The EZChildTrack Software

Parent Portal Help Guide

GTSoft Inc.

Prepared by:

GTSoft Inc.
One Sugar Creek Center Blvd., Suite #410
Sugar Land, TX 77478

CONTENTS

1. PARENT PORTAL - INTRODUCTION

The EZChildTrack software's Parent Portal increases parent involvement by enabling them to carry out a number of operations including program registration and online payment without any intervention. Additionally, the Parent Portal also provides links to information that is most relevant to a parent.

The Parent Portal interface helps parents to:

1. Register a child for a Program.

2. View enrollment details.

3. Make payments.

4. View statement reports.

5. Sign up for auto pay.

6. Keep a tab of upcoming events and important notifications.

7. Download required forms.

This help guide aims at helping you (the user) in getting a thorough understanding of the Parent Portal interface so that you can carry out all your desired tasks as quickly and efficiently as possible.

---

2. LOGGING ON FOR THE FIRST TIME

In case you are logging into the EZChildTrack software's parent portal for the first time, these steps will help you out in accessing and understanding the system in a better manner.

2.1. Logging In

You can access the EZChildTrack system using the URL and the login info provided to you.

Enter your email ID and password and click on the **Sign In** button appearing in the "Returning Customers Sign In" section. To open a new account, use the 'click here' link shown in the "New Customers Open Account" section.

2.2. Signing Up

In case you have an account number but no password, you can sign up for parent portal using the 'click here' link shown in the "Existing Customers Sign Up" section. This will take you to a screen as follows:

Enter your account number, registered email address and click on **Sign Up** button. An email message will be sent to you along with your login credentials.

2.3. *Forgot Password*

In case you have forgotten your password, use the "click here" link shown in the "Returning Customers Sign in" section of the parent portal login screen. This will take you to a screen as follows where you will be able to give your registered email address and account number. Click on the **Reset Password** button and a temporary password will be sent to your registered email address.

Forgot Password

Please enter your account number and the email address used for registration. Click on the 'Sign up' button and your login information will be emailed to you.
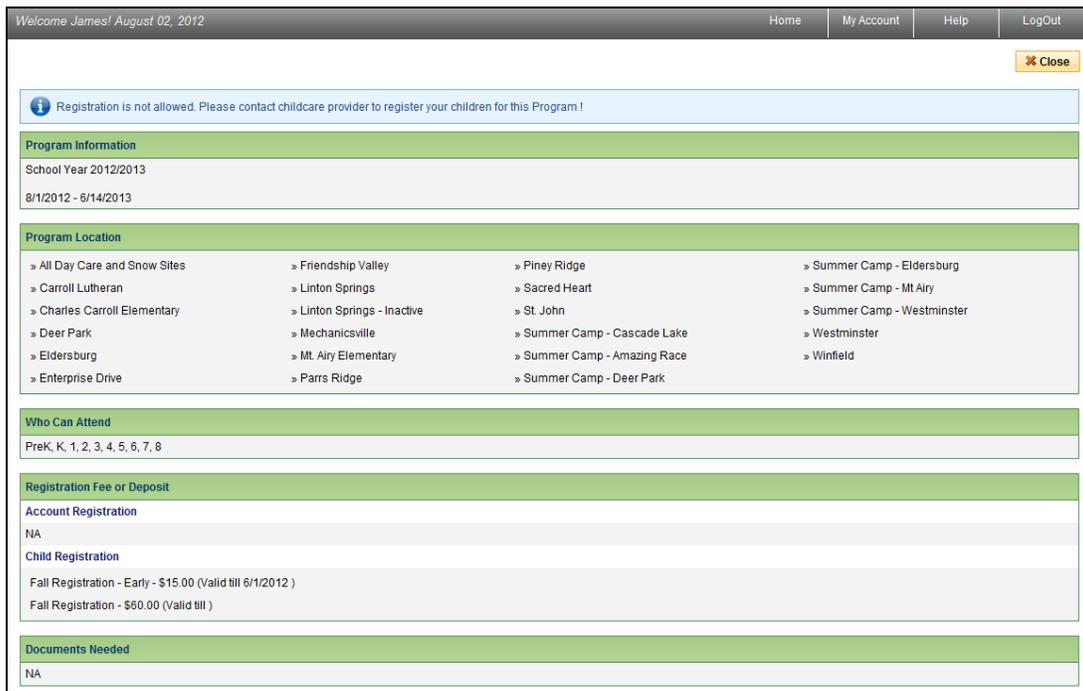
Account Number: [   ]

Registered Email Address: [   ]

[Reset Password] [Cancel]

3. VIEWING PROGRAM INFORMATION & ENROLLMENT DETAILS

Once you have logged in, you can view program information. To view a Program's details, go to the Home page and click on the 🟢 icon shown next to the Program name. This will give you an overview of information linked to this Program like the locations where this Program is conducted, supported grade levels, registration fee details, documents required at the time of registration etc.

In case registration is not allowed for any particular Program via the Parent Portal, you will need to contact the childcare provider directly to register your child(ren) for the Program.

In the "Registration" section of Home page, you will also see a [View Enrollment] button using which you can view enrollment details of registered child(ren).
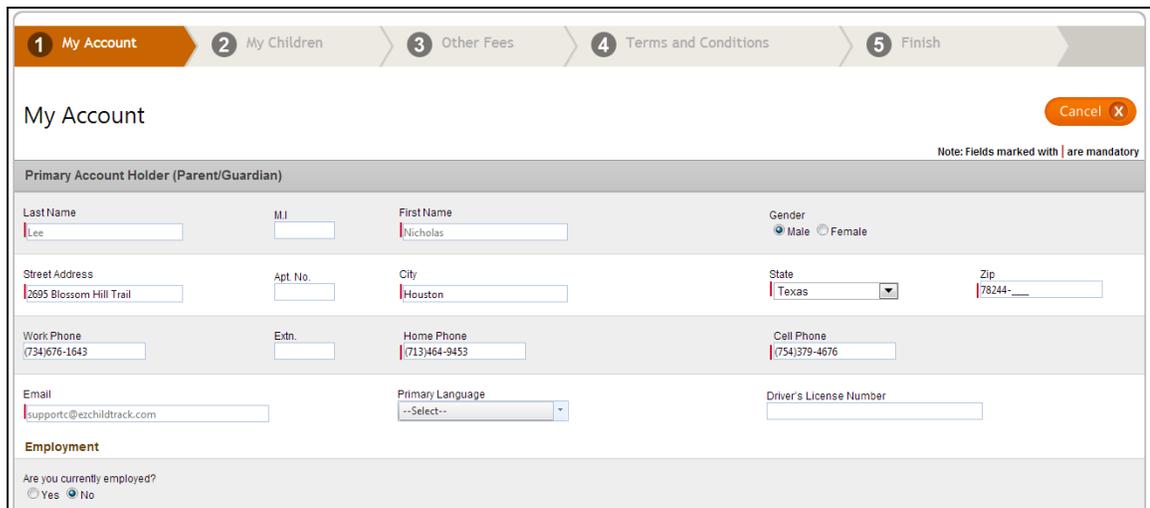
4.   REGISTERING A CHILD FOR A PROGRAM

4.1. Registration

To register a child for a Program:

1. Click on the Program's **Register** button. This button can be seen in the 'Registration' section of the Home page. Clicking on **Register** will take you to the 'My Account' page.

Partial Screenshot of My Account Page

2. If you wish to make any changes to Primary Account Holder/Secondary Account Holder/Emergency Contact details, you may do so on this page, else click on the **My Children** button shown at the bottom of the page. This will take you to the 'My Children' page.

3. On this page, you can register child(ren) or remove them from registration. To register a child, click on the **Register** button. To remove from registration, use the **Remove** button.

4. If you wish to add another child, click on the **Add Child** button.

5. When you click on the **Register** button, you will be taken to a screen as shown below, wherein you can edit the child's details and enroll him/her into desired activities:

Click on **Save Child** button once you are done entering all details. This will take you back to 'My Children' page. You can change or edit registration details by clicking on **Change** button.

> Please note that, in case of School Year program types, if there is at least one site linked to the selected school and the site is active in program period, then the "Site" dropdown is hidden in My Children page. The list of activities is directly shown in such cases.

6. Depending on the Program settings made by the Program Director, one of the 3 buttons will appear on the bottom right of the 'My Children' page.

   a. **Finish** button: When you click on the **Finish** button, a confirmation note along with registration details (including the fee details) will appear on-screen. An email will also be sent to you with registration details

   b. **Payment** button: If payment is required at the time of registration, then the **Payment** button will appear. Click on this button to head over to the Payment page.

   c. **Terms and Conditions** button: If there are any terms and conditions defined for this Program, the **Terms and Conditions** button will appear. Click on this button to review the terms and conditions.

7. In case you are required to make payment enter all required payment details including the person who is making the payment and payment method. Click on the **Submit Payment** button.

Payment Page

8. After completing the above steps, click on the 'Home' icon at the top right corner of the page to go back to the Home page.

9. A 'Pending for Approval' notification will be shown in the 'Registration' section for the particular Program. Once your application has been approved, this notification will be replaced with registration details.

10. Click on the **Register** button to register another child.

4.2. Enrolling a Child to a One Time Activity

In the "Registration" section of Home page, click on the **Enroll** link of the activity. This will take you to a screen as follows:

1. Select Site from drop-down list.
2. From the list below, select activities to which the child needs to be enrolled.
3. Click on one of the following buttons:
    a. Click on [Confirm & Enroll Another Child] to complete the current enrollment process and to begin an enrollment procedure for another child.
    b. Click on [Pay using Credit Card] to make payment via credit card.
    c. Click on [Pay using Bank Account] to make payment via bank account.

Depending on the button you have selected, you will be taken to corresponding screens.

1. If you opt to enroll another child, a pop up will be displayed as follows from which you can select the next child to be enrolled. Click on [Enroll] child to begin enrollment process of the child selected from the 'Child Name' dropdown list.

2. If you have opted to make payment via credit card, you will be taken to a screen as follows:

Enter payer/card/payment information and click on [Confirm Payment] to complete the payment procedure.

3. In case you opt to make payment via bank account, you will be taken to a screen as follows where you will be able to enter payment details. Click on [Confirm Payment] after entering required details.

4.3. Calendar based Enrollment

In case a Program has the calendar-based enrollment option enabled, you can enroll children to activities by clicking on the child's "Schedule Calendar" link from Home page. You will be taken to a screen as follows:
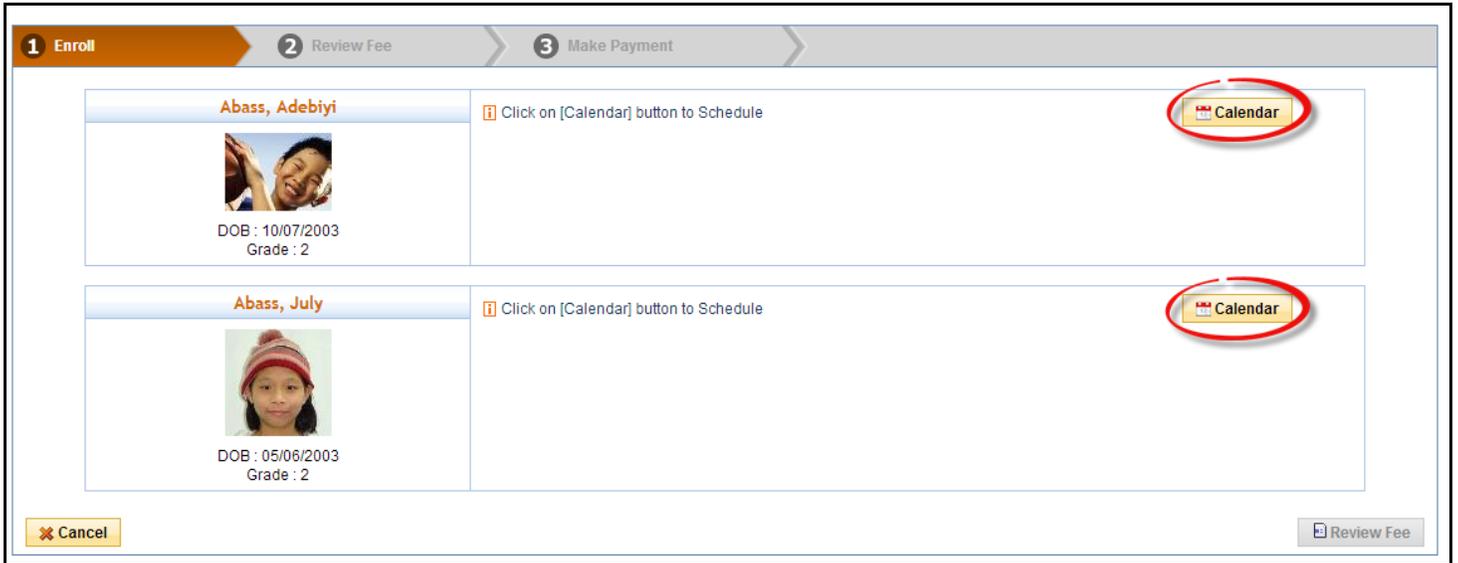
1. In the 'Enroll' section you will be able to enroll into activities. Click on the **Calendar** button to schedule.

Enroll Page

2. Select all desired activities. If you want to enroll another child click on the **Enroll** button shown below for that child. The **Copy Schedule** link can be used to copy a previous week's schedule.

3. Click on **Review Fee** after selecting all desired activities.

4. In the **Review Fee** section, review fee details.

---

5. In case you want to change the enrollment dates, click on the **Change Calendar** button to head back to the online calendar. If you want to delete the entire calendar, click on the **Delete Calendar** button or alternatively you can use the ✕ icon shown in the Action column. Click on the **Make Payment** button to head over to the next section.

6. If immediate payment is required, select the Payment Method, enter all required details like 'Paid By' and card type, number etc. and click on **Submit Payment**. Else click on **Submit Enrollment** to complete the enrollment process.

ℹ️	A suspended account will not be able to register or enroll.

5.   MAKING A PAYMENT

To make a payment:

1.   Click on the **Pay Now** button in the 'Payments & Statements' section of the Home page.

Payment Page

2.   Select the person who is making the payment from the 'Paid By' drop-down list.

3.   Specify the payment amount, card details etc.

4.   Click on **Submit Payment**.

5.   A payment receipt will be sent to the email ID (if provided).

The **View Current Invoice** button can be used to view details linked with the current invoice.

6. PRINTING STATEMENTS

To print statements click on the **View Statement** button in the 'Payments & Statements' section of the Home page.

From the 'Statements' page, you can:

1. Print invoices after selecting the desired Service Period.
2. Print payment reports for a specific time period.
3. Print tax statements for a selected financial year.

Statements Page

To generate these statements, click on the **Print** button.

7. SIGNING UP FOR AUTO PAY

To signup for automatic payment, click on the **Signup for Auto Pay** button in the 'Payments & Statements' section of the Home page.
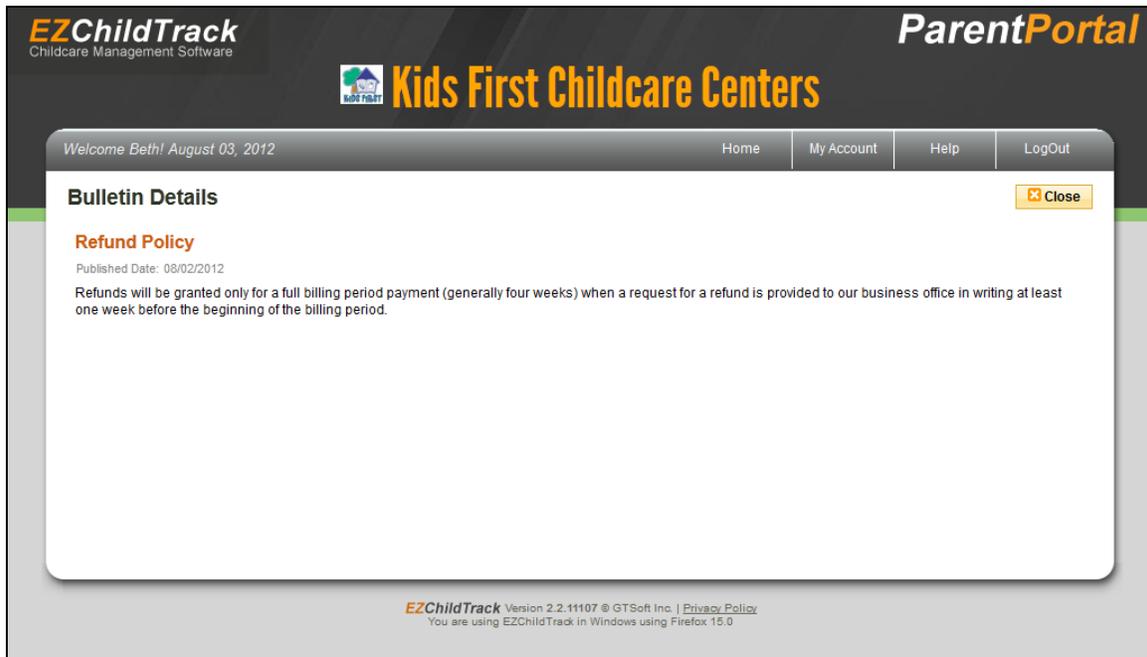

Automatic Payment Page

You can enroll using:

1. Credit Card: Click on the **Enroll using Credit Card** button to automatically make payments via your credit card.

2. Bank Account: Click on the **Enroll using Bank Account** button to automatically make payments directly from your bank account.

8. VIEWING IMPORTANT NOTIFICATIONS & DOWNLOADING FORMS

Any important events, notifications or bulletins can be viewed from the 'Information' section of the Home page. Sub-sections include:

1. Calendar: Keep a tab on all the important upcoming events.
2. Bulletins: View bulletins with important messages. Click on a bulletin to view its details.
3. Forms: Download any given form using the 📥 icon.

A Bulletin Details Example

The Home page also displays an **Email History** button clicking on which you will be taken to a screen that displays the entire list of messages, notifications and communication notes for the parent.

Email History Page

9. VIEWING ACCOUNT DETAILS

You can view account details in the 'My Account' page.

On this page, you can view:

1. Account information like the primary and secondary account holder's details.
2. Child details. Use the 'Contacts' link for each child to get more details.
3. Information linked with each contact associated with this account.
4. Update check-in codes.
5. Opt in or opt out of email/SMS subscriptions. The SMS subscription will be available only if it is allowed for the Program and if a cell phone number has been entered for the account holder. Similarly, the email subscription option will be visible only if an email ID has been provided for the account.

My Account Page

10. CHANGING PASSWORD

You can change your password from the 'My Account' page.

1. Click on the **Change Password** button.
2. Enter old password, new password and confirm new password.
3. Click on **Change Password**.

'Change Password' Page