DayCare WORKS RecCare WORKS SchoolCare WORKS

Go-Live Checklist

Are you ready to Go-Live?

Before you Go-Live, be sure you can do some of the most essential tasks within the system. If you have vital processes please be sure to add them in the blank boxes below. This will help you to keep track of your progress.

Task	Date Completed	Status	Notes
Test New Parent Registration			
Test Existing Parent Registration			
Able to Open/Close a Room for Registration			
Able to Modify Registration Questions			
Able to Create a Child from Admin Side			
Able to Approve a Registration			
Able to Reject a Registration			
Able to Add/Modify a Child's Schedule from Admin Side			
Able to Pull a Child Information Card			
Able to Batch Pull for a Room's Information Cards			
Able to Take a Check/Cash Payment			
Create a Credit Card/ACH Test Transaction			
Create a Credit Card/ACH Refund for Test Transaction			
Able to Add an Adjustment/Fee to a Family's Ledger			
Able to Send an Email from the Portal > Email Tab			
Able to Add an Administrator and Assign a Role			
Able to Modify an Administrator Role			
Able to Add a Staff Member and Assign an ID			
Able to Add a Schedule for Staff			
Able to Take Staff Attendance from Admin Side			
Able to Pull a Report to See Staff Attendance			
Able to Take Child Attendance from Admin Side			
Able to Pull a Report to See Child Attendance			
Able to Authorize a Tablet for InSite Select or Provider			
Do a Test Login for a Staff Member on the Provider App			
Able to Clock a Child In/Out on Provider App			
Able to Add/Adjust Daily InSite Sheets for Use on Provider App			
Able to Record Meals Served from Admin Side			
Able to Record Meals Served from Provider App			
Able to Pull Report for Meals Served			
Verify Center Information is Correct on Home > General Tab for all Sites.			
Add your Tax ID under setup > System Config, General Configuration			
Understand How to Create a New Program			
Understand How to Add New Program to a Semester			
Understand How to Create a New Semester			
Able to Pull a Report Displaying Student Attendance			
Able to Pull a Report Displaying Student Schedules			
Able to Pull a Financial Transaction Report			
Able to Add a Discount to the System			
Understand How to Add a Discount to a Child			
Able to Add a New Rate to the System			
Able to Add a Rate Increase			

Helpful Tips for Registration Go-Live

- Plan your Registration Go-Live for a Monday so that you are in the office and able to help parents if they have questions as they are going through the process.
- Create a walkthrough for parents to reference specific to their registration experience. Include screenshots and specific directions- this will help to cut down on calls to your office.
- If you notice there seems to be an issue for New or Existing parents while they are registering, go through a test registration to see if you can recreate the issue. If you are able to recreate the issue please send a screenshot and explanation of what was happening when the issue arose.

Helpful Tips for OnSite Go-Live

- At least one staff member should be given a user ID and password so they are able to login to the InSite Provider App (classroom management).
- Be sure student-teacher ratios have been entered on the setup > room page if you would like to monitor live ratios throughout the day on the InSite Provider App.
- You may want to print out parent/contact PIN numbers to have on hand for staff to help parents on site (Check In/Out PIN- Excel report found under Reports > Room/Program).
- *Note- any children who do not have ACTIVE schedules will not be able to be clocked in from the InSite Select App.*

Helpful Tips for Billing Go-Live

- Be sure all of your children have program/room assignments- Rooms, Start and End Dates, Days, Schedule and Rate.
- Be sure discounts have been added to children's records.
- Be sure Third-Party families have been split and Co-Pays have been entered.
- Check rates to ensure they have been entered correctly.