

Student Records (Administration)

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Tool Search: Dependent Care

Administration Student Records allows users to view and edit student records for students enrolled in Dependent Care, both past and present. Users can view/edit/adjust a student's: schedule, emergency contacts and persons authorized for pick up, charges, discounts, credits, and any forms and their completion status.

Jdent Records		Dependent Care > Admini	stration > Student R
Hide Filters Reset Search by Student Name Appl	y Filters		
Student Name	Grade	Birth Date	
Andersen, Jane	07	11/17/2013	^
Andersen, Joe	02	10/21/2018	
Allen, Beth	02	03/02/2018	
Allen. Joe	04	10/23/2015	
Anderson, Jack	10	10/12/2009	
Anderson, Joshua	07	02/01/2014	
Family-A, Student1	12	01/01/2011	
Family-B, Student1	12	01/01/2011	
Family-B, Student2	11	02/02/2012	
Family-B, Student3	10	03/03/2013	
Family-C, Student1	12	01/01/2011	~
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Using Filters

Users may search for a specific student, or subset of students, using the filter options.

1. To filter student records, press the **Show Filters** button. Available filters for student records display.

Hide Filters Reset		
Search by Student Name	Search by Grade	Apply Filters

- 1. To **Search by Student Name**, type in the name you'd like to search by. Users can search by a single letter or multiple letters.
- 2. To **Search by Grade**, type in the grade level by which to search.
- 3. Once the desired search filters are entered, press **Apply Filters**. Student records



meeting the search criteria display.

- 4. To remove any filters, press **Reset**. The full list of student records displays.
- 5. To hide the filter search fields from view, press **Hide Filters**. The search filters are hidden from view. It is important to note that hiding filters does not remove filters. Any set filters remain and the Student Records list reflects those filters.

Student Records

Users can view student records by selecting the student whose record they'd like to view. Users are able to view and edit sessions for which the student is registered, their session schedule, any charges applied to the account, emergency contacts and persons authorized for pickup, and any forms needed for the session.

Viewing a Student Record

To view a specific record, find the student record you want to view and click on the record.

Student Records 🕁	Dependent Care > Site Staff	> Student Records
Student Records A, Charla Student #: 000000000 Grade: 07 DOB: 11/17/2013		
Display Previous Sessions		
NSD Summer Enrichment	View	
Close		A, Micah >



- A student record screen displays listing all currently enrolled sessions for the student. To view a list of previously enrolled sessions for the student, toggle the **Display Previous Sessions** option to **ON**. To view only currently enrolled sessions for the student, toggle **OFF** the **Display Previous Sessions** option.
- 2. To view a session in more detail, choose the session you wish to view and press **View**. A screen displays with session details for the student.

udent Records ជ								Dependent Care > Ad	ministration
Student Record	ls								
Allen, Jane Student	t #: 111111 Grade: 02 E	00B: 03/02/2018							
Group A - Summer E	xplorer								
Schedule				- Emergency Contacts/	Authorized Pick Up People		-		
Daily Summer Care	06/16/25 - 08/01/25 Clev	eland Elementary		Name	Phone	Authorized Pick Up Person			
Monday Tuesda	y Wednesday Thursday	r Friday		Mom Allen (Guardian)	Work: (555)555-1478 Work: (555)555-1109	Authorized Pick Up Person			
Edit				Father Dad Allen (Guardian)	Cell: (555)555-1477	2			
				Name Sibling Sister Allen	Phone	Authorized Pick Up Person			
				Edit					
Charges				- Discounts			-		
DATE	NAME	AMOUNT		START DATE END	DATE NAME	AMOUNT			
06/11/2025	Registration Fee	\$50.00	Adjust	06/11/2025	Family Discount	\$50.00 Edit			
Add				Add					
Credits				- Forms					
DATE	NAME	AMOUNT		Required Forms					
Add				War Room Doc COMPLETE					
				Last modified by Adminis	trator, Demo on 6/11/25, 2:28	PM			

3. From this screen, users can both view and edit: Schedule, Emergency Contacts/Authorized Persons, Charges, Credits, Discounts, and Forms.

Editing a Student's Session Schedule

Users are able to both view and edit a student's session schedule.

1. To edit the student's session schedule, press **Edit**. The Student's Current Schedule displays.

rrent Sch	edule				
te					
eveland Ele	mentary				
st Attendanc	e Date (Require	d) Las	t Attendance	Date (Requi	red)
st Attendanc)6/16/2025 inimum 2 d	e Date (Require	d) Las	t Attendance 3/01/2025	Date (Requi	red)
st Attendanc)6/16/2025 inimum 2 d Daily Sumn	e Date (Require ays per week ner Care 6:00	d) Las	t Attendance 8/01/2025 M	Date (Requi	red)
st Attendanc 06/16/2025 inimum 2 d Daily Sumn Monday	e Date (Require ays per week ner Care 6:00 Tuesday	d) Las	t Attendance 3/01/2025 M Thursday	Date (Requi	red)

- 2. Use the **First Attendance Date** and **Last Attendance Date** fields to enter the date range to which the schedule change applies.
- 3. Use the **Weekday** check boxes to determine the days on which the student will attend the session. The student is scheduled to attend on all of the checked days.
- 4. When finished, press **Save** to save any changes made to the student's schedule or **Cancel** to exit without saving the changes.



Student Session Emergency Contacts and Authorized Pickup Person(s)

Users may not remove Emergency Contacts from a student record. They may, however, change their Authorized Pick Up Person status or add new emergency contacts and authorized pick up persons.

1. To view/edit the list of Emergency Contacts and Authorized Pick Up Persons for a student, press the **Edit** button. The Emergency Contacts/Authorized Pick Up People list displays.

Name Mother Mom Achilles (Guardian)	Phone Cell: (555)555-1478 Work: (555)555-1109	Authorized Pick Up Person
Name Father Dad Achilles (Guardian)	Phone Cell: (555)555-1477	Authorized Pick Up Person
Name Sibling Sister Achilles	Phone	Authorized Pick Up Person

- To change a person's Authorized Pick Up status, either mark or unmark the checkbox. If the Authorized Pick Up Person checkbox is marked, the person *is* authorized to pick up the student. If the checkbox is unmarked, the person *is not* authorized to pick up the student.
- 3. To add a new emergency contact/authorized pick up person, press Add.

Phone (Required)
Remove

- 4. Enter a **Name** and **Phone** number for the new contact.
- 5. If this person is authorized to pick up the student from care, mark the **Authorized Pick Up Person** checkbox.
- To remove a newly added contact, press **Remove**. It is important to note that existing contacts may not be removed from the list nor can a newly added contact be removed once the addition is saved.
- 7. When finished, press **Save** to save any changes made to the student's schedule or **Cancel** to exit without saving the changes.

Student Session Charges



Users are able to adjust charges applied to the student's session or to add additional charges.

Adjusting Existing Charges

1. Find the charge you'd like to adjust and press **Adjust**. The Adjust a Charge screen displays.

Adjust a Charge	
Charge Name 06/11/2025 Registration Fee	
Effective Date (Required)	
06/23/2025	
Adjustment Amount (Required)	
Comment (Required)	
	/
	111.

- 2. The **Charge Name** is read-only cannot be changed.
- 3. In the **Effective Date** field, enter the date on which this charge adjustment takes effect.
- 4. Use the **Adjustment Amount** to enter the amount the charge will be adjusted. This amount must be equal to, or less than, the current charge.
- 5. Enter a **Comment** explaining the adjustment. This is a required field.
- 6. When finished, press **Save** to save any changes made to the charges or **Cancel** to exit without saving the changes.
- Once the adjustment is applied, users are able to edit the adjustment by pressing the Edit button. From the Edit screen, users may change the Effective Date and the Adjustment Amount. Users must also enter a Comment explaining the reason for the edit.

Adding Additional Charges

 To add an additional charge to the student session charges, press Add. The Add a Charge screen displays.

Charge Name (Required)	
Effective Date (Required)	
06/23/2025	
Comment (Required)	

- 2. Use the **Charge Name** drop-list to select a charge the apply to the student's charges.
- 3. In the **Effective Date** field, enter the date on which the charge should be applied.
- 4. Enter a **Comment** as to why the charge is being applied. This is a required field.
- 5. When finished, press **Save** to save any changes made to the charges or **Cancel** to exit without saving the changes.

Student Session Discounts

Users are able to edit existing discounts applied to the student's session or to add additional discounts.

Editing Existing Discounts

1. Find the discount you'd like to change and press **Edit**. The Edit a Discount screen displays.

Discount Name (Required)			
\$50.00 Family Disco	•		
Start Date (Required)		End Date	
06/11/2025	(mm)	month/day/year	r t

- 2. Use the **Discount Name** field to determine the appropriate applied discount. If the appropriate discount is selected, leave this field as-is.
- 3. In the **Start Date** and **End Date** fields, enter the date range for which to apply this discount. If the discount should be indefinitely applied, leave the End Date blank.
- 4. Mark the **Apply Discount to Drop Ins** if the discount should be applied to any drop-in care for the student. Leave the checkbox unmarked if the discount should not be applied to drop-in care.
- 5. When finished, press **Save** to save any changes made to the discounts or **Cancel** to exit without saving the changes.



Adding Additional Discounts

 To add an additional discount to the student session discounts, press Add. The Add a Discount screen displays.

Discount Name (Required))		
	•		
Start Date (Required)		End Date	
Citar i Date (requireu)			_

- 2. Use the **Discount Name** drop-list to select a charge the apply to the student's charges.
- 3. In the **Start Date** and **End Date** fields, enter the date range for which to apply this discount. If the discount should be indefinitely applied, leave the End Date blank.
- Mark the Apply Discount to Drop Ins if the discount should be applied to any drop-in care for the student. Leave the checkbox unmarked if the discount should not be applied to dropin care.
- 5. When finished, press **Save** to save any changes made to the discounts or **Cancel** to exit without saving the changes.

Student Session Credits

Under session Credits, users may edit existing credits or can add additional credits to the account.

Editing Existing Credits

1. Find the credit you'd like to change and press **Edit**. The Edit a Credit screen displays.

Edit a Credit
Credit Name (Required)
Overcharge
Effective Date (Required) 06/02/2025
Credit Amount (Required)
25.00
Comment Parent overpaid amount due. Edit Comment (Required)



- 2. Use the **Credit Name** field to enter the name of the credit. Leave this field as-is if the name of the credit still works.
- 3. In the **Effective Date** field, enter the date on which to apply this credit. Leave this field as-is if it does not need changing.
- 4. Next, enter the amount to credit the account in the **Credit Amount** field. Leave this field asis if the credit amount is still correct.
- 5. Use the **Edit Comment** field to explain the reason for the credit. This is a required field.
- 6. When finished, press **Save** to save any changes made to the discounts or **Cancel** to exit without saving the changes.

Adding Additional Credits

 To add an additional credit to the student session credits, press Add. The Add a Credit screen displays.

Add a Gredit		
Credit Name (Required)		
Effective Date (Required)		
06/23/2025		
Credit Amount (Required)	52 - 34	
Comment (Required)		

- 2. Use the Credit Name field to enter the name of the credit.
- 3. In the **Effective Date** field, enter the date on which to apply this credit.
- 4. Next, enter the amount to credit the account in the **Credit Amount** field.
- 5. Use the **Comment** field to explain the reason for the credit. This is a required field.
- 6. When finished, press **Save** to save any changes made to the discounts or **Cancel** to exit without saving the changes.

Student Forms

The Forms section can be used to view any student forms and their completion status. Forms cannot be edited or added form this screen.