InSite Provider Application 3.1.0

User Guide

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INTRODUCTION

Simplify your center management with Cirrus Group, LLC's InSite Provider application. This application is designed for a streamlined, quick and easy way for your administrators and staff to access the important features of the Provider Editions of DayCare Works, SchoolCare Work, and RecCare Works at your points of service, or wherever you need. Information is automatically linked to your Cirrus Group, LLC hosted applications with real-time information updates and reporting capabilities.

LOGGING IN

Log into the InSite Provider application with the username and password used to sign into DayCare Works, SchoolCare Works, or RecCare Works, then push Enter.
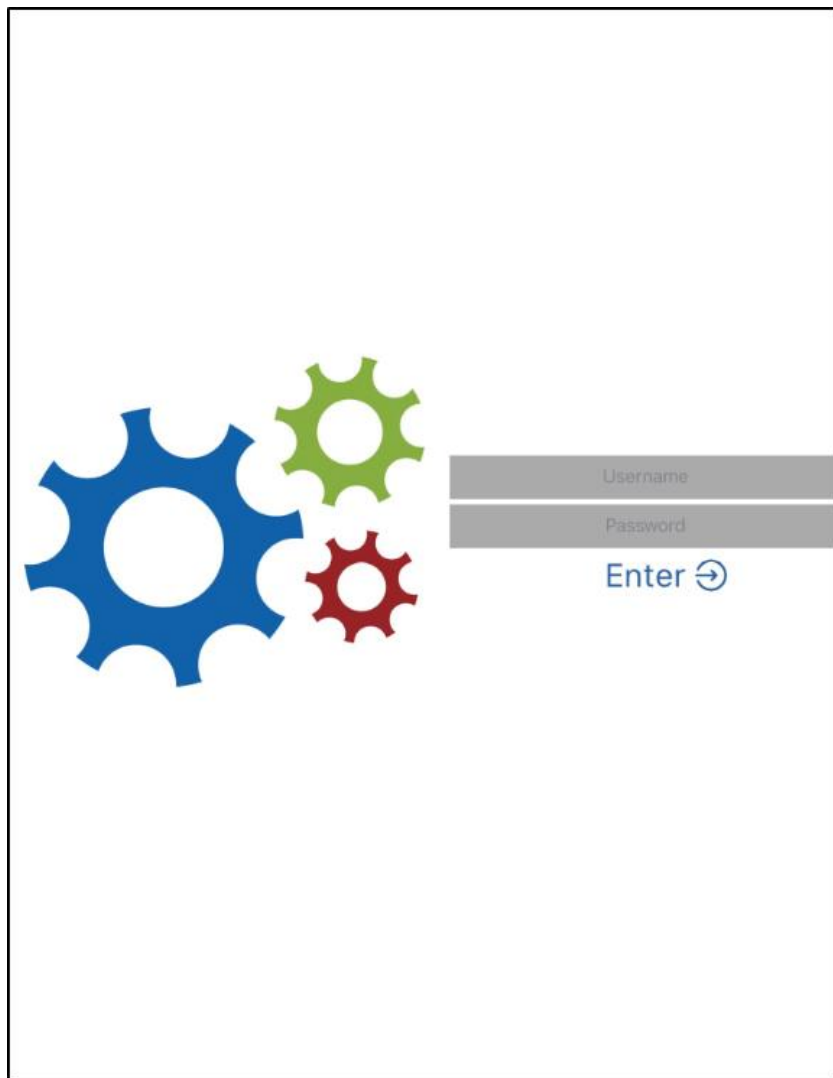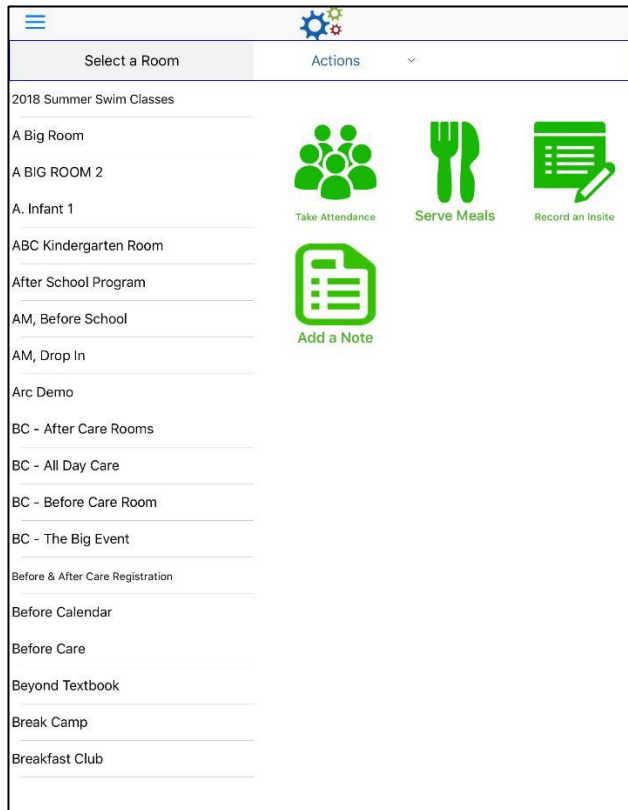
GENERAL NAVIGATION

HOME SCREEN

Upon logging in, the list of rooms will be on the left side of the screen and actions will display on the right.

> **Key Point:** Some of the options throughout this application can be turned on/off based on user role. This can be done via the administrator site.
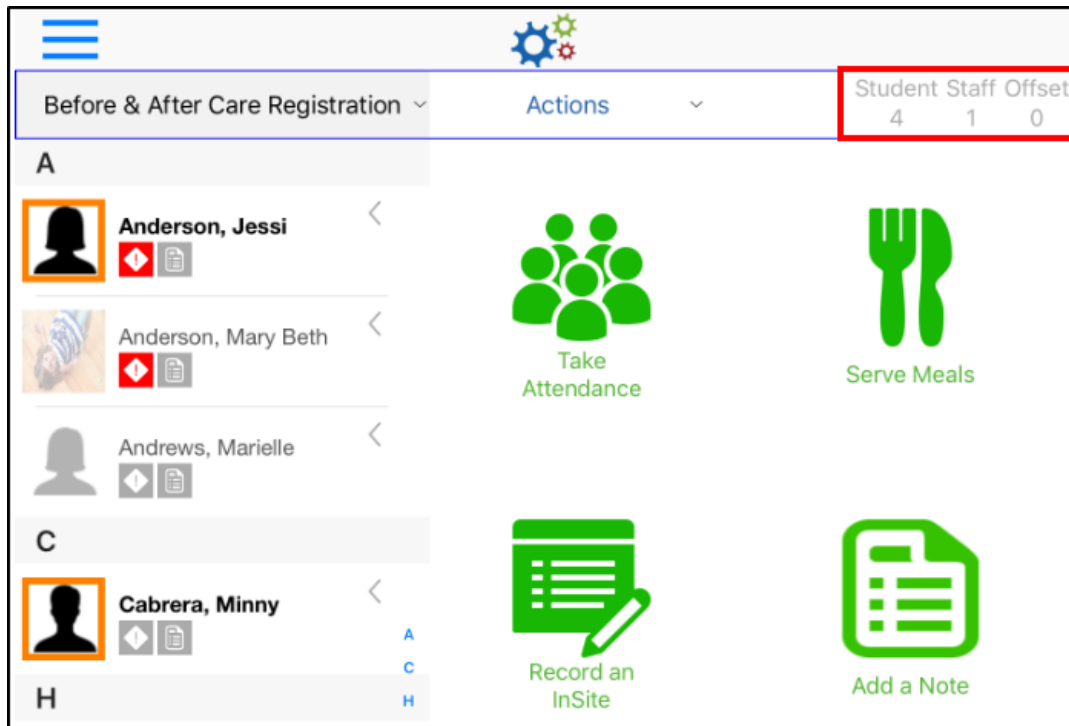

The following options are available:

- Menu Options (Top Left)
    - Classroom
    - Live View
    - Today's Daily InSites
    - Main Attendance
    - Logout
- Actions
    - Take Attendance
    - Serve Meals
    - Record an InSite
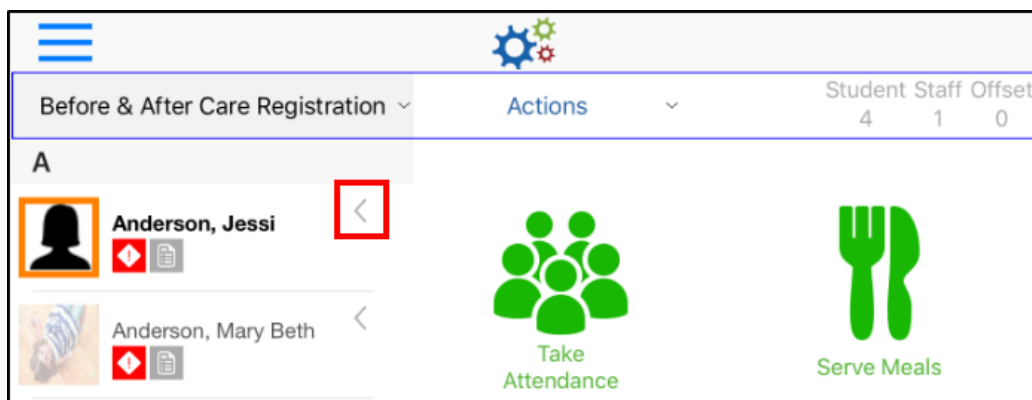   - Add a Note

STAFF/STUDENT RATIO

From the home screen, once a room is selected, the staff and student ratio will display in the top right corner.
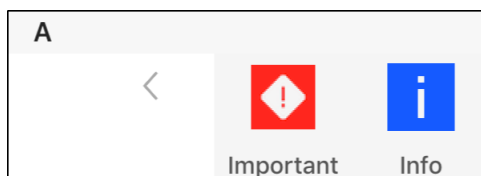

IMPORTANT INFORMATION/INFO

Once a room is selected, Important Information and Student Information is viewable.

1. Select a room
2. Locate the student
3. Click the arrow or swipe to the left


4. Click the Important or Info icons

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a. Important Information - the following information will display

b. Student Information - the following information is available under the Info icon and pulls from the student's child record

    i. View/Update student's photo

    ii. Profile

       1. General – full name, address, height, weight, etc.

       2. Health – miscellaneous health information

       3. Consent – consent for field trip, photo release, transportation, etc.

       4. Additional Personal – custody, language, school information

       5. Additional information – miscellaneous information, such as, bladder control, convulsion, foods forbidden, etc.

       6. Additional Activity Information – sunscreen/bug spray indicator, swim information, etc.

       7. Pickup Restrictions – any names listed here are unable to pick up the student

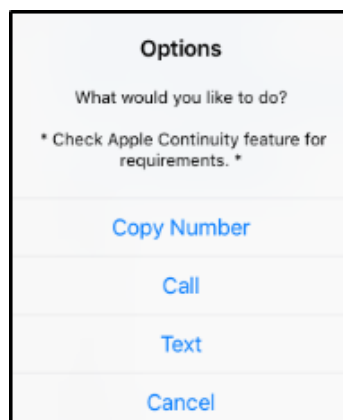   iii. Contacts – guardians, emergency, release phone numbers and email addresses

1. Swipe the contact to the left or click the arrow to view more information regarding the contact person
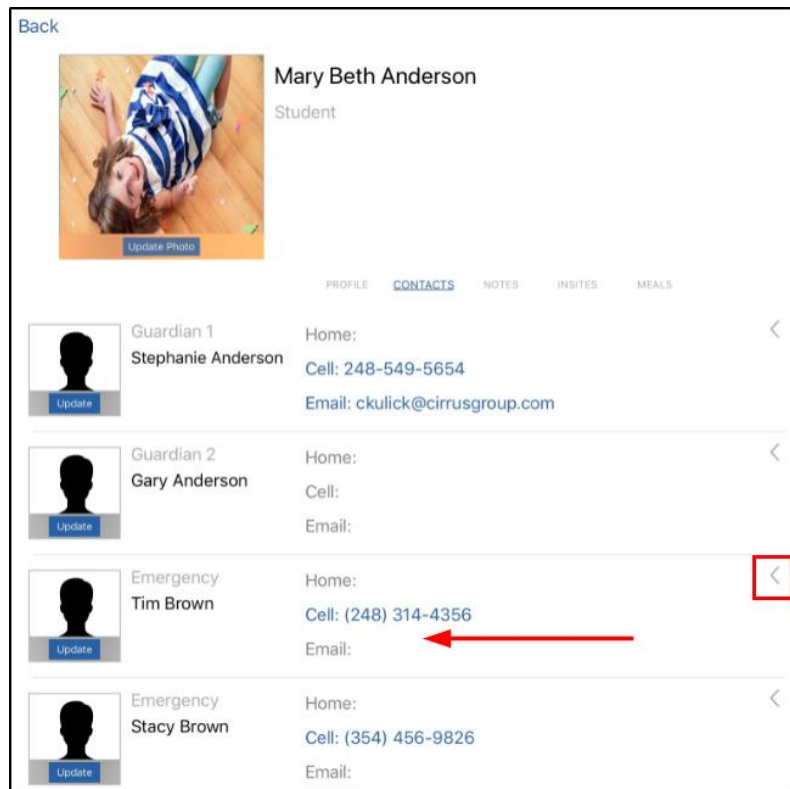
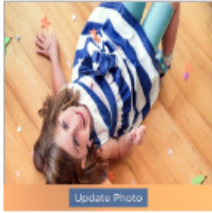2. Update the picture of the contact person by clicking Update

3. Select and hold to view more options

iv. Notes – when a note is added for the day, it will show up in this section

v. InSites – when an InSite is added for the day, it will show up in this section. From here, they can be edited or deleted, but not added (click here to add an InSite)

1. To view or edit, click on the INSITES title

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2. Edit the time, notes, or photo as necessary
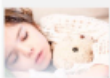
3. Once changes have been made, click:

    a. Cancel – cancel screen without saving changes

    b. Delete – delete the InSite

    c. Submit changes – save changes made to the InSite

vi. Meals – when a meal is served, the time and what type of meal will be noted

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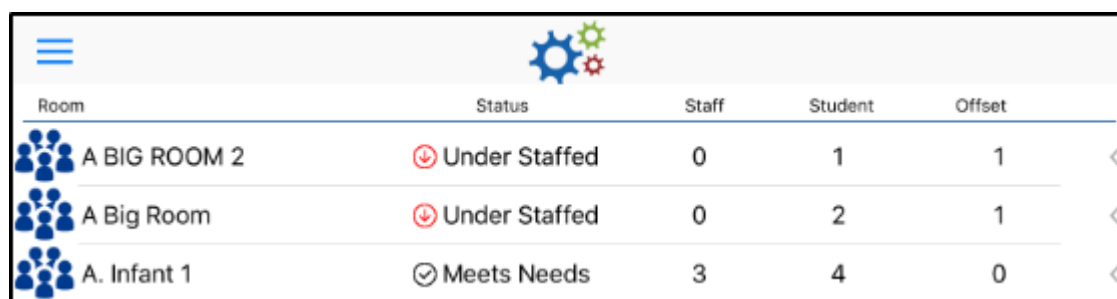Revised: January 31, 2019 | V 1.0

MENU OPTIONS

The ≡ (menu) icon on the top left corner is available from all screens within the application. Clicking this icon will show who is currently logged into the application, among other options:

- Classroom - this option navigates back to the home screen
- Live View
- Today's Daily InSites
- Main Attendance

LIVE VIEW

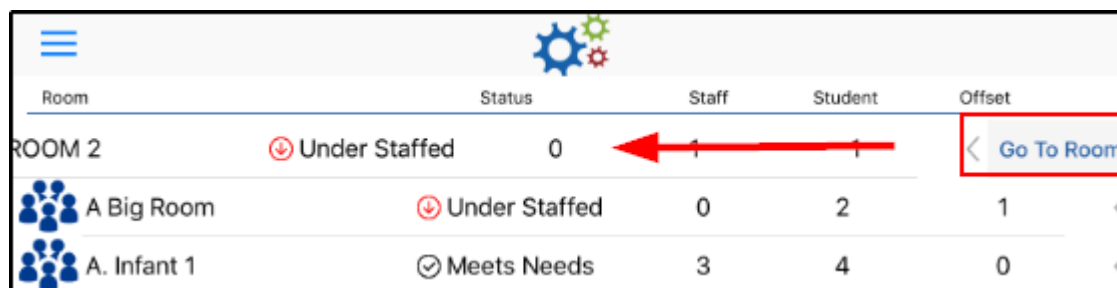Live View will display the current staff: student ratio in each room.

Room	Status	Staff	Student	Offset
A BIG ROOM 2	Under Staffed	0	1	1
A Big Room	Under Staffed	0	2	1
A. Infant 1	Meets Needs	3	4	0

- Room - the rooms will display alphabetically
- Status
  - Under Staffed - there are currently too many students and not enough staff in the room
  - Meets Needs - the staff to student ratio is correct
- Staff - current number of staff in the room
- Student - current number of students in the room
- Offset – the overage or deficiency of staff per the number of students

To navigate to the room, slide the room line to the left and click Go To Room

TODAY'S DAILY INSITES

InSites added from the Record an Insite button will appear in Today's Daily InSites. This screen can be filtered to view Daily Sheets, Photos, or both. Daily InSites will show the current week entries in order from oldest to newest. To locate Today's Daily InSites, follow the steps below:
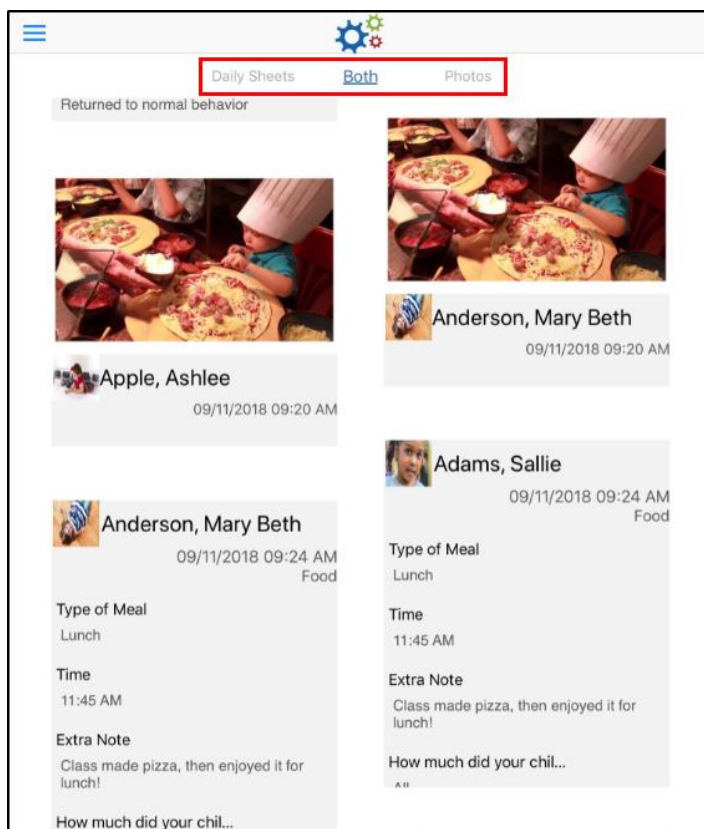
1. Click the menu icon in the top left corner
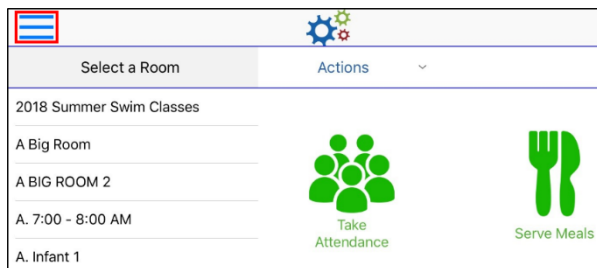
2. Click Today's Daily InSites
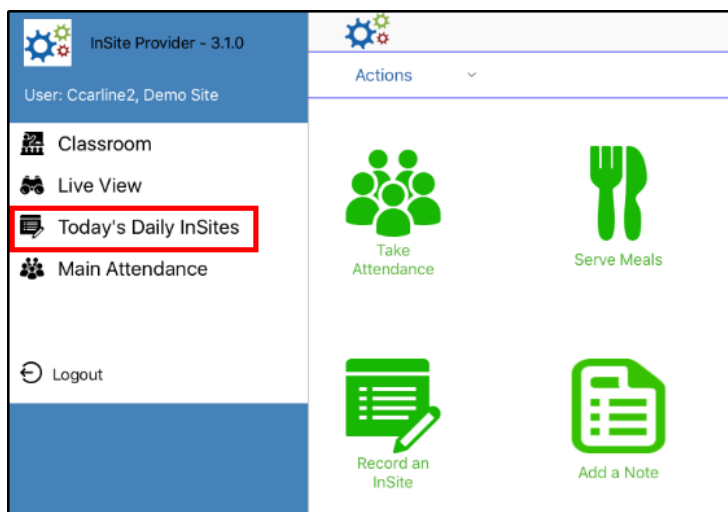
3. Select to view Daily Sheets, Photos, or Both - below is an example of both Daily Sheets and Photos

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Revised: January 31, 2019 | V 1.0

MAIN ATTENDANCE

The Main Attendance screen allows staff to view attendance, check in or check out students/staff, mark students as present, or move students to another room. There are four different ways to view/filter students:

- Center - View all students within the center
- Category - View students within a category
- Grade - View students within a specified grade
- Room - Show only students within a selected room/program

ACTIVITY IDS

The Main Attendance screen has three activity IDs that must be enabled prior to viewing the screen and utilizing all available filters:

- **1808: Main Menu - Main Attendance** – this Activity ID must be enabled for the Main Attendance screen to be visible. This activity ID also allows users to utilize the default student filters: Center and Room
- **1819 : Main Attendance – Attendance Option – Category Filter** – this activity ID allows users to filter students by Category
- **1820: Main Attendance – Attendance Option – Grade Filter** – this activity ID allows users to filter students by Grade
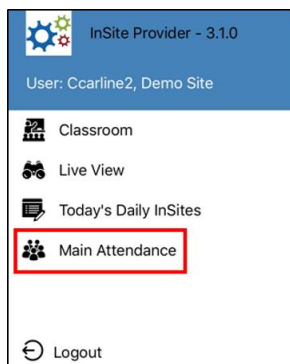
VIEWING STUDENTS/STAFF

To view student and staff attendance, follow the steps below:

1. Click the Menu icon
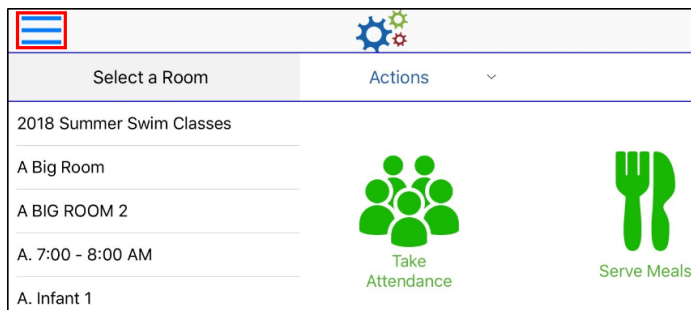
2. Select Main Attendance

3. Under the Select Attendance Option section, select Center, Category, Grade, or Room

4. If Category, Grade, or Room was selected, choose from the Select An Item list. If Center was selected, skip this step

5. The appropriate students will display based on what was selected in steps 3-4
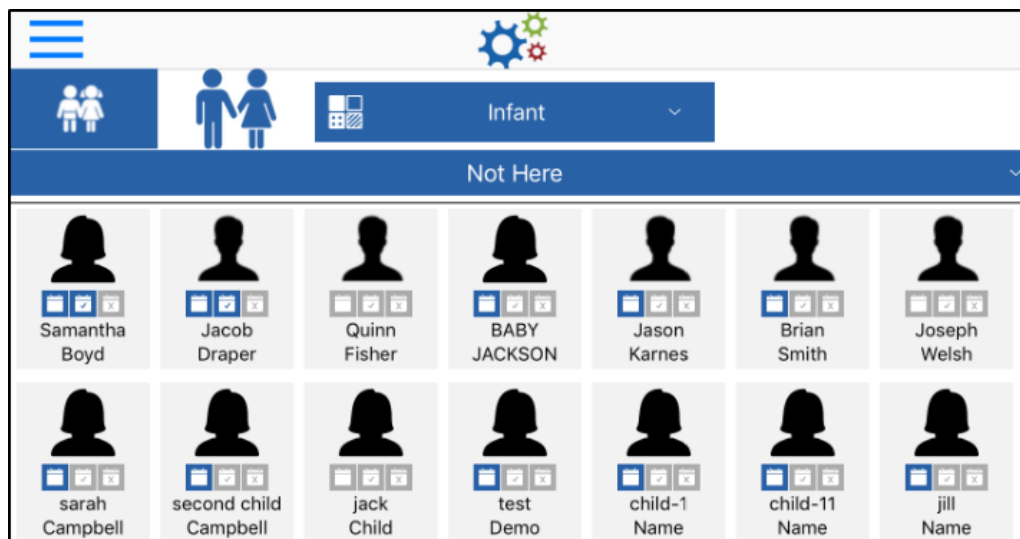
6. To filter the students by attendance status (Not Here, Both, or Here), click the drop-down menu highlighted below. **Please Note:** this title will be different depending on the options selected previously
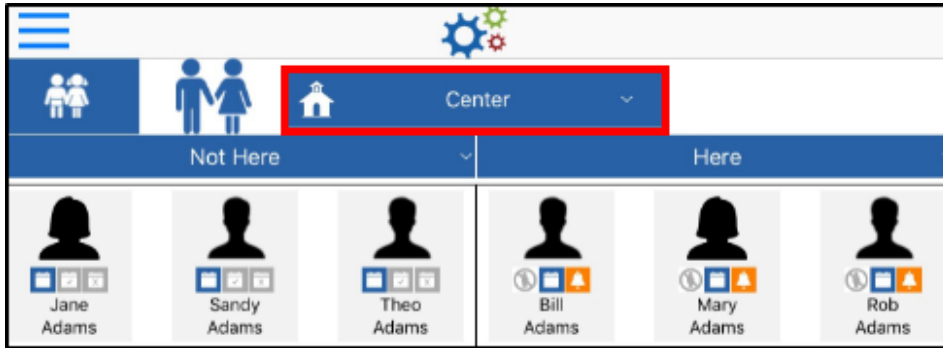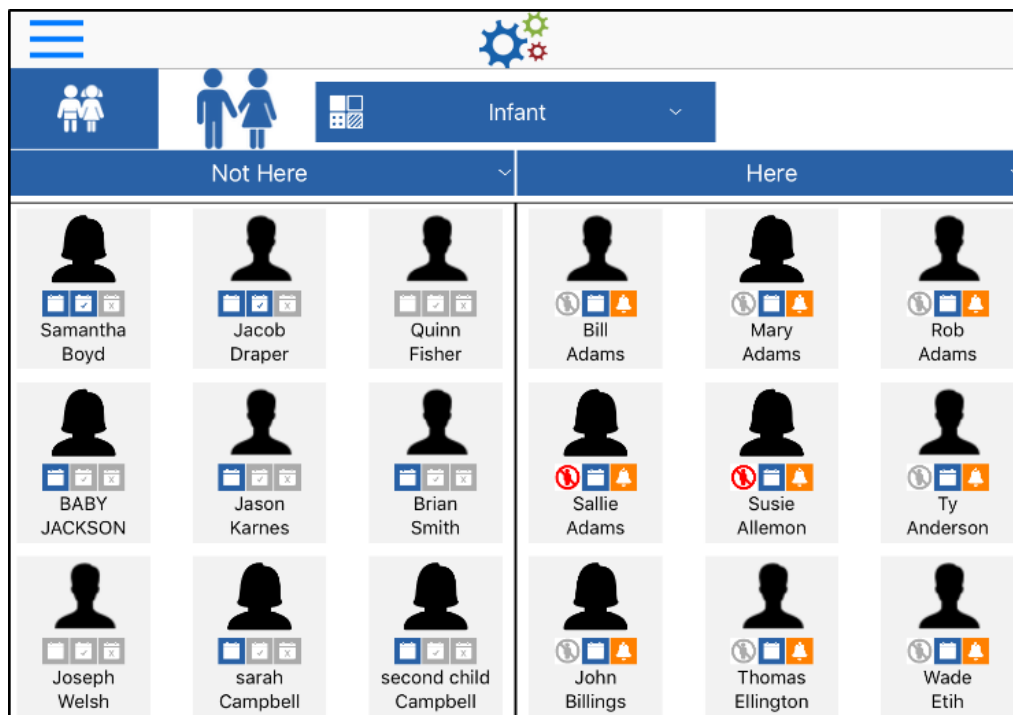

7. Select which students should display under the Show Persons section
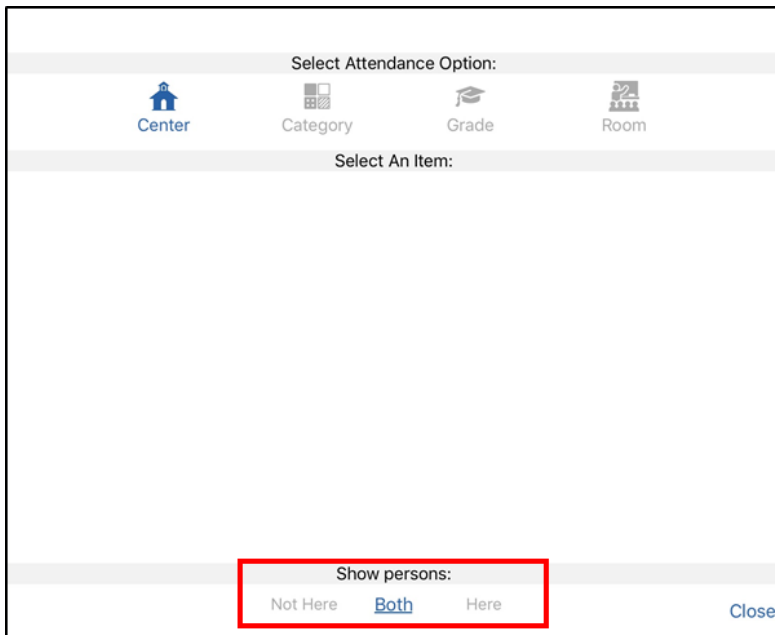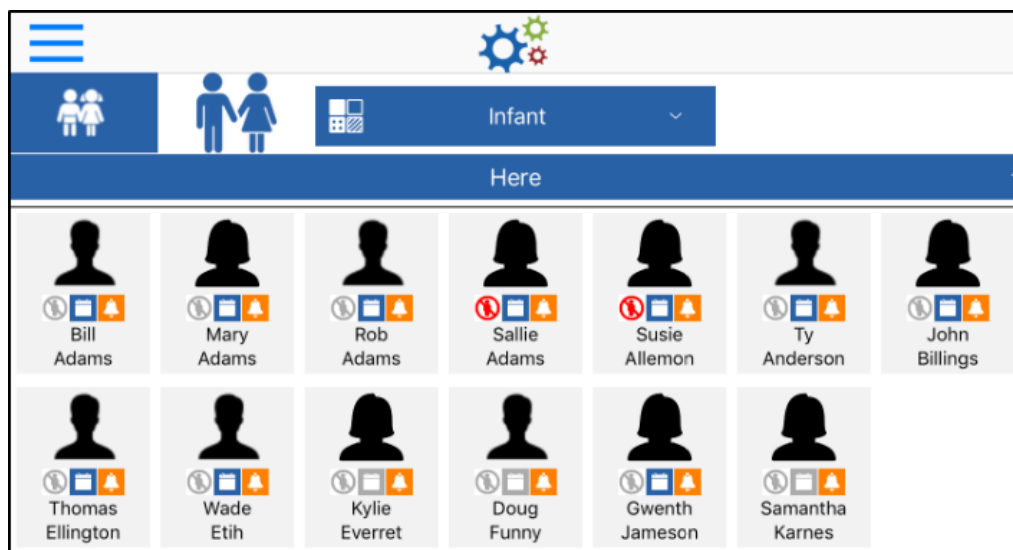

a. Not Here – this option only displays students <u>not</u> currently checked in

b. Both – all students will display (checked in and checked out)

c. Here – only students currently checked in will display

Key Point: To quickly check in/out multiple students, select all necessary students from the Not Here or Here column and drag them to the opposing column.
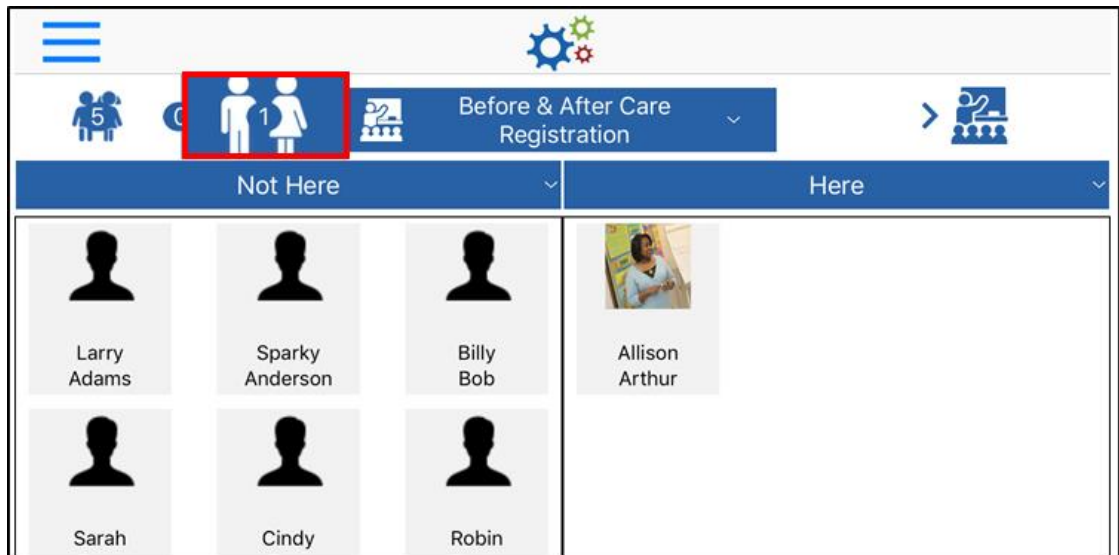
ADDITIONAL MAIN ATTENDANCE SCREEN OPTIONS

- Toggle between the staff and student lists by clicking the appropriate icon:
 - When the left icon has a blue background, students are being displayed
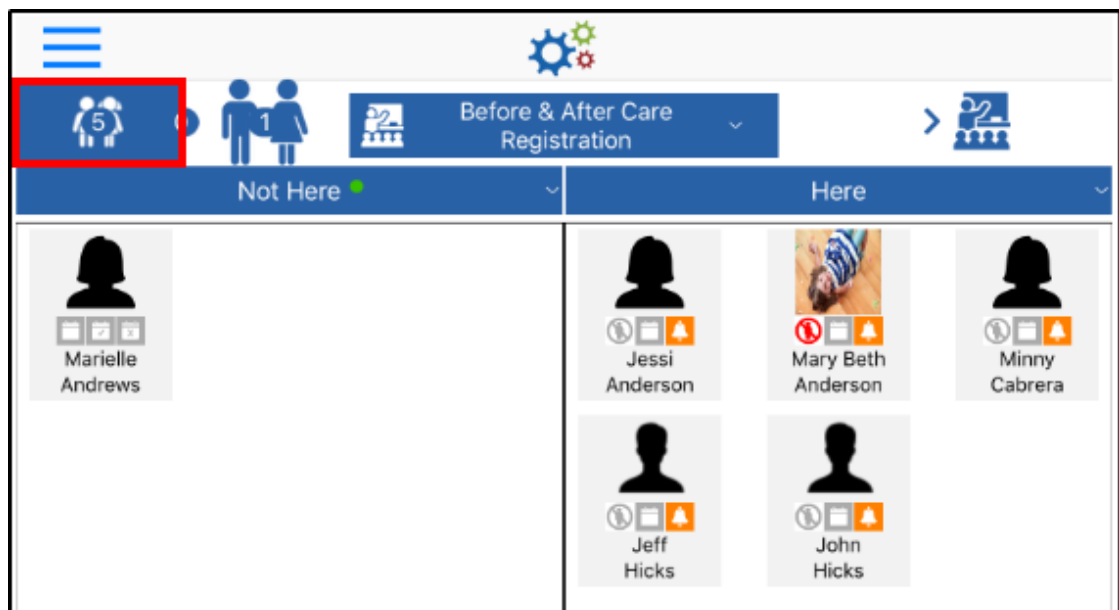
o When the right icon has a blue background, staff is displayed

- When the Attendance Option is set to Room, and a room is selected, the student/staff ratio displays in the top left corner of the screen. In the example below, there are currently 15 students and 2 staff members checked into the selected room. The number between the student and staff icons represents the offset. **Please Note**: ratios can be setup on the room configuration screen

- On the Main Attendance screen, the "Not Here" student list can be filtered to show only students with schedules, without schedules, or both:
    - Click the Not Here title
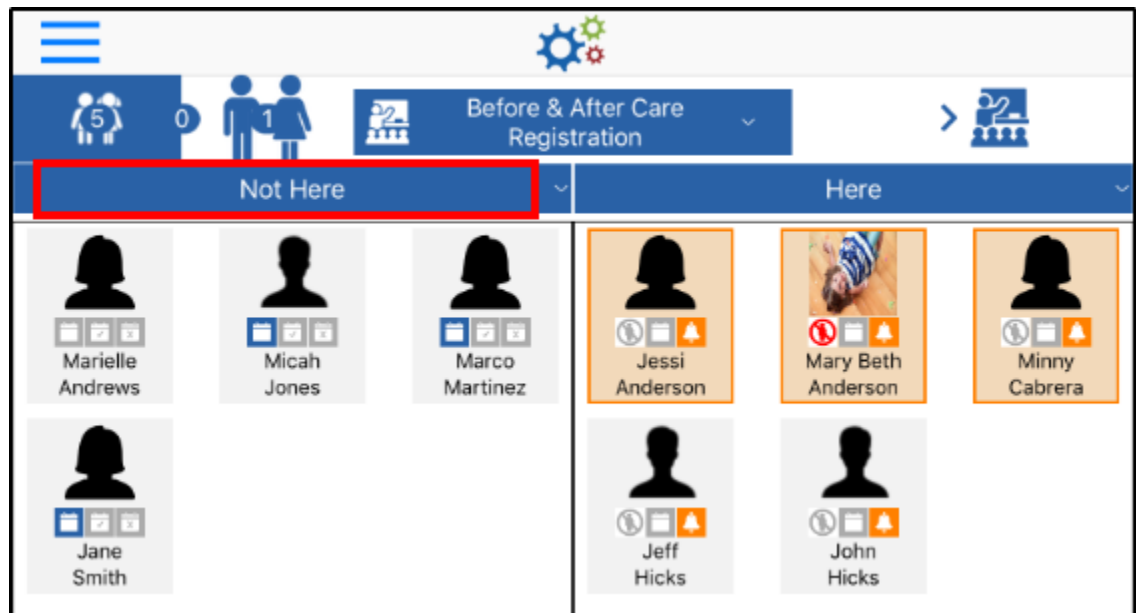
    - Select the necessary filter option

- Not Scheduled – only students without a schedule for the current day will display
- Both – all students, scheduled and not scheduled, will display
- Scheduled – only students scheduled to attend that day will appear in the list

- When the list is filtered, a green circle will appear to alert staff

- Select All/Deselect All – There is a Select All and Deselect All option at the bottom of the Not Here column and one set at the bottom of the Here column. This option allow staff to quickly check in all students/staff within a column

- Search Staff – The Search Staff feature is a quick way to check in staff members
  - Click the Search Staff icon at the bottom of the screen
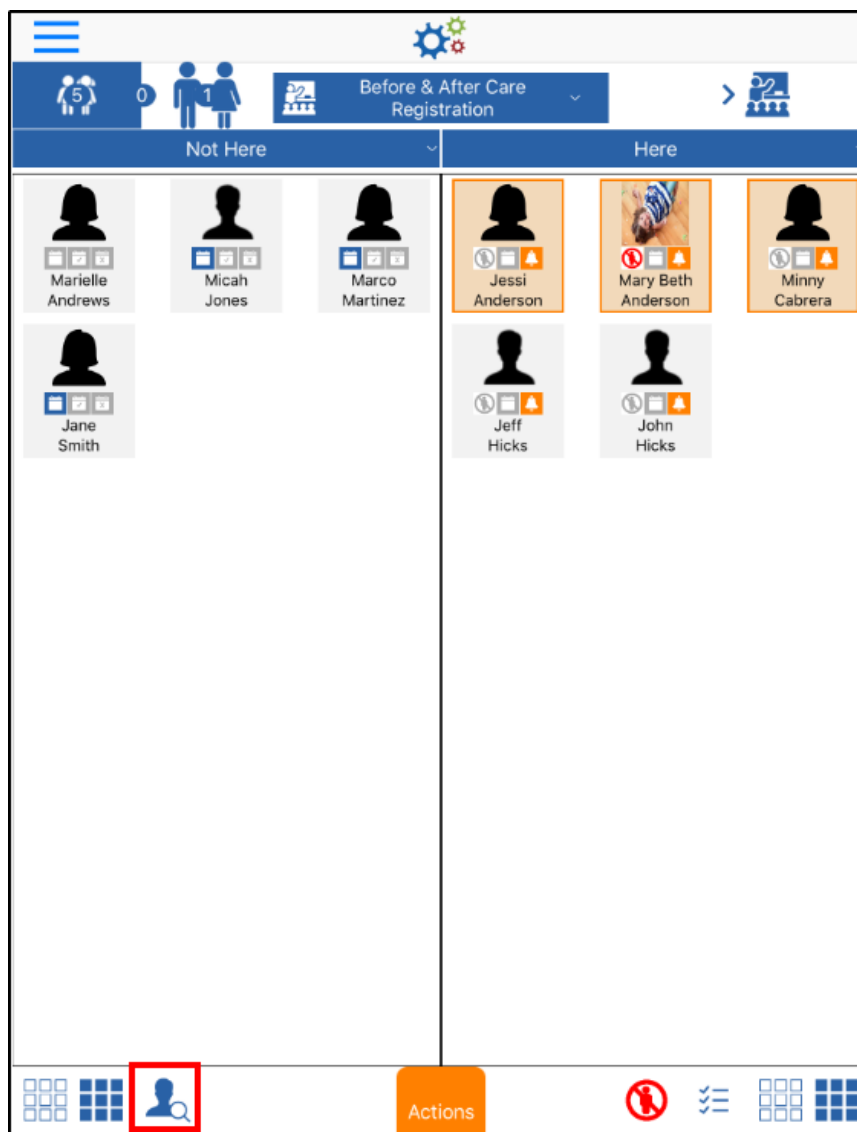
o   Search for the staff member by full or partial first or last name and click Submit

o   Select the staff member by clicking on their name, then click Check In

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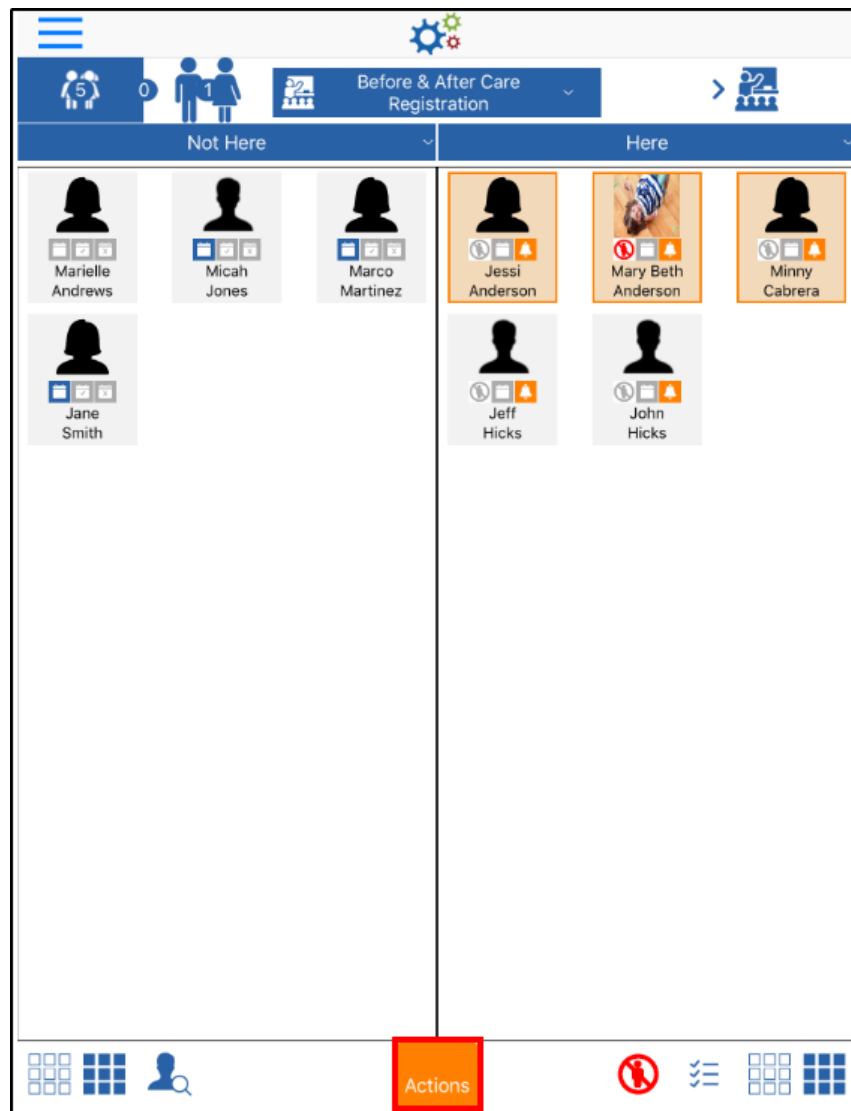
- The Actions menu is a quick and easy way to check students/staff in or out at a specified time
  - Select the students or staff to check in/out
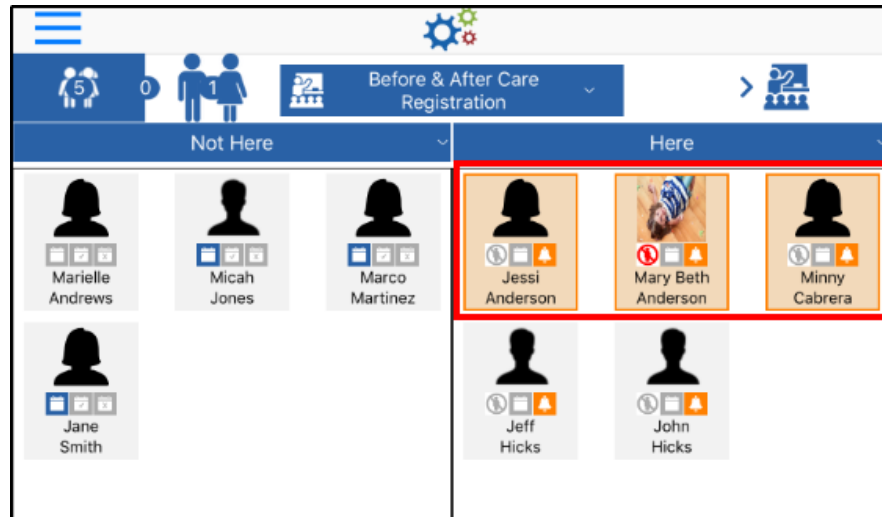
  - Click the Actions menu at the bottom of the screen

o   Select the correct time and click Check In/Check Out, Present, or Move

- ▪ Present – this option marks the student as present in the room
- ▪ Move – move students or staff to other rooms

o   A confirmation screen will appear, click OK

SELECT OPTIONS

The Here column displays a list of students currently in the selected room. Use the Select Options icon to view where the students were initially checked in to, if applicable.

Please Note: The Select Options will only list the original room the student was checked into, it will not list the movements of the student throughout the day.

For Example: If a student was checked into "Room A" and moved to "Room B", then "Room C", the Select Options would only show "Room A".

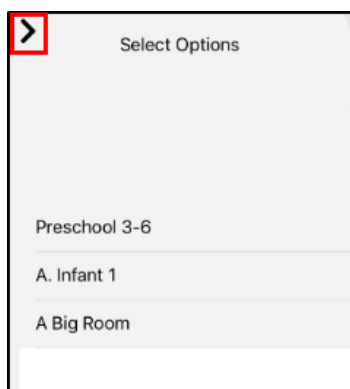Follow the steps below to view or move students to their original room:

1. From the Main Attendance screen, select the center, category, grade, or room you wish to view
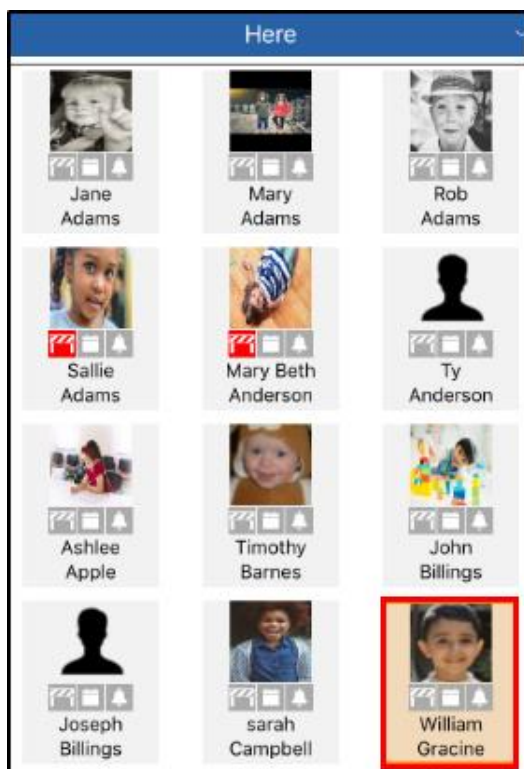2. Click the Select Options icon from the bottom of the screen

3. A list of rooms will appear. Select a room to view the list of students

> Select Options

Preschool 3-6

A. Infant 1

A Big Room
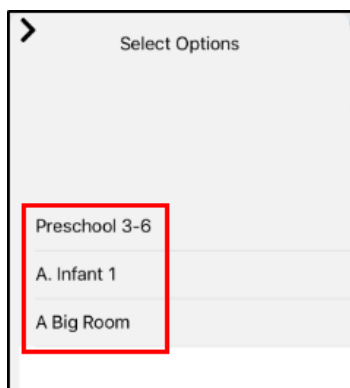
4. Click the arrow button to confirm room selection

> Select Options

Preschool 3-6

A. Infant 1

A Big Room

5. All students that were checked in to the selected room will be highlighted. From here they can be moved, marked as present, or simply view the students from the selected room

Here

Jane Adams   Mary Adams   Rob Adams

Sallie Adams   Mary Beth Anderson   Ty Anderson

Ashlee Apple   Timothy Barnes   John Billings

Joseph Billings   sarah Campbell   William Gracine

MAIN ATTENDANCE SCREEN ICONS

On the main attendance screen, there are 5 icons that appear. The chart below will describe what each icon means:

Icon	Description
	Scheduled Today – the student is scheduled to attend
	Was Here Today – the student attended that day
	Absent – student is absent
	Pickup Restrictions – the student has restrictions in the system on who can/cannot pick them up
	Present Time Expired – the student has been checked in, but not marked as Present <u>or</u> it has been over 30 minutes since student has been marked as Present

TAKE ATTENDANCE

When selecting the Take Attendance action on the home screen, there are multiple options available:

- Check IN - check one or more students/staff into a room

- Check OUT - check one or more students/staff out of a room

- Delete Attendance - delete a student's attendance for the day (only one student at a time)

- Move - move one or more students/staff to a different room

- Present - mark one or more students as present

SIDE MENU OPTIONS

There are 4 options on the right side of the Take Attendance screen.
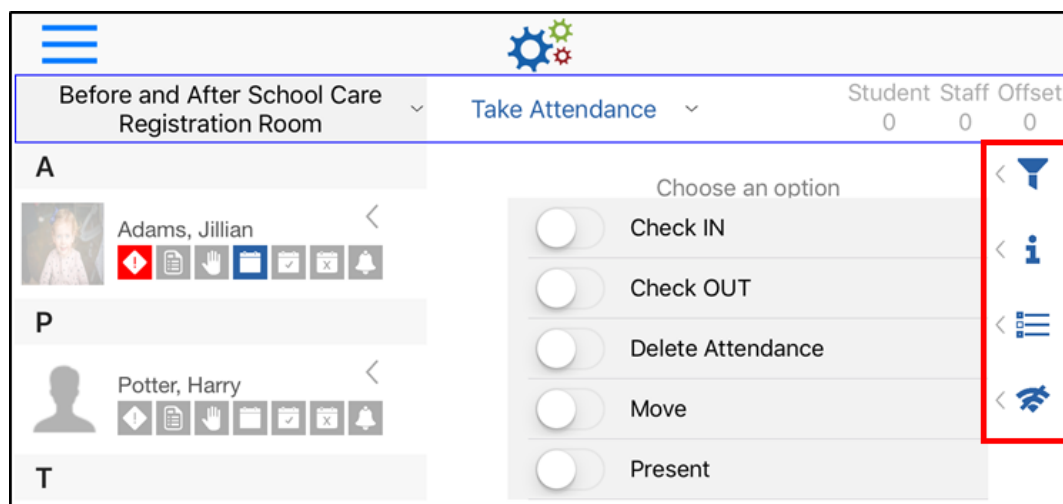
Click the arrow to the left of the icon to access each menu.

Icon	Description
◀ 🔻	**Filter** - by Room or Center, Not Here, Here or Both, Not Scheduled, Scheduled or Both
◀ ℹ	**Information** - Important Information, Note, Here, Scheduled Today, Was Here Today, Absent, Present Time Expired
◀ ☰	**Select Options** - Select All, Unselect All
◀ 📶	**Offline Attendance** - Check In - Offline, Check Out - Offline

FILTER

The Filter icon allows the student list on the left to be filtered.

- Room or Center - select if you wish to view the students assigned to the selected room or all students in the center not currently checked into a different room
- Not Here/Here/Both - choose if you wish to view students who are not checked in, view only students checked in, or view both
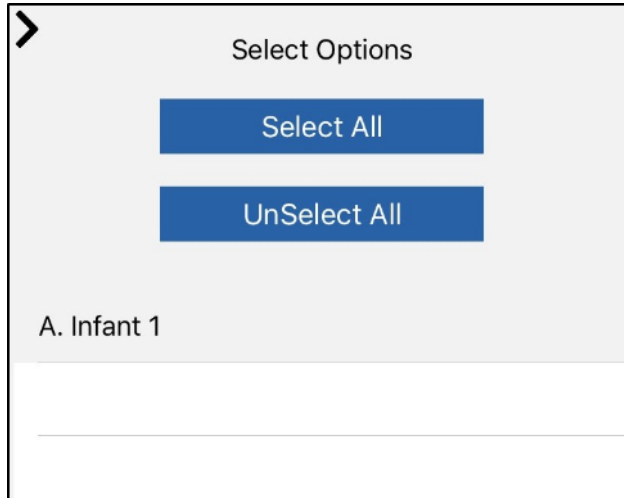- Not Scheduled/Scheduled/Both - choose to view only students who are not scheduled for the day, scheduled for the day, or both

INFORMATION

The Information icon displays a legend describing what each tile from the Attendance screen means. When a tile is in color, it means there is information or active, when a tile is grayed out, it is not active.

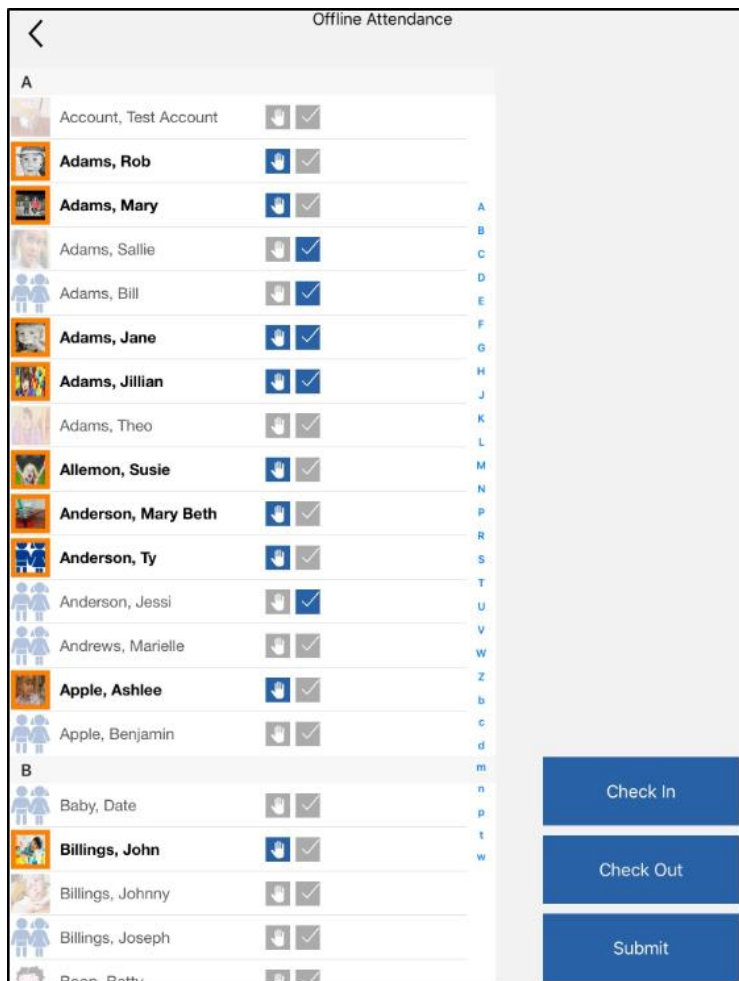| Icon	Description
	Important Information – contains information such as attendance, consent, and health
	Note – a note was added from the home screen
	Here – the student has been checked in
	Scheduled Today – the student is scheduled to attend
	Was Here Today – the student attended that day, but is not currently there
	Absent – the student is scheduled to attend, but it absent
	Present Time Expired – the student has been checked in, but not marked as Present or the student was marked as Present over 30 minutes ago

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SELECT OPTIONS

This option allows students from the left to all be selected, deselected, or only students within a certain room to be checked in, checked out, moved, or marked as present.

OFFLINE ATTENDANCE

Offline Attendance allows one or more students to be checked in and out, but does not have the option to change the Check In/Out time.

| Icon	Description
	The student is currently checked in, but not submitted
	Student is not checked in
	Student is currently checked in and submitted
	Student was checked out and not submitted

CHECK IN/CHECK OUT

Follow the instructions below to check a student into a room:

1. From the Take Attendance screen, ensure the Student option is selected at the bottom of the screen - Student is the default option. Please Note: for staff check in/out, select Staff instead of Student and follow the steps below
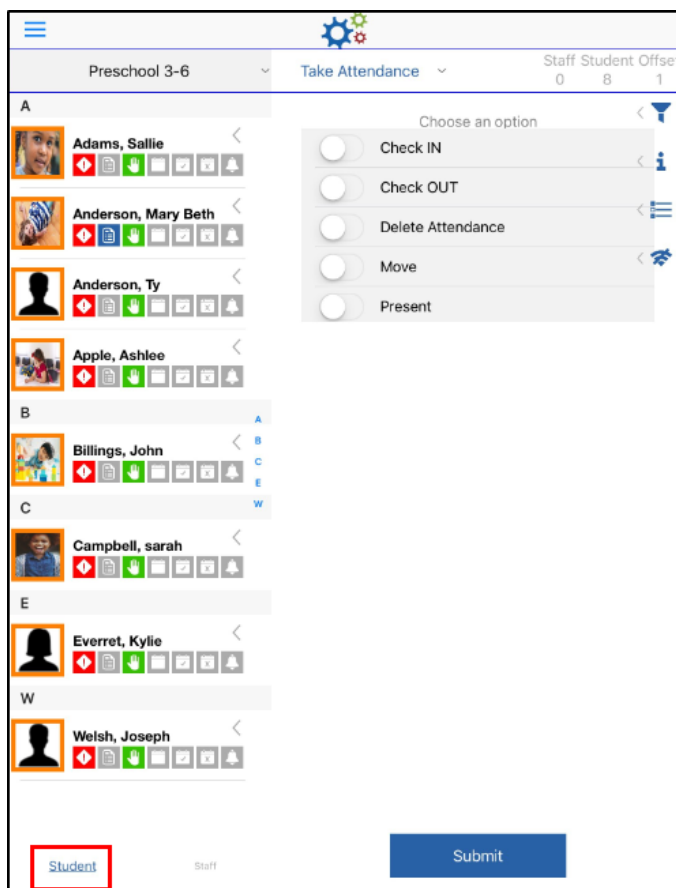
2. Choose Check IN or Check OUT - the selected option will be blue
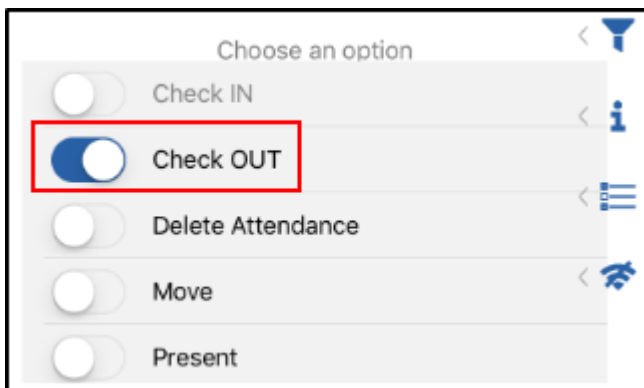
3. Tap the students to check in/out. The line will turn light blue when the student is selected. To deselect, tap the student again
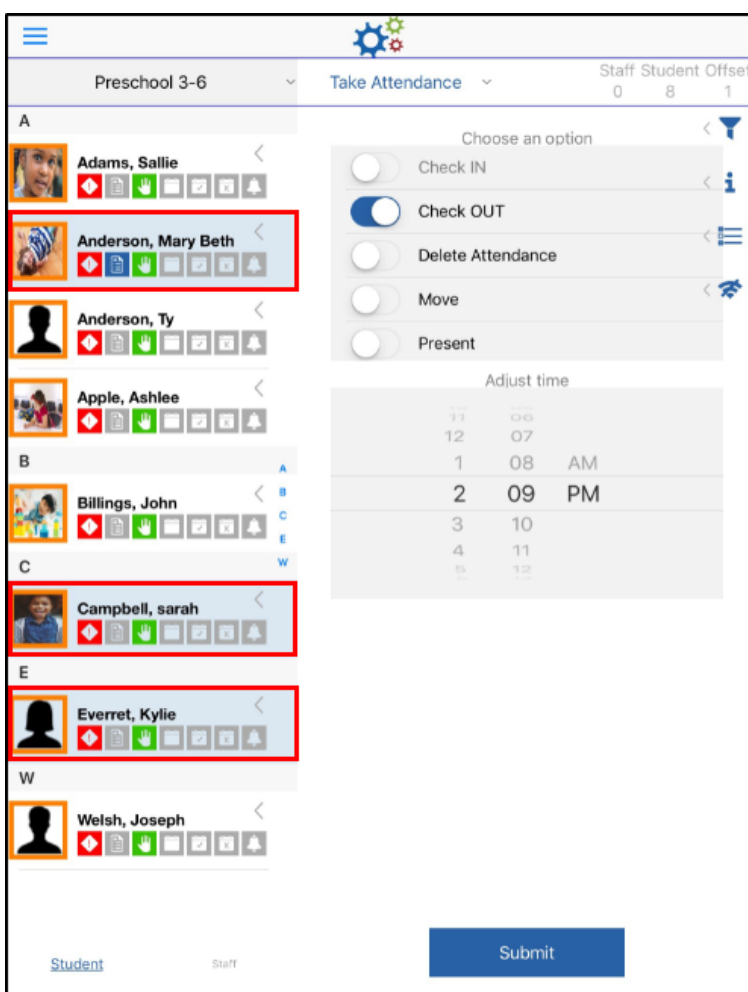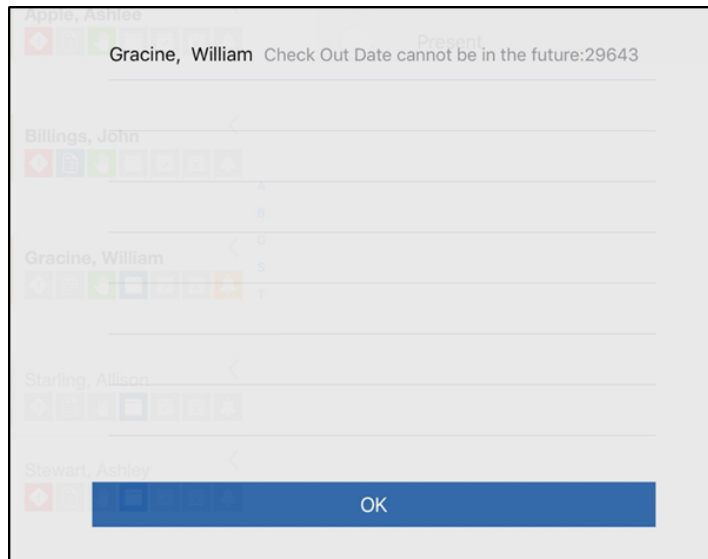
4. Select the correct time for check in/out - the time will default to the current time. **Please Note:** only past times are selectable

5. Click Submit
6. The confirmation screen will display the status of each student's check in/out, Click OK
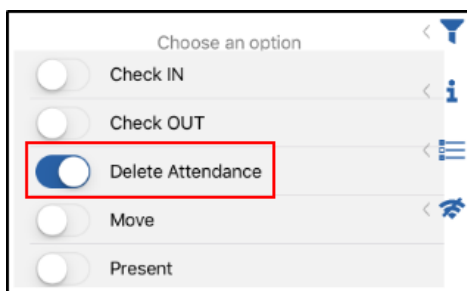   a. Success - the check in/out was successful

b. Check In/Out Date cannot be in the future
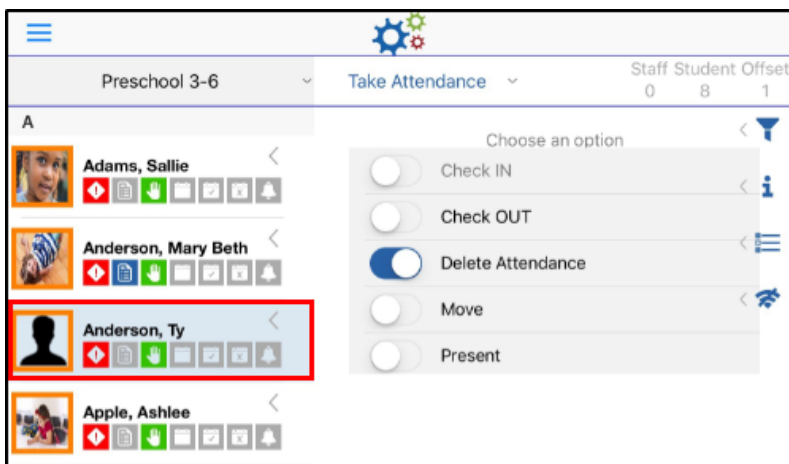

DELETE ATTENDANCE

To delete a student's attendance for the day, follow the steps below:

1. Click Delete Attendance

2. Select the student to delete. **Please Note**: only one student's attendance can be deleted at a time
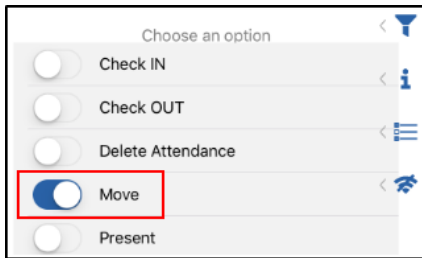

3. Click Submit - There is no confirmation screen, once you click submit, the attendance will be deleted
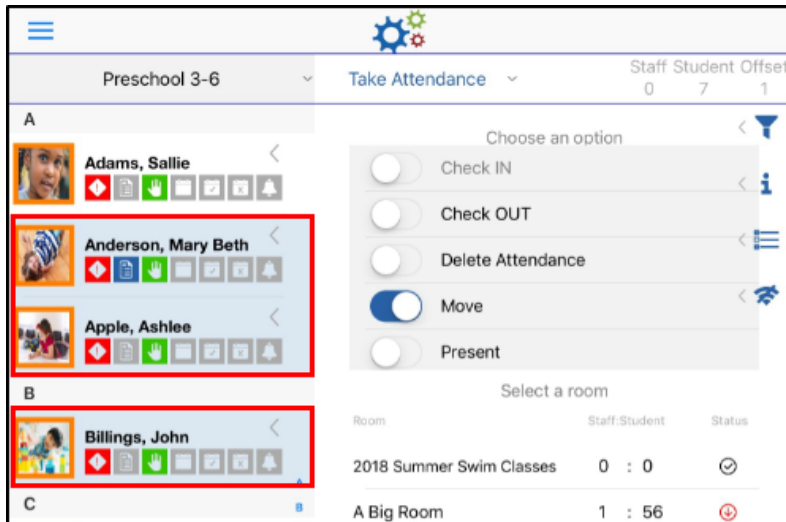
MOVE

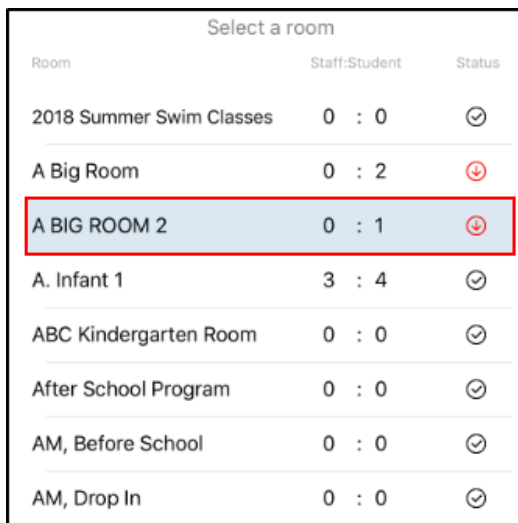To move students to a different room, follow the steps below:

1. Select Move

2. Select the students from the left that should be moved

3. Select the room the students should be moved to. This screen also shows the staff to student ratio
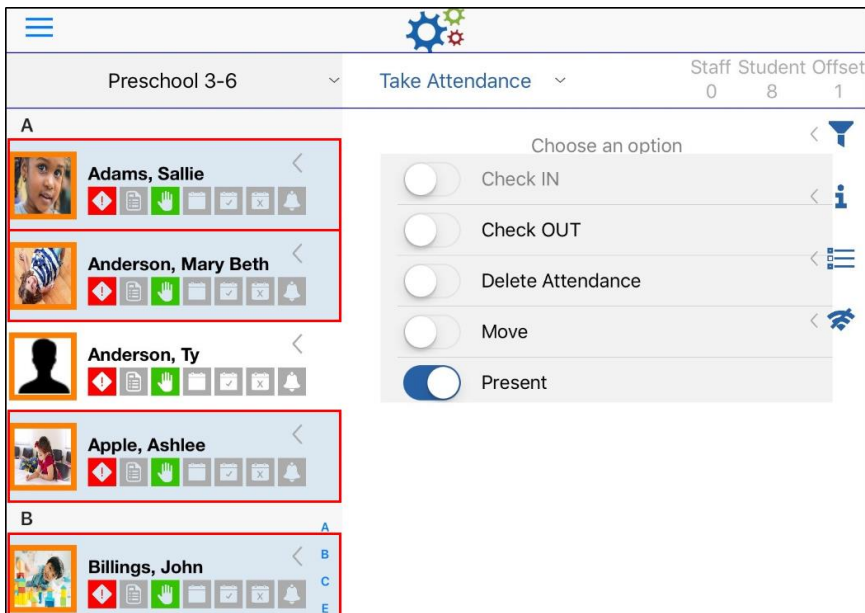

4. Click Submit

PRESENT

The Present option allows staff to record that students are currently present and accounted for. The Present icon will consistently reappear 30 minutes after the student has been marked as Present.

1. To mark a student as present, select Present from the Take Attendance screen
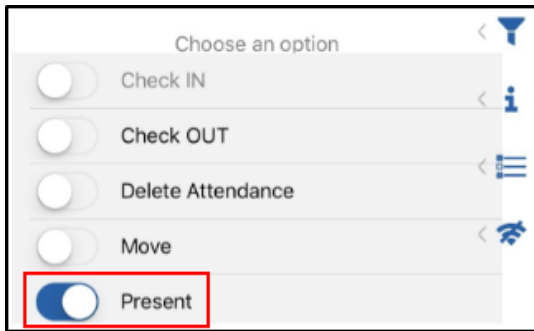
2. Select the students from the left that should be marked present. **Please Note**: only students who are checked in will show in this section
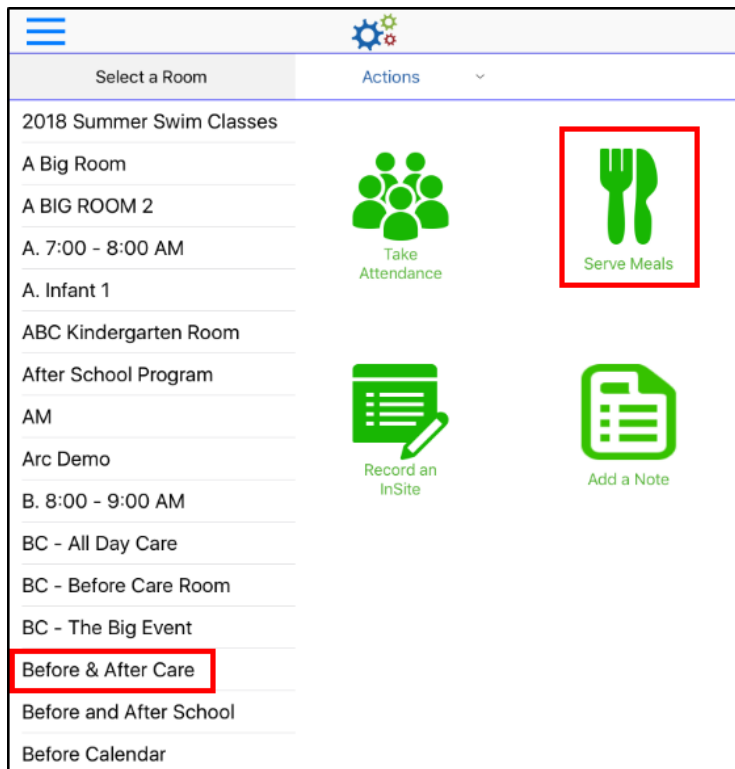

3. Click Submit
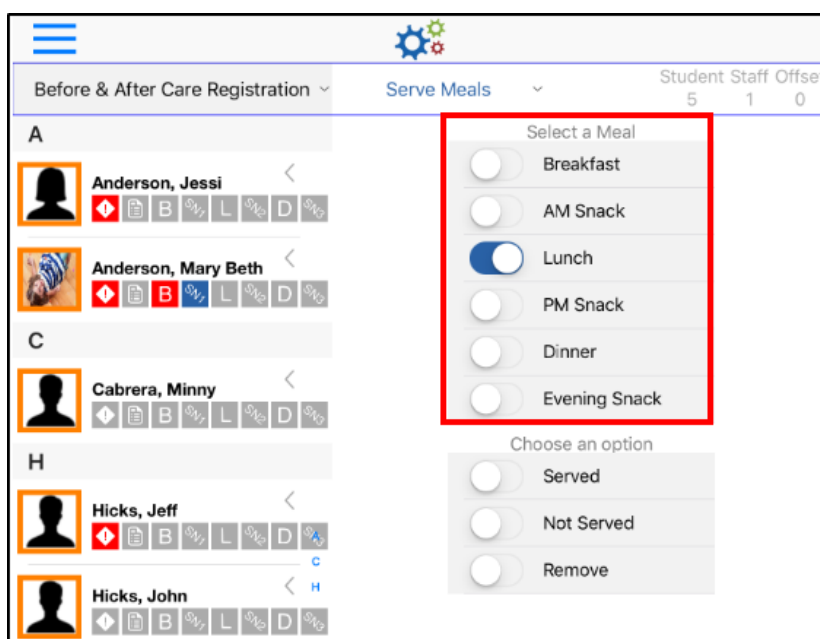4. Click OK on the confirmation screen

SERVE MEALS

Use the Serve Meals option from the home screen to record meals served to students. Once a meal is selected, there are three options to choose from: Served, Not Served, or Remove.

ADDING AND REMOVING MEALS

1. Choose a room from the left and click Serve Meals


2. Select a meal to record

a. Breakfast

b. AM Snack

c. Lunch

d. PM Snack

e. Dinner

f. Evening Snack

3. Choose an option

a. Served - the meal was served to the student

b. Not Served - the meal was not served to the student

c. Remove - a meal needs to be removed from the student

4. Select the students on the left that are associated to the selected meal. **Please Note:** only students that have been checked in for the day will be on the list

5. Click Submit

6. Once the meal has been submitted, each meal indicator will turn blue, see chart below

    a. When the icon is blue - the corresponding meal has been Served

    b. When the icon is gray - the corresponding meal has not been recorded

    c. When the icon is red - the Not Served option was selected
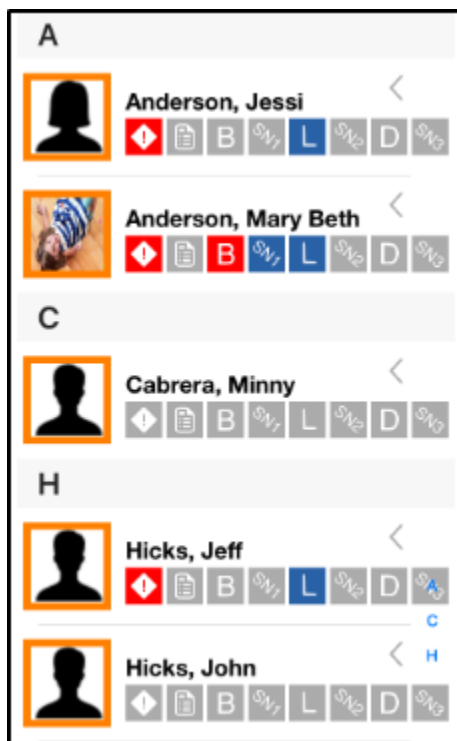
The below chart explains what each meal indicator stands for:

Icon	Description	Icon	Description
B	Breakfast	SN2	PM Snack
SN1	AM Snack	D	Dinner
L	Lunch	SN3	Evening Snack

CIRRUS GROUP LLC

RECORD AN INSITE

InSites are used for recording activities the students were involved in throughout the day. Activities include naptime, reading, time out, etc. and are communicated to parents via the parent portal.

1. Select a room and click Record an InSite

2. Select a Category. **Please Note:** categories can be added/edited from the administrator site.
3. Enter the details for the InSite - time, comments, etc.

4. Add a photo and photo comment
    a. Click the camera icon on the bottom right
    b. Choose Library or Camera
    c. Select/take the photo
    d. Add any comments in the Add a comment section
    e. Click Save
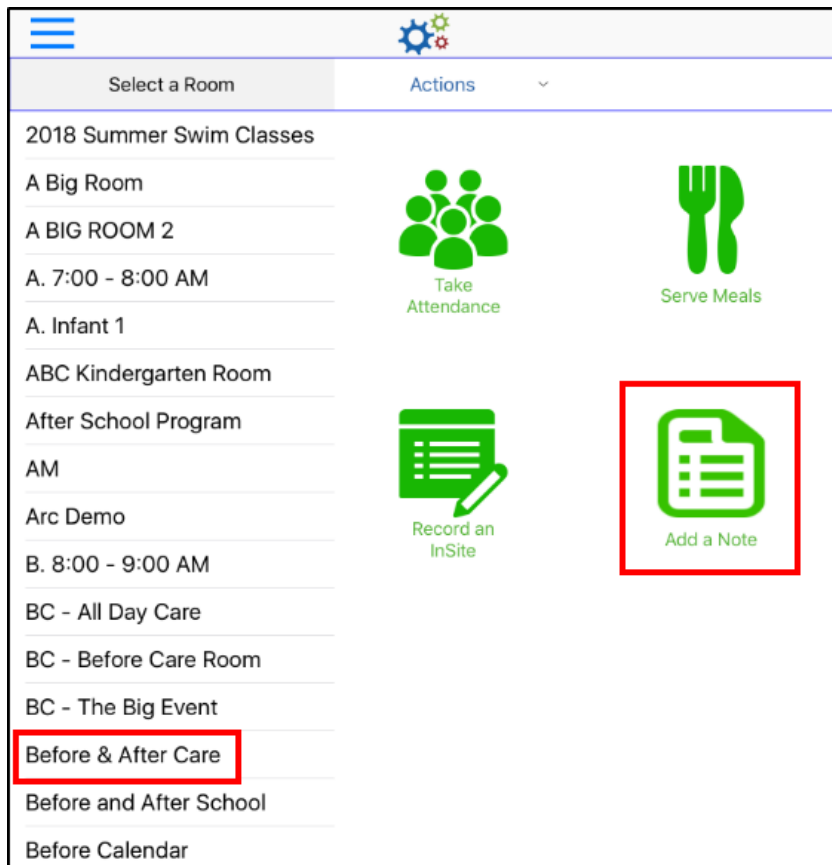5. Select the student(s) from the left that participated in the InSite

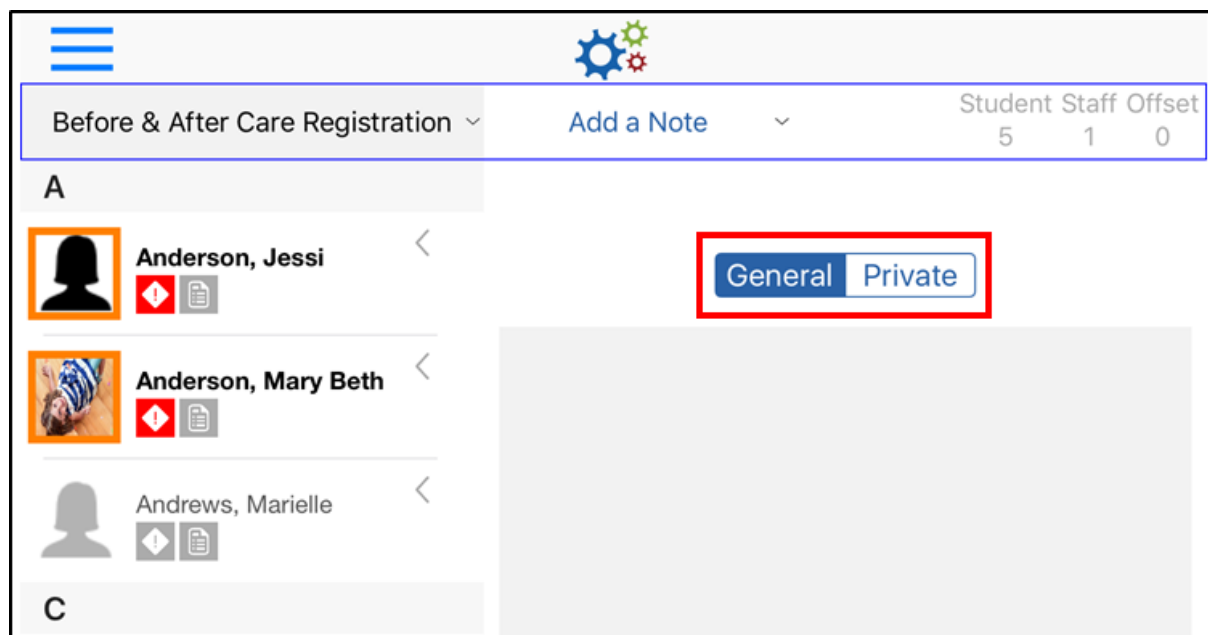6. Click Submit. These will appear in Today's Daily InSites

ADD A NOTE

Notes can be added to a student or several students and marked as general or private. Follow the steps below to add a note:

1. Select a room and click Add a Note

2. Select General or Private - the selected option will be blue

a. General - these notes show up when student is checked out on InSite app

b. Private - these notes are not viewable by parents

3. Enter the details for the note

4. Select the students on the left - the selected students will be light blue

5. Click Submit

6. Click OK on the confirmation popup to submit the notes

InSite Provider Application 3.1.0
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