KidKare EasyPay Start-Up Checklist

Welcome to KidKare EasyPay! This checklist walks you through the basic steps needed to get started with KidKare EasyPay. It assumes that you already have a KidKare account with participants enrolled.

❑ **Set User Permissions & Manage Your Accounting Settings**

Specify who on your staff can and cannot access your accounting information. You can find these settings on the User Permissions page. See **Set User Permissions for EasyPay**.

Next, manage your accounting settings on the Site Level Settings page. You can customize your email templates, set a starting invoice number, and sign up for ePay. See **Manage Accounting Settings**.

❑ **Sign Up for ePay**

ePay allows your Payers to pay invoices online with a credit card or bank account. Once you set up ePay, Payers can also set up automatic payments. Money is deposited directly into your account, eliminating cumbersome trips to the bank to deposit money or checks!

You can sign up for ePay on the Site Level Settings page. See **Sign Up for ePay** for step-by-step instructions.

❑ **Add Contacts & Payers to Participant Accounts**

Add contacts and designate them as payers on the Participant Accounts page. The information you enter here does not affect enrollment data. Ensure that at least one contact is designated as a payer of invoices.

You can also add agencies if an agency is responsible for all or a portion of a participant's care. Split payments between agencies and between contacts, as needed.

See **Manage Contacts**, **Manage Agencies**, and **Manage Payment Settings** for details.

❑ **Create Invoices**

Create invoices and email them to payers! You can also set up recurring invoices that run automatically according to a schedule you set.

See **Create Invoices** and **Create Recurring Invoices** for more information.

❑ **Record Payments**

Record cash and check payments made towards invoices. You can also record payments made with existing account credits. This moves your invoices to Paid status.

See **Record Invoice Payments** for details.

❑ **Track Additional Income**

If you have income from another source, track it on the Other Income page. This can include registration fees, claim reimbursement, spousal income, grants, and so on.

See **Enter Other Income** for more information.

❑ **View Reports**

KidKare EasyPay comes with several financial reports you can view and print at any time. See **EasyPay Reports** for details.

More Information

For more information about everything KidKare EasyPay has to offer, access the KidKare Knowledge Base at **https://help.kidkare.com/help**. You can also access this page at any time from KidKare. To do so, click **Get Help** from the menu to the left. **Click here** to access the complete EasyPay knowledge base.