

EZCARE ONLINE

Getting Started: Setting up your EZCare Online Database

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Table of Contents





Contents:

<i>How to use this Manual</i>	3
<i>Icons to recognize in this Manual</i>	3
<i>Navigating In EZCare Online</i>	4
<i>The Red Menu Bar</i>	4
<i>Drop Downs</i>	4
<i>Tabs</i>	5
<i>Buttons</i>	5
<i>Links</i>	5
<i>Quick Searches</i>	5
<i>New Window</i>	6
<i>How Information is Organized in EZCare Online</i>	6
BEGIN FILLING IN YOUR DATABASE	7
<i>Editing Drop Down Lists</i>	7
<i>Adding Locations or Changing Existing Location Name</i>	10
<i>Considerations for Multiple Locations within a Single Database</i>	10
<i>Change the Time Zone for your Location</i>	11
<i>Setting/Editing Field Defaults: State, Zip and Area Code</i>	11
<i>Setting a default Tax Rate</i>	11
<i>Creating Hours of Operation and Exceptions</i>	12
<i>Open 24 Hours?</i>	13
<i>How to Keep Track of Attendance</i>	13
<i>Adding Staff</i>	14
<i>Adding Classes</i>	14
<i>Entering Class Information/Field Notes</i>	15
<i>Copying a Single Class</i>	16
<i>Assigning Staff to Classes</i>	17
<i>Creating and Assigning Schedule Templates</i>	17
<i>Adding Families, Students, Billing Contacts</i>	20
<i>Scheduling/Registering Students</i>	21
<i>Changing your Password</i>	22
OTHER CONSIDERATIONS WHEN CONTINUING WITH SETUP	22
TO DO CHECKLIST	22
PRINTABLE GETTING STARTED CHECKLIST:	23

How to use this Manual

This document will walk you through the system setup and configuration step by step. It will discuss customizing drop down fields, setting default values, adding classes, adding families and students and bring you to the point of enrolling students into classes.

Throughout the document you will see 4 Icons: Note, Action, Next Step and Video Help. These are meant to help organize and assist you in your data entry process.

I C O N K E Y	
	Valuable information
	Take Action
	The Next Step
	Video Help

Icons to recognize in this Manual

The following information provides an explanation of the icons used in this document:



The **Note** Icon refers to important considerations and valuable information related to your organization's programming in EZCare Online.



The **Action** Icon refers to your "starting point" on EZCare Online's Red Menu Bar.

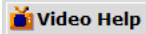


The **Checkmark** Icon indicates the next step in your input order.



The **Video Help** Icon indicates that video help exists for this topic and can be accessed by clicking the Video Help Button within your EZCare Online Database. Video headings separated by forward slashes (/) indicate multiple video titles.

Navigating In EZCare Online



System Overview

Within EZCare Online there are 5 Navigational Tools. They are:

- The Red Menu Bar
- Drop Downs
- Tabs
- Buttons
- Links
- Quick Searches

The Red Menu Bar

Your Starting Point in EZCare Online is the Red Menu Bar. This contains the entire selection of drop down menu options. To select a Menu Option, bring your cursor over the menu name and the list of options is presented. Highlight the option of choice.

The Menu Options found on the Red Menu bar are:



Families: Used for Quick Family Entry, Listing and Searching

Students: Used for Student Skills, Listing and Searching

Classes: Used for all class functionality

Staff: Used for all instructor/staff entry, listing and searching

Transactions: All Financial Transactions in EZCare Online are sourced here

Reports: Reporting Functionality

Tools: Used for Setting up your Organization's Default values

Drop Downs

Drop Downs are indicated by the 'down' arrows circled in the figure below. Clicking on the arrow displays a list of selections to choose from. Almost all of EZCare Online Drop Downs are customizable. You will be taught to tailor your drop downs and add information relevant to your organization.

EZCare Online Getting Started Guide

Location: (Class only available to Students from same Location)

Status: Active (If Active, will be billed during Post Tuition Fees) **Per-Day:** No

Class Name: All Star Team Camp

Tuition Fee: -10

Description: [More...](#)

Session: 75 **Room:**

Category1: **Category2:** **Category3:**



You will be shown how to change these drop downs and add your own criteria.

Tabs

On many screens take note of the Tabs which provide separate screens of information



Buttons

Buttons have Red text and are found on the Family, Student and Class Pages



Links

Links are shown with blue text and an underline. Names can be links as well as commands. Watch for them! They are shortcuts. Any link that is not blue is one that you have clicked on previously.

Primary Contacts									
2 record(s) found. Print Refresh									
Contacts	Type	Home Phone	Work Phone	Cell Phone	Email	Bill	Login	Portal UserID	Last Login
Carolyn Jay	Mother	2153269854				Yes	Yes		
Michael Jay	Father	2153269854	2154723200		mjay@adp.com	No	Yes		

Students									
1 record(s) found. Print Refresh									
First Name	Last Name	Active	Gender	Birth Date	Age	Grade	Enrolled Classes	Wait	
Test	Jay	Y	Female						

Quick Searches

Within EZCare Online there are two quick search windows. One is for Families and Students and the other is for classes. You can use an asterisk * at the beginning of your entry to perform a wild card search of any similar endings. So, at the beginning, you must enter: *ander will give you any name starting with "something" but containing or completing with anders. ie: sanderson, anders, anderson

The Global Search (top-center of screen) also allows you to search contact cell (mobile) phone numbers. You can search on the last 4 digits, 7 digits (no dash) or 8 digits (with dash).



If there is only 1 unique value when using the Family Search window, you will be brought to that family's page. If there are several values a list will be presented.

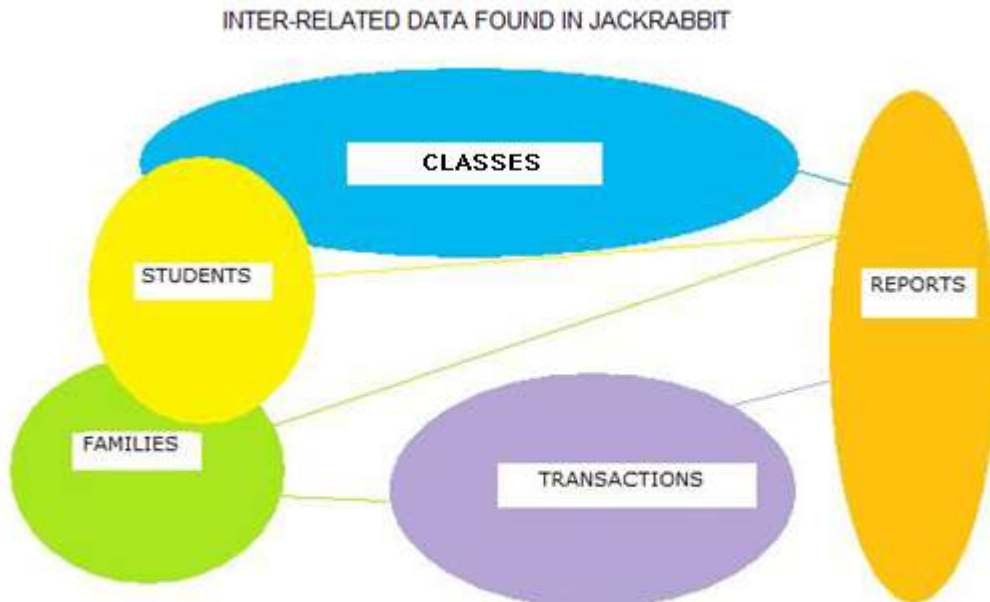
New Window

You have the option of opening a New Window directly from the EZCare Online Database. This would allow you to open a new screen in EZCare Online without disturbing what you are doing.



How Information is Organized in EZCare Online

Below is a basic diagram that shows where the various fields in EZCare Online can be found. The relationship between all these fields shows WHERE you can find information.



From the shapes above, you can see: Families have -> Students who are scheduled in -> Classes which create -> Transactions -> ALL of which can generate -> Reports.

Begin Filling in your Database

Now we will begin the process of entering your information bringing you to the point of enrolling students in classes!



STEP 1: Organizational Settings: drop down Lists, locations and Tax, Time, Hours of Operation

Editing Drop Down Lists

Within EZCare Online there are many areas with drop down list fields. Setting default drop downs creates standard selections that can be used for searching and applying information. New drop down values can be added at any time.



Old drop down values should be kept to allow you to pull historical information. Otherwise, if you remove a selection from a drop down list you can no longer pull information from that selection; you will need to re-add it.



You may not remove the ACTIVE and INACTIVE drop down values from the Family Status drop down list.



Action -> go to TOOLS – EDIT DROP DOWN LISTS

Definition of Drop Down Labels:

Class Category 1 – Class Category is an important organizational tool in EZCare Online. Category 1 is used to organize your revenue and also to organize classes within your database and on your website.



Please see the Main User Guide – Ensuring Accurate Revenue Recording for an in depth discussion of this value.

Your Revenue will be organized with TOTAL REVENUE BY CATEGORY 1. However you want to see your revenue broken down has an impact on the Category 1 values you create. Keep in mind though that values can be used as search criteria in Online Registration also so they need to be a balance between revenue and organization characteristics of your organization.

Class Category 2 - A Sub Category break down can be skill levels, for example: Intermediate, Advanced, Level Gold, etc.

Class Category 3 – A Sub Category breakdown and additional Search Category, example: Days of the Week.

Class Room – The identification of rooms/areas where the classes are held. Single Location examples: Toddler room, 4 year old room, Teen afterschool. Multi-Location Examples: Stockton - Toddler, Philmont – 4 Year Old Room A, Parkside – Pre-K (where Stockton, Philmont and Parkside are other locations)

Class Session – For schools that run year-round / perpetual, session examples are: 2008-2009, Summer, 2009-2010, 2009 Winter Break

For schools who have sessions: 2008 – Winter, 2009 – Spring, 2009 Summer

Class Status – Some settings here are defaults such as Active, Inactive, Future, Terminated. If you have a special class status you can add a definition. (Class Status settings are not commonly changed.)

Contact Types – Who is the Contact Person created for the Family? Contacts are also the Billing Contacts like Mother, Father or Grandparent.

Credit Card Types – Identifies which credit card was used in a transaction, e.g. Visa, Discover or Am Ex. Delete the cards types that you do not accept for payment.

Drop Reason – Why did someone drop the class? Some reasons could be: Too difficult, Sick, Moved or Promoted.

E-Payment Schedule – What payment options are you providing your clients? This refers to what payment schedule they are on such as the 1st of the Month, etc. It is also used to select those assigned to the schedule. Delete the values you do not use so that another user does not select an option that is not offered.

Exception Reasons – These are the reasons why your program will be closed on any given date. Exceptions will be entered into your Hours of Operation (described further in this document) in order for your database to take accurate attendance using the "Generate attendance" feature. Please refer to the main User Guide on Generating Attendance.

Enroll Type – This is the tag placed on the Enrollment History Report, Drop History, Enrollment Detail Report. This can be changed on the Student Page. Examples: Trial, Trial-enrolled, Transfer, Enrolled, Waitlist

Family Source – Known as Family Source – How did you hear about us? How did you hear about us is located on the Web Registration form and the Quick Registration Form. This is used to collect information as to where clients come from.

Reports can be run to determine where people heard of your organization. Example: Newspaper, Brochure, Online, Ad.

On Web Registration it is a REQUIRED field for your clients to fill in.

Family Status – ACTIVE and INACTIVE are two default values that must remain in the drop down list. You may want to add additional values such as Moved, Changed Schools, etc.

ACTIVE and INACTIVE are statuses used by EZCare Online to indicate that a family has students enrolled in classes (ACTIVE) or no students enrolled (INACTIVE). EZCare Online automatically assigns a status of ACTIVE to a family with a student enrolled in a class. You cannot change the ACTIVE status to any other status – if you do, EZCare Online will change it back to ACTIVE. Once a family no longer has students enrolled, EZCare Online automatically changes their status to INACTIVE.

You are allowed to change the status of an INACTIVE Family by selecting another value from the drop down list, **BUT** you cannot change an INACTIVE family to ACTIVE – only EZCare Online can do this. A family remains INACTIVE until they have a student re-enrolled in another class. For additional information on setting up Family Status please refer to the *EZCARE ONLINE USER GUIDE - FAMILY STATUS* section.

Instructor Certification Level – Used to assign a Certification Level to Instructors. Certified Teacher, Early Childhood Diploma, St Johns Ambulance certified etc. This is used only on the Instructors Information page.

Instructor Position – Used to assign Positions, e.g. Lead, Back-Up, Assistant, etc. to Instructors.

Instructor Skills – Used to assign Skill Levels (instruments) to Instructors. This field is located on the Instructors Information Page to show what skills this instructor has, for example you might assign an Instructor's instruments they can teach: Piano, Art, French. These skills are seen at the top of the Daily Class schedule.

Membership Type – Used to separate Families for Billing or Search purposes. This is a filter available on the Post Tuition Fees screen that allows you to bill on certain families at any one time. Examples: Monthly, Yearly, Bi-Monthly, weekly payers.

Payment Method – How did the client pay? Examples: Check, Credit Card, Cash, Gift Certificate.

Skill Level Attained – Used to assign Student skill levels. Examples: Level 1, Level 2, White Belt, Brown Belt.

Transaction Sub Types – Typically Transactions have a TYPE such as Tuition, Registration used to track Payment Revenues. Sub Types can expand on this information and break down the Transaction Type further. A good example is where Transaction Sub Types could be used for merchandise sales, where the Transaction Type = Merchandise and the Sub Type might be = Book Bag.

Another use for Sub Type's is if you post tuition monthly and you want the month to be on the transactions, you can put the months of the year in this field. When you

run the Post Tuition feature you can specify the month. This makes statements easier to follow for customers.

Transaction Types – This defines the Transaction Type for Fees and Payments. Examples: Tuition, Merchandise, Registration. These can also be used for Searching.

Adding Locations or Changing Existing Location Name

This only applies to organizations that want multiple locations set up for Families and Classes. Having Locations allows you to organize classes by location as well as run revenue reporting by location.

If you have a Mobile Program this is a good way to track your various locations. This will separate your class listings and allow you to pull financial reports by location.

Changing an existing Location Code/Name:

When your database is created in EZCare Online a default Location code is created. If you wish to change the default Location code, please send an email through the "Support" button in EZCare Online to request a change.



Action – > go to TOOLS – EDIT LOCATIONS

- Highlight "Tools" on the red menu bar and select "Edit Locations". Click on the "Add Location" button to add a location.
- When you have completed inputting the information, click on the "Save Changes" button near the top of the page and the changes will be saved.

Considerations for Multiple Locations within a Single Database

1. Currently, the Executive Dashboard shows totals of all Locations. A per Location break down is not yet available.
2. Students in a family of Location A CAN enroll in Classes of Location B (this enrollment has to be done from the CLASS record, not the student / family record). Transactions (fee and payments) for this family / class will take on the location of the FAMILY, not the CLASS. Payment and revenue reporting will put this money under the Family's location, NOT the class Location.
3. If you have EZCare Online's e-Commerce Module and a single EZCare Online Database with multiple Locations, EZCare Online can be linked to a single bank account. All Location's ecommerce payments will be linked to the single bank account. If you need ecommerce payments split between multiple bank accounts:

Example: Location A money goes to one account, but your location B money needs to go to a separate account. This cannot be done within a single EZCare Online database. You would need to activate an additional database for the other bank account / Location. (EZCare Online offers a 10% discount on a second database).

Change the Time Zone for your Location

EZCare Online's servers are located on the East Coast in the Eastern US Time Zone. By verifying your time zone you can ensure that all Financial Transactions and enrollment records have the correct date. For example: without this change, clients in California would have to remember that at 9pm their transactions would be stamped with tomorrow's date.



Action – > go to **TOOLS – EDIT SETTINGS**

- Highlight TOOLS on the red menu bar and select "Edit Settings".
- Scroll to the bottom of the summary page and enter in the appropriate time zone and daylight savings information for your location.
- Save Changes.

Setting/Editing Field Defaults: State, Zip and Area Code

You can set EZCare Online to a default City, State, Zip and Area Code. This is a time saving feature when adding new families and students. (To set Your Company Logo, see User Guide -System Admin Tasks section: "Setting up your Logo".)



Action → go to **TOOLS – EDIT SETTINGS – EDIT DEFAULTS/TAX TAB**

- Enter in the appropriate information. Defaults are time saving features that are used when inputting information. They can be overridden during data entry.
- When you have completed inputting the information, click on the "Save Changes" button near the top of the page and the changes will be saved.



The default value of **ACTIVE** for **Family Status** cannot be overridden. It is assigned by EZCare Online when a family has at least one student enrolled in a class. It cannot be changed.

Setting a default Tax Rate

(Set up ONLY if you will charge tax on your services or merchandise.)



Action → go to TOOLS – EDIT DEFAULTS – DEFAULTS TAB

Tax settings are located under Tools → Edit Settings → Edit Defaults/Tax selection.
You will see several fields:

There are two areas where you may want the tax calculated for you as an addition to your cost. If you charge Tax on Fees and Services you need to set up the following:

For Example: Canadian Clients charge GST on Services and Fees.

Services Taxable: set this field = yes if you tax your services (ex: classes).
When set, after you enroll a student in a class, the "Post Enrollment Fees" window will display the Tax field. When running Post Tuition Fees or Post Tuition Fees by Hour (described elsewhere in this guide) you are now able to post taxes on Tuitions or not.

Post Fees Taxable: if this field is = yes, the Tax field on the "Post Fees" window will be calculated automatically. Post Fees is used to post any type of fee, including non-service (goods/products) fees.

Tax Rate: Enter your tax rate (without the %).

Tax Label: This is the tax field name on your Post Fees or Post Enrollment Fees window. For Example: GST, PST

Creating Hours of Operation and Exceptions




Action → go to Tools – Edit Hours of Operation And Exceptions

In order to set up your Hours of **Operation**:


1. From the Main TOOLS menu select the EDIT HOURS OF OPERATION option.
2. Select the Add Hours Button
3. The Add Hours of Operation screen is presented
4. Select a location and enter the IN/OUT hour for each day
5. Save

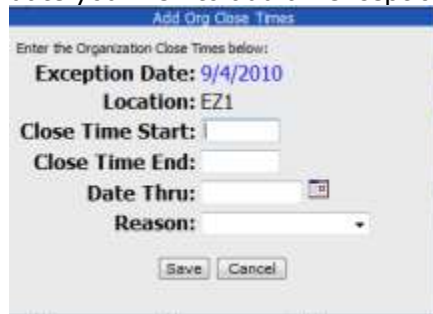
Enter the standard operating hours for each Location for each day of the week your program is open.

In order to set up **Exceptions**:

On the same screen you will see the  icon which is where you enter the Exceptions. Exceptions are the dates and reasons your center will be closed. **If you do not set up Exceptions, students WILL be marked as attending on a day your center is not open.**

If you wish to create exceptions to your schedule such as holidays:

1. From The Main TOOLS menu – select the EDIT HOURS OF OPERATION option
2. Select the  icon in the exceptions Column.
3. You are presented with a current calendar, select the ADD button on the date you wish to add an exception for.



4. Put in a Start Time, End Time or THRU date (for example a week's time), Select a Reason. Save changes.

Both of these items are **very** important to the proper functioning of your database.

Open 24 Hours?

If you are open 24 hours, there is a setting which must be set to Yes.



Action → go to TOOLS – EDIT SETTINGS

Clock Org Name:	Melanie's Daycare
Open 24 Hours?:	Yes ▾

This is the organization name that will appear on the clock-entry screen
(does org operate 24 hours a day?)

How to Keep Track of Attendance

There are 2 options to track Attendance:

1. Time Clock
2. Generate Attendance

The Time Clock is a pinpad into which a parent enters their Personal Identification Number (PIN). The Clock will track each student's check in and out time for each day, along with the PIN of the person doing each.

Generate Attendance is a tool to mark every student as present. The user can then edit the attendance record to adjust for any variances (sick day, early pick up, etc).

A decision will need to be made on which option to use. Please refer to the User Guide for more details on both options.

STEP 2 – ADDING STAFF

Adding Staff



Action → go to STAFF – ADD STAFF

- From the Red Menu Bar select STAFF – ADD STAFF.
- You will be asked to enter the Staff members First and Last Name.
- Complete all information associated with this staff member.
- Save your information.

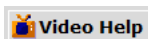


Staff information can be edited later as it does not affect Instructor/Class assignment. As long as your Instructor Names are inputted you can proceed.



The Classes Tab for the Staff will be completed upon assigning the Instructor to a Class later on.

STEP 3 – ADD CLASSES/LESSONS AND ASSIGN INSTRUCTORS/STAFF



Classes/Private Lessons

Adding Classes



Action → go to CLASSES – ADD CLASS

Perhaps the most thought provoking part of setting up EZCare Online is deciding how to name your classes. (Please see the NOTES found at the end of this short section on items you should watch for.)



Look for the icon.

We suggest naming your classes in conjunction with the Category 1, Category 2 and Category 3 fields located on the class page. (See Edit Drop Down Lists section to edit these fields, and see Special Note on Category 1).

You are immediately given the option to enter a class name. It is useful to consider adding the Name, Time, Days and Level when naming your class. This gives both you and your customers the most information when seeing the class name.

(If you are adding Private Lessons, please see the User Guide for Private Lesson provisions).

The class names should be kept under 20 characters and should provide a decent description of what they are and when they meet. The class name can be changed at any time by editing it in the Class Name field on the Class record.

Group Class name examples:

Pre-K MWF 9:30-12:00 or MWF 4's with Lunch Bunch

For Private Classes use instructor, skill, time/day: Sally Smith M 3:00 or SS-Mon-3:00.



EZCare Online currently does not support multiple times for classes. It DOES support Multiple Days – You may consider creating separate classes for each time.



Please limit the length of your class name to under 15 characters and do not use special characters such as * & ! @ or "".



Classes are sorted alphabetically in EZCare Online and searches begin from your starting character.

Entering Class Information/Field Notes

Class Meets on days - check the box(s) of the days the class meets.

Tuition Fee - This is the FEE charged to student(s). So, if you are a monthly payment organization, you would enter the monthly tuition fee.

Class Description - This is the information that both staff and clients see regarding a class. If you have Web Registration, this is what clients see as a description of the class offered. Do not use special characters such as trademark [™] or copyright [©] (for example) as they may not print properly.

Category 1, 2 and 3 - Assign the group this class belongs to. Revenue can be separated by this value. For Example if you want to track revenue by Class Type: Pre K, After school, Mommy and Me. This is also how your revenue will be organized.

Max Size - Maximum number of students allowed in a class. Multi-student (or group) classes have a Max Size > 1 (ex: 8, 12). Private Classes should have a Max Size = 1.

Max Wait - Max number of students allowed on the wait list.

Registration Date - This controls when students can be enrolled in the class. Prevents enrollment from starting too early.

Start/End Date - Important for Visual Class Schedules: Weekly, Daily & Room. If the start date is not present, classes will NOT be visible on the class schedules.

Start/End Times - Important for Visual Class Schedules: Weekly, Daily & Room. If the start & end time is not present, classes will NOT be properly displayed on the class schedules.

!! It is important to enter proper time format examples as shown on the class page in these fields.

Duration - Important for the Instructor Time Report. This duration is used to calculate the number of minutes an instructor is to be credited for teaching this class.

Display on website - If you are using online registration, a class will only display on your website, if this field is set to Yes. For your advanced classes that you may want to only display only on your website set this field to Yes. You would then set "Allow web Registration" field to No.

Allow web registration - If you are using online registration, a parent/student may only enroll in this class, if this option is set to Yes.



In order for the Weekly/Daily/Room class schedules to display properly, the following fields are required: Class Registration date, start/end dates, start/end times.

Copying a Single Class

- Go to the Class record you wish to copy.
- Click on the "Copy Class" button near the top of the page and the system will ask for the new Class Name.

- Enter the new Class Name and click on the "Submit Class" button. A duplicate class with the new class name will be created.



You can create several new classes with this function and then use "Edit All Classes" under Classes Menu to make changes to all the classes on one screen, instead of going into EACH CLASS, making changes, saving – going to the next class, making changes, saving, etc.

Assigning Staff to Classes

Instructors are assigned to Classes from the Class page.

- Go to the Instructor's Tab on the Class Page
- Click the drop down to view your list of Instructors
- Save Change



STEP 4 – CREATING SCHEDULE TEMPLATES

Creating and Assigning Schedule Templates

A Schedule must be created for each student. The Schedule will show which Class the child is attending along with the exact days/times. To make this process most efficient, please create Schedule Templates.

Schedule Templates are a set of your most frequently requested schedules. You can create as many Schedule Templates as necessary. A Location needs to be assigned to each Template



Action → go to Tools – Edit Schedule Templates – Add Template

Enter a description of the Schedule Template for the Template name. Example: Monday – Friday 9am to 5pm, MWF 9am to 1pm, TThr 9am to 5pm.

Each Template can be assigned to Classes as an available schedule option as appropriate. A Public field set to Yes indicates this Template is an available schedule for **all** Active Classes. If Public is set to No, this indicates it is only a schedule option for certain Active Classes.

Enter the Template days/times appropriately for each Schedule option.



Reminder: A Schedule needs to be created for each Class a student will be attending.



If you have only 1 Schedule Template which pertains to **all** of your classes, you only need to create 1 Public template. You will not need to create any other template or assign the template to any classes because you have made it Public.



If you have multiple Locations and a Schedule Template is appropriate for all Locations, leave the LOC field blank. This will make it as an available option for all of your Locations.

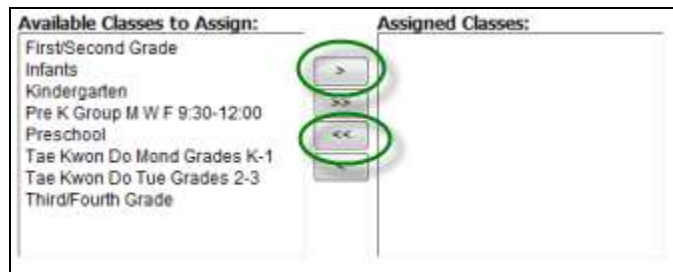
Assign Schedule Templates to Specific Classes

While some Schedule Templates are Public and can be chosen as an option for any Class, some Templates are only appropriate for certain Classes. For these, you should assign the Template to the specific Class.

Click on the blue link for the Template you want to assign to a Class. Once inside, click on the Class the Template is available as an option. To select multiple Classes, hold down the Ctrl Key while highlighting the Classes. Save Changes.



The single arrow will move the highlighted Class to the box the arrow is pointing towards. The double arrow will move all listed Classes to the box the arrows are pointing towards. (see diagram below)



STEP 5 - ADDING IMMUNIZATIONS

If you need to track your Student's Immunization histories, this function will help tremendously. You will be able to quickly enter which Immunizations a student has received and also run reports to see who is due in 30 days or past due.



Action → go to Tools – Edit Immunizations/Req. – Add Immunization/Requirement

Setting Default Immunization Templates

You can create a record of default immunizations that are required and assign a deadline for when the immunizations are due. **As soon as the Immunizations are Saved, these will appear in the Medical tab for each Student.**

1. From the Main TOOLS menu select the EDIT IMMUNIZATIONS option.
2. Select the ADD IMMUNIZATION/REQUIREMENT
3. On The screen presented select if the Category of immunization (medically required or standard immunization), Name, Description and Due Dates
4. Save your changes



Enter the # of months since birth that the immunization is due in the Date fields. Example if an immunization is due at 6 months and 18 months, then set Date1 = 6 and Date2 = 18



To delete and Immunization record – select the red X on the line of the immunization and save changes.



STEP 6 - ADDING FAMILIES, STUDENTS AND BILLING CONTACTS

All Family information contains 3 things: Basic Family Information, Student information and Contact Information.

EZCare Online has a Quick Registration form which allows you to enter ALL Family through ONE page. Any information entered into a family can be edited or added through either the FAMILIES MENU or the FAMILY PAGE.



Registering a New Student/Families/Students Videos



A family can be added with a status of ACTIVE. However, EZCare Online will change this to INACTIVE if the student is not enrolled in a class. Please see the EZCare Online User Guide: Understand Family and Student Status.

Adding Families, Students, Billing Contacts



ACTION – > go to FAMILIES – QUICK REGISTRATION

- Go to Families Menu and select the Quick Registration Page.
- Enter all Family and Student Information and submit.
- To view this Family information find the family in the Quick Search field (Yellow Box at the top of the EZCare Online screen) and familiarize yourself with the tabs.



If you are enrolling a new family, you have the ability to email them a confirmation of the enrollment at the bottom of the Quick Registration form.



Trial classes are classes that have the Trial field set to YES on the Quick Registration Form. Student classes that have TRIAL selected will appear on the Class Roster as a Trial. The drop date should be set to the day AFTER the actual date that the student trials the class. See the User Guide for further instructions on Trial Students.



ACTION – > go to FAMILIES – SEARCH, ADD STUDENT, ADD CONTACT, CHANGE BILLING CONTACT OR EDIT INFORMATION

To modify Family Information

- Use the Quick Search field (top of EZCare Online Screen – Yellow Box) to enter name of family, click GO.
- Click on the Family Name Link.
- Click on ADD a STUDENT BUTTON, ADD a CONTACT BUTTON, make modifications and save.
- Click on the Contact name to be assigned BILLING CONTACT = YES.



STEP 7 – SCHEDULING STUDENTS INTO CLASSES



Registering a New Student Video

Scheduling/Registering Students

There are SEVERAL ways to add students into classes. EZCare Online has added links and options where they are the most useful and convenient for you.

Quickest Enrollment:



From the Quick Search Field – enter a family name when you find the student you are looking for, click the “schedule” link.

Enrolling from the Family Page:



Action – > Go to the Family Page – click the schedule link next to the student’s name.

Enrolling from the Student’s Page:



Action – > Click the Add Schedule button in the top right hand corner of the student’s page.

Adding from the Class Page



Action – > Go to the Class Page – click on the Schedule Students button.



STEP 8 – MANAGE USERS WHO LOG INTO EZCARE ONLINE

When you purchase EZCare Online, you are allowed a certain number of users that can login at the same time. We call this limit the Concurrent User Limit. You can have as many USER ID’s setup in EZCare Online as you like, but only your maximum concurrent user limit can log in all at the same time. If a user tries to login beyond the maximum limit, they are told they cannot login due to this limit being reached and are given the names of who is currently logged into EZCare Online at this time. If you wish Additional Concurrent Users – contact support and check our pricing page.



ACTION – > go to TOOLS – MANAGE USERS AND PERMISSIONS – ADD USER BUTTON.

- Click the ADD USER Button.

- Enter New User Id, First and Last Name, Email and password. Please note an email address is very important if users want to contact support through the support button.



A default password of 12345 prompts the User to change their password.



You can also restrict EDIT USER PERMISSIONS which allows you to restrict access to certain information on a per user basis.

Changing your Password

We suggest you change your password from the original one given to you by EZCare Online.

- Highlight 'Tools' on the red menu bar. Select "Change Password".
- When you have completed entering your new password click "Save Changes".

Other Considerations When Continuing with Setup

If you wish to set up e-commerce with EZCare Online immediately, please read the e-commerce User Guide. There is important information there on processing and lead time needed for set up.

Please also use the EZCare Online User Guide as a resource to setting up your database. We recommend printing off the User Guide's to help you in the setup.

To Do Checklist

The last page of the Getting Started Guide has a Checklist of the minimum items you need to complete in order to get your EZCare database started. Feel free to print and check off these items as you complete them. This allows you to keep track of your progress as you learn!

This is the end of the Getting Starting: Preliminary User Guide, for additional Information on EZCare Online, please refer to the videos and User Guide (look for the User Guide Button) which are both accessed from within the EZCare Online Software. They are located in the top right hand corner of your screen when you log in to EZCare Online

[If you have comments or suggestions about this User Guide, please email support@jackrabbittech.com](mailto:support@jackrabbittech.com)

Don't forget your checklist below!

Printable Getting Started Checklist:

Edit Drop Down List

Use The list provided in this guide to Add necessary drop down values

Edit Locations and system defaults

Locations, Time Zone, Field Defaults, Tax

Edit Hours of Operation

Create Hours of Operation for each Location

Enter Exceptions into the Hours of Operation for each Location

Add Staff

Add Classes and assign staff

Add Classes, Copy additional Classes, Assign Staff to Classes

Schedule Templates

Create Schedule Templates

Assign Templates to appropriate Classes

Create Immunizations/Requirements

Add Families, Students and Billing Contacts

Use Quick Registration to add Family/Student information. (Schedules will also be created now)

Manage Users that will use your database

Add Users, Change Permissions, Learn how to Change Password

Your EZCare Online system is well on its way! Make sure to reference the other User Guides to get the best of EZCare Online!

