

Getting Started with Alpha Cares



Connect. Automate. Work Smarter!

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Resources to run your Center with Alpha Cares



Help Guides

- Complete User Manual can be accessed at: <http://alphacares.com/manuals/AlphaCares-UserManual.pdf>
- Online Help Guide via Alpha Cares Portal.



Short Training Videos

- 5 minute short Youtube video clips.
- Accessed through Alpha Cares Portal Help Guide.



Alpha Cares University

- Coming soon!
- Get to know our product first hand with a custom class – speak to our Customer Care representatives for more details!



Live Webinars

- These web-based seminars are by topic-module, conducted at your request. Speak to our Customer Care representatives for more details!

The Alpha Cares Getting Started manual provides a pictorial overview and is meant to be a quick guide for your successful implementation of Alpha Cares software. For a step-by-step reference, use the User Manual (an online version is available in Alpha Cares Portal), view the 5-minute topical YouTube videos, or better yet - plan to attend Alpha Cares University.

What's in this guide ?

Part One: Getting the most of your 15 day Free Trial

- 1 Get started easily
- 2 Family Data and Immunization records
- 3 Attendance Tracking
- 4 Automating Accounts Receivable
- 5 Easily Connect with Parents
- 6 Dashboard at a glance – keys to Working Smarter

Part Two: Planning a successful Alpha Cares implementation

- 7 People, Process and Tools
- 8 Rolling out Alpha Cares – think Internet!
- 9 Five keys to ensuring Success!

Part One:

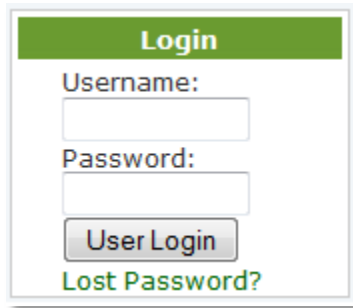


Getting the most of your 15 day Free Trial

1

Get started easily

Login from anywhere, anytime



The screenshot shows a login form with a green header labeled "Login". Below the header are two input fields: "Username:" and "Password:". Below the password field is a "User Login" button and a "Lost Password?" link.

in the office **AT A LIBRARY**
outside the office *at an internet cafe*
quick peek while on vacation **at Starbucks...**

There are no “per seat” licenses to purchase. You never have to perform any patches, upgrades or fixes. We do it all for you while you run your business.

Access your account from any internet connection, whether you’re at home, in the office or at a café using your smart phone.

TIP! Write down your login and password – store it away securely. If you forget, click on the Lost Password link, the system will send you 2 emails – one to verify your request, and the other to reset your password.

Discover – try it yourself




Family Data: Start by entering your Family Data.



All modules depend on having Family Data entered, so this is the place to start!

Sample Data Loaded: As part of your evaluation, we have uploaded 2 families with 4 children as sample data. Please feel free to delete the "ATrialFamily" and "ASampleFamily" family records at any time.

Ask Questions: All throughout the Alpha Cares Portal you will notice this icon  on the top right hand corner of the screen / window. Simply click on the question mark icon whenever you have questions to ask, send your question to us and our Support staff will answer your question promptly!

Overview of Modules



Accounts: Setup, then create Adult Ledgers. Automate Invoices.



Attendance: Utilize either One-Click or Time-Clock.



Connections: Mass Email Newsletters. Automate Parent Communications.



Staff: Staff personnel data.



Manage Classes Create groups or classes. View attendance by class.



Calendar: Set Event Reminders.



Dashboard: At-a-glance vital information and event reminders.



Smart FAQ: Answers to commonly asked questions.



Settings: General system-wide settings.

2

Family Data and Immunization Records

One-click – easily include address of head of household, no need to re-type

Include up to 65,000 characters so whole documents can be stored together

Load all family pictures – easily view entire family on one screen

The screenshot shows the 'Adult-Guardian Edit' window with the following fields and features:

- Main Tab:** * Name (Felicia Adams), Relation (Mother), Work Phone ((832) 738-9283), Cell Phone ((713) 292-9019), Alt Phone, Email (feliciaadams23@yahoo.com).
- Address Tab:** Radio buttons for 'Same as Head_of_family', 'Current Address', and 'New Address'. Fields for * Address (123 Goodwill Street), City (Houston), State (Texas), and Zip Code (78782).
- Upload A Picture:** A section with a 'Choose File' button and a note: 'Click "Browse" to select picture. Note: Only JPGs of less than 1000kb will upload.' Below it is an 'Upload a picture' button.
- Buttons:** 'Update' and 'Cancel' at the bottom.

To delete entry, click on Check in again

Child Immunization Records

Quickly include pre-filled entries simply by checking the boxes

The system remembers individual entries, eliminating the need to retype. Simply make your selection from the suggested list

Use the system reminder to stay on top of immunizations

Vaccination	Optional Note	Month	Day	Year	Action
<input type="checkbox"/> Comvax [Hib + HepB]				2013	
<input type="checkbox"/> Pediarix [DTaP+HepB+IPV]				2013	
<input type="checkbox"/> HepB 1of3 at-birth				2013	
<input type="checkbox"/> HepB 2of3				2013	
<input type="checkbox"/> HepB 3of3				2013	
<input type="checkbox"/> Rotavirus [RV]				2013	
<input type="checkbox"/> Diphtheria, Tetanus, Pertussis [DTaP]				2013	
<input type="checkbox"/> Haemophilus influenzae type b [Hib]				2013	
<input type="checkbox"/> Pneumococcal [PCV]				2013	
<input type="checkbox"/> Inactivated Poliovirus [IPV]				2013	
<input type="checkbox"/> Influenza (Seasonal)				2013	
<input type="checkbox"/> Measles, Mumps, Rubella [MMR]				2013	
<input type="checkbox"/> Varicella vaccine				2013	
<input type="checkbox"/> HepA 1of2				2013	
<input type="checkbox"/> HepA 2of2				2013	
<input type="checkbox"/> Meningococcal vaccine (optional)				2013	

Update Cancel

Let us do your Data Entry!
Fast, safe and convenient service to load your Family Data.

Is your family data still in paper format or in another software package such as Procure? We can help you load your data FAST.

We'll provide a formatted spreadsheet for you to enter your data or for a one-time service charge, our support team can lift the burden off of your shoulders. We'll get your data loaded quickly and accurately. Ask your Alpha Cares Customer Care Associate for details.

3

Attendance Tracking

Two Methods to do Attendance Tracking

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

One-Click Method

This list is ordered by lastname

Click on first alphabet of last name to search.

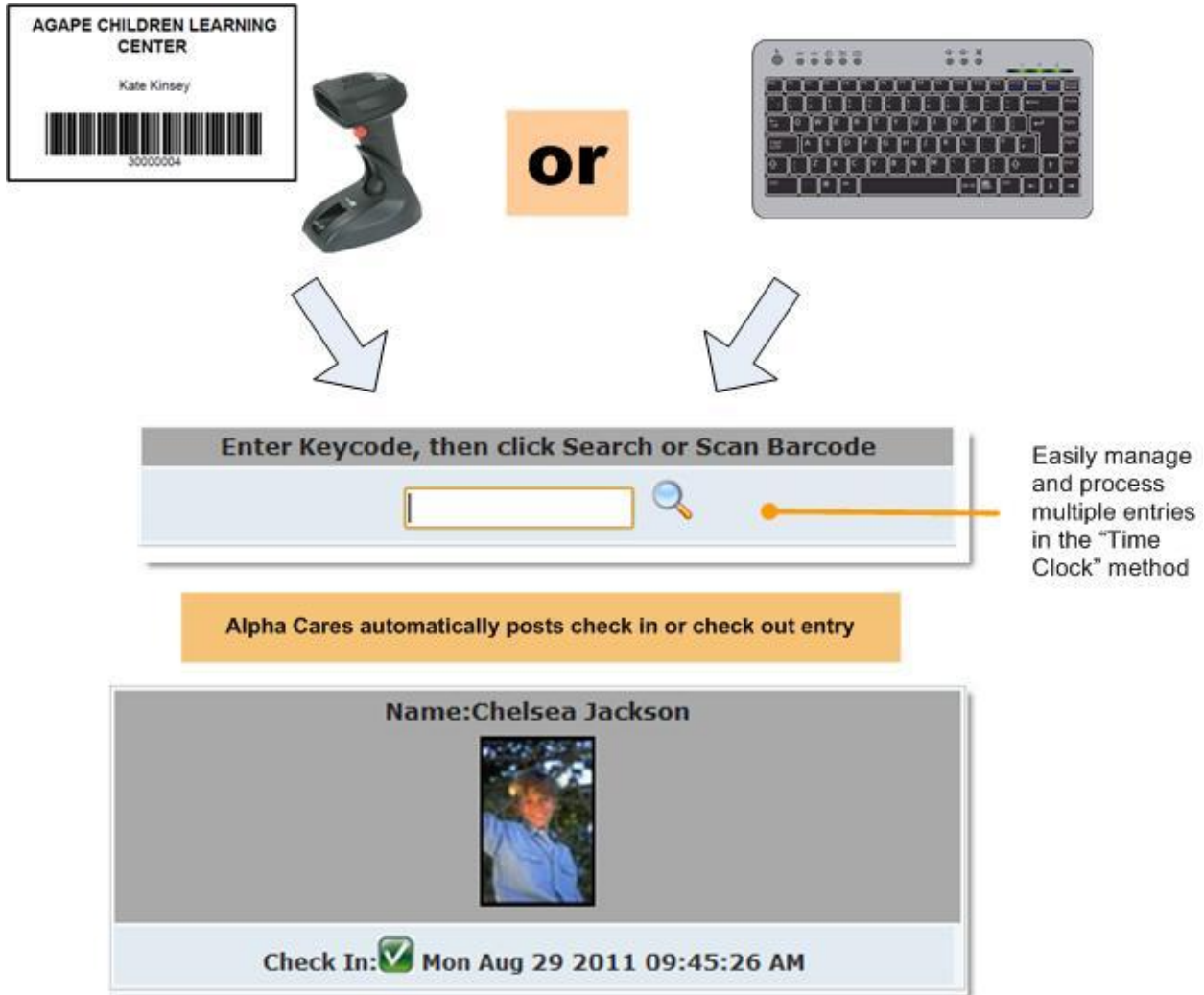
Click once to check in

Click once to check out

Name	Check In	Check Out
Teresa Adams	<input checked="" type="checkbox"/> Thu Oct 11 2012 06:05:18 p.m.	<input checked="" type="checkbox"/> [Date time stamp]
Jasmine Adams	<input checked="" type="checkbox"/> [Date time stamp]	<input checked="" type="checkbox"/> [Date time stamp]
Justin Adams	<input checked="" type="checkbox"/> [Date time stamp]	<input checked="" type="checkbox"/> [Date time stamp]

To delete entry, click on “Check in” again

Time-Clock Method



4

Automating Accounts Receivable

Three ways to invoice

You can create an ad hoc invoice, setup an automated invoice (see Auto-Invoice™) or create an invoice template, which allows you to post batch invoices. You choose which method suits you best. You also have the option of automatically sending your invoices via email.

- Ad hoc – through Family Ledger
- Mass Invoicing – must first setup invoice template
- Auto-Invoice™ - must first define weekly, monthly cycle, or by previous week's attendance (by hours attended)

Automate - setup invoice templates

Build as many invoice templates as needed per Adult Ledger

Once defined, invoice templates show up on the Mass Invoicing Screen

Child Name	Account	Memo	Invoice Amt
Anita Brown	Tuition	Weekly Breakfast Mon-Fri	34.5

Automate - setup Auto-Invoices

Auto-invoices™ are true time savers. Set the file up once and let the system post, create and email PDF invoices to parents as often as you choose (weekly, monthly, etc.)

Once the master file is defined, auto invoices are completed by the Alpha Cares system on weekly or monthly billing intervals. You can also define the billing based on the number of hours.

Auto-Invoice Setup

Ledger Name:
Brown, Felicia
123 Goodwill Street
Houston TX 78782
Mother

Auto-invoice setup for each child

Anita Brown Correy Brown Justin Brown

Add Invoice

Add Invoice

Create invoice for either child-related or non-child related item.

Child-related Non-child related

Child-related

* Child's Name: Sandra Foreman

* Date: 02/02/2013

* Trans Code: 4010 Tuition

Auto Fill: Monthly Infant...Amount:\$550

* Memo: Monthly Infant

250 characters

* Invoice Amt: 550

E.g. 150.75

Add Child Invoice **Cancel**

1. Invoice can be child or non-child related
2. One invoice per child allows easier reporting of revenues
3. Customizable Transaction codes allows income statement reporting based on codes
4. Easily create your own service rate plans. It makes it even more convenient each month during billing

5

Easily Connect with Parents

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.

Keeping You Current



Parenting



Food



Nutrition

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, food and parenting. Parents receive these as email newsletters with your child care center as the sender.

Automated Parent Communications

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.

[Back to Inbox](#) Archive Report spam Delete Move to Labels More actions

Exciting Fall Semester Activities Inbox | X

★ **Agape Children Learning Center** to me [show details](#) 12:18 PM (2 minutes ago) [Reply](#)

Agape Children Learning Center
Exciting Fall Semester Activities

Hello Joshua Goospar,

Scheduled events for Fall 2010:

One: Picture Taking Day on Thurs Oct 14, 2010

- Dress up in a Fall Theme
- Cost is: \$15 per child

Two: Houston Zoo Outing on Wed Oct 27, 2010

- Bring extra change of clothing
- Cost is: \$30 per child
- includes lunch and transportation
- don't forget to sign parental consent form

Have a wonderfully blessed day!

Weather Forecast for Zip: 77469



Current Conditions:
Fair, 77 F

Forecast:
Fri - Sunny. High: 86 Low: 52
Sat - Sunny. High: 87 Low: 55
Sun - Partly Cloudy. High: 86 Low: 58
Mon - Mostly Sunny. High: 85 Low: 61
Tue - Partly Cloudy. High: 85 Low: 61

[Full Forecast at Yahoo! Weather](#)
(provided by [The Weather Channel](#))

Dawson Bradley
Agape Children Learning Center
10003 Whatcome Blvd, Suite A
Quigley VA 77450
carthur3306@gmail.com This message is from Agape Children Learning Center. We treat your personal information with utmost caution. No personal data is shared with or sold to outside parties. To report abuse related to this communication, please contact us at our email address.

powered by  Alpha Cares® Connections™

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Dashboard at a glance – keys to Working Smarter

From your dashboard, you can easily view your accounts with outstanding balances. With one click, you can see the ledger details as well.

You can also see from your dashboard which children have upcoming immunizations.

Never miss another little one's birthday. The dashboard provides information on any upcoming birthdays with 14 days.

The screenshot shows a dashboard interface with three main sections: Family Accounts, Children Records, and Upcoming Birthdays. A 'Dashboard' button is at the top left. The 'Family Accounts' section includes a note about the calculation date (May-30-2013) and a list of accounts with outstanding balances. The 'Children Records' section lists immunizations due in the next 30 days for Jasmine Adams and Jayden Fincher. The 'Upcoming Birthdays' section lists Justin Brown and Susan Fincher with their current ages and upcoming birthday dates.

Family Accounts

Note: Current balances calculated year-to-date as of today: **May-30-2013**. Forward dated invoices, payments or credit notes are not included in this computation.

Account: Brown - Brown, Felicia - has outstanding balance of: \$180.00
Account: Fincher - Fincher, Mary - has outstanding balance of: \$138.00
Account: Gilden - Gilden, James - has outstanding balance of: \$120.00

Children Records

Children immunizations due in the next 30 days:

Jasmine Adams	06-07-2013	HepB, 2of3
	06-14-2013	Bring medical records
Jayden Fincher	06-07-2013	Hep A

Upcoming Birthdays in the next 14 days:

Justin Brown is now: 10 yrs, has birthday on: Tue 06-04-2013
Susan Fincher is now: 4 yrs, has birthday on: Sat 06-08-2013

Part Two:

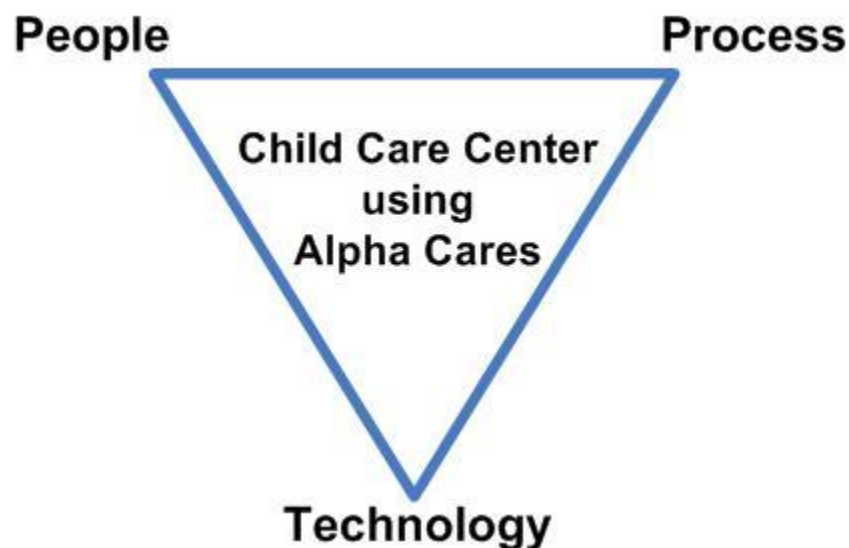


Planning a successful Alpha Cares implementation

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People, Process and Technology

The Essence of Good Business



Simply investing in new software isn't enough to provide instant productivity. The technology is great, but until you're able to harness the power, you often miss out on some of the great features – and ultimately miss out on your investment. To unlock productivity and success, it's advisable to consider these three aspects of business: people, process and tools (technology).

People

Following a **typical role/activity**:

- Administrator - Attendance and Immunizations
- Accounting
- Marketing, Parent Communications

Who "owns" the process? Who is involved? What is their role? How do you keep everyone on the same page and pulling in the same direction?

Process

This is where you define and describe the chain of actions that will result in the successful conclusion of the activity. Define the steps that motivate employees to get their jobs completed with accuracy, within realistic timeframes and without compromising quality work.

For example, here is a process step description of Attendance Tracking:

- Consider placing an Attendance Display Station on a rolling-cart near your lobby area or near your designated drop-off entrance.
- If utilizing Barcode ID "Time –clock" method - have all IDs printed and in a convenient binder so that if parents forget their IDs; a quick check in your binder allows them complete the check in process in a seamless manner.

Technology

Now that you've defined the process for your parents, introducing the technology allows for a consistent and productive transition. This is where Alpha Cares shines and our tried and true technology has been perfected to meet the needs of any child care provider.

Quick Tip:

Ensure you have the proper tools in place to support the needs of your organization, including printers and internet enabled computers.

Covering these bases is just one more step toward success.

Note: We're really excited about Alpha Cares University . We'll be making our announcement soon – this is a great way to incorporate the technology and business models into your organization.

8

Rolling Out Alpha Cares – think Internet!



Create a Plan



Set up your Alpha Cares Stations



Common mistakes to avoid

Create a Plan

It doesn't matter if your center has 30 or 300 children, a successful roll-out of any software system starts with a plan. We recommend you chart out a plan of action that at least incorporates these simple elements:

About 4 weeks out

- Perform a dry-run with a select group (say all staff members, or all of your 3 year-old class, etc.)
- Select a subset of functionality to implement ("Attendance" only or "Accounts" only or "Parent Communications" only)
- Identify simple goals for improvement (smoother check-in process, or more accurate and timely accounts receivables)
- Preferably pick a mid week start date so that you can make adjustments over the weekend

About 2 weeks out

- Tweak your plan and processes – are people aware of goals?
- Communicate your plan and goals to parents, staff and volunteers
- Schedule time for each staff member to participate in appropriate training (online videos , webinars or tutorials)
- Send reminder notifications for your start date to parents

Set up your Alpha Cares Stations

Acquire and Position Computers

- Consider your needs and order hardware
 - check-in computer station
 - Barcode scanners (using Time-clock method)
 - Printers for reports
 - staff access to computers
- Internet connectivity to all computers (Wired preferable to Wireless)

Common mistakes to avoid

- ✓ **Do make sure computer station, barcode scanner and printers are in working order**

Sometimes the most obvious task becomes a point of frustration for parents – ensure that everything is in working order before tasking staff and parents to utilize the system.

- ✓ **Do review your check-in station prior to the start of your center's day**

A simple check to ensure that you are able to connect to the internet should be sufficient.

✓ **Do have a backup plan in case you are unable to access internet**

In the event your internet service is down, have a backup attendance sheet in place for marking attendance. When the internet service is restored, it is easy to perform the “Update Attendance” function to keep records accurate.

✓ **Do not send parents an invoice email twice**

Some directors have inadvertently set up Auto-Invoice™ as well as placing the same parent on a Mass Invoicing schedule. Proper training can eliminate this potential problem.

9

Five keys to ensuring Success!



It changes the job people do. Most of us are creatures of habit. We don't like our routines changed or even our jobs redefined. When a company begins to incorporate new technology or other new methods of doing business, it can result in resistance among employees, despite the fact that it makes their lives easier.

Key 1: Ensure People understand why the change is made - get their buy-in whenever possible.



People are unclear who owns various parts of the application. When no one is explicitly responsible for the adoption of individual processes, or if there's no one who can provide guidance, implementation becomes overwhelming, confusing and it can result in even more resistance.

Key 2: Assign keepers of all key modules. This is your expert / specialist "go-to" person for that module or process.



There's no clear way to measure success. As the old adage goes, *you can't manage what you don't measure*. How can a project succeed if success can't be defined?

Key 3: Define success in measurable terms. Ensure the objectives are clear to your team: We're going to eliminate confusion in the mornings. We're going to streamline billing practices. We're going to ensure the children in our care aren't being exposed to illnesses because a booster shot was overlooked.



There's no communicated change management or internal marketing.

It's crucial for leaders to keep everyone up to date on any new software or upgrades that are going to be implemented. Provide insight into why the changes are coming, when they're coming (and when you expected the transition to be complete) and how it will make their jobs easier. If people don't know about a tool's implementation from the start, how can they get excited about it and then ultimately adopt it?

Key 4: Slogan, mantra (or jingle?) Conduct a distinct internal marketing campaign so people know it's not business as usual.



There aren't enough incentives for employees to change behaviors.

People look for **benefits** in changing their established ways of doing things. Incentives don't have to be monetary, but they need to be tangible, such as a process that works better than the previous one, being easier to use, more efficient, reliable, etc.

Key 5: Even if you're handing out Godiva chocolate bars - celebrate and mark the milestones. Provide incentives for change. (not just because the "boss said so...")