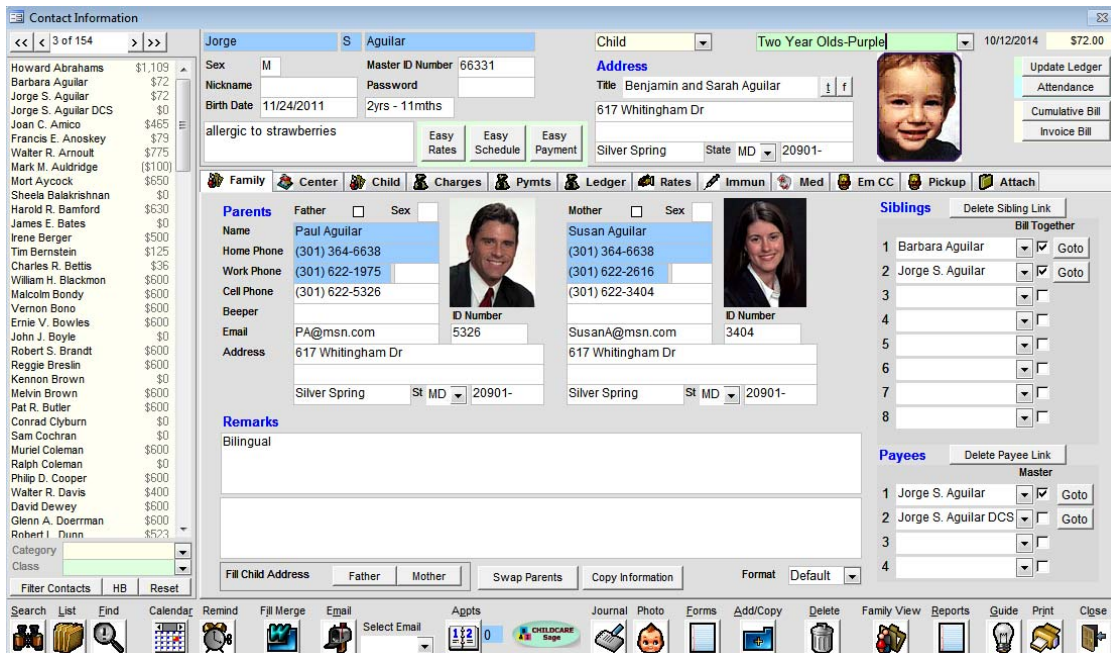




# ChildCare Sage User's Guide (Childcare and Preschool Management System) Version 17.3



The Childcare Sage Manual explains how the Childcare Sage works conceptually and also points out all of the functions and button actions in the program. This user's guide explains in more detail a number of tasks in the Childcare Sage. The order of the tasks are based on how you would begin using the Childcare Sage.

If you can't find the answer to your questions in this Guide, or in the Manuals, please check our website, call us, or email us.

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## General List of Steps to Start Using the Childcare Sage

The Quick Start Guide uses the easy setup and entry screens in the ChildCare Sage to quickly setup the system, and enter children and staff. These screens are limited to common setups and situations. Please review the ChildCare Sage manuals, guides, and tutorial videos to learn the full capabilities of the system.

- 1) double click the ChildCare Sage icon from your Windows desktop
- 2) select the version you purchased when asked by hitting the version number (1-5) and then press Enter or click OK
- 3) click the Start button, then fill in the Easy Setup screens. You can change all of the selections you made at any time by clicking on the Setup Menu, then clicking on Screen Choices. You can also reopen the Easy Setup screens by click Initial Setup from the Setup Menu.
- 4) to enter children, click Easy Enroll from the Main Menu
  - a. you can add up to 6 siblings per family
  - b. enter the child names, birthdates, timeclock id, etc
  - c. enter the child's class (this will copy the rates created in 3) above into that child's record
  - d. enter the parents information along with their timeclock id's
  - e. enter emergency contact and doctor/dentist information (this can also be done at a later date)
  - f. click Enroll
- 5) to enter staff, click All Records from the Main Menu
  - a. to add a staff member, **always** click Add/Copy (bottom center)
  - b. on the Add Contact screen, click Add Staff from the selector at the top, then enter the staff persons name, and class (if applicable)
  - c. finally click Add at the bottom
  - d. continue entering the staff member with their birthdate, address, phone numbers, etc
  - e. use the Easy Schedule to enter the staff's schedule
  - f. if you plan to use the timeclock, fill in the staff's master Id number below their last name (we recommend using the last 4 digits of their cell phone number)
  - g. fill in the Billing Start Date (when you want the system to start tracking the account) at the top left of the **Rates** tab
  - h. fill in the staff's Certifications, Medical History, and Emergency Card (this can also be done at a later date)
- 6) enter staff wages by clicking Easy Wages

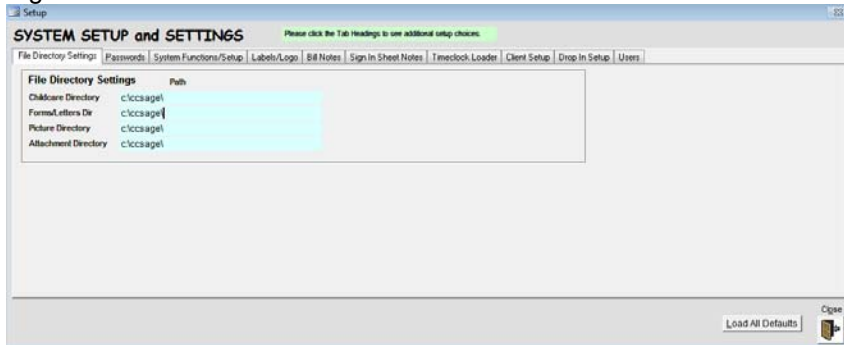
Repeat steps 4) - 6) to enter all of the children/staff at your center.

- 7) once all the children are entered, you can start to bill the accounts by clicking Child Billing Menu from the Main Menu, then Easy Charge
  - a. from the bottom left, select the period you want to charge (day/week/month)
  - b. select a date in the period you want to charge
  - c. click Calculate Charges
  - d. click Post (the default password is: post )

## Setting Up Childcare Sage Options

### System Settings:

Figure 1:



To open the system setup screen, click Setup Menu from the Main Menu and then click System Setup.

The first tab in the Setup screen lets you setup the location (paths) of the Childcare Sage system.

The following table points out system functions that may not work if the directory settings are incorrect:

(in the following tables Directory is abbreviated to dir)

Directory Label	Path To	Problems if directory is invalid or program is not installed
Forms/Letters dir	*.doc, *.rtf	Can't open form letters or forms
Picture dir	.jpg/.bmp	photos will not appear
Attachments dir	.pdf/.doc/.xls	attachments won't open

### Setting Up Drop Box Lists

Most choices for drop boxes in the Childcare Sage (entry boxes that let you pick from a list of items when you click the down arrow on the right side of an entry box) are setup on the Screen Choices screen (opened from the Setup Menu.) Whenever possible, select a value from a drop box instead of entering your own value. If what you want to enter is not in the list, go to this screen and add it to the desired list.

### Screen Choices.

Figure 2:

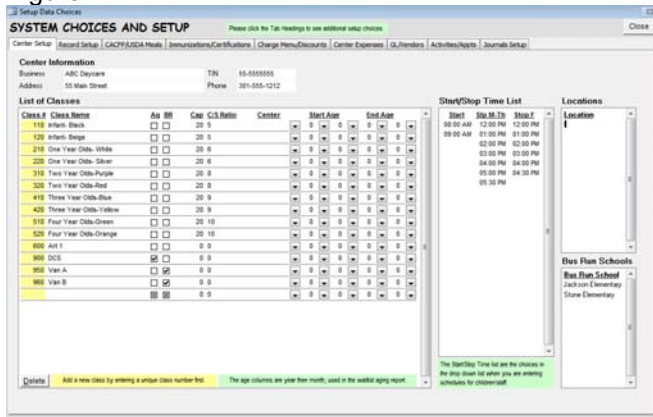


Figure 2a:



The Start/Stop Times appear when you enter the scheduled attendance for children and staff.

Instead of typing in the time, you can enter most choices in this box and then select them when entering the scheduled attendance.

You should setup classes and assign children to them even if you don't have classes. For example, you can setup class #1 and call it "ABC Daycare". You would then assign all of the children into that class.

## Setting Up Class Rates

The initial setup in the childcare sage lets you enter basic rates for the classes at your center, and adds those rates to the Schedule of Charges (global rate list.) You can add more rates (part time rates, annual registration, late pickup, stay and play, special classes (karate, gymnastics) etc,) on the Schedule of Charges Setup screen (opened from the Setup Menu.)

Schedule of Charges

Figure 3:

Off	Rate Title	Charge Label	Start Date	End Date	Fixed
<input type="checkbox"/>	Drop In Care	Drop In Childcare Charge			<input type="checkbox"/>
<input type="checkbox"/>	Gymnastics 04/01/14-05/30/14	Childcare Charge	03/30/2014	05/31/2014	<input type="checkbox"/>
<input type="checkbox"/>	Late Pickup	Late Pickup Charge			<input type="checkbox"/>
<input type="checkbox"/>	Rate 2	Childcare Charge			<input type="checkbox"/>
<input type="checkbox"/>	Rate 3	Annual Registration Fee			<input type="checkbox"/>
<input type="checkbox"/>	Infant- Black	Infant- Black			<input type="checkbox"/>
<input type="checkbox"/>	One Year Olds- Silver	Childcare			<input type="checkbox"/>
<input type="checkbox"/>	Three Year Olds- Blue	Childcare			<input type="checkbox"/>

Add Easy Rate: opens the Easy Rates screen to add a new rate (figure 3a)

Add Rate: opens the full Rate Editor to add a new rate (figure 3b)

Exp: opens the full Rate Editor with the selected rate

Del: deletes the current rate

Off- turns rate off (rate will not be charged anywhere in the system)

Fixed- is this a fixed rate (charged regardless of attendance) or an attendance based rate?

Add Easy Rate: Figure 3a:

**EASY RATES**

Rate Title: Rate 9

Type:  Child Care  Late Pickup  Annual Charge

Charge Every:  Hour  Day  Week  2 Weeks  Month

Charge Label: Childcare Charge

Start Date: [ ] [ ] [ ] [ ] [ ] [ ]

End Date: [ ] [ ] [ ] [ ] [ ] [ ]

Amount: [ ] [ ] [ ] [ ] [ ] [ ]

Buttons: Save, Close

This screen lets you add the most common childcare rates to child accounts. Simply fill in the screen top to bottom with the type of rate, how often you want to charge it, what you want the charge to say on the bills and statements, when you want to start charging it, when you want to end charging it, and how much you want to charge.

Edit Rate: Figure 3b:

**Edit Rate**

Rate Title: Late Pickup

Charge Label: Late Pickup Charge

Start & End Date: [ ] [ ] [ ] [ ] [ ] [ ]

Billing Period: Day

Apply Rates For:  All Hours  Hours Entered  Hours Not Entered  Shifts

**Weekly Rates**

Weekly Rate	1 Day	5 Days	9 Days
\$0.00	\$0.00	\$0.00	\$0.00

**Daily Rates**

Daily Rate	Sunday	Thursday
\$0.00	\$0.00	\$0.00

**Hourly Rates**

Hourly Rate: \$60.00

Minimum Hourly Minutes: 0

Apply Minimum Hourly Minutes: Always

**Rate Schedule**

Day	Shift 1	Rate	Shift 2	Rate
Sun	<input type="checkbox"/>		<input type="checkbox"/>	
Mon	<input checked="" type="checkbox"/>	06:05 PM	<input type="checkbox"/>	
Tue	<input checked="" type="checkbox"/>	06:05 PM	<input type="checkbox"/>	
Wed	<input checked="" type="checkbox"/>	06:05 PM	<input type="checkbox"/>	
Thu	<input checked="" type="checkbox"/>	06:05 PM	<input type="checkbox"/>	
Fri	<input checked="" type="checkbox"/>	06:05 PM	<input type="checkbox"/>	
Sat	<input type="checkbox"/>		<input type="checkbox"/>	

Buttons: Check Rate, Close

Once these rates are set up, you can add them into any account in the Schedule of Charges area at the bottom right of the Rates tab for each child.

The green class column to the left of each rate is the class/room that each rate is assigned to. If you use the easy enroll screen to enroll families and select a class for each child, all of the rates for that class will be automatically selected for that child. The Schedule of Charges don't require a start/end date. Please see the Rates section in childcare sage manual for step by step rate setup instructions and sample rates.

## Setting Up Class Schedules

You can add basic schedules for each class at your center into the Chart of Schedules (global schedules list.) You can add as many schedules as you like including part time schedules, bus run schedules, etc. Global schedules are added on the Schedule of Charges Setup screen (opened from the Setup Menu.)

Chart of Schedules (batch schedules)

Figure 4:

**CHART OF SCHEDULES**

Off	Schedule Name	Start Date	End Date
<input type="checkbox"/>	One Year Olds- White		
<input type="checkbox"/>	One Year Olds- Silver	04/01/2014	05/31/2014
<input type="checkbox"/>	Three Year Olds-Blue		one year old

Add Schedule: opens the Edit Schedule box to add a new schedule

Exp: opens the current schedule in the Edit Schedule box

Del: deletes the current schedule

Edit Schedule

Figure 4a:

**Edit Schedule**

Class: One Year Olds- White

Name: One Year Olds- White

Session 1: 08:00 AM - 02:00 PM

Session 2: 08:00 AM - 05:00 PM

Start: [ ] [ ] [ ] [ ] [ ] [ ]

End: [ ] [ ] [ ] [ ] [ ] [ ]

Buttons: Check Schedule, Copy Schedule from Other Schedules, Copy Schedule from Rate Hours, Close

Click the Copy button again to fill the schedule after you select it from the pop-up schedule selector.

Please enter schedules for different classes separately with start and end dates.

Once these schedules are set up, you can add the schedules into any account in the Chart of Schedules area at the bottom right of the contact's Center tab.

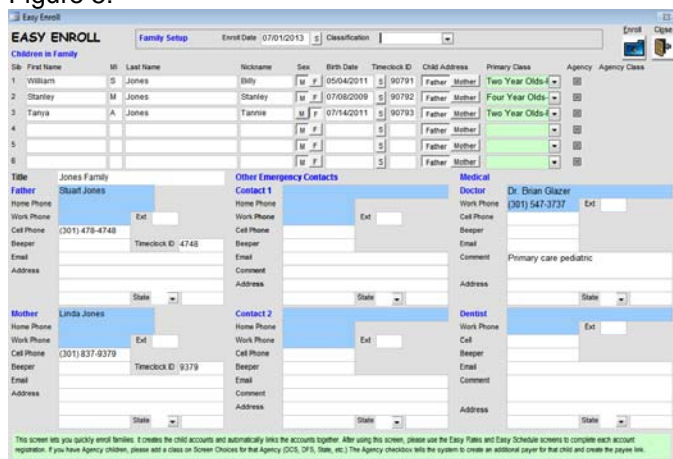
The green class column to the left of each schedule is the class/room that each schedule is assigned to. If you use the easy enroll screen to enroll families and select a class for each child, all of the schedules for that class will be automatically selected for that child. The Chart of Schedules don't require a start/end date.

## Working With Contacts

### Enrolling Children using the Easy Enroll Screen:

To add children to the program, click Easy Enroll from the main menu. On this screen, you enter 1 family at a time with up to 6 siblings. You can also enter parent and doctor information, if needed. For each sibling, you enter their birthdate and their class. Once you click Enroll, the system will automatically create the accounts, link the siblings together, and assign rates based on your predefined room rates (see the previous section in this manual.) To enter new families, close this screen and come back into it.

Figure 5:



To enroll children, you must enter at least the following:

- 1) child's first and last name
- 2) child's birthdate
- 3) child's primary class (if applicable)

If you want to use the ChildCare Sage Timeclock or optional fingerprint scanner, please enter the Timeclock ID for the children, parents, and pickup persons.

### Adding A Contact To The System (children, staff, visitors, etc)

Figure 6: (To open the contacts screen, click All Records from the Main Menu.)



To add a new contact to the system, click **Add/Copy** from the menu at the bottom of the Contact Information Screen (figure 6). Select which type of record you want to add, then fill in the name, class, etc. Click **Add** to create and open the new record. Once the new record opens, you can enter additional information.

### Adding a Sibling

There are 2 ways to enter sibling records:

- 1) enter siblings in the Easy Enroll screen, or
- 2) add a sibling to an existing child.

To add a sibling to an existing child, click **Add/Copy** on the existing child's contact screen. On the Add Contact screen, select **Add Sibling of Current Child**. You can select which information you want to copy from the current child in the copy option checkboxes at the bottom left. After you click **Add**, the new sibling is automatically linked to the current child.

### Deleting A Contact From The System

To delete the currently displayed contact from the system, click **Delete** on the Contact Information Screen (figure 6). Note that deleting a contact is irreversible and deletes all charges, expenses, payments, timesheets, immunizations, appointments, journals, and rates for that contact.

### Entering Extra Charges

The Childcare Sage lets you add extra charges to each account such as registration fees, field trips, etc, or give credits to the account if the center is closed, for free days, or to prorate childcare charges. (Some centers give free days if all payments over the course of the year are made on time, etc.)

### Child Timesheet

Figure 7:



Figure 6a:

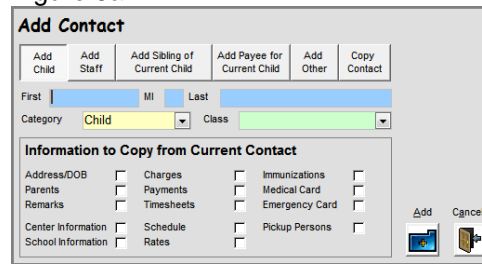
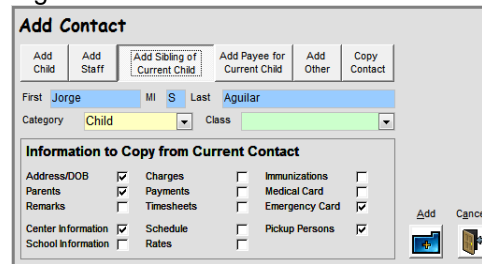
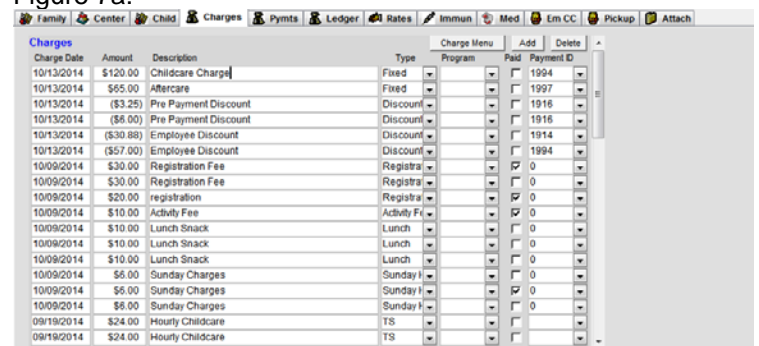


Figure 6b:



### Charges tab

Figure 7a:



Extra charges or credits can be added to 1 account at a time, to a class, or to a list of accounts.

### Adding charges or credits to 1 account

There are 4 ways that you can add an extra charge or credit to an account. From the specific contact record:

- 1) click the Charges tab,
  - a) click Add at the top of the tab, or go to the first empty row, then enter the charge, or
  - b) click Charge Menu at the top of the tab and select a charge
- 2) click Attendance at the top right,
  - a) enter the charge into an empty row in the Charges area at the top right of the Timesheet screen, or
  - b) click a date on the calendar, click Charge Menu in the timelog area on the right side, select a charge

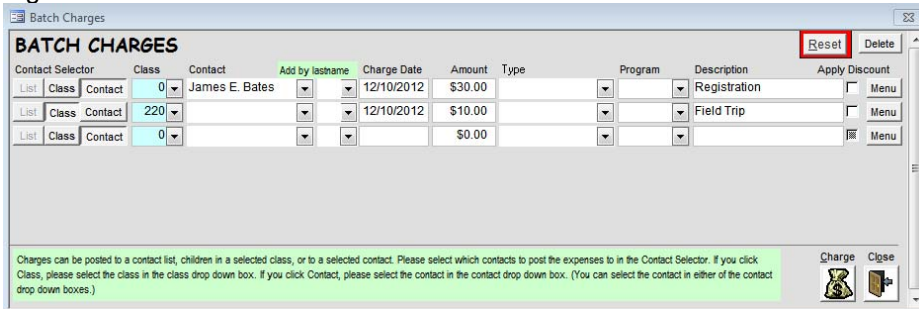
To enter an extra charge, make sure the charge date is filled in, enter the amount, select the charge type (optional), and then enter a description for the charge.

To enter a credit, follow the same steps in the preceding paragraph, except put a minus sign, - , before the amount. The system will always display credits in parentheses “(\$25.00)”.

Adding charges or credits to a class or list

To add extra charges or credits to a class or list of accounts, click Child Billing Menu, then Batch Expenses from the main menu.

Figure 8:



Charges on this screen are entered the same way as in the Expenses area, except that you can select which accounts to charge the expense to in the contact selector:

List: Charge the expense to a list of contacts. To learn how to select a list, see **Using the Find Contacts screen to Create a List** below

Class: Charge the expense to a specific class. This only charges the children in the class and skips the staff.

Contact: Charge the expense to a specific contact. This is that same as entering the expense on the Timesheet screen, except that you can enter a list of expenses and charge them at once, versus going into each account.

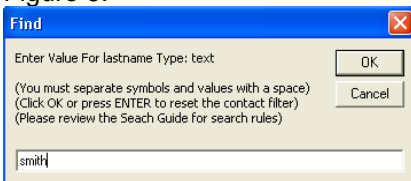
Once you have entered all of the expenses to charge, click Charge at the bottom right (the charge password is “post”).

**Going to a Specific Child or Staff Member**

You can go to a specific contact without scrolling by simply clicking their name from the list on the left side of the contact screen. If the name is not on the list, click Reset at the bottom left of the list, and then select the name. You can also do a quick search by using the Find Box search from the Contact Information screen. The find box is opened by clicking on any data entry box and then clicking FIND at the bottom left.

The Find Box can only search in 1 piece of information (ex: last name) . The Find Contacts screen can search across multiple pieces of information (ex: last name and birth date).

Figure 9:



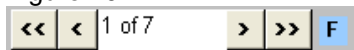
**Search Examples:**

To find George Smith, click in last name, click on FIND and then type Smith into the pop up box.

If the system finds only one contact with the last name Smith, the system goes to that contact without filtering the records. If more than one contact is found with the last name Smith, the contact information screen is filtered with the result. (You can determine if the contact information screen is showing a filtered contact list by looking for a blue F next the record counter at the top left of the screen, see Figure 10. In this case, the filter is: last name = smith)



Figure 10:



To turn off the filter, click Find and then click Ok or press Enter on your keyboard with entering any value to search for.

**Using the Find Contacts screen to Create a List or Search Multiple Fields**

Figure 11:



The Find Contacts screen can be opened from the Contact Information screen by clicking the Search button. You can enter values in any of the white boxes on the Find Contact screen. If you fill in more than one white box, the combination of values in the white boxes is searched for.

**Search Examples:**

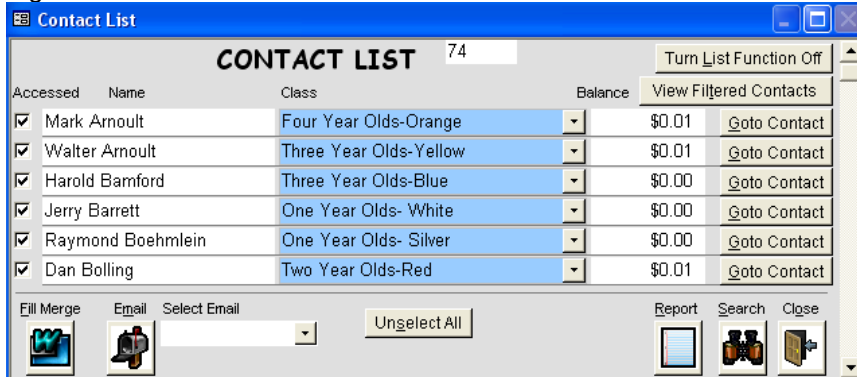
To find all children who owe a balance, select child from category and enter > 0 in the Bill Owed box.

After you enter search criteria, click Search.

If the search criteria returns only one contact, that contact is displayed on the Contact Information screen. If more than one contact is found, the contacts are listed alphabetically on the Contact List screen (figure 12).

**Selecting A Contact Group**

Figure 12:



If you want to select a group of contacts for a batch function, report, email, or mail merge, start by entering search criteria into the Find Contacts Screen. If your criteria finds more than 1 contact, the Contact List screen appears. The next step is to turn on the list function by clicking the Turn List Function On button at the top right. Click YES to replace the search criteria. Once the list function is on, there will be an empty checkbox to the left of each contact. To select all of the contacts listed for the new group, click the Select All button, or individually check the desired contacts.

By checking the desired contacts, you are creating a list. You can use this list anywhere that you see a Last/List/All selector by clicking List. The selector is used in batch functions, reports and labels, and you can also use this list by clicking the Fill Merge and Email buttons on the Contact List screen.

### Performing a Mail Merge with a Group

Before the mail merge feature can be used, you must enter the filename and path for the desired mail merge files. The demo merge file is pre-entered into the system.

When you click Fill Merge, a Mail Merge Files List appears displaying the available mail merge files that can be run from the program. Simply click OPEN next to the desired file.

To finish the mail merge, click the Merge button in the center top area of Microsoft Word. (For Word XP, there is an icon for Merge.)

### Adding New Mail Merge Files

The Childcare Sage can fill in form letters created in Microsoft Word. The following contact information is automatically filled in on the form letter for the contacts that you select:

Title, or if title is empty, (First Name + MI + Last Name)

Address Line 1

Address Line 2

City, State, Zip and

Next appointment date and time

We include a demo form letter that is setup to fill in the contact information. To create other form letters, simply copy the demo letter as many times as you want, and edit the copy to read whatever you would like.

To copy the demo, do the following:

- a) Click the My Computer Icon on your Windows Desktop (Figure 13a)
- b) Click on C: or Local Disk C: (Figure 13b)
- c) Click on the ccsagemailmerge folder (Figure 13c)
- d) Right click on the mailmergedemo file (Figure 13d)
- e) Select Copy
- f) Right click on any blank area and select Paste (Figure 13e)

Figure 13a



Figure 13b



Figure 13c

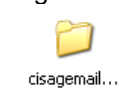


Figure 13d

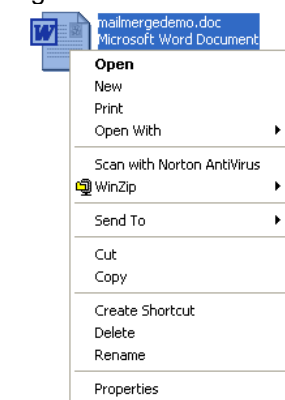


Figure 13e



A New File called "Copy of mailmergedemo" will be created (Figure 13f.) You should now rename the new file by:

- a) Right click on the new file
  - b) Select Rename (Figure 13g)
  - c) Rename the file to any meaningful name (keep in mind that you cannot have **spaces** or **quotes** in the name)
- Press Enter

Figure 13f

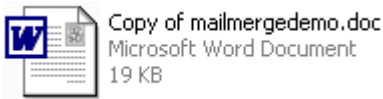


Figure 13g

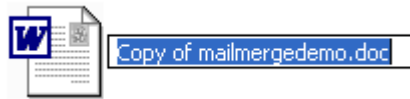


Figure 13h



After the new file has been renamed, you can now edit it to read whatever you would like by:

- a) Double click the file to open it in Microsoft Word
- b) Once Word opens, change the file to read whatever you would like (Figure 13h)
- c) Keep in mind that the text surrounded by << >> is the area for the contact information in the form letter
- d) Once you are done, click File then Save
- e) Exit Microsoft Word

After you have copied, renamed, and edited the file, you must tell Childcare Sage that the file exists so that you will be able to automatically open it in the mail merge/form letter function.

To add the file to the Childcare Sage, do the following:

- a) Start the Childcare Sage
- b) Click Utilities from the Main Menu
- c) Click Word Merge Files (Figure 13j)
- d) Click Add (Figure 13j)
- e) Type in a meaningful display name for the file (eg. portfolio review)
- f) Select the file from the file dialog box (Figure 13k)
- g) Click Close

Figure 13i

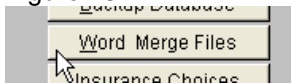


Figure 13j

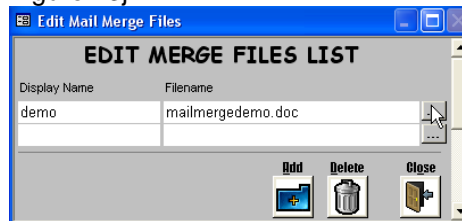


Figure 13k

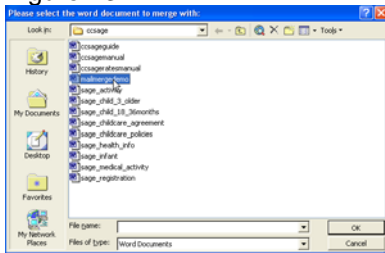
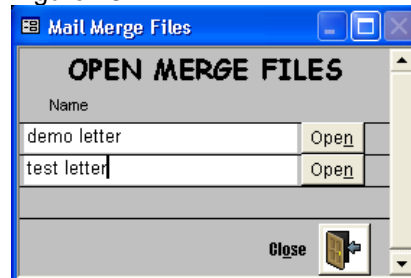


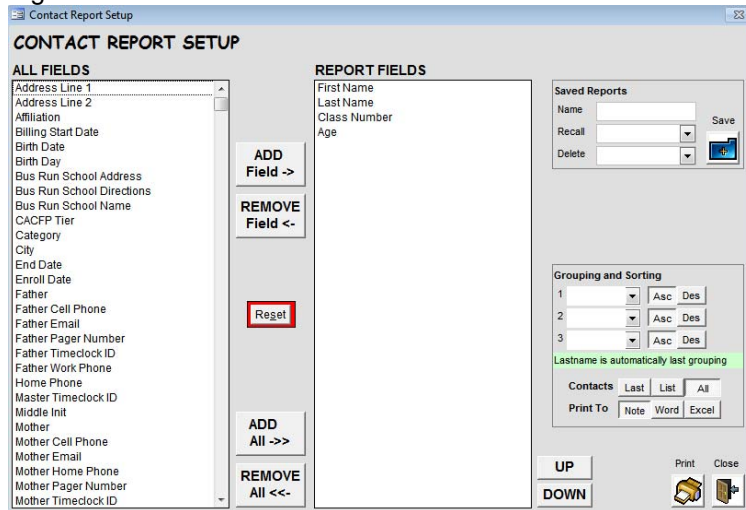
Figure 13l



Now whenever you select contacts and click Fill Merge, the new file will appear in the Open Merge Files box.

## Running A Contact Report

Figure 14:



To run a contact report, open the Report screen from the main menu, then click CONTACT REPORT.

To select which contact fields you want in the report and the order that the fields should appear in, click the field in order on the left side of the screen, then click Add Field. (An example of a contact field is First Name, Last Name, or Category.) All contacts fields in the Report Fields box will appear in the report.

### Report Examples:

To print a report of all the children stored in the system and their name and street address, search and select a group of children (see above), click Last Name, First Name, Address1 and Address2 in that order, and choose Contact List from the selector above the Run button. Next, click the RUN button.

## Creating a Bus Run Report

You can use the Childcare Sage scheduling system to create a weekly bus run sign-in sheet complete with scheduled attendance. Follow these steps:

a) add the Bus/es into the childcare sage

Add each bus as a room on the List of Classes. Check BR (bus run) and enter the capacity of the bus.

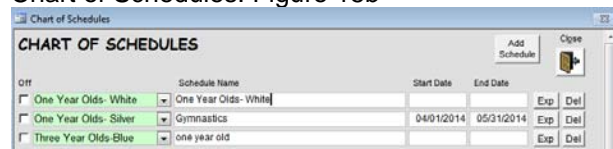
Choices Screen: Figure 15a



b) create global schedules for each Bus

Add each standard bus schedule on the Chart of Schedules (morning, afternoon, etc.) You don't have to create part time or occasional bus schedules on the chart of schedules.

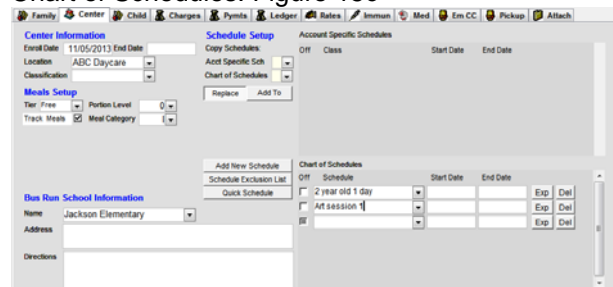
Chart of Schedules: Figure 15b



c) add bus schedules to child accounts

Add standard bus schedule to the Chart of Schedules area at the bottom right of the center tab of each child that rides the bus. If children have part time or occasional bus schedules, you can use the Account Specific Schedules (and Easy Schedule) for each child.

Chart of Schedules: Figure 15c



d) run the Bus Run sign-in sheet:

go to the report menu, then the Sign In Sheets tab, check Show Schedule on the right side, push in week, enter a date for the week you would like in the weekly sign-in sheet area, click Weekly Bus Run.