BASIC CHILD CARE ENROLLMENTS & MANAGEMENT

INITIAL ENROLLMENT

If registering more than one child, process in same transaction to ensure family receives Sibling Rate Reduction.

1. Open the **Customers** module
2. Search for and select the child to be registered
3. Check for required membership (if applicable)
4. Go to the **Actions** tab on the Customer Account
5. Under **New Transactions**, click **New Receipt**
6. Under **FlexReg**, select **Enroll/Modify Enrollment**
7. Search for and select the appropriate Child Care program (Recommended: Search by Site and Program name)
8. If needed , adjust **1st Date** and **Last Date**
9. Click **Submit**
10. Select desired days of care for the appropriate session
    a. Choose appropriate grade for SACC or classroom for ECLC if there is more than one option
11. Click **Show on Calendar**
12. Click **Submit** (*Skip to page 4 if program full and adding to Waiting List)
13. Under the **Automatic Payment Plan** section of the screen, choose the Payer and enter Payer's credit/debit card or checking account information
14. Answer **Custom Questions** (if applicable)
15. Prompt parent/guardian to sign waivers
16. Click **Enroll**
17. Review **Description** to confirm the child has been enrolled in the correct program
18. If registering additional child(ren)
    a. Under **FlexReg**, select **Enroll/Modify Enrollment**
    b. Search for and select the appropriate Child Care program (Recommended: Search by Site and Program name)
    c. If needed , adjust **1st Date** and **Last Date**
    d. Click **Submit**
    e. Click **Submit**
    f. Select child from **Potential Customers** list
    g. Click **Select**

INITIAL ENROLLMENT (Cont.)

h. Select desired days of care for the appropriate session
   i. Choose appropriate grade for SACC or classroom for ECLC if there is more than one option
a. Click **Show on Calendar**
b. Click Submit
c. Under the Automatic Payment Plan section of the screen, choose the Payer and enter Payer's credit/debit card or checking account information
d. Answer Custom Questions (if applicable)
e. Prompt parent/guardian to sign waivers
f. Click Enroll
g. Review Description to confirm the child has been enrolled in the correct program
h. Repeat steps a-o as needed until all children in the family have been registered

19. Click **Pay** and process payment
20. Select parent/guardian as Payer from the **Potential Customers** list
21. Click **Select**
22. Click **$** next to the desired payment method
23. Click **Pay and Finish**
24. Click **Send Email** to send a copy of the receipt to Payer (Inform Payer email may go to Junk/Spam)

If a Payer would like to pay more than the initial installments due, complete this transaction and see page 6.

ADDING A CUSTOMER TO A WAITING LIST

No payment is due up front to be added to a waiting list. Initial payment and automatic payment method information will be taken at the time of enrollment.

1. Complete steps 1-12 on page 2
2. Click **Add to Waiting List**
3. Click **Submit**
4. Answer **Custom Questions** (if applicable)
5. Prompt parent/guardian to sign waivers
6. Click **Enroll**
7. Review **Description** to confirm the child has been enrolled in the correct program
8. Click **Finish**
9. Click **Send Email** to send a copy of the receipt to Payer (Inform Payer email may go to Junk/Spam)

TAKING PAYMENT FOR A FUTURE INSTALLMENT

Families may make manual payments towards their tuition in advance of the scheduled automatic charges. Automatic payments will only process if an installment has not already been paid in full; Installments partially paid will only be charged the remaining balance.

1. Open the **Customers** module
2. Search for and select the child enrolled in the program
3. Go to the **Actions** tab on the Customer Account
4. Under **New Transactions**, click **New Receipt**
5. Under **Account Actions**, select **Pay on Account**
6. In the **Payment** column, enter the amounts to be paid towards the applicable line item(s)
7. Click **Submit**
8. If payments for additional child(ren) need to be made:
    a. Under **Account Action**, select **Pay on Account**
    b. Select the name of the child from the **Potential Customers** list
    c. Click **Select**
    d. In the Payment column, enter the amounts to be paid towards the applicable line item(s)
    e. Click **Submit**
    f. Repeat steps a-e as needed
9. Click **Pay** and process payment
10. Select parent/guardian making the payment as Payer from the **Potential Customers** list
11. Click **Select**
12. Click **$** next to the desired payment method
13. Click **Pay and Finish**
14. Click **Send Email** to send a copy of the receipt to Payer (Inform Payer email may go to Junk/Spam)

UPDATING AUTOMATIC PAYMENT METHOD

If a family needs to update their credit/debit card or checking account information for their draft in person.

1. Open the **Customers** module
2. Search for and select the child enrolled in the program
3. Go to the **Account Balance** tab on the Customer Account
4. Find the name in the **Account Owner** column
5. Search for and select the name of the Account Owner
6. Go to the **Account Balance** tab under the Account Owner's account
7. In the **Automatic Payment** column, click the link for the payment information attached to the payment plan that needs to be updated
8. Enter new information
9. Click **Submit**
10. Click **Done**