

CHILD CHANGING PARENTS

If you have entered the wrong parent or the parent has changed there are 7 steps to follow to switch over.

This tip sheet will walk you through:

1. Create the new/correct parent
2. Link the new parent to the child
3. Create a booking
4. Create CCS Enrolment
5. Fix Session Reports (if you have been submitting under the wrong parent)
6. Generate new e-Signatures (if you are using our e-Signature module)
7. Accounts (Invoices and Receipts)
8. Inactivate incorrect parent

CHILD CHANGING PARENTS

Detailed

1. Create the correct parent

Create the parent through child care menu, select parent guardians and then click create.

If you need further instructions please see the tip sheet called Creating Parents and Children

NOTE: It's important that you CREATE a brand-new record for the new parent and not just EDIT the parent you already have in the system.

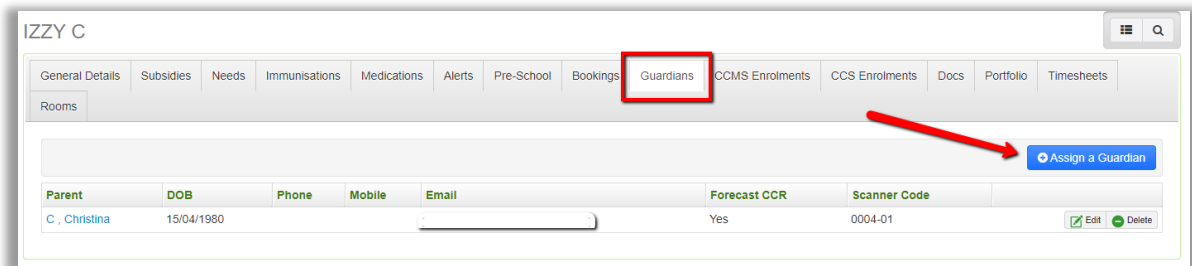
2. Link the new parent to the child

Click on childcare - children

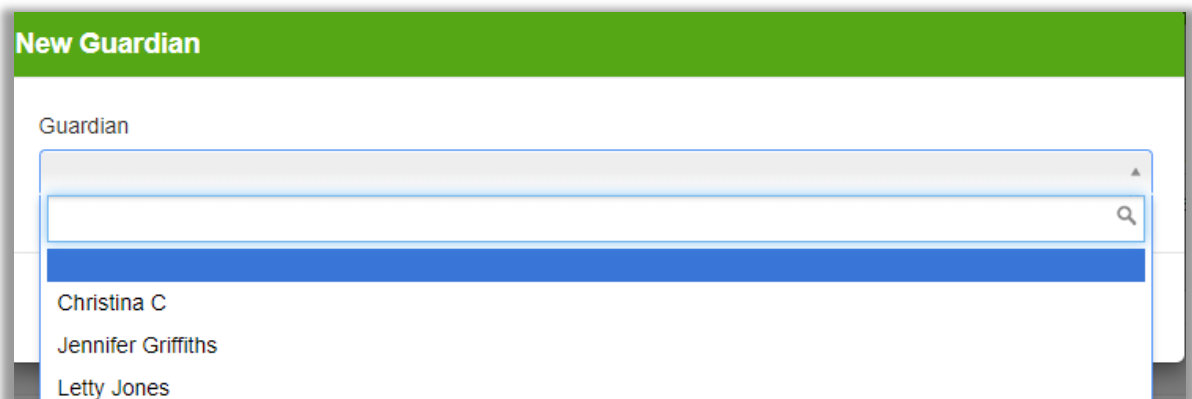
Search for the child and click edit the child

Click on the Guardians tab

Click Assign a Guardian



Select the new parent from the list and click save



Detailed cont.

3. Booking

1. Go to the Booking Tab
2. Click on the room name
3. Edit the booking

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General Details Subsidies Needs Immunisations Medications Alerts Pre-School **Bookings** Guardians CCMS Enrolments CCS Enrolments Docs Portfolio Timesheets

Rooms

Booking Details New Booking

Weekly Forecast **May 27 - Jun 2** < This Week >

Mon 27/5	Tue 28/5	Wed 29/5	Thu 30/5	Fri 31/5	Sat 1/6	Sun 2/6
There are no Approved sessions booked for this week.						

OSHC Care Room

Sessions	Guardians	Active / Inactive	Date Range	Default Program	Status	Approval Date	Approval By	
0		Active	29/04/2019 - ongoing	After School Care	Approved	8/05/2019		Edit

When the template opens select an end date and save:

LDC Room **OSHC Care Room**

Edit Booking

Start Date: 12/08/2019

End Date:

Default Program: Joey's Room

Approval Date: 15/08/19

Next, you will need to create a new booking and select the new parent on each session:

Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
Program: Koala Fee Schedule: Koala Fee Tier: 1st Fee Guardian: Sabina Glado Start: 07:00 AM, End: 06:00 PM [Delete] [Copy] [Edit]	+	+	Program: Koala Fee Schedule: Koala Fee Tier: 1st Fee Guardian: Sabina Glado Start: 07:00 AM, End: 06:00 PM [Delete] [Copy] [Edit]	Program: Koala Fee Schedule: Koala Fee Tier: 1st Fee Guardian: Sabina Glado Start: 07:00 AM, End: 06:00 PM [Delete] [Copy] [Edit]	+	+

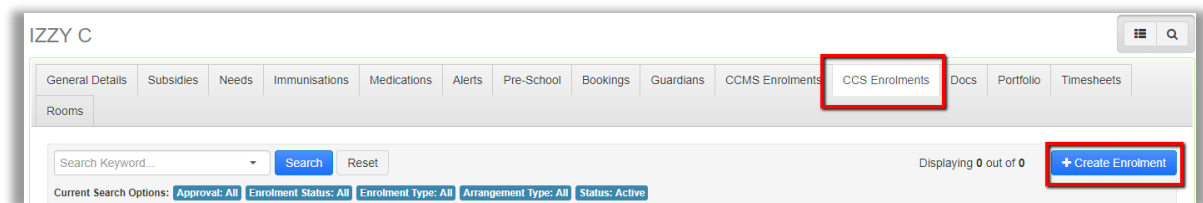
Repeat this process for each session of care and then **save** the booking.

NOTE: For more information on how to create a booking, please see our tip sheet called 'bookings'.

Detailed cont.

4. CCS Enrolment

Go to the CCS Enrolments tab and create a new enrolment selecting the new correct parent



NOTE: It's important that you CREATE a new enrolment as you cannot EDIT an existing enrolment to change a parent.

5. Session Reports

If you have submitted any session reports under the incorrect parent you will first need to cancel all session reports and then submit new session reports to CCS under the *now* correct parent.

If you are unsure on how to cancel a session report please refer to our tip sheet called **Cancelling a Session report**.

6. e-Signatures

If you are using electronic signatures make sure that you generate a new pin for the correct parent, partner and any contacts. Their previous e-signature pin is no longer correct and will become invalid as the incorrect parent has been made inactive.

7. Accounts

Invoices: If you have needed to cancel session reports, the software will automatically create an adjustment invoice to remove the charges from the now incorrect parent account.

After you submit under the correct parent, check if any payments have come in so you can disburse them, you will then invoice the correct parent.

1. Accounts
2. Invoices
3. Create Attendance Invoice

Detailed cont.

4. Select weekending
5. Select Parent
6. Click Submit

Receipts: If you have receipted under the wrong parent you will need to remove the receipts under the incorrect parent and apply the payments to the correct parent account.

For further instructions on deleting and creating receipts please see the tip sheet called **Receipting**

8. Inactivate Parent

Inactivate the incorrect parent to avoid any confusion on bookings, timesheets and e-signatures.

If you are unsure on how to inactivate a parent please see our tip sheet **Inactivating Parents/Guardians and children.**