





SERVICE SETUP

There may be certain fields within your software you wish to customise to suit your service needs.

This tip sheet will walk you through the different areas within the setup and the options you have:

- Banks
- Child Needs
- <u>Guardian Reminder Categories</u>
- Roles
- **Groups** (currently being developed)
- Public Holidays
- Family Contact Types
- **<u>Priority of Access</u>** (we will generally set this up when you commence)
- Rounding
- Email templates
- BPay Settings (speak to Child Care Central who will assist with this set up)
- Transport Locations
- RedPAY Settings (speak to Child Care Central who will assist with this set up) •
- Holiday Periods
- Wait List Priorities
- Wait List Location







SERVICE SETUP

Detailed

Accessing Set Up

Click the **Settings cog** and select **Setup**.

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40 Stop Imperso	nating
DASHBOARD	
■ Accoursett ► (Coursett	r
Work Centre	anagement
Welcome to your Work Centre.	ting Docs
Ste Settings	
E Parent Portal	
Daily Care Children In Care e-Signatures Parent Feedback Messages Approvals	
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The following page will appear:

- 🗘	Demonstratio	n Site - Redbourr	ne Child Care Cer	ntre 🤇	hild Care 🔻	Processing *	Accounts •	Reports *	Quality •	Program & Practices *	Admin 🔻				Support 🗘 -
Home	Setup														
SET	SETUP														
Bani	Child Need	s Guardian Remi	inder Categories	Roles	Groups	Subsidy Schemes	Public Ho	olidays Fami	ly Contact Type	es Billing Periods	Priority of Access	Rounding	Email Templates	BPay Settings	
Tran	sport Locations	redPAY Settings	Holiday Periods	Wait L	ist Priorities	Custom Authoris	ations W	ait List Location							
													Displayin	g 0 out of 0	O Create New Bank
Nai	ne				Co	de				Suburb					

Enter the relevant details in each of the tabs.







<u>Banks</u>

Click the **Create New Bank** button:

Home	Setup P															
Banks	Child Needs	Guardian Remi	nder Categories	Roles	Groups	Subsidy Schemes	Publi	c Holidays	Family C	Contact Types	Billing Periods	Priority of Access	Rounding	Email Templates	BPay Settings	
Transpo	ort Locations	redPAY Settings	Holiday Periods	Wait L	ist Priorities	Custom Authorisa	ations	Wait List L	ocation							
														Displayin	g 0 out of 0	Create New Bank
Name					Co	de					Suburb					

The following window will appear:

Name			
Address Line 1	Address Line 2		
Suburb		State	
		VIC	•
Electronic Details			
Create ABA File	Create Debi	it Entry	
User Bank (Bank Code)	User Name		
	BSB (Format 999	9-999)	Account Number
Entry Description			
Entry Description			
Entry Description Remitter Name	ABA File Name	e	
Entry Description	ABA File Name	e	
Entry Description	ABA File Name	e NBA (Where YYYY-MIN	N-DD is the period end date)

<u>Helpful Hint:</u>

Bank Details (This is for your service's bank). Name – Enter the name of the bank. Address – Enter the Address for the Bank.

Electronic Details

Use this section if you wish to create an ABA file when the Bank Deposit Advice is created.

Create ABA File – Tick this option to tell the system to create an ABA file when the Bank Deposit Advice is created.





Create Debit Entry - You should only click on this option box to create a Debit Entry if you have been instructed to generate such an entry by your bank.

User Bank – Enter a 3 character bank abbreviation. e.g. WBC for Westpac Banking Corporation. You should check with your bank for the correct abbreviation.

User Name – Enter the account name responsible for the deposit.

User Number – Enter the Identification Number allocated by the bank to identify the User.

Entry Description – Enter the general description of the entries that will be contained in the deposit file. This description will be printed against the deposit on the Educators Bank Statement e.g. FDC Payments.

BSB – Enter the Bank/State/Branch number of the User Account. In the format ###-###

Account Number – Enter the account number of the User Account.

Remitter Name – Enter the name of the remitter or originator of the entry.

ABA File Name – This file is in the required Australian Bankers Association format. Enter the prefix you want to have at the front of the file name for the ABA file. This will be followed by the period end date in the format YYYYMMDD and the file extension ABA.

E.g. If you choose CBA, a file created for the period ending 14 June 2015 will be called: CBA20150614.ABA

Enter all relevant details and click Save

<u>Child Needs</u>

Click the Create New Child Need button:

Janko	Child Needs	Guardian Remi	nder Categories	Roles	Groups	Subsidy Schemes	Public Holidays	Family Contact Types	Billing Periods	Priority of Access	Rounding	Email Templates	BPay Settings	
Transpor	t Locations	redPAY Settings	Holiday Periods	Wait L	ist Priorities	Custom Authorisa	tions Wait List I	Location				~		
												Displaying 5 i	tems 🛑 🕑 Crea	te New Child Need
Name														
0	and a set of the set													🛛 🖉 Edit 🛛 🔵 Delete
Commu	inication													
Commu Learnin	inication g and Applying	Knowledge												Edit ODelete
Commu Learnin Mobility	nication g and Applying	Knowledge												Edit Delete
Commu Learnin Mobility Speech	inication g and Applying	Knowledge												Edit Delets

A similar window as below will appear:







Need	
Name	
	Close 🖺 Save

Enter the name of the Child Need and click Save.

Guardian Reminder Categories

Click the Create New Category button:

Home	Setup															
SETUF	C															
Banks	Child Needs	Guardian Remi	nder Categories	Roles	Groups	Subsidy Schemes	Public	: Holidays	Family Conta	ict Types	Billing Periods	Priority of Access	Rounding	Email Templates	BPay Settings	
Transpo	rt Locations	redPAY Settings	Holiday Periods	Wait L	ist Priorities	Custom Authorisa	ations	Wait List Lo	ocation				~			
Name													Displaying	3 items O Cre	ate New Guardian	Reminder Categ
Update	Details															🗾 Edit 🕒 D
Immuni	isation Docum	entation														🗾 Edit 🕒 🗅
Enrolm	ent															🖉 Edit 🕒 D

Enter the name of the Category and click Save

<u>Roles</u>

Where you can create roles for staff members and customise permissions. A default **Full Access** role will already be created however you can utilise this option if you are wanting to set up your own roles for specific staff members.

To do this first click on the Create New Role button:

Home	Setup															
SET	UP															
Ban	ks Child N	eeds	Guardian Remi	nder Categories	Roles	Groups	Subsidy Schemes	Public Holida	iys Fam	ly Contact Types	Billing Periods	Priority of Access	Rounding	Email Templates	BPay Settings	
Trar	isport Locatio	ns re	edPAY Settings	Holiday Periods	Wait L	ist Priorities	Custom Authorisa	tions Wait I	List Location	1						
Ľ				Search										Displaying 10 o	out of 10	Create New Role
Na	me 📀											Action				
Ao	count Admin A	ccess														
Ad	min Staff															🖉 Edit 💌
Ch	ild Care															Edt 💌
Co	ordinators															🖉 Edit 💌
Ed	ucator															🖉 Edit 💌
e-s	ignature															🖉 Edit 💌
Fu	Access															Permissions







Enter in a **name** for the role e.g limited access and click **save**

Add Role		×
Role Name		
		Close 🕒 Save

The role will now appear in the list.

To customise what the users assigned to this role can see and do in your system click on the dropdown arrow and select **Permissions**

Name O	Action
Account Admin Access	
Admin Staff	Z Edt 💌
Full Access	Z Permissions
Limited Access	Z Edt 💌
Mary	Delete
1	Permissions

Select the first component Admin

Permissions for	Limited Access		×
Select Component	Account Level Admin	.▲ Q,	
Permission Typ None - User View - User Edit - User h 	Admin Child Care Family Fees	^	t date details within the sub component int
Sub-Component	Finance Library		Description
Ccs Provider	Program & Practices Quality	•	Grant access to CCS Provider details
			Close 🕒 Save

This will open the sub-components, Permission Types and Description



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			— G F	201	JP-			



Sub- Component	Permission	Description
Payments	None 🔻	View and query CCMS payments and remittances
Approvals	None	Manage your approvals. Users can view details of the approval such as service details, places, accreditations, approval fees and messages. Note: anyone who has access to this sub component can access all of the approval details within your organisation
Sites	None	Manage your site details. Note: anyone who has access to this sub component can access all of the site details within your organisation
Users/Personnel	None 👻	Manage users and ccms personnel. From here users can be created and mapped to sites and approvals
Setup	None	Allow users to access setup features such as: areas, field workers, banks, reminder categories, child needs, training, roles, groups, subsidy schemes, public holidays, deduction categories and levies
Parent Portal Guardian Access	None	Enable scheme users to grant parent portal access to guardians in their sites
Update CCMS Profile	None 🗢	Allows a user to send a profile update to CCMS

Read the Description and then set a permission.

The different permission types are:

None: User cannot access this area at all View: User only view area and will not be able to make changes Edit: User will have full access to this area

Then move onto your next component **Childcare** and follow the same steps until you have moved through all components adjusting permissions within each area.

Click **save** when you are finished.

NOTE: We recommend after you've assigned the new role to a user that you log in as the user first to double check the user can only see and have access to the areas you've assigned as some components can be linked.

<u>Groups</u>

Click the Create New Group button:

Home	Setup														
SETU	>														
Banks	Child Needs	Guardian Remi	nder Categories	Roles	Groups	Subsidy Schemes	Public Holi	days Fa	mily Contact Types	Billing Periods	Priority of Access	Rounding	Email Templates	BPay Settings	
Transpo	ort Locations	redPAY Settings	Holiday Periods	Wait I	ist Priorities.	Custom Authorisat	tions Wa	it List Locat	ion						
Кеум	rords		Search										Displaying	1 out of 1	Create New Group
Name	0						Active								
Child C	Care Group						Yes								🗾 Edit 🕒 Delete
1															







Enter the name of the Group, select Active and click Save

Add Group		×
Group Name	Active YES	
		Close 🖹 Save

Note: This is part of a future feature.

Public Holidays

Creating Public holiday will instruct the software to mark all booked session as Absent.

To create Public Holidays, click on **Create New Public Holiday** button:

inks	Child Needs	Guardian Remi	nder Categories	Roles	Groups	Subsidy Schemes	Public Holida	ys Family	Contact Types	Billing Period	s Priority of Access	Rounding	Email Templates	BPay Settings	
anspor	t Locations	redPAY Settings	Holiday Periods	Wait L	ist Priorities	Custom Authorisati	ons Wait L	List Location							
Keywo	ords		Search										Displaying 4 out of	4 💽 Create N	lew Public Holiday
lame			Date O			All Day	St	tart Time		End	Time	Ac	tions		
nzac [Day		25/04/2021			Yes	N	/A		N/A					🖉 Edit 🔵 Delete
oxing	day		26/12/2018			Yes	N	/A		N/A					🖉 Edit 🕒 Delete
hristm	as		25/12/2018			Yes	N	/A		N/A					📝 Edit 🔵 Delete
aster			19/04/2018			Yes	N	/A		N/A					📝 Edit 🔵 Delete
1															

Enter the **Name, Date** and whether it is an All Day Public holiday or a part day holiday:

Public Holiday De	etails		
Name			
Date	05/11/2021		
All day holiday			
Start Time		End Time	
12:00 AM		12:00 AM	
			Close 🖹 Save

Click Save







Family Contact Types

Click the Create New Contact Type button:

ETU	D															
Banks	Child Needs	Guardian Remi	nder Categories	Roles	Groups	Subsidy Schemes	Public	c Holidays	Family (Contact Types	Billing Periods	Priority of Access	Rounding	Email Templates	BPay Settings	
Transpo	rt Locations	redPAY Settings	Holiday Periods	Wait I	List Priorities	Custom Authorisa	tions	Wait List L	ocation							
Keyw	ords		Search											Displaying 5 out	of 5 • Create	New Contact Type
Name	0															
Doctor																Edit Ociete
Emerg	ency Contact															🖉 Edit 🕒 Delete
Family	Friend															🖉 Edit 🕒 Delete
Grandp	parent															📝 Edit 🕒 Delete
Uncle																Edit Oelete
1																

Enter the name of the contact type and click **Save**.

Priority of Access

Click the **Create Priority off Access** button:

ETUP															
Banks	Child Needs	Guardian Remi	nder Categories	Roles	Groups	Subsidy Schemes	Public Holid	ays Famil	y Contact Types	Billing Periods	Priority of Access	Rounding	Email Templates	BPay Settings	
Transpor	t Locations	redPAY Settings	Holiday Periods	Wait I	List Priorities	Custom Authorisa	ations Wait	List Location					-		
													Displaying 4 out	of 4 O Crea	te Priority of Access
													Displaying 1 ou		
Name Work/St	tudy														📝 Edit 🖨 Delete
Respite															Edit O Delete
Null															🗾 Edit 🕒 Delete
Child At	t Risk														Edit OPelete

Enter a priority reason and click **Save**.

<u>Rounding</u>

You can set fees charged to round to the nearest cent or dollar by selecting edit:

SETUF	0														
Banks	Child Needs	Guardian Remi	nder Categories	Roles	Groups	Subsidy Schemes	Public Holiday	s Family	Contact Types	Billing Periods	Priority of Access	Rounding	Email Templates	BPay Settings	
Transpo	rt Locations	redPAY Settings	Holiday Periods	Wait L	ist Priorities	Custom Authorisa	tions Wait Li	t Location							
Name						Act	ive								
Fee Ch	arged					No	Rounding								🖉 Edit

Click Save.







Email Templates

Click the Create Email Template button:

anks	Child Needs	Guardian Remi	nder Categories	Roles	Groups	Subsidy Schemes	Public Holidays	Family Contact Types	Billing Periods	Priority of Access	Rounding	Email Templates	BPay Settings	
anspor	t Locations	redPAY Settings	Holiday Periods	Wait L	ist Priorities	Custom Authorisati	ons Wait List	Location						
												Displaying 7 o	ut of 7 🔁 📀 Cre	ate Email Templa
ame							Template Type							
taff Ro	ster						Staff Roster							📝 Edit 🕒 🗅
arent/(Guardian Invoi	ce					Parent/Guardian	Invoice						🖉 Edit 🕒 🗅
Inline E	Enrolment URL						Online Enrolmen	t URL						🖉 Edit 🕒 D
nline B	Enrolment Noti	fication to Site					Online Enrolmen	t Notification to Site						📝 Edit 🕒 🖸
Inline E	Enrolment						Online Enrolmen	t						🖉 Edit 🕒 🗅
ommu	nication						CCB Statement							🖉 Edit 🕒 🕻
lommu	nication						Statement of Acc	ount						📝 Edit 🙆 🛙

A window like below will appear:

			 Templat	e			
Subject			 Paren	t/Guardian	Invoice		
Subject			 				
Body							
		H. H.	X ₂ X ²	Ξ Ξ	۰۳	Normal	•
email body goe	s here						
email body goe	s here						

Name the template, select the area for the template to appear in the software, Add a subject and body.

Click Save







Transport Locations

Click on **Create New Location** for your pick up and drop off locations with transport:

anks	Child Needs	Guardian Remi	nder Categories	Roles	Groups	Subsidy Schemes	Public Holida	rs Family	Contact Types	Billing Periods	Priority of Access	Rounding	Email Templates	BPay Settings
ranspor	t Locations	redPAY Settings	Holiday Periods	Wait L	ist Priorities	Custom Authorisa	tions Wait L	ist Location						
Se	arch Keyword		• Search	Reset									Displaying 2 out	of 2 • Create New Location
Curr	rent Search Opti	ions: Status: Active												
Loc	ation O						Street				Area		Active	Action
Red	lbourne Early L	earning Centre					1234 R	de Road			Chermside		Yes	Edit
Red	lbourne Primar	y School					671 Gyr	npie Road			Chermside		Yes	Edit

Fill the details of Location, Street and Area:

Enter the transport lo	cation details to c	reate a new Pick	up or Drop Off Lo	cation
Location *				
Location				
Street				
Street				
Area				
Area				

Click **Save**.

Holiday Periods

If you are closing for a period for example school holidays, click **Create Holiday Period** button:

SETU	Р															
Banks	Banks Child Needs Guardian Reminder Categories Roles Groups Subsidy Scheme						es Public Holidays Family Contact Types Billing Periods Priority of Access Ro						Rounding	Email Templat	es BPay Settings	
Transport Locations redPAY Settings Holiday Periods Wait List Priorities Custom Authorisations Wait List Location																
Search Keyword. Search Reset Displaying 7 out of 7 Create Holday Period Current Search Options: Status: Active												oliday Period				
N	ame	Sta	art Date O		End Date	e P	rograms			Child	ren			Active	Actions	
cl	cloderue 2309/2021 2309/2021 ASC, Afternoon All children Edit Deleter															
Training 5/10/2020 11/10/2020						20 A Ji R	After School Care, Before School Care, All children Joeys Room, Kangaroo Room, Pretend Room, Flower Room, OOSH, BSC, ASC,						Yes	Edit Delete		







Fill the details of the Holiday period and click **Save**:

create Holiday Period		
Name *		
Name		ŧ
Start Date *	End Date *	
Start Date	End Date	
Programs		Select All
Search programs		
Children *		All Children
Search children		
h		,
		Save Cancel

Note: When you submit a Holiday Period you also need to under the Family Assistance Law send through a Temporary Closure notification to CCSS.

To do this click onto the **Settings cog** and select **Approvals**

Demonstration Site - Red	oourne Child Care Centre	Child Care 🔹	Processing •	Accounts +	Reports -	Quality -	Program & Practices +	Admin 👻	Support 🔅 -
Home									Demonstration Site
									Stop Impersonaling
DASHBOARD									Account Settings
Work Contro									CCS Provider
WOIK Centre									E CCS Debt Management
Welcome to your Work Centre.									E CCS Supporting Docs
									Site Settings
									E Parent Portal
Daily Care	Children In Care		e-Signature	es 📋	Paren	Feedback			🗁 Approvals
Ψ(\frown			busers/Personnel

Click onto **CCS Service Profile**, select the Temporary Ceasing tab and click **create**

CCS S	ERVIC	Е									Ľ	Query Service Profile
Name: Red	bourne Cen	tre Based C	are	CCS S	ervice Id: 77777	7777A	Туре:	LDC			Commencement Da	te:
Name	Address	Contact	Fees	Child Care Places	Weeks/Year	Approval Status	Approval Conditions	Financial	Trustee	External Management	Temporary Ceasing	Stop Operating Sale
Notificat	ions Ser	ious Inciden	ts AC	CS Cap Percentages	Location of Re	ecords						
											Displaying	0 out of 0 • Create
There	are no reco	ords to displa	iy									

Enter the date range, select the reason for closure and **submit**





Create Ceasing	
Start Date 10/12/2021 End Date	
Reason Closure over Christmas or 💙 Reason Text	-
Authorised By	
Sally Williams	``````````````````````````````````````
	Close 🗄 Submi

Wait List Priorities

Click on Create Wait List Priority button:

ETUP)														
Banks	Child Needs	ds Guardian Reminder Categories Roles		Roles	Groups	Subsidy Schemes Public Holida		c Holidays	Family Contact Types	Billing Periods	Priority of Access	Rounding	Email Templates	BPay Settings	
Transport Locations redPAY Settings Holiday Periods Wait List Priorities			Custom Authorisa	ations	Wait List L	ocation									
													Displaying 3 or	it of 3 💿 Crea	ate Wait List Priority
Name															
Medium	1														📝 Edit 🕒 Delete
Low															📝 Edit 🕒 Delete
High															Edit Obelete

Click Save.

Wait List Location

Click on the **Create** button to create location:



Click Save.