



Childcare Sage User's Guide (Childcare and Preschool Management System) Version 11.7



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 will explain in more detail a number of tasks in the Childcare Sage. The order of the tasks will be based on how you would first begin using Childcare Sage out of the box.

If you can't find the answer to your questions in this Guide, or in the Manuals, please check the Childcare Sage Forums on 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 entry screens in the ChildCare Sage to quickly enter and setup 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) install Microsoft Access Runtime if Access 2002/XP or newer is not installed on your computer
- 2) install the Childcare Sage from the system CD or from your account at www.childcaresage.com
- 3) double click the ChildCare Sage icon from your Windows desktop
- 4) select the version you purchased when asked by hitting the version number (1-5) and then press Enter or click OK

- 5) click the Start button, then click on Setup Menu, then click on Screen Choices
 - a. on the Center Setup tab fill in the child care center's name, address, phone number and tax id number (TIN), then fill in your center's classes or rooms (each class must have a number, if you don't have classes, simply enter your center name as a class)
 - b. on the Categories/Foods tab fill in the CACFP reimbursement chart and the times when the different meals are served at your center (if you don't participate in the CACFP program and still want to track meals consumed, only fill-in the meal times)
 - c. on the Immunization/Certification/Medical tab, change the immunization area so that the immunizations required by your state are listed. In the second column after the immunization name, select the number of shots that the immunization requires
 - d. click Close (bottom right of the screen)

- 6) click on Setup Menu, then click Batch Class Setup
 - a. select a class from the top left and then enter the rates and schedules for that class
 - b. click Save
 - c. setup additional classes by repeating 6a) and 6b) above

- 7) 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 and schedules created in 6) 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 and click Enroll

- 8) to enter staff, click All Records from the Main Menu
 - a. to add a staff member, **always** click Add (bottom center)
 - b. start entering staff by filling in their first name and last name at the top left (after last name is filled in, the screen will flicker (cycle) as the contacts are resorted alphabetically)
 - c. change the Category selector in yellow at the top of the screen to Staff
 - d. continue entering the staff member with their birthdate, address, phone numbers, etc
 - e. select the Staff's primary class from the green selector at the top of the screen
 - f. use the Easy Schedule to enter the staff's schedule
 - g. 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 social security number or phone number)
 - h. fill in the Billing Start Date (when you want the system to start tracking the account) at the top left of the **Rates** tab
 - i. fill in the staff's Certifications, Medical History, and Emergency Card (this can also be done at a later date)

- 9) enter staff wages by clicking Easy Wages

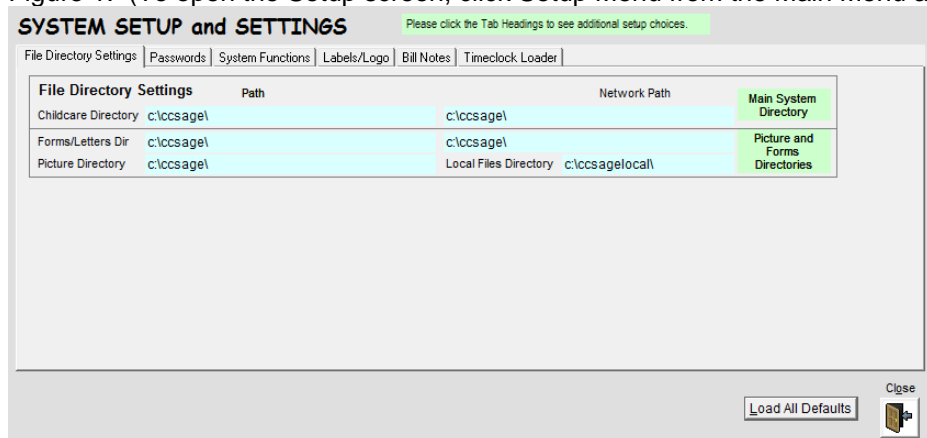
Repeat steps 7) - 9) to enter all of the children/staff at your center.

- 10) 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 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)

<u>Directory Label</u>	<u>Path To</u>	<u>Problems if directory is invalid or program is not installed</u>
Childcare dir	ccsage.mdb	backup program will not run
Forms/Letters dir	*.doc, *.rtf	can't open form letters or forms
Picture dir	.jpg/.bmp	photos will not appear

If you will be running the Childcare Sage on a network, please fill in the directories on the right side of the Setup Screen labeled Network Path:

<u>Directory Label</u>	<u>Path To</u>	<u>Problems if directory is invalid</u>
Childcare dir	network ccsage.mdb	the backup program will not work from a networked computer
Forms/Letters dir	network *.doc, *.rtf	network users will not be able to open central form letters or forms
Local Files dir	local photo,manuals	network will slow down

All networked computers running the Childcare Sage should have the same version of Microsoft Access.

Selecting International Currency

The Childcare Sage can display currency in most formats that Microsoft Windows supports. To change the currency format, check the Format International Currency box in the System Functions Tab on the System Setup screen and then go into Regional and Language Options in the Microsoft Windows Control Panel.

From the Regional and Language Options, you can select whichever currency you would like to use. (\$ and Euro can be chosen with English (United States) selected in Format and Standards.) For currencies other than \$ and Euro, you must first change the region. Once you change the region, you can then select the currency format in that region, by clicking Customize, then the Currency tab.

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 the entry box figure 2) are setup on the Screen Choices screen.

Figure 2:

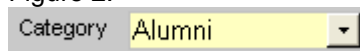
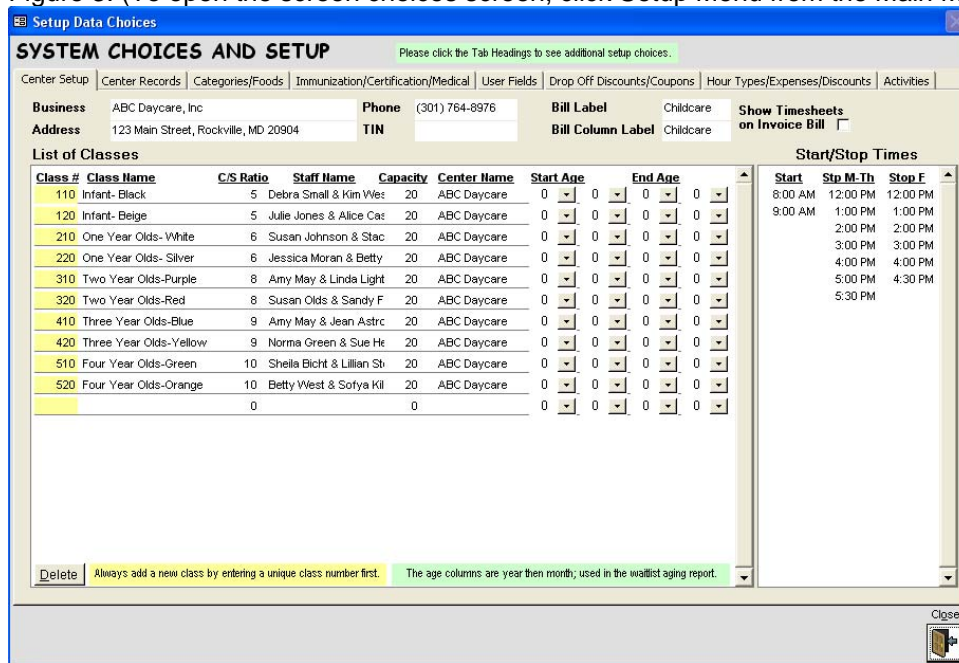


Figure 3: (To open the screen choices screen, click Setup Menu from the Main Menu and then click Screen Choices.)



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.

The Bill Label and Bill Column Label controls the labels on the Invoice bill. For example, preschools want the bill to say "Preschool Bill" instead of "Childcare Bill".

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.

All of the other tabs and columns setup drop box lists. Whenever possible, as you are entering child and staff data, select a value from the 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.

Setting Up Class Rates and Schedules

To enter rates and schedules for classes, click Setup Menu from the Main Menu, then Batch Class Setup. The Easy Batch Class Rates & Schedules screen lets you quickly setup rates and schedules for classes, including late pickup and annual registration charges. The screen is divided into 2 halves, left side is class rates, and right side is class schedule.

Figure 4:

Start by selecting a class (top left in yellow.) Next fill in the billing rate areas.

a) Childcare area: (enter or select the following)

- 1) Charge Every: what period you charge for (hour, day, week, month)
- 2) Charge Label: what the parents will see on their bill for childcare charges
- 3) Start Date: when the rate goes into affect
- 4) End Date: leave blank
- 5) Amount: charge rate

b) Late Pickup area: (check the checkbox if you charge for late pickup)(enter or select the following)

- 1) Charge Label: what the parents will see on their bill for late pickup charges
- 2) Start Date: when the rate goes into affect (since the rate is based on actual attendance, simply enter the start of the year, or when you will start using the Childcare Sage to track parent charges)
- 3) End Date: leave blank
- 4) Center Closes At: when you start charging for late pickups
- 5) Amount: late pickup hourly rate

c) Annual Registration area: (check the checkbox if you charge an annual registration fee)(enter or select the following)

- 1) Charge Label: what the parents will see on their bill for the annual registration charge
- 2) Start Date: when the rate goes into affect (for basic annual registration, set 9/1/xxxx, etc)
- 3) End Date: leave blank
- 4) Amount: annual registration fee

Click Save to save the rates for the selected Room. To setup a different room, change the class selector (top left) and make any adjustments, then click Save.

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:

The screenshot shows the 'EASY ENROLL' interface. At the top, there's a title bar and a header section with instructions. Below that is a table for 'Children in Family' with 6 rows. The first row is filled with data: SIB 1, First Name Billy, Last Name James, Birth Date 05/14/2009, Sex M, Primary Class Drop In. The other rows are empty. Below the table are several form sections: 'Father' (Shari James), 'Mother' (Linda James), 'Other Emergency Contacts' (Brian James, Sally James), and 'Medical' (Dr. Brian Glaser). Each section includes fields for Home Phone, Work Phone, Cell Phone, Beeper, Email, and Address.

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 and parents.

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

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

The screenshot shows the 'Contact Information' screen. On the left is a list of contacts with names and amounts. The main area displays the profile for 'Sam Jacobs', including his name, address (608 Warfield Dr, Rockville, MD), birth date (10/26/2006), and a photo. Below the profile is the 'Family' section, which includes 'Parents' (Paul Jacobs and Susan Jacobs) and 'Siblings' (Sam S. Jacobs and John R. Jacobs). There are also sections for 'Remarks' and 'Payees'.

To add a new contact to the system, click Add from the menu at the bottom of the Contact Information Screen (figure 4). The contact will automatically default to category Child and the cursor will go to the first name box. To move between the boxes, use the mouse or press Tab. After you enter the lastname, the screen will blink as the system refreshes and reorders the contacts in alphabetical order. You cannot enter medical, pickup person, or emergency information until you enter in a last name. If you are entering staff or others, please change the category after you enter their last name.

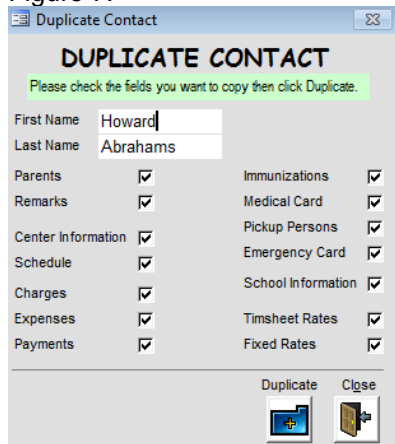
Deleting A Contact From The System

To delete the currently displayed contact from the system, click Delete on the Contact Information Screen (figure 4). Note that deleting a contact is irreversible and deletes all charges, expenses, payments, timesheets, immunizations, appointments, journals, and rates for that contact.

Adding a Sibling

The best way to enter siblings is when you are initially entering the family through the Easy Enroll screen. You can also add siblings later on by copying an existing sibling’s record. To copy the record, open the child you want to copy and click Copy. Next, select which information you want to copy from the Duplicate screen (figure 5) and then click Duplicate. You will now be taken to the copied contact’s record and can finish filling in the sibling’s information.

Figure 7:



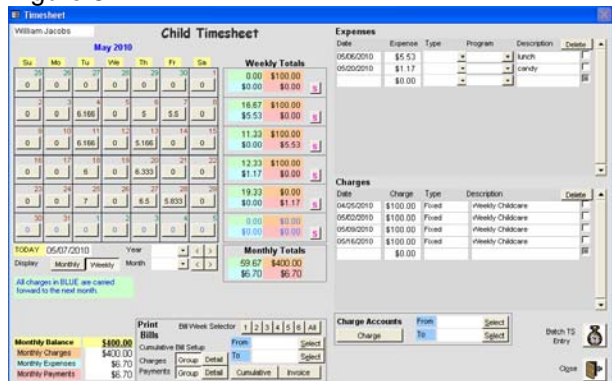
To link the siblings for billing or timeclock purposes, go to the youngest sibling (this is also the sibling whose title field will be used on the bills to refer to the family, “Jacobs Family”, “Stan and Mary Jacobs”, etc.) click Add New Sibling Link, then add the remaining siblings into the link starting in slot 2 (right of figure 4). The child who’s account you clicked Add New Sibling Link from should always be in the first row of the sibling link.

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.)

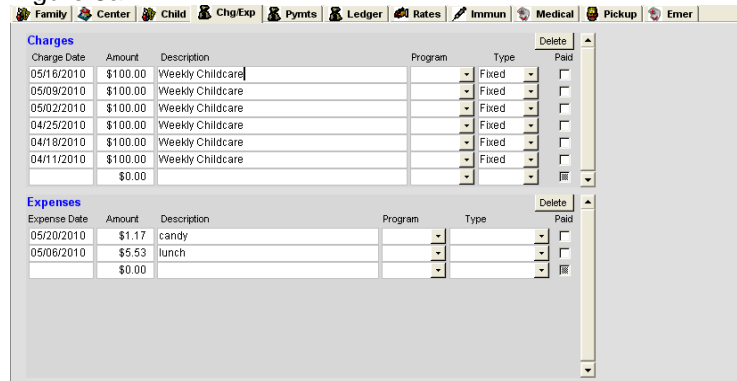
Child Timesheet

Figure 8:



Charges/Expenses tab

Figure 8a:



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

To add an extra charge or credit to an account, go to the specific contact record:

- 1) click the Chg/Exp tab, and go into the Expenses area,
- 2) click Attendance at the top right, there is an Expenses area at the top right of the Timesheet screen.

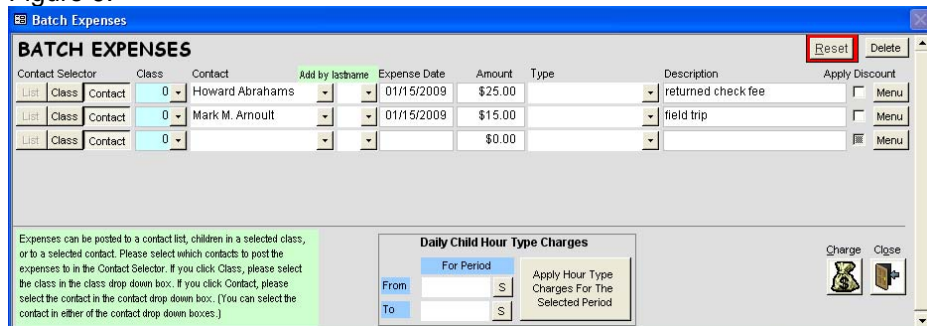
To enter an extra charge, type the date of the charge into the first empty row in the date column. Next, enter the amount, select the expense/charge type (optional), and then enter a description for the charge.

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 9:



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.

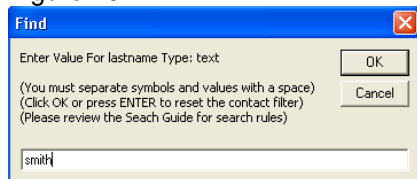
Once you have entered all of the expenses to charge, click Charge at the bottom right (the charge password is “post”).

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 10:



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 9. In this case, the filter is: last name = smith)

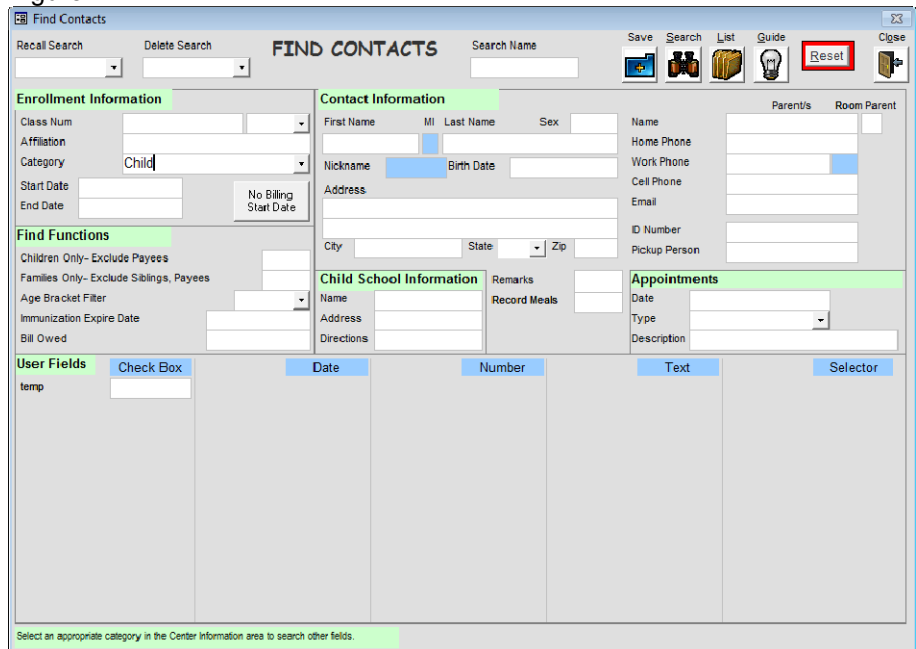
Figure 11:



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 12:



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:

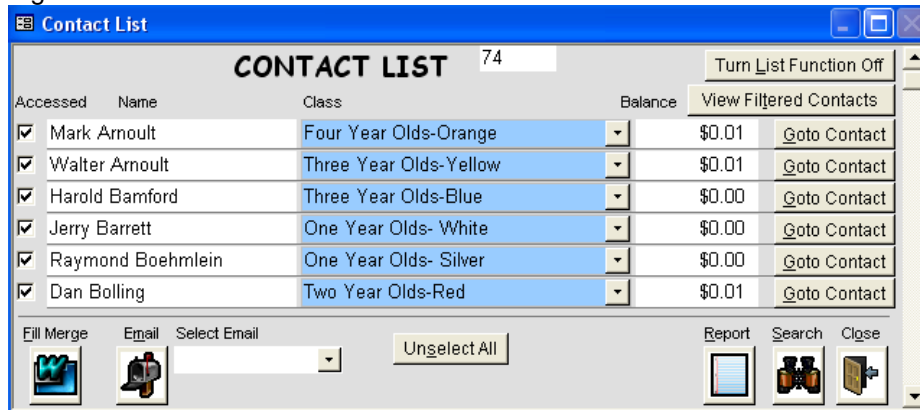
To find all children who owe a balance, select child from category and enter > 0 in the Bill Owed box.

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 11).

Selecting A Contact Group

Figure 13:



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:

Click the My Computer Icon on your Windows Desktop (Figure 14)

Click on C: or Local Disk C: (Figure 15)

Click on the ccsagemailmerge folder (Figure 16)

Right click on the mailmergedemo file (Figure 17)

Select Copy

Right click on any blank area and select Paste (Figure 18)

Figure 14



Figure 15



Figure 16

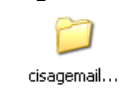


Figure 17

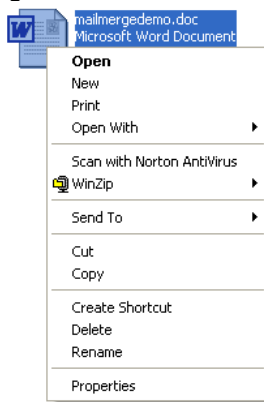
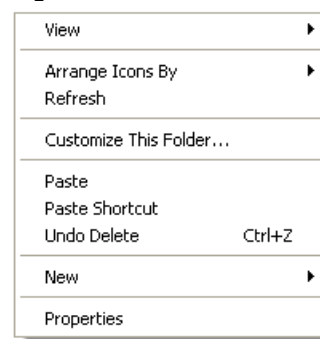


Figure 18

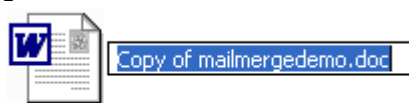


A New File called "Copy of mailmergedemo" will be created (Figure 19.) You should now rename the new file by:
 Right click on the new file
 Select Rename (Figure 17)
 Rename the file to any meaningful name (keep in mind that you cannot have **spaces** or **quotes** in the name) (Figure 20)
 Press Enter

Figure 19

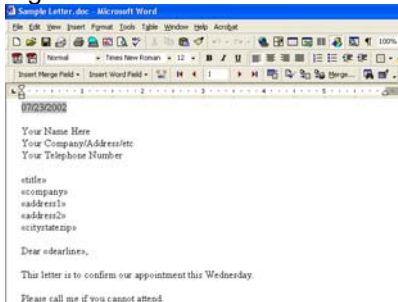


Figure 20



After the new file has been renamed, you can now edit it to read whatever you would like by:
 Double click the file to open it in Microsoft Word
 Once Word opens, change the file to read whatever you would like (Figure 21)
 Keep in mind that the text surrounded by << >> is the area for the contact information in the form letter
 Once you are done, click File then Save
 Exit Microsoft Word

Figure 21



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:
 Start the Childcare Sage
 Click Utilities from the Main Menu
 Click Word Merge Files (Figure 22)
 Click Add (Figure 23)
 Type in a meaningful display name for the file (eg. portfolio review)
 Select the file from the file dialog box (Figure 24)
 Click Close

Figure 22

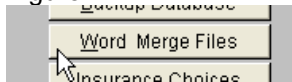


Figure 23

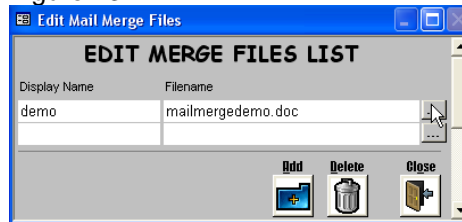


Figure 24

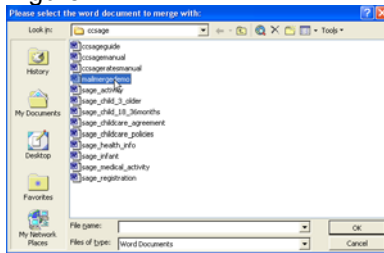
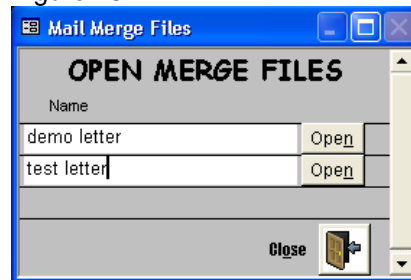


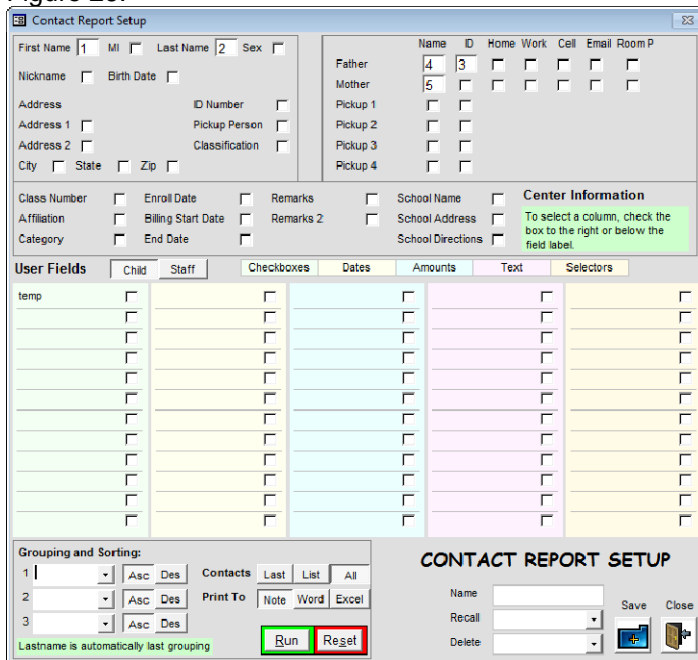
Figure 25



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 26:



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 reports and the order that the fields should appear in, click the checkboxes to the right of the contact fields. (An example of a contact field is First Name, Last Name, or Category.) When a checkbox is clicked, is replaced by a box with a number. The number specifies the order that the field will appear in the report. All contacts fields that have a number 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.