

Mocha Guide



FCC TRAINING MATERIAL

PART 1

BASIC FUNCTIONS & ENROLLMENT



Family Care Centers

Training Material

Part I: *Basic Mocha Functions & Enrollment*

Welcome to Mocha!

The new database system for San Francisco's early learning & care programs. Mocha can help you manage important information on families you serve. You can collect, organize and track data on enrollment, certification, parent fees, attendance, child level assessments, and many more.

In addition, there are easily customizable reports you can build, data visualization and task management features to assist in monitoring program status and effectiveness. Making it easier in decision making to target where program support is needed and in making policy that is backed with data.

And here is where we will start, following these user guides, designed for different workflows!

Part I : Basic Mocha Functions & Enrollment (*current document*)

Part II : Attendance & Assessment (*coming soon*)

In partnership and collaboration,



San Francisco's Office of Early Care and Education (OECE)

<https://sfoece.org/>

verticalchange

VerticalChange

<https://verticalchange.com/>

*“I’m always doing that which I cannot do,
In order that I may learn how to do it.”*

Pablo Picasso



Navigating & Enrolling in mocha

verticalchange

1. *Signing in*

2. *Landing page / Dashboard*

- Agency Bulletin Board

3. *VerticalChange Help Chat*

- Send us a message
- Find your answer now

4. *Top Navigation bar*

- My setting
- Logout
- 'Jump to contact...' Search bar
- Advanced Contact Search
- Create Function
 - ▶ Group Contact
 - ▶ Basic Contact

5. *Enrollment*

- Creating Sessions
- Enrolling Children to Sessions

6. *Side Navigation bar (Selected few..)*

- Tasks
- Reports

1

Signing in

PLEASE CHECK YOUR
INBOX AND SPAM BOX
FOR THE INVITE

Step 1 :

You were invited to VerticalChange! You should be getting an email with a link to activate your account. Follow that link and you will be asked to change your password.

- ❖ Note that you might get the option to set up a two step account verification. If you'd like that, go ahead and set it up.

vc

Change Your Password

Enter a new password below to change your password.

New password

Re-enter new password

Reset password

Step 2 :

You will get a welcome note from Ann! Included a quick guided tour & helpful links for reference. Go ahead click 'Next' button and take the tour!

Jump to contact...

Ann from VerticalChange

Hi Feven,

Welcome to Mocha by VerticalChange! Follow me to get oriented and learn some of the basic workflows you will be using in the system.

Here are some helpful links to use while you are testing the system:

[Mocha User Guide](#) for more detailed step by step guidance

[Mocha Testing Questions](#) to focus your testing and feedback

[Testing Feedback Form](#) where you can enter your testing feedback

If you run into any question or difficulties along the way don't hesitate to click on the blue bubble in the bottom right of your screen to start a New Conversation and get help.

Happy Testing!

Ann and the VerticalChange Team

1 of 6

Ann from VerticalChange

Type a name in here to search for a contact that already exists in the system, such as a child or Center. Try it out now if you like by typing in Test Child to see all the possible duplicates that come up. You can hover over them to see more information or click on them to go to their profile.

3 of 6

2

VerticalChange Help Chat

Have a question? Notice a bug? The quickest way to reach a member of the Customer Support team at VerticalChange is to chat with us!

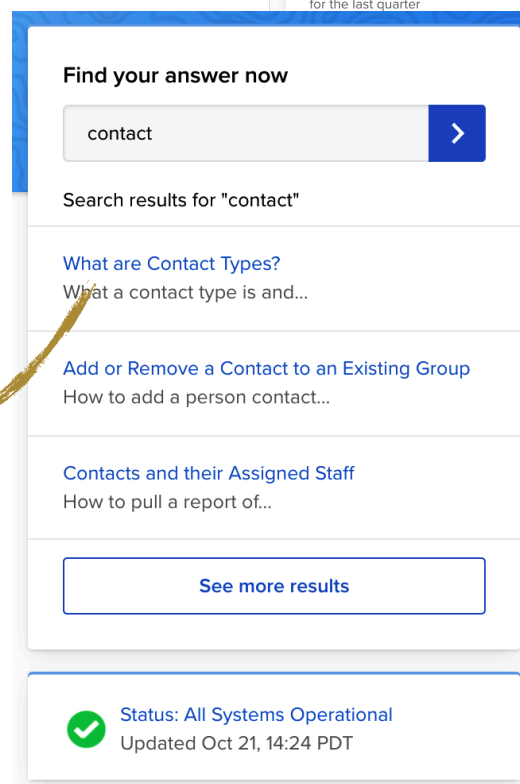
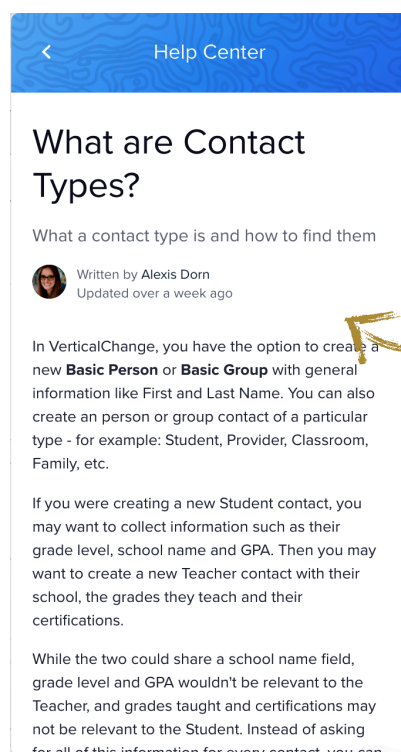
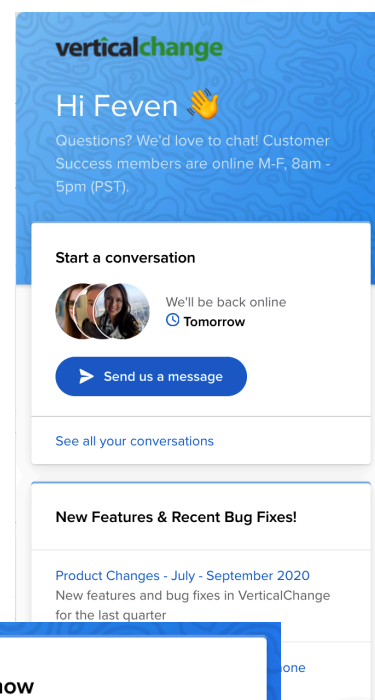
Customer Support team members are online Monday - Friday, 8:00 a.m. - 5:00 p.m. (PST). If you need assistance outside of those hours, please email us at support@verticalchange.com and we will respond to your email as soon as possible.

You can pull up the chat box in the bottom right corner of the screen by

clicking on the circular icon of a chat box.



Or you can scroll down and type in any keyword under 'Find your answer now' to search through our help documentation library.

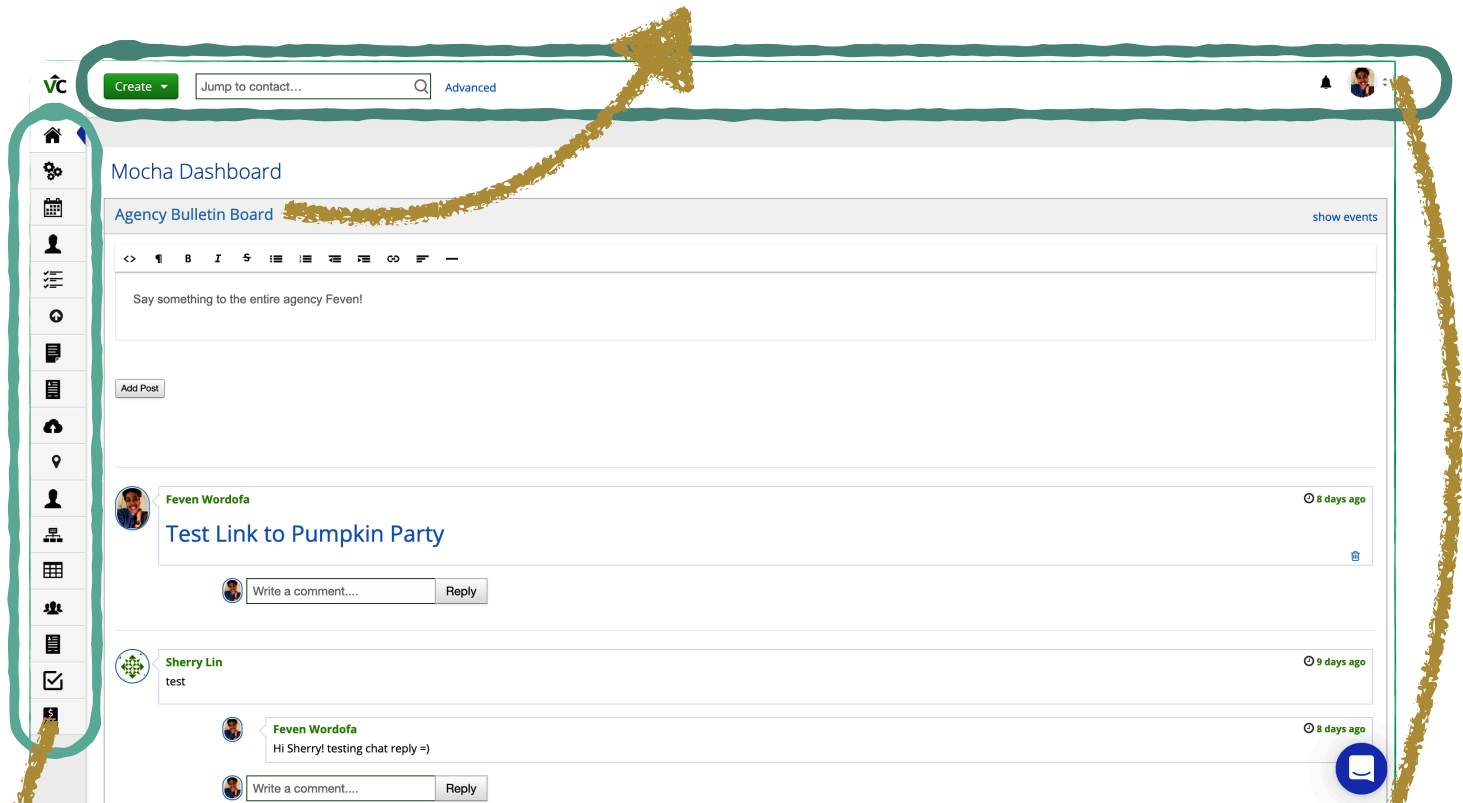


3

Landing Page / Home page

Your landing page is where you will find the Mocha Dashboard and all your navigation centers!

Step 1 : Say hello to your early care and education collaborators! This is a bulletin board where you can post public messages, share links and notes with the entire Mocha user community!



Side Navigation Bar:

You will find almost all of the things you need here; Account settings, contacts, forms, reports & domains to name the few.

Top Navigation Bar:

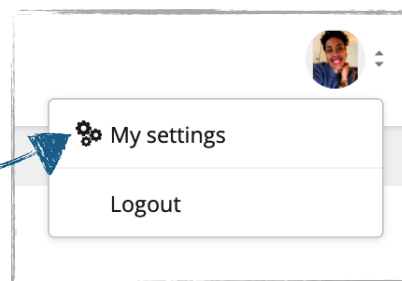
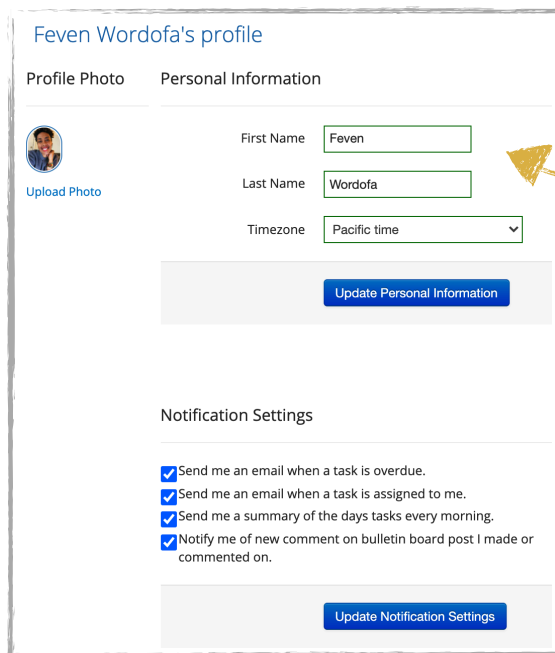
Here you will find 'My setting', 'Search bar' & the 'Create' feature.

4 Top Navigation Bar

My Settings and Logout

On the right side of your top navigation bar, you should be able to see an icon with an image on it. If you click on it, a short dropdown menu with 'My settings' & 'Logout' options appear.

We don't want to log out quite yet, so go ahead and click on 'My settings'.



Once you get into your settings; you will find the option to edit your personal information and notification settings.

'Jump to contact...' and 'Advanced'

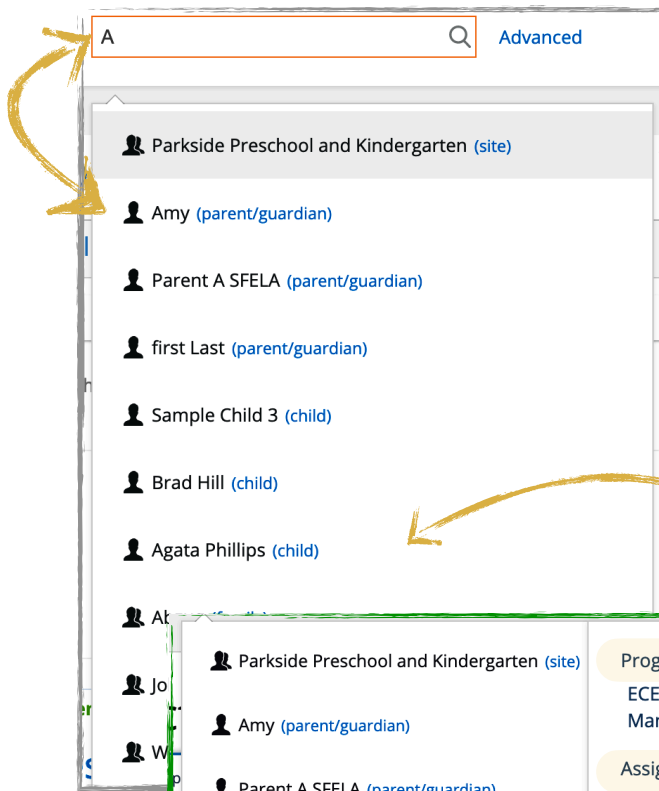
On the left side of your navigation bar, you will find a search bar that will allow you to search any contact.

A **Contact** is defined as any person (child, parent, staff) or group (agency, site, family) that we create a Mocha profile for in order to collect data and/or track services.



The *Advanced* feature here will allow you to have more standard search filters.

Step 1: Start typing a letter on the ‘Jump to contact’ bar on the top left navigator;



You should see a dropdown list of up to 10 different contact names that include what you are typing in the search bar. The blue text shows you what type of contact they are, and we'll discuss the different types and how to create them in the next section..

Step 2:

But for now, go ahead and hover around any of the contacts listed below your search bar.

You should be able to see a side window. This will display highlights of the contact such as ‘Programs’ the contact belongs to, any ‘Assigned Staff’ that is working with them, list of related ‘Family’, ‘DOB’, ‘Gender’ identity and the ‘Home Language’, so you can plan if you need a translator.

This example was a ‘Child’ contact type as you can see written next to the name. If you hover at an ‘Agency’ or ‘Site’ contact type; the information displayed on the right hand window will be a bit different.

Try it out and see!



Step 3: Search contacts using the ‘Advanced’ feature. Click on ‘Advanced’ at the right hand of the search bar.

You should arrive at this page shown below. The ‘advanced’ contact search feature will allow you to do a more detailed search.

Lets explore this page,

You can use the ‘Standard Filters’ below to search for contacts by filters such as ‘Type’ (*Child, Parent, Staff/Teacher*) or by ‘Assigned user’ (*if there is a lead person attached to the contact you are searching*), and/or by a ‘Domain’ (*QRIS, ECE programs or Not yet enrolled*), by ‘Location’(a *site associated with the contact*).

First, you will see your contacts grouped in two major tabs ‘People’ (*staff, child, parent*) and ‘Groups’ (*family, site, agency*) contacts.

Create

Jump to contact...

Advanced

Contacts

PeopleGroups

| | First | Middle | Last | Suffix | Added | Updated | Status |
|---|----------|--------|-----------|--------|------------|---------------------|--------|
| + | ABC | | CHEN | | 05/08/2020 | 07/14/2020 07:54 PM | ✓ |
| + | Adrianna | | Writers | | 04/29/2020 | 09/03/2020 10:20 PM | ✓ |
| + | Aidan | X | Gillespie | | 05/07/2020 | 06/12/2020 06:03 PM | ✓ |
| + | Aisha | | Seastrunk | | 10/02/2020 | 10/02/2020 05:37 PM | ✓ |
| + | Alexis | | Dorn | | 02/24/2020 | 02/24/2020 08:16 PM | ✓ |
| + | Alyssa | G. | Nakken | | 07/17/2020 | 07/17/2020 07:27 PM | ✓ |
| + | Amanda | Parent | A | | 02/18/2020 | 02/18/2020 09:26 PM | ✓ |
| + | Angela | Y. | Davis | | 07/17/2020 | 07/17/2020 10:07 PM | ✓ |
| + | Ann | Test | Parent | | 06/17/2019 | 06/02/2020 07:59 PM | ✓ |

Standard Filters

Name

Type

Assigned Users

Domain

Status

Location

Clear

Apply Filters

Ann

Ann Parent 2f871830-c3be-49a7-8689-77648d9f7076

Type: Parent/Guardian

Domain: ECE Program and Payment Management

Assigned Staff: None

Toggle Filters

Export all data as csv

Export visible data as csv

Columns:

First

Middle

Last

Suffix

Added

Updated

Status

Click on the + icon to open a quick preview of the contact.

You can use this icon to add/remove column on your contacts table, and export contact data

Contacts

A **Contact** is defined as any person (child, parent, staff) or group (agency, site, family) that we create a Mocha profile for in order to collect data and/or track services

There are two types of Contacts in Mocha.

1. Basic Contact: These are contact types for individual persons. Let's review the list below under this category;

- ▶ *Child* : Contains child level data, all biographic and assessments data.
- ▶ *Parent/Guardian* : Contains data on an individual parent/guardian, work/school schedule, emergency contact information, etc
- ▶ *Staff/Teacher* : Contains data including FCC owner/staff/teacher name, professional development & certificates, registry ID, etc

2. Basic Group: These are dynamic profiles for a family, an agency and/or a site. They hold information on any groups of individuals and/or multi-site agencies that can be organized under one umbrella.

- ▶ *Family* : This is used to create a household profile, unlike the parent contact above, this holds all parents/guardians information and list of children under that family.
 - ❖ **Note:** When creating a Family you will be able to also create new Parent/Guardians and Child/ren at the same time. These newly created contacts become separately searchable in Mocha.
- ▶ *Agency* : This contact is used to create a multi-site agency or a Family Child Care Center; it includes the list of associated sites, director, address and the agency type information
 - ❖ **Note:** You don't have to create or change any Agency information in Mocha.
- ▶ *Site* : This is used to create a site profile, it holds information on license type, license number, correspondence language , site capacity , and enrollment information
 - ❖ **Note:** You don't have to create or change any Site information in Mocha.

We will discuss in detail how to create a contact and the minimum required information needed to create these contact profiles in the next section.

Create

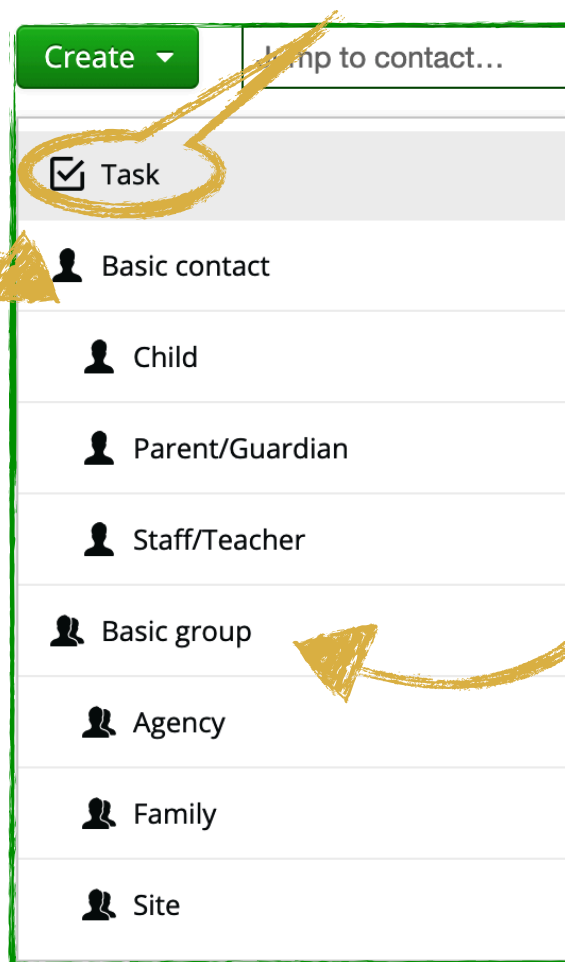
The create button here allows you to start creating a 'Task', a 'Basic contact' and 'Basic group' contact types. Review the basic definitions below and we will start creating a task, a basic contact and group contact step-by-step.

Once you click on the green **Create** button, a dropdown menu of choices appear, as shown in the image below;

Choose **Task** to assign work or call someone's attention to something in Mocha. You can make Tasks for yourself, or assign Tasks to other users. See more details in the [Task Detail Page](#).

Choose one of the listed contact types under basic contact to create an individual/person profile. Could be a **child**, a **parent/guardian** or a **staff/teacher**.

Choose one of the listed contact types under basic group to create a multi-individual profile. You **only need** to use the **family** contact type.

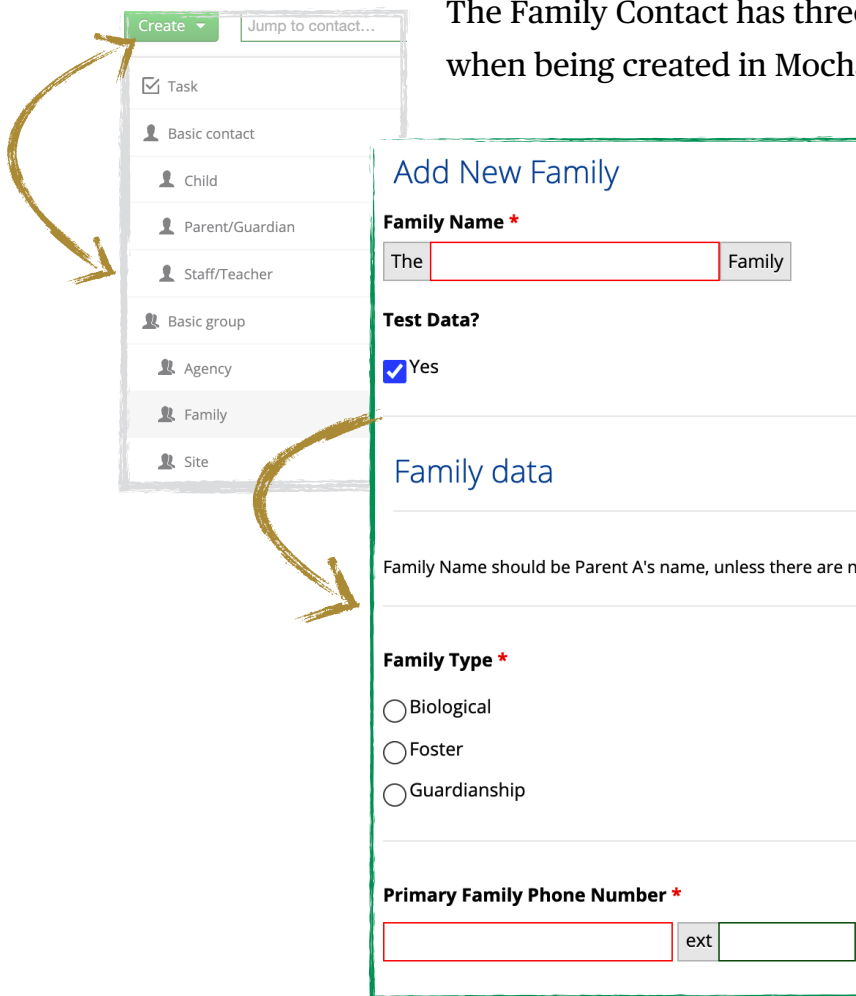


You will be only needing to focus on creating contacts for families as everything else would already be set up in the system. So let's learn how to create family contacts into Mocha in the following section.

Create Group Contact : Family

Step 1 : Click on 'Create' button on the left of the top navigation bar.

Step 2 : Click on 'Family' on the drop down menu under 'Group Contact'.



The image shows a 'Create' dropdown menu on the left with options: Task, Basic contact, Child, Parent/Guardian, Staff/Teacher, Basic group, Agency, Family, and Site. A yellow arrow points from the 'Create' button to the 'Family' option. Another yellow arrow points from the 'Family' option to the 'Add New Family' form. The form has three sections: 'Add New Family' with a 'Family Name' field (containing 'The' and 'Family') and a 'Test Data?' checkbox (checked 'Yes'); 'Family data' with a note 'Family Name should be Parent A's name, unless there are no'; and 'Family Type' with radio buttons for 'Biological', 'Foster', and 'Guardianship'. At the bottom is a 'Primary Family Phone Number' field with an 'ext' field.

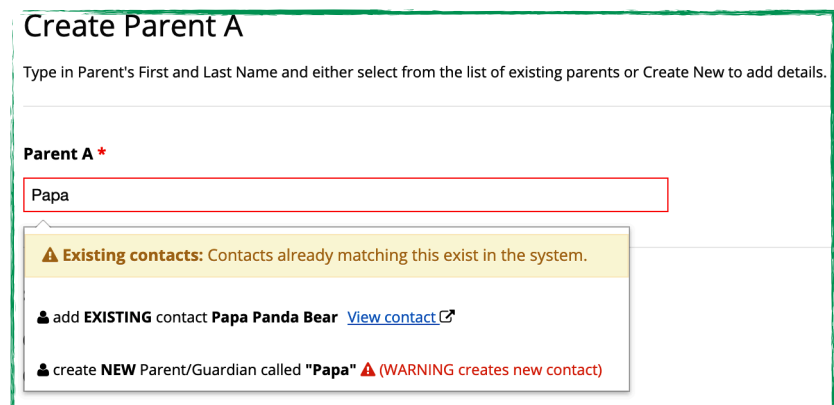
The Family Contact has three sections that needs to be filled out when being created in Mocha. First you will find, 'Add New Family'

section, second you'll enter 'Family Data' section , and finally you'll need to add parent/Guardian(s) and a child (children).

The required fields to create a family are listed here below,

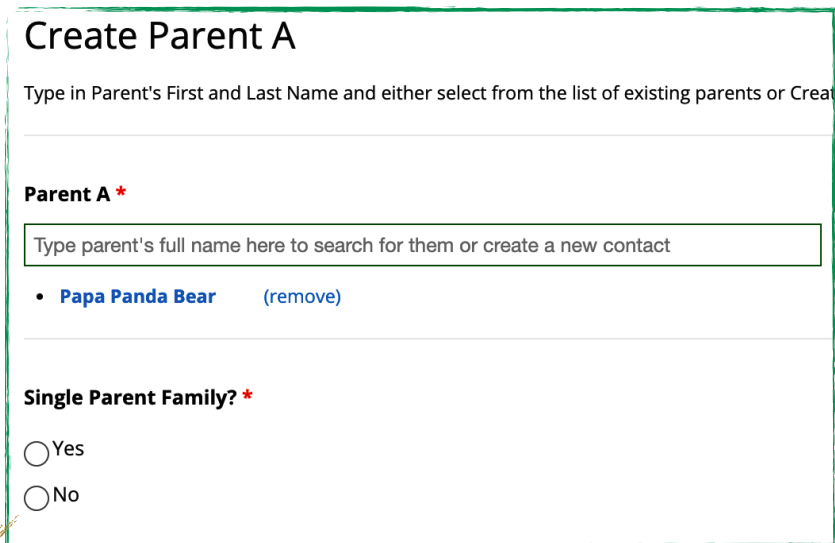
- Family Name
- Family Type
- Phone number
- Paren/Guardian A
- Single family Y/N
- List of children

Step 3 : Fill out the Family Contact creation form. When you get to the 'Create Parent A' section, type any letter(s)/name. You find a dropdown menu will appear prompting you either to add **EXISTING** contact or to create **NEW** Parent/Guardian contact.



The image shows the 'Create Parent A' form. It has a title 'Create Parent A' and a subtitle 'Type in Parent's First and Last Name and either select from the list of existing parents or Create New to add details.' Below is a 'Parent A' field with the text 'Papa'. A yellow warning box says 'Existing contacts: Contacts already matching this exist in the system.' Below that are two options: 'add EXISTING contact Papa Panda Bear View contact' and 'create NEW Parent/Guardian called "Papa" (WARNING creates new contact)'.

If you select to add an existing contact, they will appear right below the 'Parent A' box. For example, let's add the 'Papa Panda Bear' contact.



Create Parent A

Type in Parent's First and Last Name and either select from the list of existing parents or Create New to add details.

Parent A *

Type parent's full name here to search for them or create a new contact

- **Papa Panda Bear** (remove)

Single Parent Family? *

☐ Yes

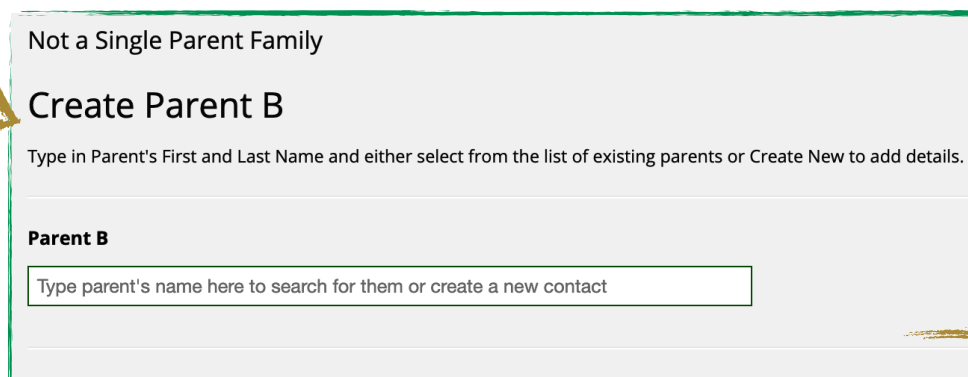
☐ No

The name 'Papa Panda Bear' appears below 'Parent A' box. You can click on the name to go to their profile.

You also have the option to remove the parent/guardian here.

Step 4 : Click on 'No' for the question if this is a 'Single Parent Family?'

A new question field will appear asking you to create 'Parent B',



Create Parent B

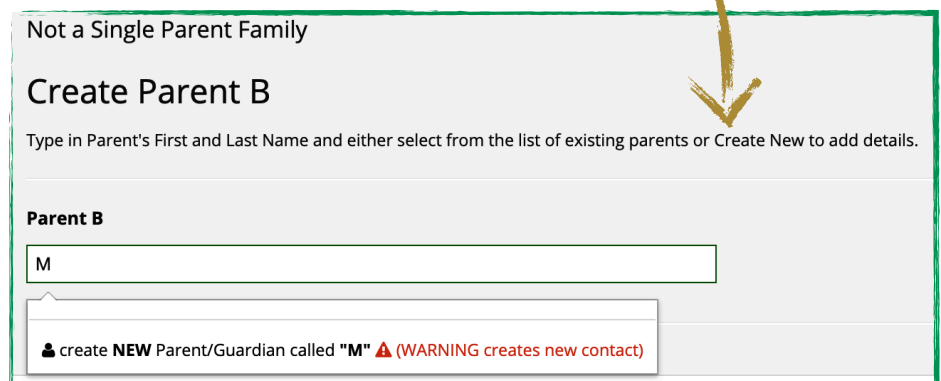
Type in Parent's First and Last Name and either select from the list of existing parents or Create New to add details.

Parent B

Type parent's name here to search for them or create a new contact

Step 5 : This time let's create a **NEW** 'Parent B' but first type the first initial to see if the parent is already in Mocha.

It looks like Parent B is not in Mocha, since you only get an option to create **NEW** parent/Guardian but not the option to add **EXISTING** contact.



Create Parent B

Type in Parent's First and Last Name and either select from the list of existing parents or Create New to add details.

Parent B

M

create **NEW** Parent/Guardian called "M" ⚠️ (WARNING creates new contact)

Type in the full name of 'Parent B' and click on 'Create NEW Parent/Guardian'.

Parent B

Mama Panda Bear

create NEW Parent/Guardian called "Mama Panda Bear" ⚠️ (WARNING creates new contact)

A window will open in the center of your screen.

This is the same form you will use if/when you [Create Basic Contact: 'Parent/Guardian'](#).

The first section of the form is titled 'Add New Parent/Guardian'.

As you scroll down more detailed questions on the Parent/Guardian will appear;

The last section of the form requires you to 'Select Location'. However, as an FCC, you should only be able to see your Center's name listed in the location's box.

You can also 'Assign Staff' to this contact. This is optional but if you have staff that will be overseeing the family's need, you can put their name here.

Parent/Guardian

Add New Parent/Guardian

First name *
Mama

Middle name
Panda

Last name *
Bear

Name suffix

External id

Test Data?
☒ Yes

Relationship to Child
☐ Parent
☐ Guardian
☐ Foster Parent
☐ Other
Please describe.

Date of Birth
MM/DD/YYYY

The second part of the form is titled 'Parent/Guardian Data'

Select location *

Select a location...

Enter into Domains

- ECE Program and Payment Management

ECE Program and Payment Management

Assign Staff

Select staff to assign...

Save with missing required fields Cancel

Once you complete filling out the details, the name of the new parent/guardian contact you created will appear below the box 'Parent B'.

Step 6: The next step in creating a 'family' group contact is to add EXISTING and/or create a NEW Child data,

Create Children

Type in Child's First and Last Name and either select from the list of existing children or Create New to add details. (Repeat for each child)

Add Children: *

Type child's full name here to search for them or create new child

Follow similar steps as above, when adding/creating the Parent/guardian into the family group contact. Add two children into the family, one existing child and a second create a new child contact for this family.

Create Children

Type in Child's First and Last Name and either select from the list of existing children or Create New to add details. (Repeat for each child)

Add Children: *

Bab

Existing contacts: Contacts already matching this exist in the system.

add EXISTING contact **Baby Panda Bear** [View contact](#)

create NEW Child called "Bab" (WARNING creates new contact)

If adding **EXISTING** child contact, type their name or initials on the search bar and they will appear in the drop down menu.

Click on the 'Add EXISTING contact Baby Panda Bear' and they will immediately appear below the field.

Create Children


Type in Child's First and Last Name and either select from the list of existing children or Create New to add details. (Repeat for each child)

Add Children: *

Type child's full name here to search for them or create new child

Baby Panda Bear [\(remove\)](#)

When adding a child contact into the family profile and the child is not in Mocha yet, click on the selection 'create NEW child called ..' from the drop down menu.

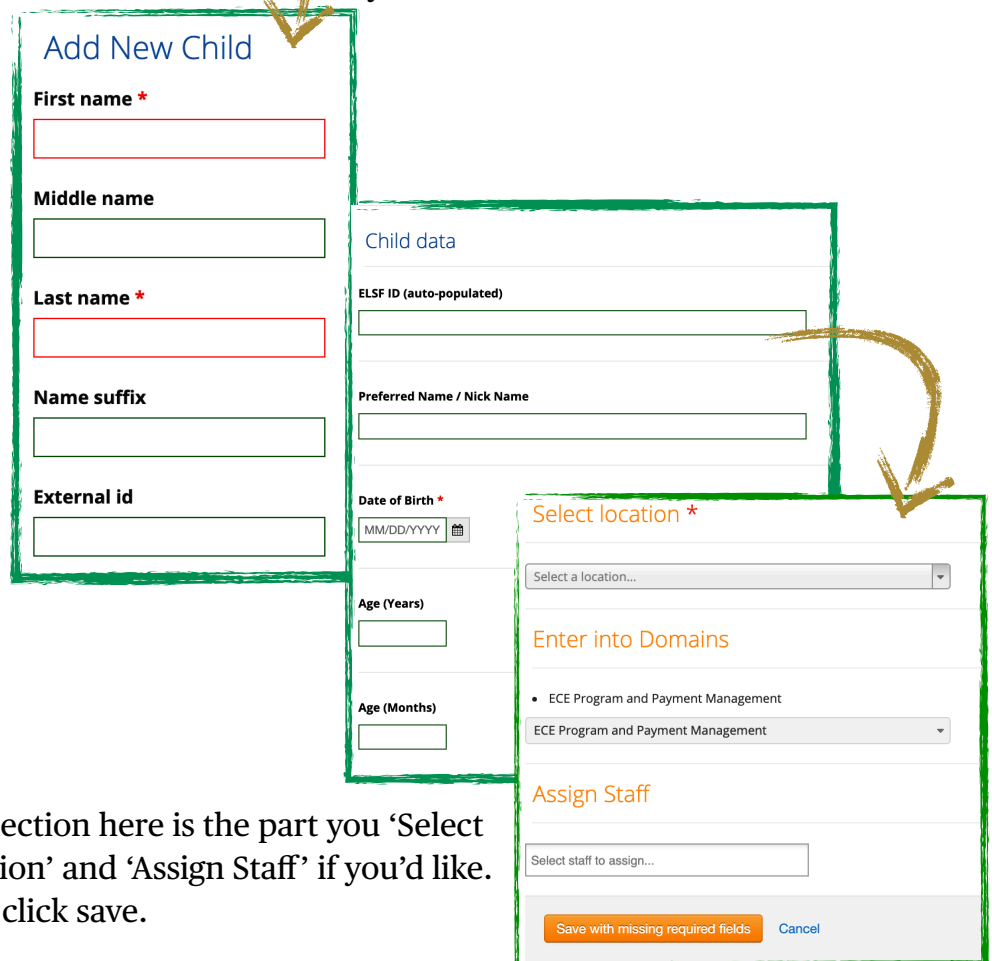


The 'Create Children' form is shown with a dropdown menu open. The dropdown menu contains two options: 'add EXISTING contact Baby Panda Bear' and 'create NEW Child called "Bab"'. A yellow arrow points to the 'create NEW Child called "Bab"' option.

A window will open in the center of your screen.

This is the same form you will use if/when you [Create Basic Contact: Child](#)

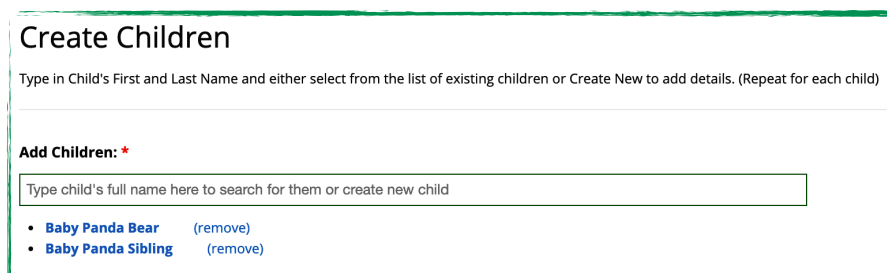
The first section of the form is titled 'Add New Child'. As you scroll down more detailed questions on 'Child Data' will appear.



The 'Add New Child' form is shown with multiple sections. The 'Add New Child' section includes fields for First name, Middle name, Last name, Name suffix, and External id. The 'Child data' section includes fields for ELSF ID (auto-populated), Preferred Name / Nick Name, Date of Birth, Age (Years), and Age (Months). The 'Select location' section includes a dropdown menu for 'Select a location...'. The 'Enter into Domains' section includes a dropdown menu for 'ECE Program and Payment Management'. The 'Assign Staff' section includes a dropdown menu for 'Select staff to assign...'. A yellow arrow points to the 'Child data' section.

Last section here is the part you 'Select Location' and 'Assign Staff' if you'd like. Then click save.

Step 7: After following the steps you should be able to see two children (one added from Existing example and one created for practice).



The 'Create Children' form is shown with a list of children. The list includes 'Baby Panda Bear' and 'Baby Panda Sibling'. A yellow arrow points to the 'Baby Panda Sibling' entry.

Select location *

- Bayview

Bayview

Enter into Domains

- ECE Program and Payment Management

ECE Program and Payment Management

Assign Staff

Feven Wordofa

Save Cancel

Step 8: Final step is to fill out the rest of the creation form and click save.

This is similar step to all the contact types we have created.

Once you click save; you will be directed to the 'Dashboard' of the newly created 'Family' profile page.

Papa Panda Bear **Family**

Dashboard Details Groups Notes Documents Domains Activities Assessments Family Summary Admin

Family Information and Subsidy Certification

Due by 10/27/2020 for ECE Program and Payment Management

Complete the Income and Family Fee form and the Family Need and Schedule form once for the whole family, and when information changes create a new form, forward the results, and update sections as needed.

Complete a Child Subsidy Eligibility and Certification form for each child's subsidy while selecting the particular child as a Participant for the form.

| | |
|-----------------------------|-------|
| Family Income Information | START |
| Family Need and Schedule | START |
| Child Subsidy Certification | START |

✓ Papa Panda Bear

ID
565b0e56-ab8d-442d-abe6-53cdf3acd84d

Location
Bayview (edit)

Domains
ECE Program and Payment Management (edit)
ECE Program and Payment Management

Assigned Staff
Feven Wordofa (unassign) (edit)

Family Type *
Biological

Primary Family Phone Number *
(123) 545-8963

Primary Family Address

Family Mailing Address

Parent A *
Papa Panda Bear

Let's briefly review each tabs on the family's profile

Dashboard: This tab contains list of forms and goals that need to be completed for the family. It includes information on Subsidy Certification and other important items.

Details: This tab contains 'Basic' and 'Family' info that was included when creating the profile. In addition, it has an option to 'add new contact type' like agency or site

Groups: In Groups tab you can see if your contact has been connected to another contact through a relationship field.

Notes: You can create a note here for others to see or for yourself to record some information. You can also view list of all notes entered by others on this contact.

Documents: The Documents section allows you to upload any document that are related to the family members. The list of documents also includes any attachments that were uploaded through the contact's activity or assessment forms.

Domains: The domains tab lets you manage & view the family's enrollment and past enrollments to different programs in Mocha. The enrollment to a domain determines what activity and assessment forms can be accessed. Examples for domains can be QRIS or Headstart programs.

Activities : The Activities tab gives you a list of all activity forms for this contact type, as well as the option to record a new Activity. Example of forms found under this tab are 'Family Fee Payment' form, 'Child's Medical Information' and 'Emergency Contact Information'.

Assessments: The Assessment tab gives you a list of all assessment forms, as well as the option to record a new assessment. Example of forms that can be found here are 'DRDPs' , 'Child Subsidy Certification', and 'Family Need and Schedule' to name the few.

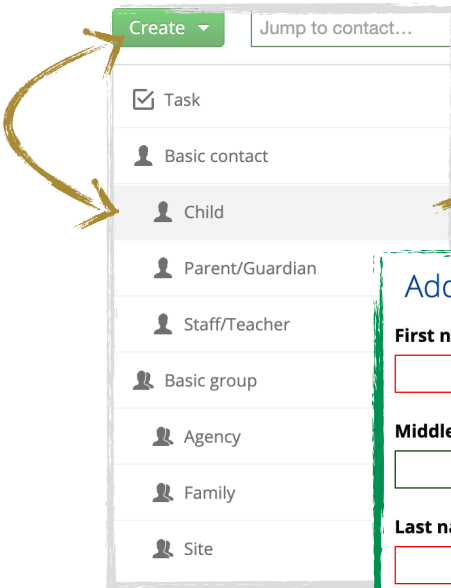
Create Basic Contact : Child

(This is in addition to the recommended process of creating through Families as shown first)

The recommended workflow in creating a 'Child' Contact is through a 'Family' Contact as shown earlier.

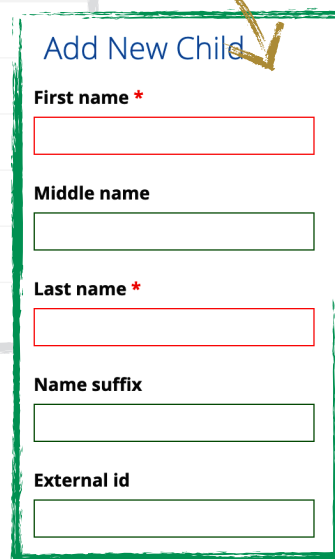
Step 1 : Click on 'Create' button on the left of the top navigation bar.

Step 2 : Click on 'Child' on the drop down menu under 'Basic Contact' type.



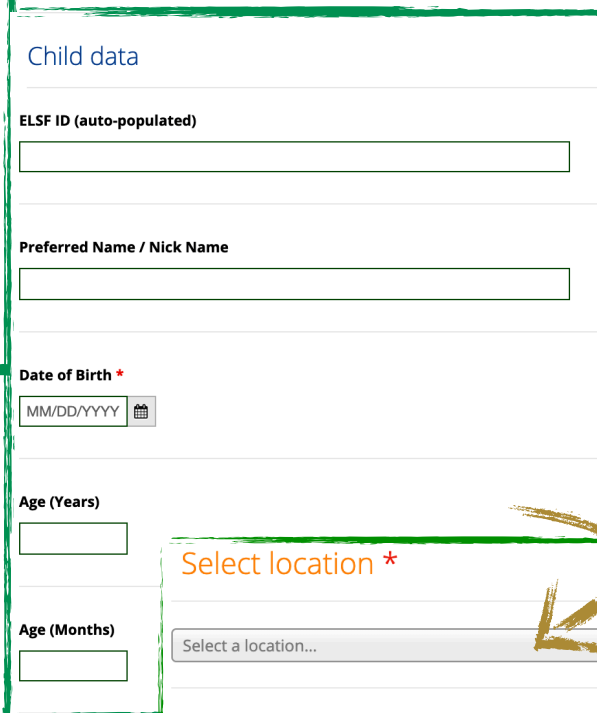
A screenshot of the 'Create' dropdown menu. The 'Create' button is highlighted in green. Below it, a list of contact types is shown: Task, Basic contact, Child, Parent/Guardian, Staff/Teacher, Basic group, Agency, Family, and Site. The 'Child' option is highlighted with a green box and a yellow arrow pointing to it.

You will see the first section of the form titled 'Add New Child'. As you scroll down more detailed questions on the child will appear;



A screenshot of the 'Add New Child' form section. It contains several input fields: First name *, Middle name, Last name *, Name suffix, and External id. Each field has a red border indicating it is required.

The second section of the form is titled 'Child Data' ; under this section there are required information you need to have so you can complete creating a 'Child Contact' type.



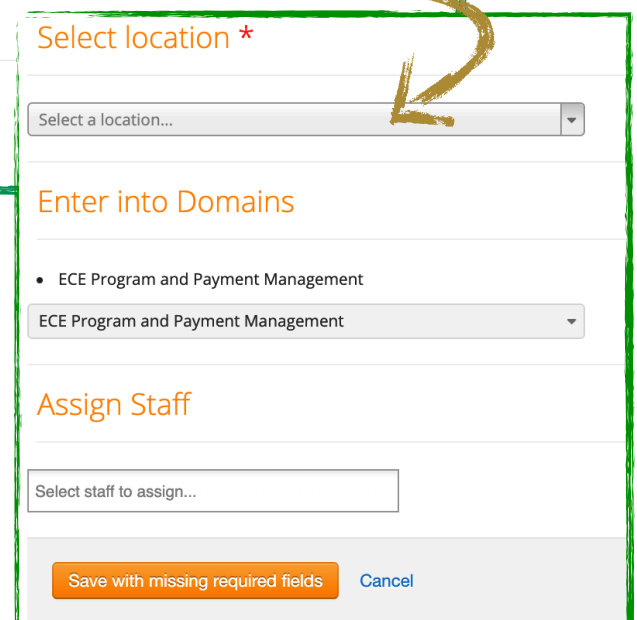
A screenshot of the 'Child Data' form section. It contains several input fields: ELSF ID (auto-populated), Preferred Name / Nick Name, Date of Birth *, Age (Years), and Age (Months). The 'Date of Birth' field has a calendar icon next to it.

List of required fields for Child data:

- Date of Birth
- Gender
- English Proficiency
- First Language
- Second Language
- Primary Home Language
- Race/Ethnicity
- Target population Information

The last section of the form requires you to 'Select Location'. However, as an FCC, you should only be able to see your Center's name listed in the location's box.

You can also 'Assign Staff' to this contact. This is optional but if you have staff that will be overseeing the family's need, you can put their name here.



A screenshot of the 'Select Location' and 'Assign Staff' form sections. The 'Select Location' section has a dropdown menu with 'Select a location...' and a yellow arrow pointing to it. The 'Assign Staff' section has a text input field with 'Select staff to assign...'. At the bottom, there are two buttons: 'Save with missing required fields' and 'Cancel'.

Step 3 : Go ahead and complete all the required fields. Then click on Save.

You will be immediately directed to the newly created child's contact '*Dashboard*' page.

Let's briefly review each tabs on the child's profile

Dashboard: Contains the 'Child Assessments' forms and 'Family/Child Forms' and any other forms that might be needed to completed under this child's contact.

Details: This tab contains '*Basic*' and '*Child*' info that was used to create the child account. In addition, it has an option to 'add new contact type' like a parent/guardian or a teacher.

Groups: This tab will be where you can create a 'family' as this child as its first member or assign the child to an already existing 'family'.

Notes: You can create a note here for others to see or for yourself to record some information. You can also view list of all notes entered by others on this contact.

Documents: The Documents section allows you to upload any document that are related to the child. The list of documents also includes any attachments that were uploaded through the contact's activity or assessment forms.

Domains: The domains tab lets you manage & view the child's enrollment and past enrollments to different programs in Mocha. The enrollment to a domain determines what activity and assessment forms can be accessed. Examples for domains could be QRIS or Headstart programs.

Activities: The activities tab gives you a list of all activity forms available for the child, as well as the option to record a new activity form. Example of forms found under this tab are; '*Child Payment Adjustment*' form, '*Child's Medical Information*' form & '*Emergency Contact Information*' form.

Assessments: The assessment tab gives you a list of all assessment forms for a child, as well as the option to record a new assessment. Example of forms found under this tab are; ASQ3, ASQ:SE2 & DRDPs assessments.

Enrollments: This tab shows child enrollment history.

Attendance: The attendance tab will allow you to select the month and year to download and view monthly attendance report.

Create Basic Contact : Parent/Guardian

The recommended workflow in creating a 'parent' Contact is through a 'Family' Contact as shown earlier.

Step 1 : Click on 'Create' button on the left of the top navigation bar.

Step 2 : Click on 'Parent/Guardian' on the drop down menu under 'Basic Contact' type.

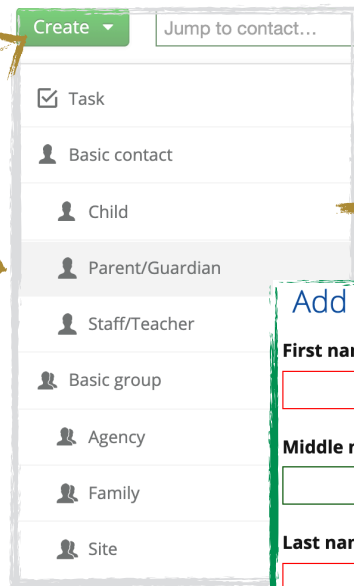
The first section of the form is titled 'Add New Parent/Guardian'. As you scroll down more detailed questions on the Parent/Guardian will appear;

The second part of the form is titled 'Parent/Guardian data'; under this section there are other information asked to complete in creating a 'Parent Contact' type.

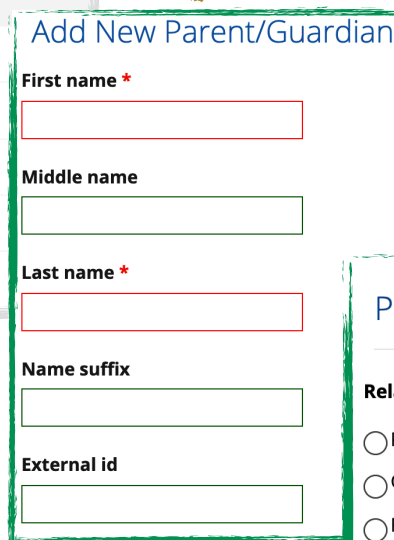
List of fields for Parent/Guardian data:

- Relationship to Child
- Date of Birth
- Gender
- Marital Status
- Single parent
- Homelessness status
- Address
- Email + Phone number

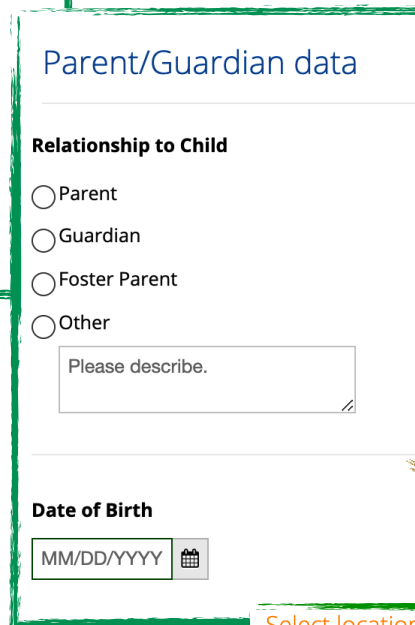
This is similar to the last section when creating 'child contact' type. Please refer to that section for more information



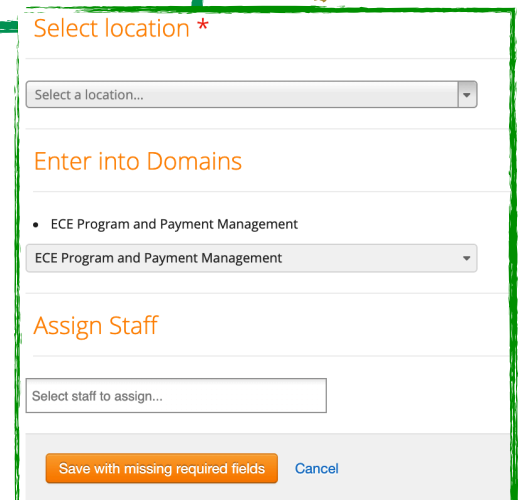
The screenshot shows a 'Create' dropdown menu with a search bar 'Jump to contact...'. The menu items are: Task, Basic contact, Child, Parent/Guardian (highlighted with a green box), Staff/Teacher, Basic group, Agency, Family, and Site. A yellow arrow points from the 'Create' button to the 'Parent/Guardian' option.



The screenshot shows the 'Add New Parent/Guardian' form section. It includes fields for: First name *, Middle name, Last name *, Name suffix, and External id. A yellow arrow points from the 'Parent/Guardian' option in the menu to this section.



The screenshot shows the 'Parent/Guardian data' form section. It includes a 'Relationship to Child' section with radio buttons for Parent, Guardian, Foster Parent, and Other, and a text box 'Please describe.'. Below this is a 'Date of Birth' section with a date input field (MM/DD/YYYY) and a calendar icon. A yellow arrow points from the 'Parent/Guardian data' section to the 'Select location' section.



The screenshot shows the 'Select location' form section. It includes a 'Select location *' dropdown menu, an 'Enter into Domains' section with a list of domains (ECE Program and Payment Management) and a dropdown menu, an 'Assign Staff' section with a 'Select staff to assign...' input field, and a footer with 'Save with missing required fields' and 'Cancel' buttons. A yellow arrow points from the 'Parent/Guardian data' section to this section.

Step 3 : Go ahead and complete all the required fields. Then click on Save.

You will be immediately directed to the newly created Parent/Guardian contact ‘Dashboard’.

The screenshot shows the 'Papa Panda Bear' contact dashboard for a Parent/Guardian. The top navigation bar includes tabs for Dashboard, Details, Groups, Notes, Documents, Domains, Activities, Assessments, and Admin. The main content area is divided into two identical sections, each titled 'Family/Child Forms' with a due date of 10/26/2020 for ECE Program and Payment Management. Each section contains a 'Family Note' field and a 'START' button. A right-hand sidebar provides contact details: ID (199a4037-6e87-4988-adf8-d67125662da5), Location (Bayview), Domains (ECE Program and Payment Management), Assigned Staff (Feven Wordofa), and Test Data? (Yes). It also includes 'Naming Instructions' for last and first names.

Let’s briefly review selected tabs that are unique to Parent/Guardian contact type.

Dashboard: This tab Contains ‘Family/Child Forms’ and all other forms that need to be filled out.

Details: This tab contains ‘Basic’ info and ‘Paren/Guardian’ info that was used to create the contact. In addition it has an option to ‘add new contact type’ like a child or a teacher/staff.

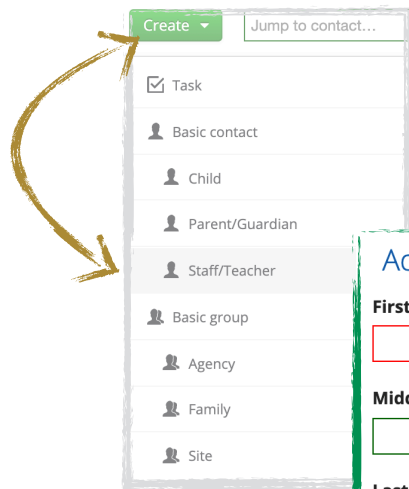
Activities : The Activities tab gives you a list of all activity forms for this contact type, as well as the option to record a new Activity. Forms found under this tab are forms that are assign to a parent/guardian contact type like ‘NOAs’ & ‘Work/school schedule’ forms.

Assessments: The Assessment tab gives you a list of all assessment forms for a parent/guardian, as well as the option to record a new assessment. Example of forms found under this tab are; ‘Child Subsidy Certification’ forms and ‘Consent’ forms.

Create Basic Contact : Staff/Teacher

Step 1 : Click on 'Create' button on the left of the top navigation bar.

Step 2 : Click on 'Staff/Teacher' on the drop down menu under 'Basic Contact' type.



The first section of the form is titled 'Add New Staff/Teacher' and then right below it is the 'Staff/Teacher data' section.

A screenshot of the 'Add New Staff/Teacher' form section. It contains five input fields: 'First name *', 'Middle name', 'Last name *', 'Name suffix', and 'External id'. Each field has a red border and a green outline.

Under Staff/Teacher data section, there are many required fields to complete and create a 'Staff/Teacher' contact type, review the list below;

A screenshot of the 'Staff/Teacher data' form section. It contains several input fields: 'Registry ID *', 'Date of Birth' (with a calendar icon), 'Work Email *' (with the value 'user@example.com'), 'Personal Email' (with the value 'user@example.com'), and 'Work Phone Number *'. Each field has a red border and a green outline.

List of required fields for Staff/Teacher data

- Registry ID
- Work Email
- Work phone
- Gender
- Primary Language
- Additional Language

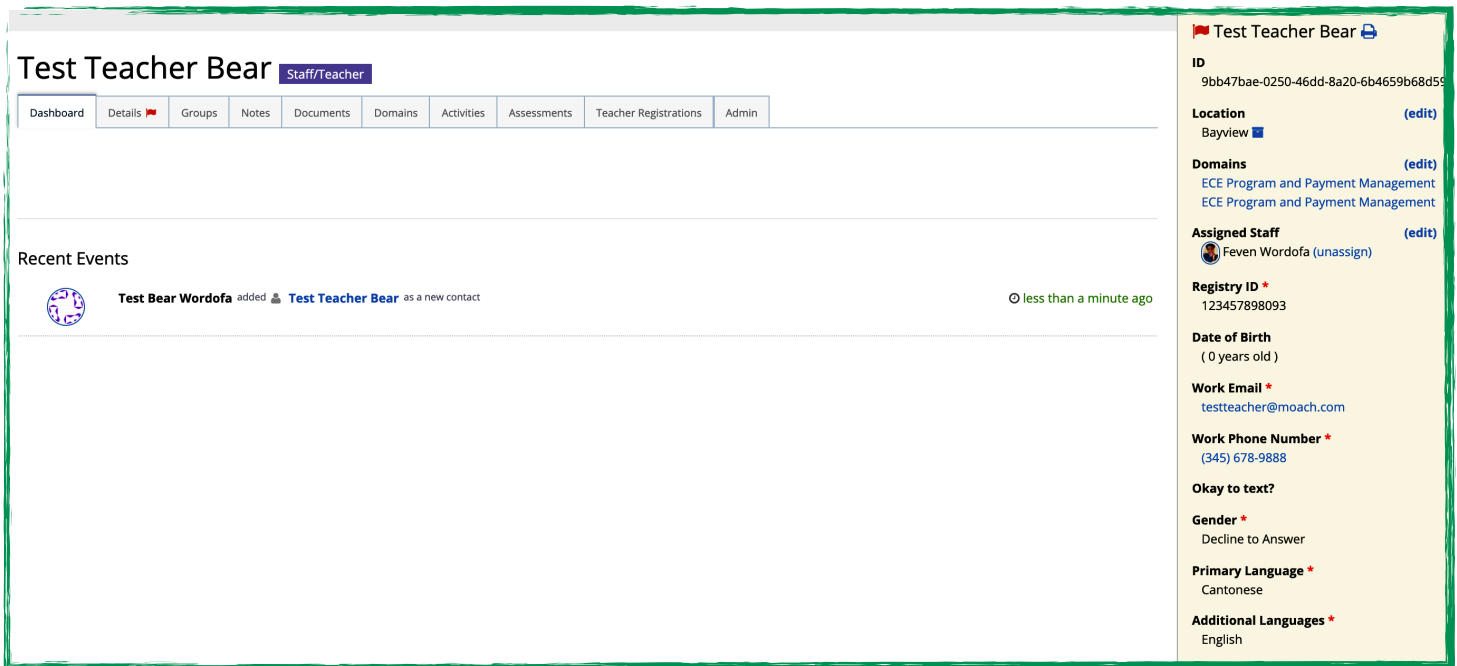
The last section of the form requires you to 'Select Location'. However, as an FCC, you should only be able to see your Center's name listed in the location's box.

You can also 'Assign Staff' to this contact. This is optional but if you have staff that will be overseeing the family's need, you can put their name here.

A screenshot of the 'Select location' and 'Assign Staff' form sections. The 'Select location' section has a dropdown menu with the text 'Select a location...'. The 'Assign Staff' section has a dropdown menu with the text 'Select staff to assign...'. At the bottom, there are two buttons: 'Save with missing required fields' and 'Cancel'.

Step 3 : Go ahead and complete all the required fields. Then click on Save.



You will be immediately directed to the newly created Staff/Teacher contact 'Dashboard' page.



Test Teacher Bear [Staff/Teacher](#)


[Dashboard](#) [Details](#) [Groups](#) [Notes](#) [Documents](#) [Domains](#) [Activities](#) [Assessments](#) [Teacher Registrations](#) [Admin](#)

Recent Events


 **Test Bear Wordofa** added  **Test Teacher Bear** as a new contact less than a minute ago

Test Teacher Bear [Details](#)

ID
9bb47bae-0250-46dd-8a20-6b4659b68d59

Location [\(edit\)](#)
Bayview 

Domains [\(edit\)](#)
ECE Program and Payment Management
ECE Program and Payment Management

Assigned Staff [\(edit\)](#)
 Feven Wordofa (unassign)

Registry ID *
123457898093

Date of Birth
(0 years old)

Work Email *
testteacher@moach.com

Work Phone Number *
(345) 678-9888

Okay to text?

Gender *
Decline to Answer

Primary Language *
Cantonese

Additional Languages *
English

Let's briefly review selected tabs that are unique to the Staff/Teacher contact.

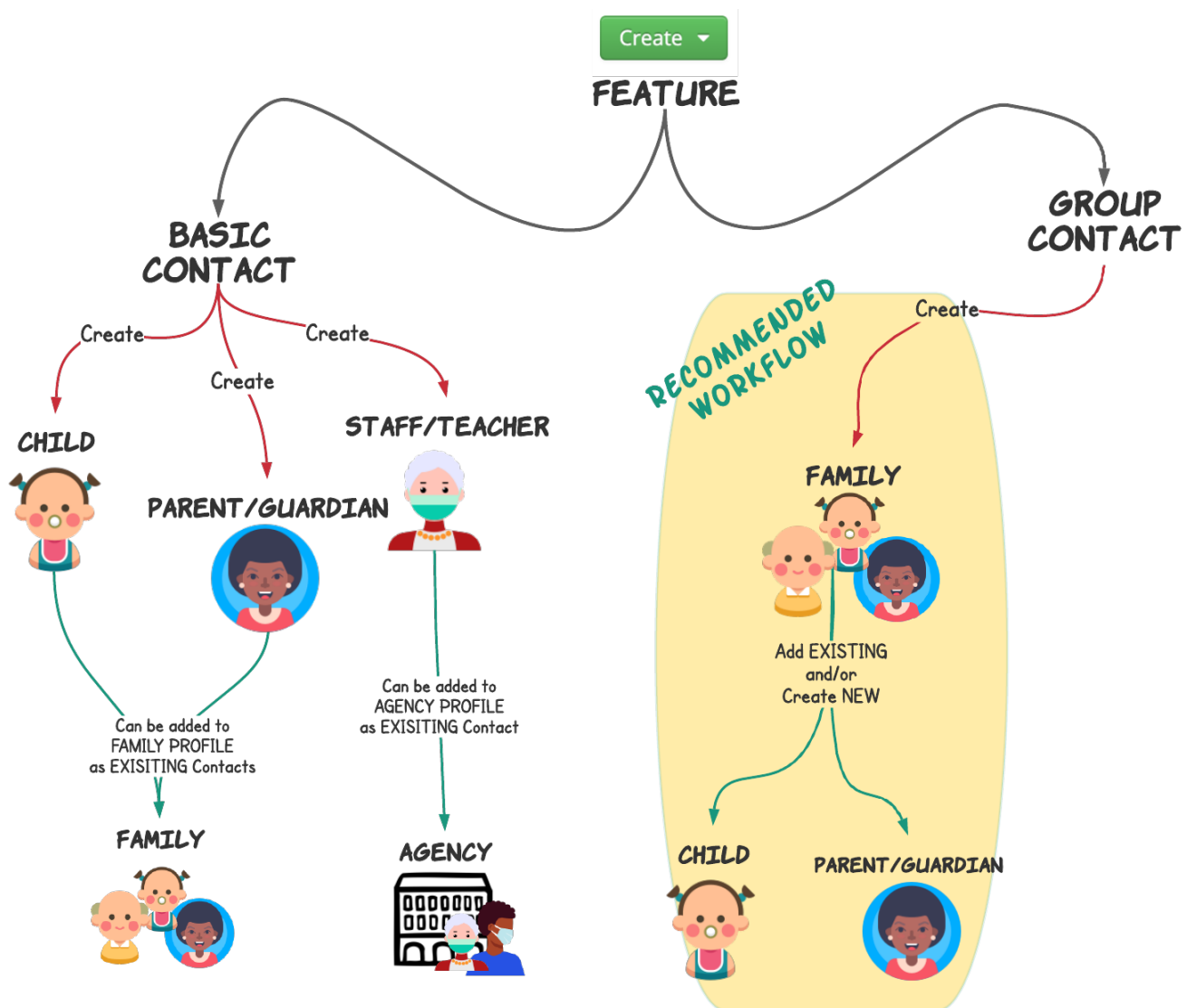
Activities : The Activities tab gives you a list of all activity forms for this contact type, as well as the option to record a new Activity. Example of forms found under this tabs are forms that are specifically assigned to a staff/teacher contact type like 'Help Desk Contact Notes'.

Assessments: The Assessment tab gives you a list of all assessment forms, as well as the option to record a new assessment. Example of forms that can be found here are DRDPs or any assessments programs require to be filled by Staff/teacher.

Teacher registration: The teacher registration tab is used to enroll a teacher to a classroom session so they can take attendance. You will be able to select a specific class, teacher's position, employment status and start/end date of class assignment in this tab.

Summary of Ways to Create Contacts

You will notice by now, there are many places and ways you can create contacts. Specially under the dynamic group contact types like **Family** contacts. Let's review few ways here;



There are two contact types, Basic and Group contact. Basic Contacts are for Child, Parent/Guardian and Staff/Teacher, mean while, Group Contacts are Family, Agency and Site (Agency and Site will be you as an FCC, so that would be already created). *The most efficient and recommended way to creating contacts for Mocha Users is through the Family Contact Forms.*

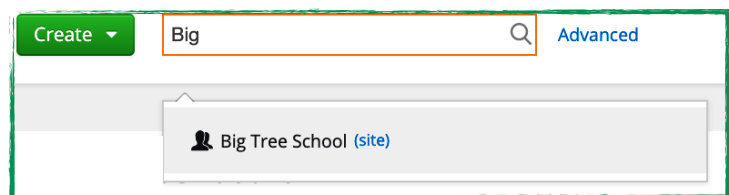
5 Enrollment

Enrollment in Mocha is done once you create your classroom session in your site and start enrolling children in them. The first step towards finishing enrollment and starting to take attendance is creating sessions and enrolling certified children in.

Creating Sessions

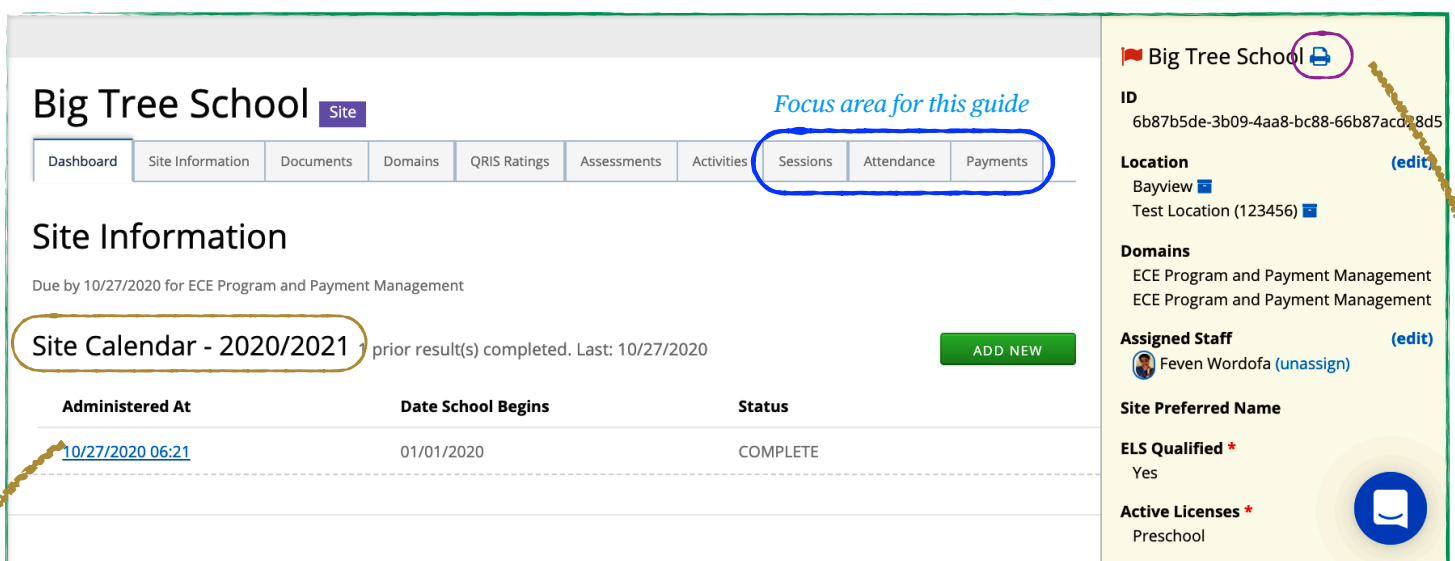
Sessions can be created by the site supervisor, FCC owner or anyone in the program that has a permission to do so. So let's create some sessions for an Agency/Site so we can enroll children and take attendance, count meals and track their pick-up and drop-offs.

Step 1: Search for the Agency/Site you will be working with by typing it in the 'Jump to contact...' box.

A screenshot of a web interface showing a search bar with the text 'Big' entered. To the left of the search bar is a green button labeled 'Create' with a dropdown arrow. To the right is a magnifying glass icon and the word 'Advanced'. Below the search bar, a dropdown menu is open, showing a result: 'Big Tree School (site)' with a person icon to its left.

For now, we will be using 'Big Tree School' as an example.

Step 2: You will land on the selected Agency/Site's profile. This is Big Tree School's dashboard.

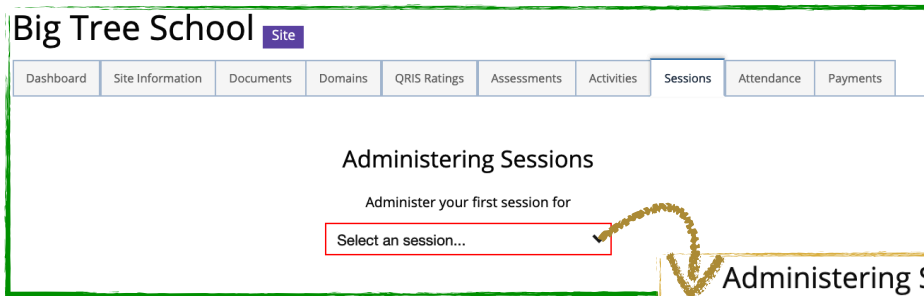
A screenshot of the 'Big Tree School' dashboard. The top navigation bar includes 'Dashboard', 'Site Information', 'Documents', 'Domains', 'QRIS Ratings', 'Assessments', 'Activities', 'Sessions', 'Attendance', and 'Payments'. The 'Sessions' tab is highlighted with a blue circle and labeled 'Focus area for this guide'. Below the navigation bar is the 'Site Information' section, which includes a 'Site Calendar - 2020/2021' link circled in orange. Below this is a table with columns 'Administered At', 'Date School Begins', and 'Status'. The first row shows '10/27/2020 06:21', '01/01/2020', and 'COMPLETE'. To the right of the main content is a sidebar with site details: 'Big Tree School' (with a car icon circled in purple), 'ID' (6b87b5de-3b09-4aa8-bc88-66b87acd28d5), 'Location' (Bayview, Test Location (123456)), 'Domains' (ECE Program and Payment Management), 'Assigned Staff' (Feven Wordofa), 'Site Preferred Name', 'ELS Qualified' (Yes), and 'Active Licenses' (Preschool). A blue speech bubble icon is at the bottom right of the sidebar. A yellow arrow points from the 'Site Calendar' link to the text below, and another yellow arrow points from the car icon to the text below.

Click here to view and/or modify the school year calendar that's for this Site. It will be handy to have accurate calendar for attendance keeping.

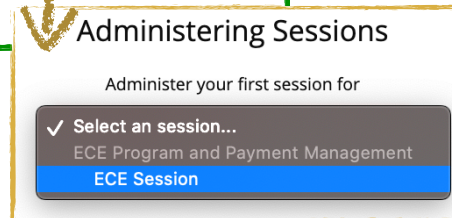
Click here to get a PDF document of either the Site contact details or the Site's entire file.

Step 3 : Click on 'Sessions' tab from the Agency/Site profile. You will land in the Sessions page.

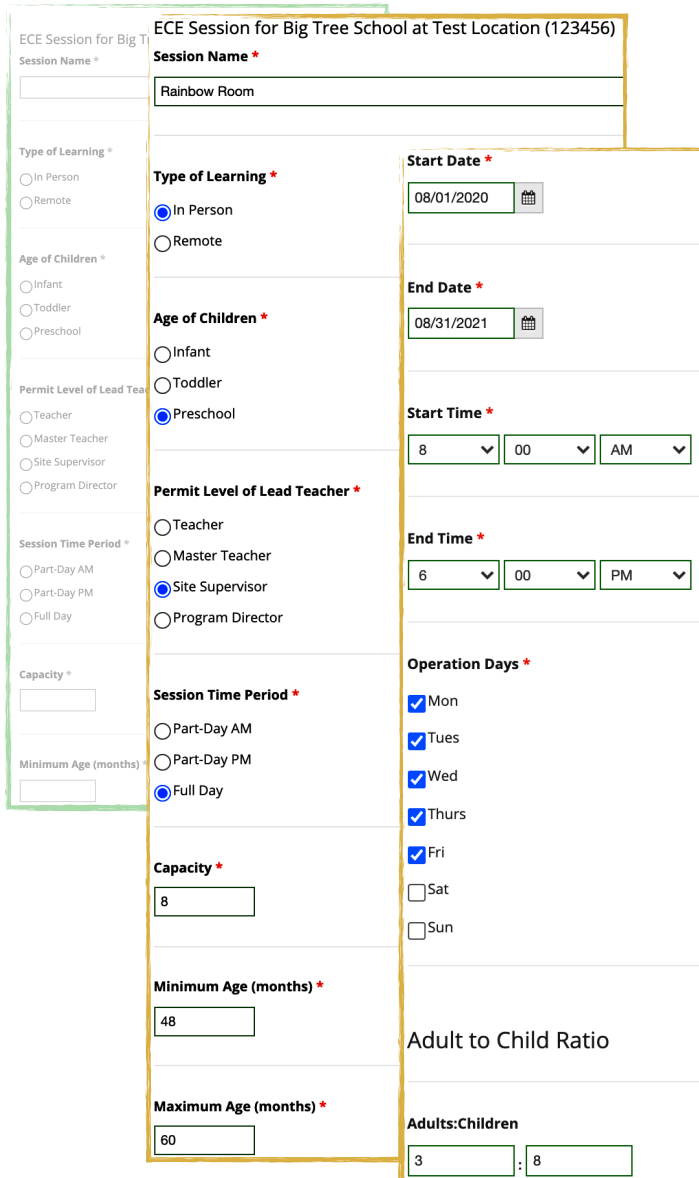
In this case, there are no sessions administered in Big Tree School. You should be seeing a note that says ***“Administer your first session for..”***



Step 4 : Click on the drop down arrow in the 'Select a session...' box. A list of session types drops open - Select **'ECE Session'**



Step 5 : You will arrive at the Session creation form. Fill out all the required fields.



In order to create a session, you need the following information ;

- Type of Learning (*In person or Remote*)
- Age of Children (*Infant, Toddler, Preschool*)
- Permit Level of Lead Teacher
- Session Time Period (*Part day, Full day*)
- Capacity (*class room capacity*)
- Max and Min age in months (*this information will determine who you allow to enroll into the session during registration*)
- Start and End date of session (*if end date is open please put 01/01/9999*)
- Operation Days
- Adult to Child Ratio

Step 6 : Click on Save at the bottom



You have successfully created your first session in your Agency/Site. You should be able to view the newly created sessions in the 'Sessions' tab in your FCC's profile. See below;

You can **click here** to keep adding classroom sessions. Repeat as many times as needed.

Big Tree School [Site](#)

Dashboard Site Information Documents Domains QRIS Ratings Assessments Activities Sessions Attendance Payments

Existing results

[Record a new session...](#)

| Administered By | Form | Name | Start Date | End Date | Start Time | End Time |
|-------------------|-------------|--------------|------------|------------|------------|----------|
| Test Bear Wordofa | ECE Session | Rainbow Room | 10/01/2020 | 01/01/9999 | 8:00 AM | 6:00 PM |

Click here to open the classroom session

Step 7 : Click on the Session name to open it. Explore the Session page.

You can view/manage attendance and roster here. But first we have to enroll some children in the classroom session first. That will be our next section!

Big Tree School [Site](#)

Dashboard Site Information Documents Domains QRIS Ratings Assessments Activities Sessions Attendance Payments

[Back to active sessions](#)

ECE Program and Payment Management

Meeting time: - from to

[View attendance and roster](#)

Session information:

Session Name *
Rainbow Room

Type of Learning *
In Person

Age of Children *
Preschool

Permit Level of Lead Teacher *
Teacher

Session Time Period *
Full Day

Capacity *
8

Minimum Age (months) *
48

Maximum Age (months) *
60

Start Date *
Oct 1, 2020

[Print](#) - [Delete](#) - [Edit](#)

Big Tree School [Site](#)

ID
6b87b5de-3b09-4aa8-bc88-66b87acd28d

Agency
Bamboo Forest Center

Location (edit)
Test Location (123456)

Domains (edit)
ECE Program and Payment Management

Assigned Staff (edit)
Feven Wordofa (unassign)

Site Preferred Name

ELS Qualified *
Yes

Active Licenses *
Preschool

Site License Number - Preschool *

Address *
7896 Tree St.,
San Francisco California
94122

Site Phone Number *
(856) 984-1236

Primary Contact

Secondary Contact

Language of Correspondence

Program Type *
Large Family Child Care Home

Accredited? *
No

QRIS Participation Status *

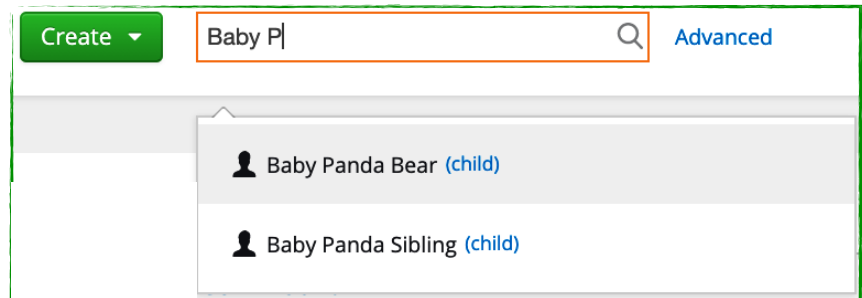
Print : You can get all the 'Session Information' to print directly or as PDF.

Delete: You can delete classroom sessions that are duplicate or created by error. Recommended step if a working session is being closed is to edit the 'Session End Date' to the accurate end time. That way you will keep the historical record.

Edit : you can edit session information here like capacity, adult:child ratio, etc

Enrolling Children into Sessions

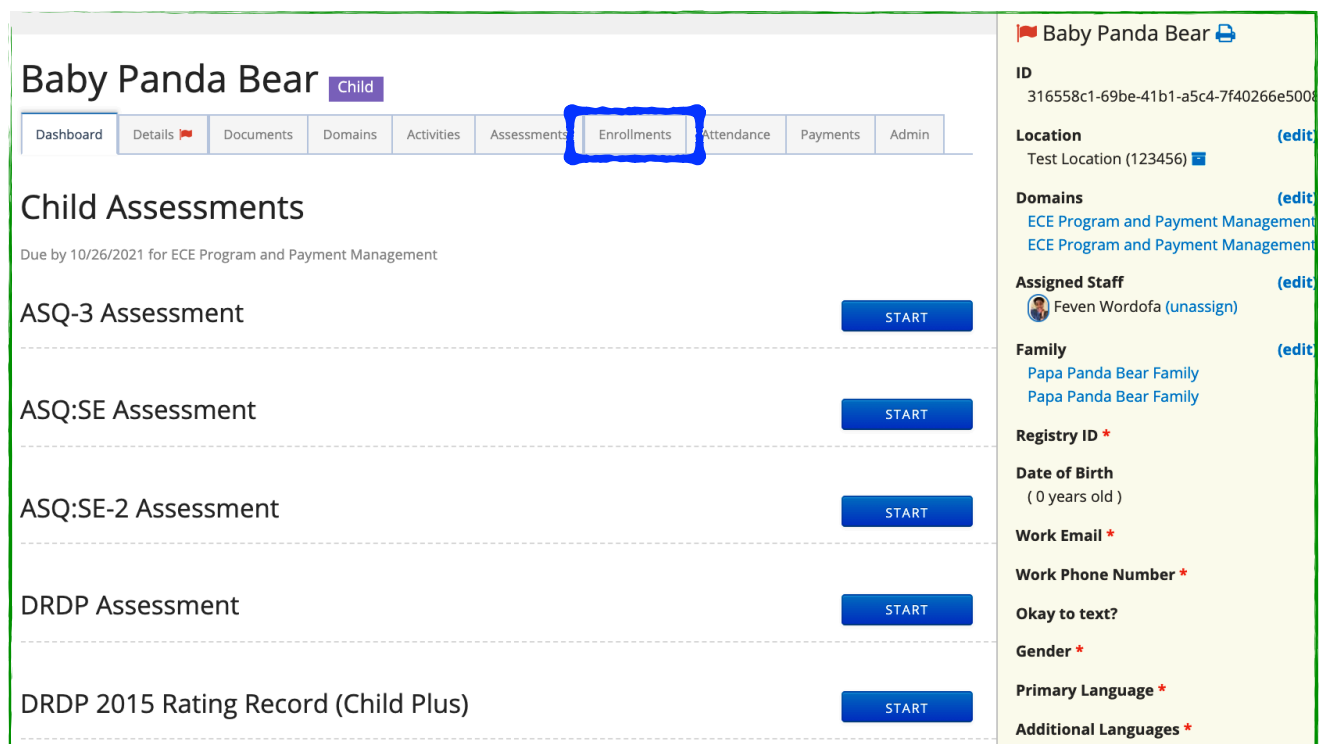
Step 1: Search for the Child you want to enroll by typing their name in the 'Jump to contact...' box.



A search bar with a green 'Create' button on the left and an 'Advanced' link on the right. The search input contains 'Baby P' and has a magnifying glass icon. Below the search bar, a dropdown menu shows two results: 'Baby Panda Bear (child)' and 'Baby Panda Sibling (child)', each with a person icon.


For now, we will be using 'Baby Panda Bear' as an example.

Step 2: You will land on the selected Child's profile. This is Baby Panda Bear's dashboard. Please refer to earlier section to review details on each of these tabs. For now we will just use the 'Enrollments' page.



The dashboard for 'Baby Panda Bear' (Child) features a top navigation bar with tabs: Dashboard, Details, Documents, Domains, Activities, Assessments, Enrollments (highlighted with a blue box), Attendance, Payments, and Admin. The main content area is titled 'Child Assessments' and lists five assessment types, each with a 'START' button: ASQ-3 Assessment, ASQ:SE Assessment, ASQ:SE-2 Assessment, DRDP Assessment, and DRDP 2015 Rating Record (Child Plus). A sidebar on the right contains child details: ID (316558c1-69be-41b1-a5c4-7f40266e5008), Location (Test Location (123456)), Domains (ECE Program and Payment Management), Assigned Staff (Feven Wordofa (unassign)), Family (Papa Panda Bear Family, Papa Panda Bear Family), Registry ID, Date of Birth (0 years old), Work Email, Work Phone Number, Okay to text?, Gender, Primary Language, and Additional Languages.

Step 3: Click on 'Enrollments' tab



The 'Enrollments' tab is active, showing the title 'Administering Enrollments' and the instruction 'Administer your first enrollment for Baby Panda Bear'. Below this is a dropdown menu with the text 'Enroll in an active session...' and a downward arrow.

This child has never been enrolled into any sessions. Therefore, you should be seeing a note that says ***“Administer your first enrollment for Baby Panda Bear”*** and prompted to select from the available active sessions in the location the child is enrolled in.

Step 4 : Click on the drop down arrow in the ‘Enroll in an active sessions...’ box. A list of sessions will drop down - Select the newly created classroom session, **‘Rainbow Room’**.

NOTE - IF YOU DON'T SEE THE CLASSROOM SESSION YOU CREATED, CHECK THE LOCATION WHERE THE CHILD IS ENROLLED IN. THE CHILD MUST BE ENROLLED IN THE SAME LOCATION THAT THE SESSION IS CREATED UNDER.

Step 5: Select funding source/ subsidy and Save.

In the future, this section will auto-populate with any active certifications the child has, but in the meantime you'd need to select all funding sources applicable for that session enrollment. Children Council and Wu Yee will be entering certifications for FCCs

Step 6 : You will land on the session registration form. Fill out all the fields.

The registration form collects start and end date of classroom enrollment, daily schedule, enrollment funding & family fee.

Depending on the ‘Daily Schedule’ you enter, the **‘Total Hours per Week’** will be auto-calculated.

Step 6: Select Enrollment Funding source or private payment and any adjustment information that needs to be included here.

Enrollment funding will auto-populate from Certification form which will be filled out by Children's Council or Wu YEE for all FCCs. For now select manually all your PFA or ELS kids.

In this example, let's select PFA as subsidy applied to this child's enrollment.

Step 7 : Finally, select if you'd like to apply the family fee to this enrollment and save the form.

PFA Funding

- ☒ PFA 12-month, 5 days a week
- ☐ PFA 12-month, 4 days a week
- ☐ PFA 12-month, 3 days a week
- ☐ PFA 11-month, 5 days a week
- ☐ PFA 11-month, 4 days a week
- ☐ PFA 11-month, 3 days a week
- ☐ PFA 10-month, 5 days a week
- ☐ PFA 10-month, 4 days a week
- ☐ PFA 10-month, 3 days a week
- ☐ PFA 9-month, 5 days a week
- ☐ PFA 9-month, 4 days a week
- ☐ PFA 9-month, 3 days a week

Direct Program Payment Options

- ☐ Private Pay - Infant
- ☐ Private Pay - Toddler
- ☐ Private Pay - Preschool

Private Pay Rate

\$

Adjustment Factor

- ☐ Infant
- ☐ Toddler
- ☒ Preschool
- ☒ Three Years and Older
- ☒ Exceptional Needs
- ☐ Limited and Non-English Proficient
- ☒ At Risk of Abuse/Neglect
- ☐ Severely Disabled

Adjustment Hours

- ☐ Half Time
- ☐ Three Quarter Time
- ☒ Full Time
- ☐ Full Time Plus
- ☐ Variable Schedule

Rate Category (For RMR subsidies only)

- ☐ Hourly
- ☐ Daily
- ☐ Weekly
- ☐ Monthly

Apply Family Fee to this child's enrollment/subsidy *

- ☒ Yes
- ☐ No

Family Fee Auto-Calculated

\$

Registration Fee

\$

Funding Source(s) - Autocalculated

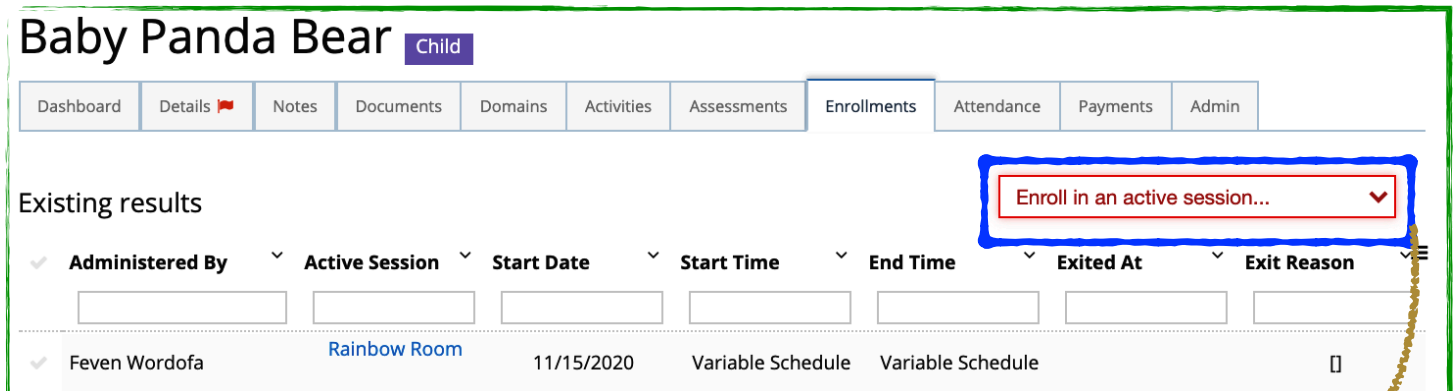
PFA 12-month 5 days

Save

Cancel

Family fee will be auto-calculated based on information collected on family size and income during the eligibility and certification process.

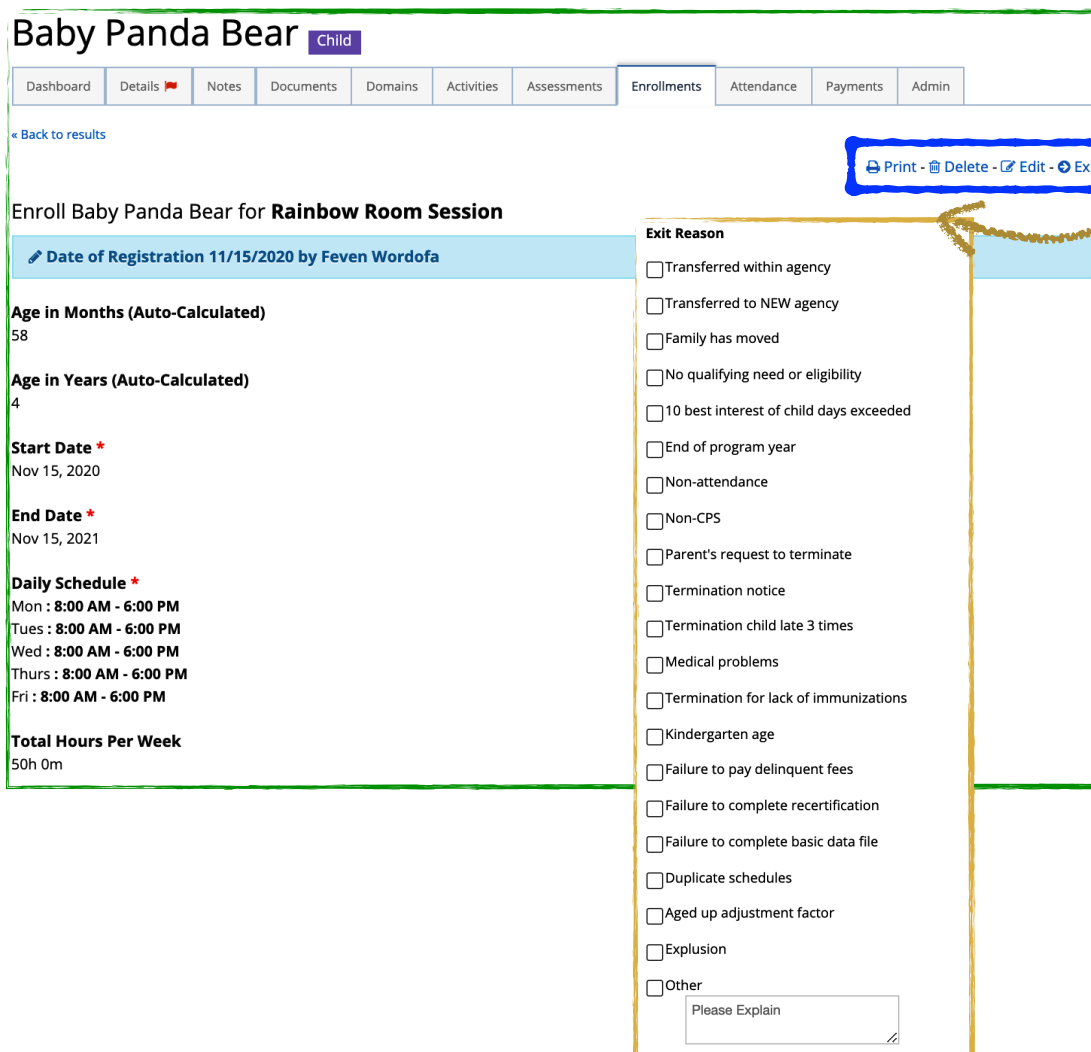
Once you save the registration form. You will be able to see the session under the child's profile in the 'Enrollments' tab. In this example, you can see 'Baby Panda Bear' has an existing active session called 'Rainbow Room'.



| Administered By | Active Session | Start Date | Start Time | End Time | Exited At | Exit Reason |
|-----------------|----------------|------------|-------------------|-------------------|-----------|-------------|
| Feven Wordofa | Rainbow Room | 11/15/2020 | Variable Schedule | Variable Schedule | | |

You can continue enrolling 'Baby Panda Bear' into other session here. For example, a different AM and PM classroom session or if the child is in alternate classroom session in different days of the week etc

Step 8 : Click on the session name from here to open the details.



Enroll Baby Panda Bear for **Rainbow Room Session**

[Date of Registration 11/15/2020 by Feven Wordofa](#)

Age in Months (Auto-Calculated)
58

Age in Years (Auto-Calculated)
4

Start Date *
Nov 15, 2020

End Date *
Nov 15, 2021

Daily Schedule *
Mon : 8:00 AM - 6:00 PM
Tues : 8:00 AM - 6:00 PM
Wed : 8:00 AM - 6:00 PM
Thurs : 8:00 AM - 6:00 PM
Fri : 8:00 AM - 6:00 PM

Total Hours Per Week
50h 0m

Exit Reason

- ☐ Transferred within agency
- ☐ Transferred to NEW agency
- ☐ Family has moved
- ☐ No qualifying need or eligibility
- ☐ 10 best interest of child days exceeded
- ☐ End of program year
- ☐ Non-attendance
- ☐ Non-CPS
- ☐ Parent's request to terminate
- ☐ Termination notice
- ☐ Termination child late 3 times
- ☐ Medical problems
- ☐ Termination for lack of immunizations
- ☐ Kindergarten age
- ☐ Failure to pay delinquent fees
- ☐ Failure to complete recertification
- ☐ Failure to complete basic data file
- ☐ Duplicate schedules
- ☐ Aged up adjustment factor
- ☐ Expulsion
- ☐ Other

Please Explain

You can **'Print'** registration info from here.

The **'Delete'** option will only be available for removing enrolled child. If the child no longer needs to be in this classroom, you have an option to **'Exit'** them from a session. When you click on 'Exit', you will be prompted to select an 'Exit Reason' and enter 'Exit Date'. You can also use the **'Edit'** here to make changes/updates to their classroom session registration info.

6 Side Navigation Bar

Task

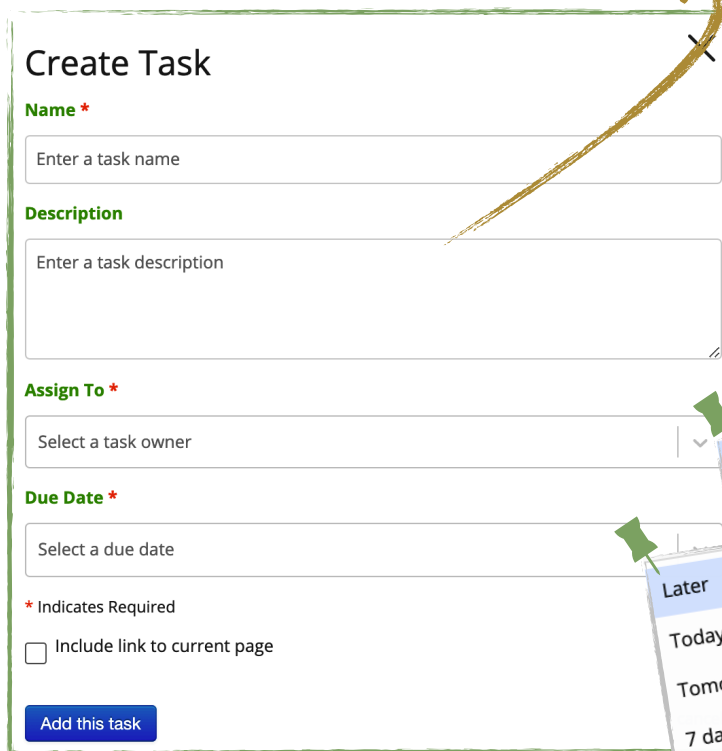
Step 1 : Click on the **'Create'** button on the left of the top navigation bar.

Step 2 : Click on **'Task'** on the drop down menu. You should see a widow open as pictured below. From here fill in the necessary steps ;

Use the **'Description'** bar to enter details on the task you want to create.

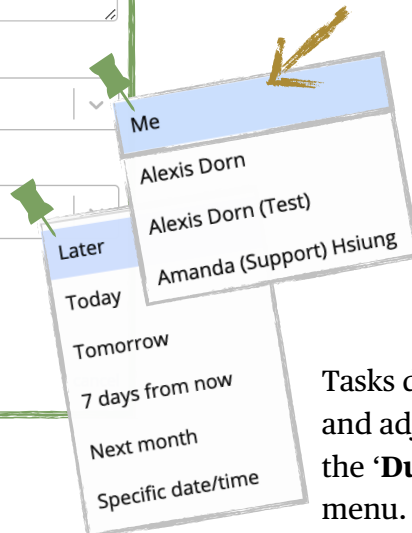
Tasks can be assigned to yourself or others. Use the **'Assign To'** menu to select the contacts you want to allocate as assignee. You are able to assign a Task to multiple people.

Select all the names you want to add here.



The screenshot shows the 'Create Task' form with the following fields and annotations:

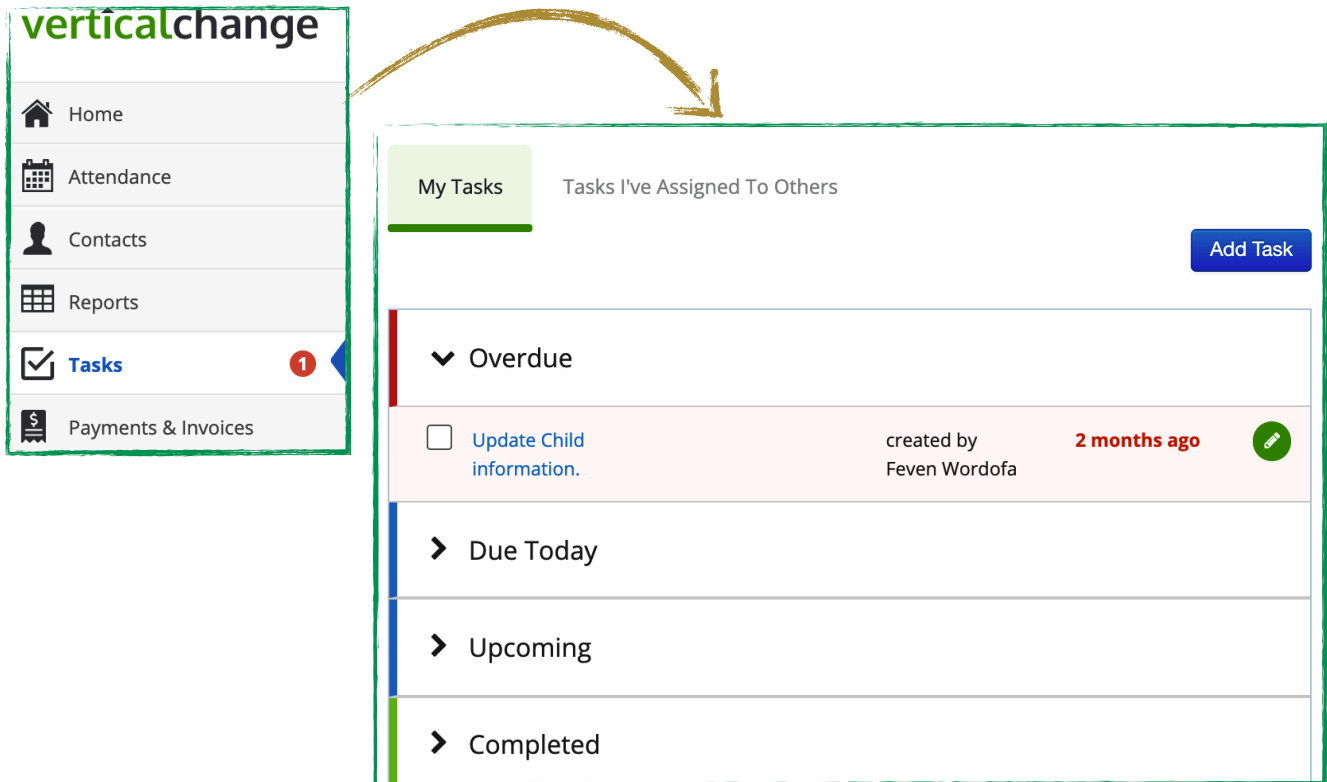
- Name ***: A text input field with the placeholder 'Enter a task name'. A green arrow points to this field from the text 'Use the 'Description' bar to enter details on the task you want to create.' (Note: the text in the image is slightly misaligned with the field).
- Description**: A larger text input field with the placeholder 'Enter a task description'. A green arrow points to this field from the same text.
- Assign To ***: A dropdown menu with the placeholder 'Select a task owner'. A green arrow points to this field from the text 'Tasks can be assigned to yourself or others. Use the 'Assign To' menu to select the contacts you want to allocate as assignee. You are able to assign a Task to multiple people.' and 'Select all the names you want to add here.'
- Due Date ***: A dropdown menu with the placeholder 'Select a due date'. A green arrow points to this field from the text 'Tasks due dates can be set and adjusted here under the 'Due Date' dropdown menu.'
- * Indicates Required**: A note indicating that fields with an asterisk are required.
- Include link to current page**: A checkbox with the label 'Include link to current page'. A green arrow points to this checkbox from the text 'If you click on this box "include link to current page", it will attach a link to the page you are currently on to the task. Helpful for assignee or yourself to get to the exact location on Mocha the task is referring to.'
- Add this task**: A blue button at the bottom of the form.



If you click on this box *"include link to current page"*, it will attach a link to the page you are currently on to the task. Helpful for assignee or yourself to get to the exact location on Mocha the task is referring to.

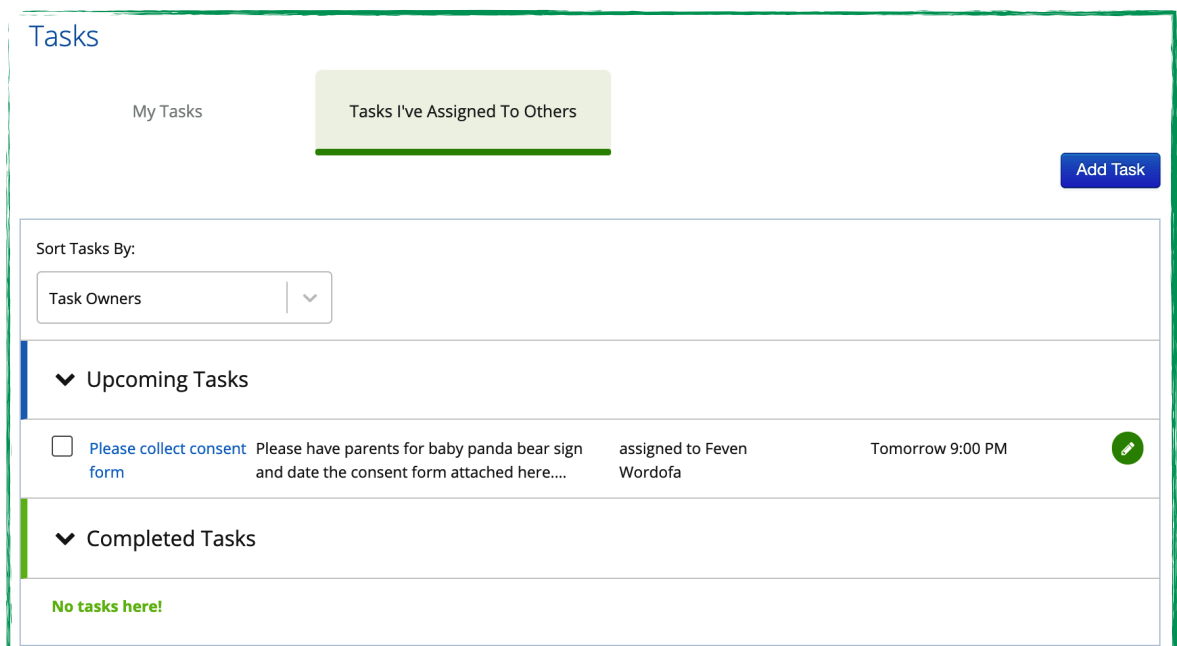
Step 3 : Once you complete your entry, click on **'Add this task'** button to save your task assignment. You will see a **'successful!'** confirmation flag.

Step 4 : Go to the side navigation bar, you should see a red notification bubble  next to the 'Task' bar: Click to open the 'Tasks' page;



Here you will see your tasks under 'My Tasks' listed in four categories; 'Overdue', 'Due Today', 'Upcoming' and 'Completed'. You can click on each of the categories and a list of task will appear.

You can also click on the 'Tasks I've Assigned to Others' to view list of 'Upcoming' and 'Completed' task you have created and assigned for others to compete.



Step 5 : Click on anywhere in upcoming tasks listed or you can click on the green edit icon to open & review the task;



Update Task

Name

Please collect consent form

Description

Please have parents for baby panda bear sign and date the consent form attached here. Thank you

Reassign to Another User

Select a task owner

Due Date

Select a new due date

Update Task

Here you can review all the details for the task or edit/update information by just cleaning in the appropriate box.

You can also reassigned the task to others by clicking on the arrow as shown below. And make changes to the due date as well.

✓ Reassign this task to...

Ann Cowell

Alexis Dorn

Matthew Rector

Test Bear Wordofa

Alexis Dorn (Test)

Ocean (Support) Chow

You can finalize and save your updated task by clicking on 'Update Task' here.

Click here to delete a task.

Step 6 : Go back to 'My Tasks' and Click on the hyperlinked blue letters to see if the location where the update needs to be made that's included in this task.

Tasks

My Tasks Tasks I've Assigned To Others

Add Task

▼ Overdue

No overdue tasks!

▼ Due Today

No tasks due today!

▼ Upcoming

☐ 'Happy Baby' classroom remodeling Please place new photos and art works, replace desks and install... water play corner. 10/24/2021

Completed

When you click on the blue hyper link letters, you should be taken to the specific session/profile/form where the update/change needs to be made as stated on the task.

Bamboo Forest Center Site, Agency

Dashboard Details Notes Documents Domains Activities Assessments Sessions

← Back to active sessions

ECE Program and Payment Management

Meeting time: - from to

View attendance and roster

Session information:

Session Name *
Happy Baby

Type of Learning *
Remote

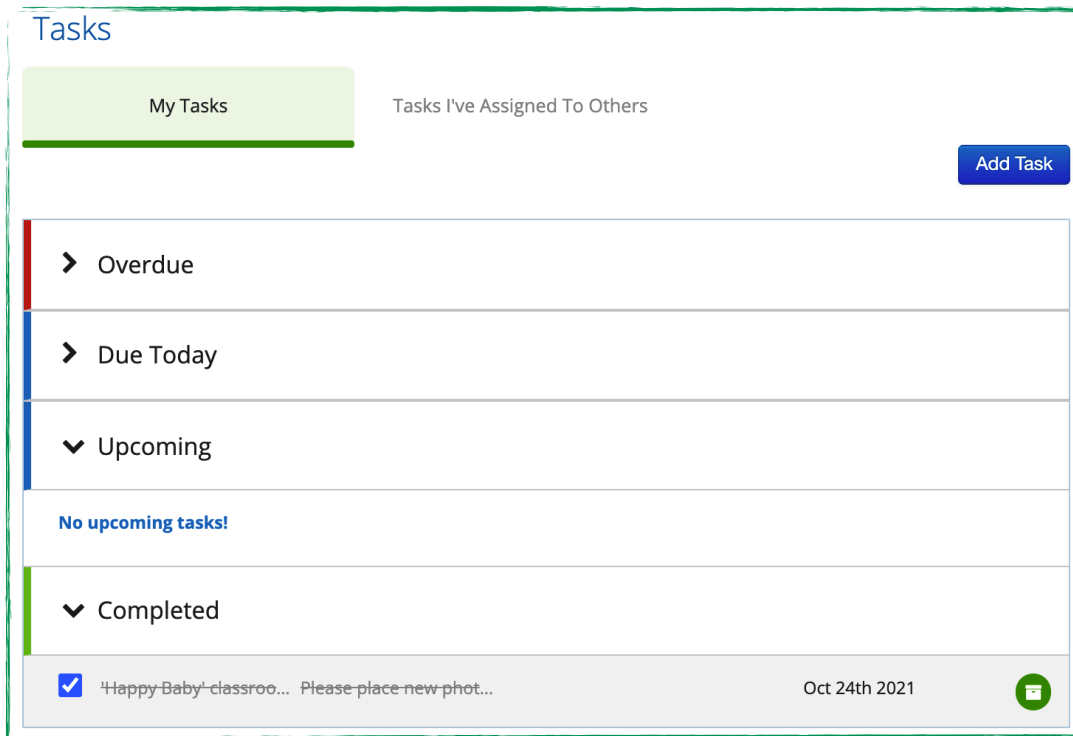
Age of Children *
Infant
Toddler
Preschool

Permit Level of Lead Teacher *
Site Supervisor

Session Time Period *
Full Day

Capacity *
14

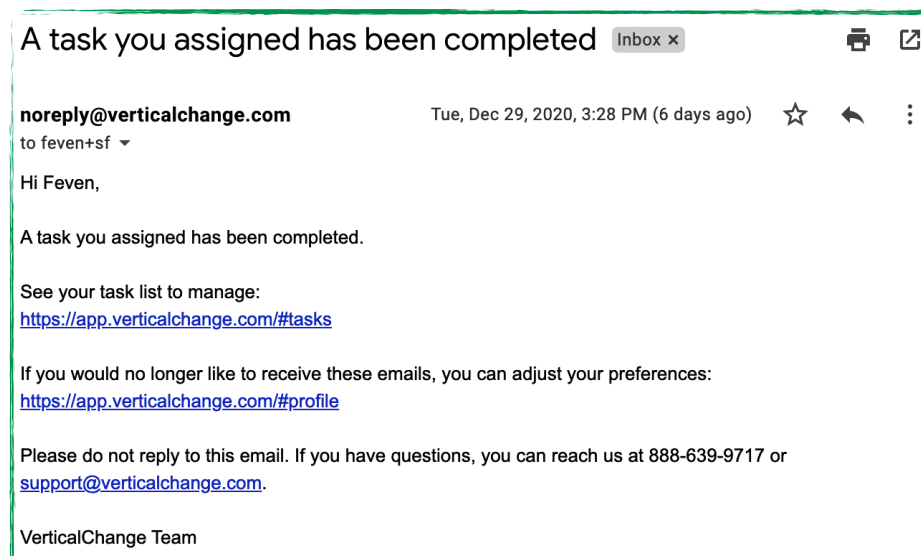
Step 7 : Once you complete the task, you can simply click on the check box next to a task to close/complete a task.



You should automatically be able to see the task moving from 'Upcoming'/'Due Today' to 'Completed' task list.

You will see the task ~~penciled~~ out as complete. And if you decided to reopen the task, just click on the check box again to have it active again.

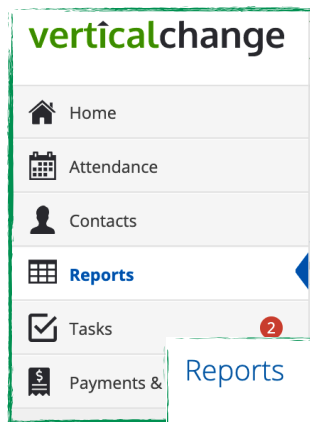
Step 8: Finally, you will get an email notifying you or the person who assigned the task that it has been completed.



Email notifications will be sent out for : Task are due today, when new tasks are assigned to you and/or when a task you assigned is completed. You can adjust your preferences if you don't like to receive these notification emails.

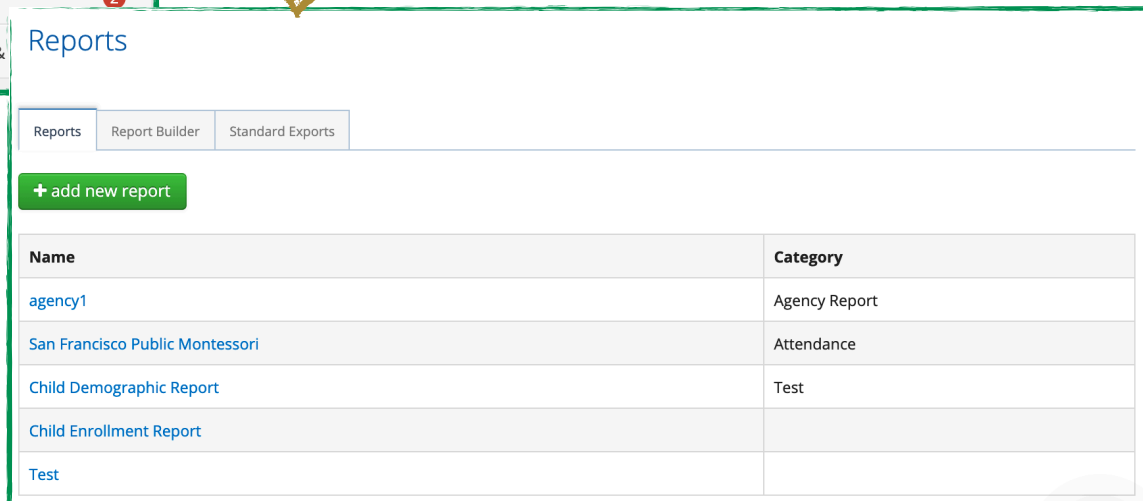
Reports

Step 1 : Click on 'Reports' link on the side navigation menu.



It will bring up a list of reports that you or someone else in your agency have saved.

You can select the report you want from that list, or you can select to **+add new report**.



There are three tabs in your report page;

Report: You find all of your reports (made by you or others in your agency) listed as above

Report Builder: This is where you find all your data collected through the various forms in Mocha. From here you can select different data fields and build your own reports.

Standard Reports: Are custom build SQL reports created by VerticalChange staff.

Reports will be organized by **Name** and **Category**.

It's always helpful to have a clear and systematic way of categorizing your reports so they will be easier to locate.

Step 2 : Click on add a new report. This will be taken to the report builder page

Here decide at what level you want to pull data from;

People (*Child, Staff/teacher or Parent/Guardian*)

Group (*Agency, Site or Family*)

Domains (*QRIS or Other*)

Name and Categorize your new report here; and save once you have all the fields you need.

The screenshot shows the report builder interface. On the left, there is a sidebar with a search bar labeled 'filter fields', a 'filter tags' section with 'show all', 'close all', and 'clear search' buttons, and a 'Report on:' section with buttons for 'People', 'Groups', and 'Domains'. Below these are checkboxes for 'Show group results' and 'Require form result'. A list of categories is shown with expandable icons: Person, Activities, Assessments, Sessions, Registrations, and Attendances. A green box highlights the 'Person' category, which is expanded to show sub-categories: Basic fields, Child, Common fields, Parent/Guardian, Staff/Teacher, Locations, Programs, Activities, Assessments, and Sessions. A green box also highlights the 'Child' sub-category, which is expanded to show a list of fields with checkboxes: All Fields, ELSF ID (auto-populated), Preferred Name / Nick Name, Date of Birth, Age (Years), Age (Months), Gender, Limited English Proficiency?, First Language, Second Language, Primary Home Language, Race/Ethnicity, Click to view target population requ, Target Populations (Select all that A, Special Needs (Select all that apply), ADHD: Diagnosed or Suspected?, and If Diagnosed, Date of Diagnosis (est). On the right, there is a form with 'Name *' and 'Category' fields, a 'Save report' button, and tabs for 'Details' and 'Summary'. A blue box contains the text 'INFO: Select columns on left to add to report.'.

So let's stay on the 'People' or Basic contact level view;

The left side of your report builder holds all the data you have entered at any point in Mocha. Eg: if you click the + next to 'Person'..

It will drop down into further specific categories, like **Child**, **Parent/Guardian** or **Staff/Teacher**..

Click on Child...

Here you will find Child level data such as age, language, race/ethnicity...

Step 3 : Choose any data field you'd like to see and see what you get on the details page;

As soon as you start click on the fields on the left, column of data with list of child level data will appear,

PeopleGroupsDomains

Show group results

Require form result

Person

Basic fields

Child

All Fields

ELSF ID (auto-populated)

Preferred Name / Nick Name

Date of Birth

Age (Years)

Age (Months)

Gender

Limited English Proficiency?

First Language

Second Language

Primary Home Language

Race/Ethnicity

Name *

Baby Pandas Report

Category

Panda Project

Save report

Details (4)SummaryFilters (1)

Export

Re-order columns

| Child | Child | Child | Child | Child | Child |
|--------------------------|----------------------------|---------------|-------------|-------------------------------------|----------------------------------|
| ELSF ID (auto-populated) | Preferred Name / Nick Name | Date of Birth | Age (Years) | All - Gender | All - Race/Ethnicity |
| 1 | | 01/01/2017 | 3 | Male | Hispanic/Latino |
| 123456789 | Anna | 12/20/2016 | 3 | Female | Asian - Chinese |
| test | test | 01/29/2020 | 0 | Male | Alaska Native or American Indian |
| N/A | N/A | 04/01/2019 | 1 | Another Gender Identity: Non-binary | Unknown/Decline to State |

On the example above, I wanted to see the *ELSF IDs, Names, DOB, Age, Gender and Race/ Ethnicity* of children in Mocha. Each variable will appear as a column , and the corresponding data will list right below it.

Step 4: Name and add your report to a category and save;

If you go back to the report folder, you will find your newly created report in the list.

Reports

Reports

Report Builder

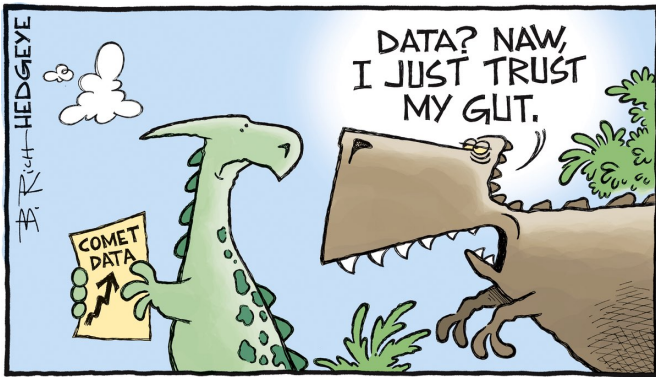
Standard Exports

+ add new report

| Name | Category |
|---------------------------------|---------------|
| agency1 | Agency Report |
| San Francisco Public Montessori | Attendance |
| Baby Pandas Report | Panda Project |
| Child Demographic Report | Test |
| Child Enrollment Report | |
| Test | |

Finally ,

you've made it to the end!



VerticalChange team members would love to get your feedback on this document; the *Mocha Guide - Part I: Basic Function*.

Please submit comments, ideas, suggestions, frustrations, jokes and corrections by clicking here [SUBMIT FEEDBACK](#) to Feven Wordofa, Customer Success Manager at VerticalChange.

Thank you so much for your undivided attention!

In collaboration & partnership,
Customer Success Team

verticalchange