Cares offers two methods of attendance tracking.
- **Alpha-search method ("alphasrch")**
    - Attendees and Staff names are accessed by last name. Check-in and check-out is accomplished using the one-click feature.
    - Only one check-in and one check-out entry per day are recorded.
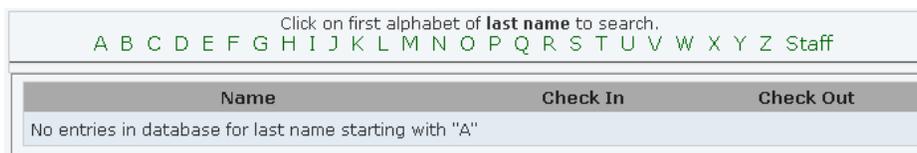
- **Time-clock method ("timeclock")**
    - Attendees and Staff are each automatically assigned a unique "keycode".
    - The system registers a check-in or check-out each time they enter their unique keycode.
    - The attendance entry screen is set up to accept reading the underlined barcode version of their keycode. (using the barcoded ID cards)
    - The Attendance Time-clock will also accept keyboard entry, so you can type in the individual's keycode.
    - Multiple check-in and check-out entries can be recorded automatically by the system.

Name:Chelsea Jackson

Check In: ☑ Mon Aug 29 2011 09:45:26 AM

⚠️ **Note:**

Alpha Cares has special software that will generate Children and Staff barcoded IDs containing each unique keycode. Alternatively, plastic barcode cards can be made through vendors. (similar to the barcode entry system that many YMCAs have)

See section on **Barcodes and Keycodes** for more details.

Attendance Reports

Main Menu -> Attendance -> Attendance Reports -> Staff Attendance Reports or Children Attendance Reports

Purpose: Select to print Staff or Children Attendance Reports.

Step 1: To print a report, you must first select the date range of your report. By clicking in the date text field, a popup calendar appears that helps you easily select dates. The end date defaults to today's date, but you can click and select a different ending date for your report. You can also type dates directly into the field.

Step 2: Next, select the names of staff members (or children's names in the Children Attendance Reports). The selection mechanism searches for first or last names that begin with that particular letter of the alphabet. Check the box of the names you want to see included in the report. Click on "**Print Attendance Report**" button and the report appears in another browser window.

Optionally you can click on "**Print Totals Report**" to view total number of hours-minutes per attendee for a selected date range.

⚠️ **Note:**

- In cases where there was a check-in but no corresponding check-out, the system defaults to a check-out time of "[none]".
- For mass update entries, check-in is defaulted to 6:00am, check-out to the **TIMECLOSE** value set in the System Settings module.
- **TIMECLOSE:** This is an optional value that can be set in the System Settings module.

Preparations for adopting Attendance Time-clock (Center Edition only)

- To implement the Attendance time-clock feature, you will need:
    - **Equipment:** Obtain a USB-barcode reader, and attach it to a basic Internet capable computer located at your arrival area. Below is a suggested online vendor for this device.
    - The Attendance Time-clock will also accept keyboard entry, so you can type in the individual's keycode.
    - **Optionally** (or perhaps at a later date) you may consider printing plastic barcoded IDs with a printer vendor. There are a variety of such vendors online. Below is a suggested vendor.
    - If you decide to print plastic barcoded IDs, you will need to re-generate your existing keycodes to a sequential number-system. Refer to the excerpts of the manual pages below.
    - **Make the switch**. Go to System Settings module, and switch Attendance Format to "timeclock".
    - **Distribute** each student's and staff member's keycode. We suggest printing the barcoded IDs on Avery 5371 pre-perforated card-stock as the quickest method. These can then be laminated for protection against water and spills.
    - **Print the report** called "Report of all Assigned Keycodes – Staff and Children". You can use this to refer to keycodes of entering children who forget their barcode IDs.

USB Laser Barcode Scanner	Model: FG9800 from http://gogo-power.com $59.95 – free shipping	Alpha Cares has started to stock the "Farsun" Barcode scanners for $59.95. Speak to your sales representative to order. **Note:** Scanner should be "Code39" compatible.
Pre-perforated card stock for barcoded IDs.	Avery 5371 from Walmart online, Staples, Office Depot, etc.	Avery has many similar products. (generic brands are available) Be sure you select one with the same printing dimensions as the Avery 5371.
Card Laminator	GBC Heat seal Model H110 4.5 inch Pouch Laminator from Staples, Office Depot, Amazon.com, etc.	Allows you to quickly laminate each barcoded ID.
Laminating Pouches	GBC 51005 Heat Seal Ultra Clear Thermal Laminating Pouches, business card size from same place where you buy your laminator.	Suggested source: amazon.com – they come in packs of 100.

7 - Connections

Main Menu -> Connections
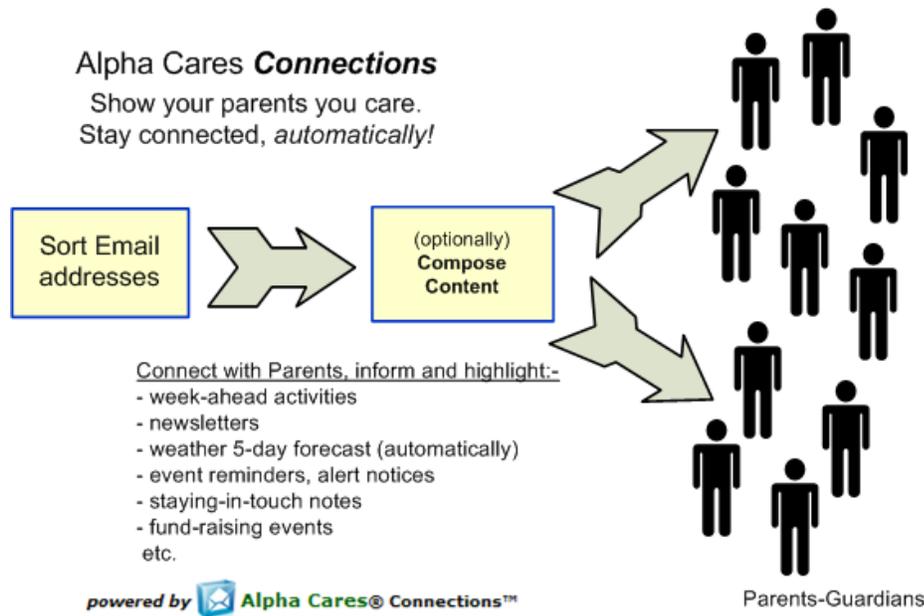
Guide to Connections Module

- **Highlights:** Utilize Alpha Cares Connections to stay in constant communications with parent-guardians.
- **Advantages:** Keep in front of parents with consistent communications. Content is automatically generated and sent to Parent-Guardians by Alpha Cares. Alternatively, send an alert, event notice or activity reminder in a newsletter format.
- **Results:** An automated email is sent weekly to parents with 5-day weather forecast for their zip code titled: "Weather Forecast Courtesy of [Your Child Care Center Name]". This Email is sent every Monday at 1AM Eastern Time to all parents-guardians of your choice.

Main Page

- **Step 1:** Sort your Email recipient list. Make sure each person has a valid email and zip code defined. To do this go to Family Data module, pull up person and update their address-book records.

- **Step 2:** From the Connections Home Page, check and un-check persons you wish to receive Email communications. You're done! The system will automatically generate and send out all emails. (Mondays at 1AM Eastern Time)
- **Step 3:** Optionally, include an email message that gets sent that week. Using the "Send Later" function, compose an email message (e.g. reminder for month ahead activities) that will be added to the email communication.

⚠ **Note:**

Check zip: You may see this status in the Zip code column. It means that either you have a bad zip code, (perhaps a typo error) or it could be that the Yahoo Weather Services cannot locate weather information for this particular zip code. **Corrective action:** Simply make sure that it is not a typo error. There is nothing that can be done about the Yahoo Weather Services error – it may correct itself in the future. What happens in this case? This parent will get an email that does not have the 5-day weather forecast portion or will simply not receive an email if there is no custom message portion.

⭐ **Tip:**

Email SPAM folder: On occasion, your email may misclassified into the SPAM folder. Remind your parents to look for your Center's communications in the SPAM folder – ask them to mark it as non-SPAM. In some cases they will have to setup "white-list" filters, whereby future emails from your Center will be placed in the appropriate INBOX.

Custom Message

Main Menu -> Connections -> Custom Message

Parents will appreciate anything that makes their days go smoother. One of our most popular features is the personalized 5-day weather forecast (by zip code) delivered right from your child care center. It's a great tool for parents as they plan their child's wardrobe for the coming week. Also, note the upcoming activities; again this is a great way to keep constant communication flowing between your child care center and parents.

⭐ **Tip:**

You can pre-format your newsletter in MS-Word, then cut-and-paste into the custom message editor

by clicking on this button

Example of a custom message sent to parents that includes the weather forecast for the parent's zip code area.

Send Article

Main Menu -> Connections -> Send Article

Alpha Cares knows that a progressive child care center dedicates considerable time and effort in parent communication. Regular communication helps parents feel connected to your child care center and their children when they're with you. Communication shouldn't be limited to just discussing problems or bringing up late payments.

To help you save time while keeping you informed, our staff prepares thoughtfully researched articles for you to send to parents. These articles titled *Keeping You Current* are prepared monthly on current discussion topics like nutrition, safety and parenting. Parents receive these as email newsletters with your child care center as the sender.

8 – Calendar

Main Menu -> Calendar

Guide to Calendar Module

- The Alpha Cares Calendar Module is a convenience function. Once entered, all information is available *at-a-glance*.
- Schedule your center holidays, administrative days, fund raising events, etc. Event reminders appear on the Dashboard Module.
- Schedule <u>one-time</u> or <u>recurring events</u>. Plan ahead - activities for the week, month, or year.

Submit Event

Calendar -> Submit Event

- **Step 1:** Click on Calendar then "Submit Event" on the Main Menu. Select Category, enter Title of event.
- **Step 2: If not a recurring Event** then enter Start date and time; check on "No" for end date. Type a description of the event and click "Save" button at the bottom of the screen.
- **If it is a recurring Event** – Select if this is a "Daily", "Weekly", "Monthly" or "Yearly" event; click on the appropriate option. For each section fill in the corresponding details, type a brief description and then *click on the "Save" button at the bottom of the screen.*

⭐ **Tip:**

From the Main Calendar Page, notice that you can view events (tabs) by **week, month, year**, etc.

9 – System Settings

User Menu -> System Settings

The system settings module is an important sub-module (found underneath User Menu) – it is the one place where settings utilized by the different modules can be found. It's important enough that we will dedicate a chapter to this sub-module!

- **Start Time:** This is the time your Center starts tracking Attendance. See "Center Type" and an explanation of how these two settings are used.
- **Max Hours in one Shift:** Not currently used.
- **Time of Closing:** Used in Attendance reports and other reports to reflect check-out time in mass updates.
- **Center Type:** Not currently used.

Attendance Format ⚠ **Note:** This feature is seen and available to customers of Center Edition and higher only.

- Current options are: "**timeclock**" and "**alphasrch**" Please refer to the Attendance Module for an explanation of how these options are used.

10 – User Menu

The user menu contains links that help you maintain your Center's account information e.g. business name, email, address, telephone number and login password.

It is critical to maintain a valid email address as Alpha Cares forwards important communications about your account - via Email.

⚠ **Note:**

Email SPAM folder: On occasion, Alpha Cares Emails to you may land up in the SPAM folder. Please be reminded to look in the SPAM folder – perhaps mark it as non-SPAM. In some cases a "white-list" filter may need to be added for Alpha Cares Emails.

User Menu items

- **Edit Account:** Update / modify your account information; change your password or email contact. The address maintained here is your *Business Address*. This address will be used in all official receipts, emails, etc. generated on behalf of your Child Care Center by the Alpha Cares system.
- **Inbox:** If you ask a technical question through the "Ask a question" form, answers will be returned through this internal inbox. **NOTE:** This is not your regular Email inbox - it is *internal* Alpha Cares Portal Email - used to by Alpha Cares Administrators to communicate with you.

Payment Portal

The Alpha Cares Payment Portal is where your credit card and payment information is maintained. Subscription to Alpha Cares services is automatically deducted from your credit card. To log in, use your account email and password. https://secure.alphacares.com

⚠ **Note:**

The address maintained in the Payment Portal is your *Billing Address* (which can be set to be the same as your Business Address).