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 Office of Early Care & Education

San Francisco's Office of Early Care and Education (OECE)
https://sfoece.org/

vertîcalchange

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

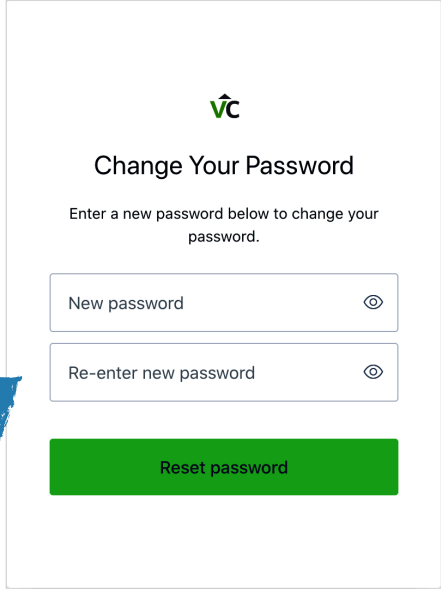
PLEASE CHECK YOUR INBOX AND SPAM BOX FOR THE INVITE

1 Signing in

Step 1 :

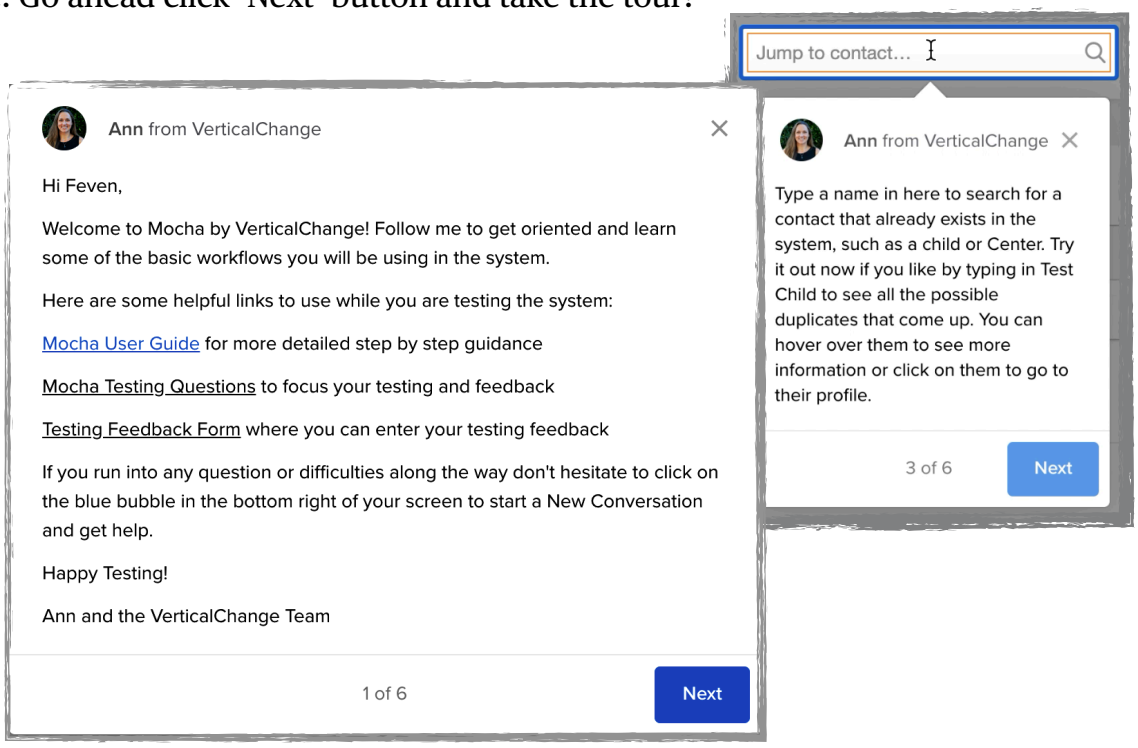
You were invited to VerticalChange! You should be getting an email with a link to activate your account. Follow that link and you will be asked to change your password.

- 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.



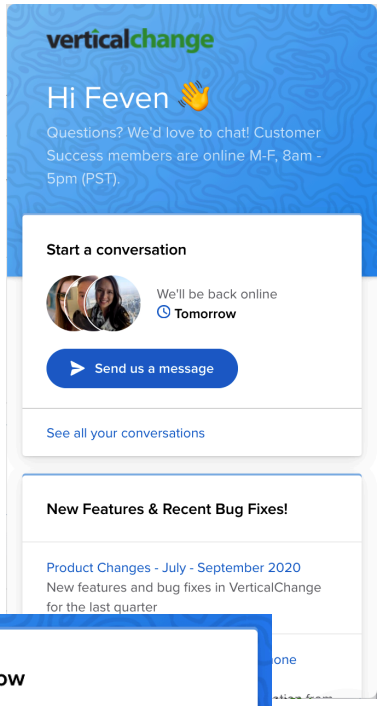
Step 2 :

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!



2 VerticalChange Help Chat

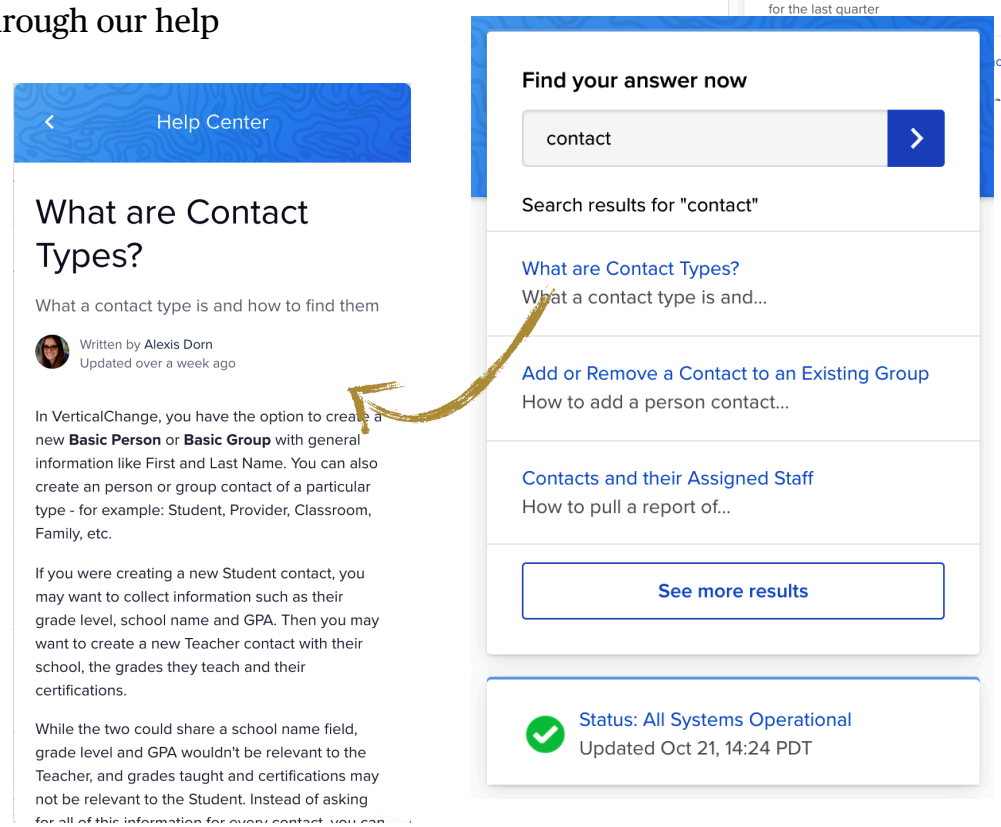
Have a question? Notice a bug? The quickest way to reach a member of the Customer Support team at VerticalChange is to chat with us!



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. 

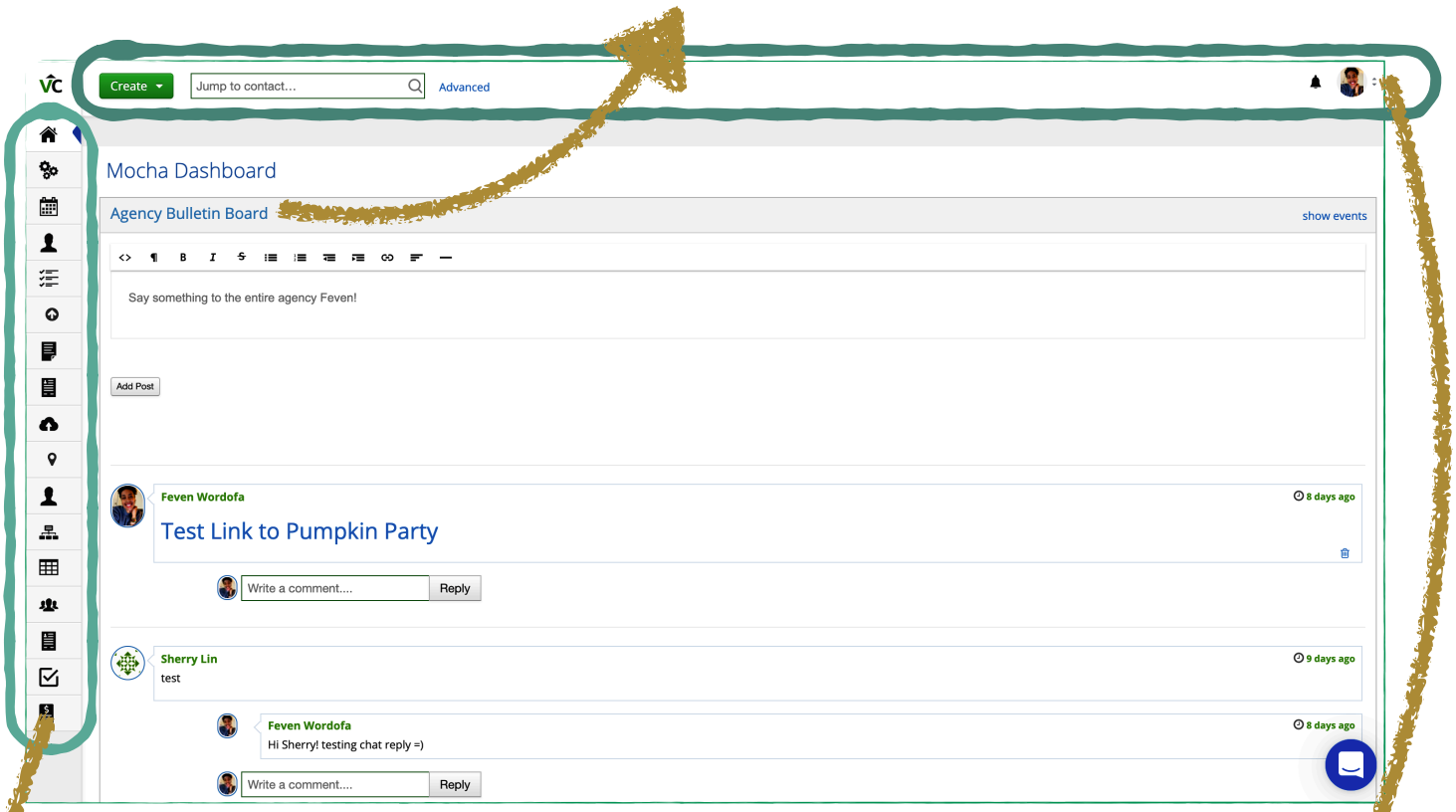
Or you can scroll down and type in any keyword under 'Find your answer now' to search through our help documentation library.



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:

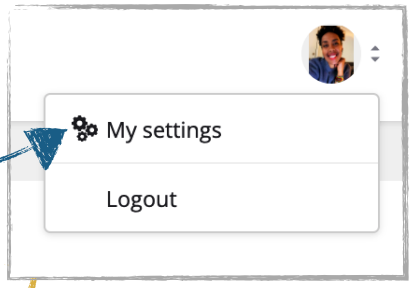
Here you will find 'My setting' , 'Search bar' & the 'Create' feature.

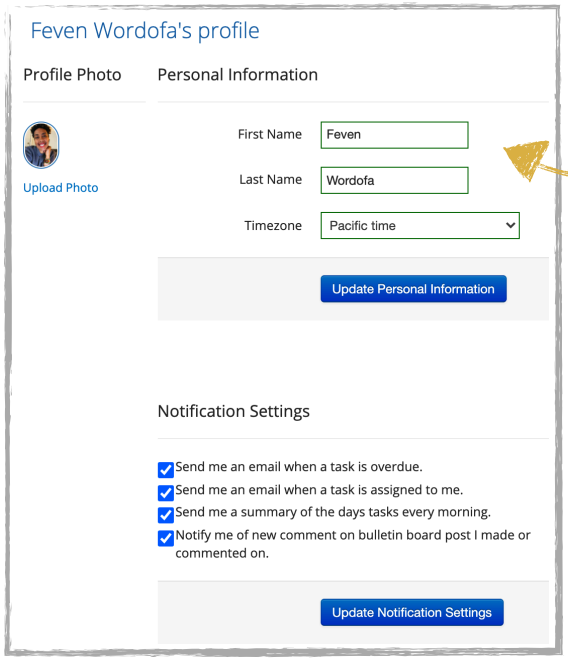
4 Top Navigation Bar

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.

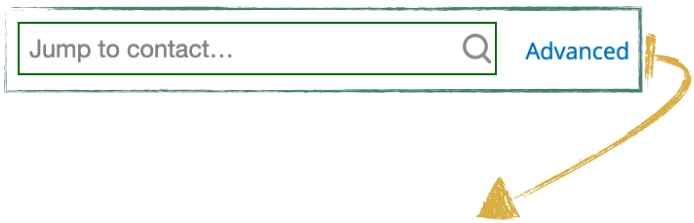
We don't want to log out quite yet, so go ahead and click on 'My settings'.





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

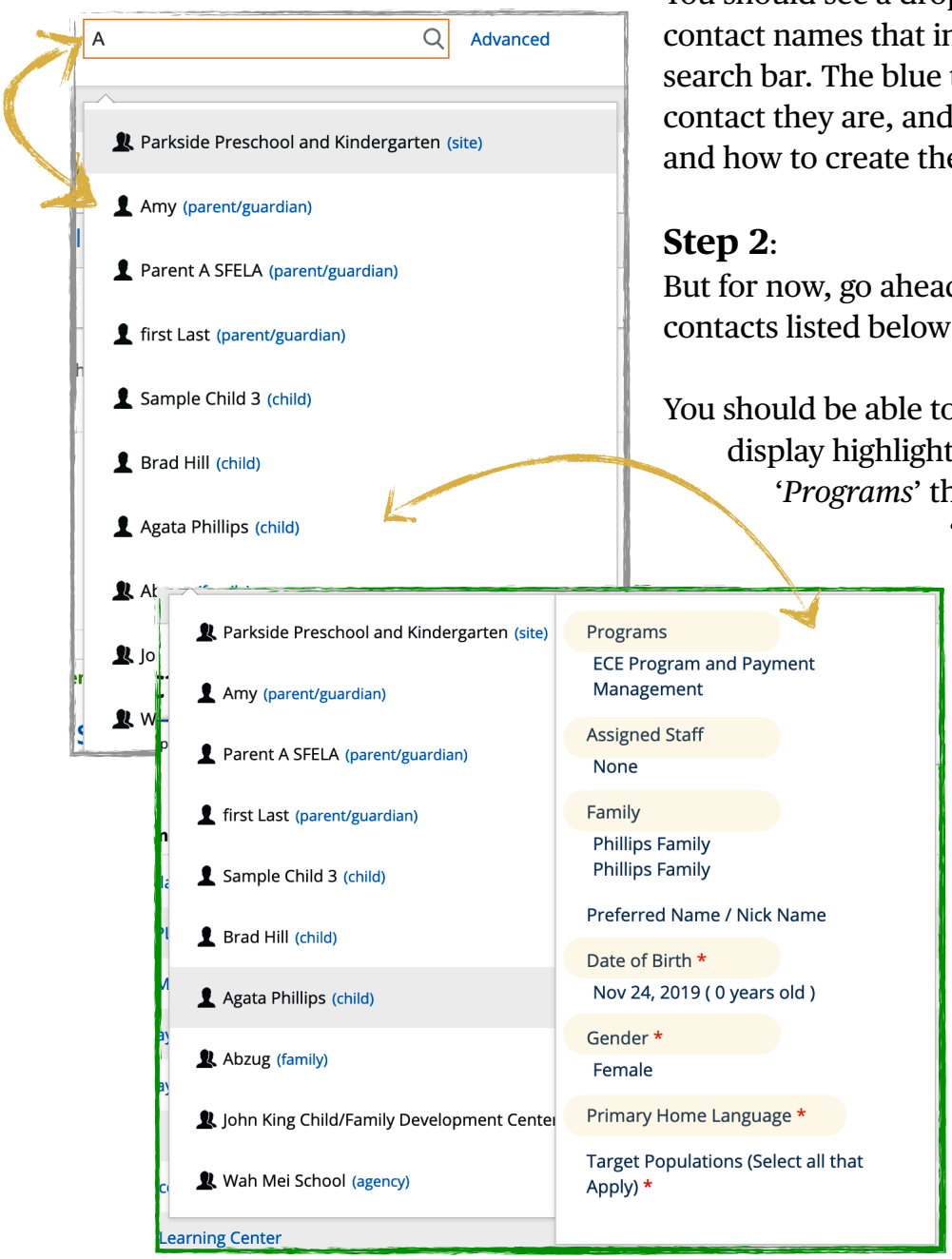
'Jump to contact…' and 'Advanced'



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!

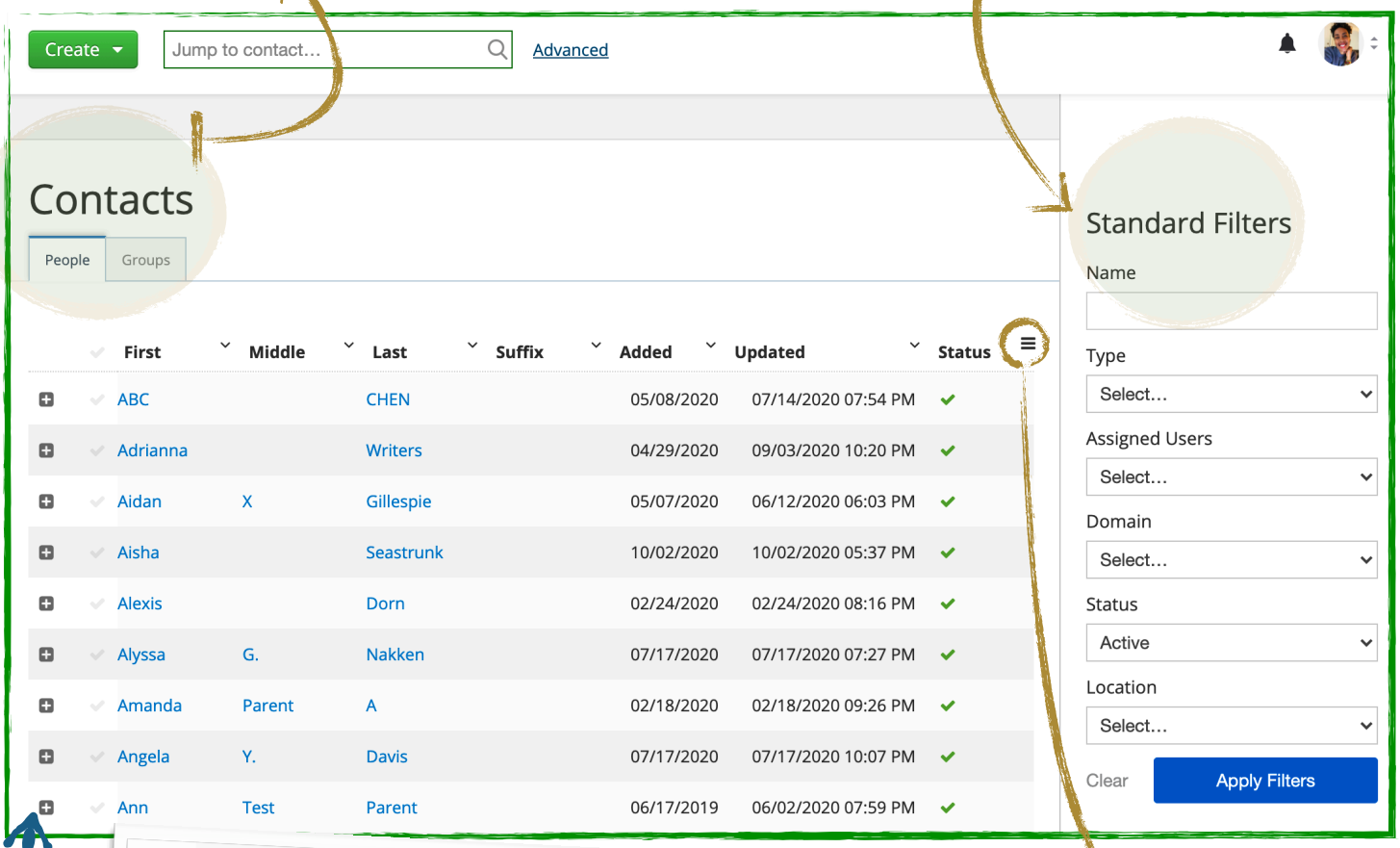
Step 3: Search contacts using the 'Advanced' feature. Click on 'Advanced' at the right hand of the search bar.

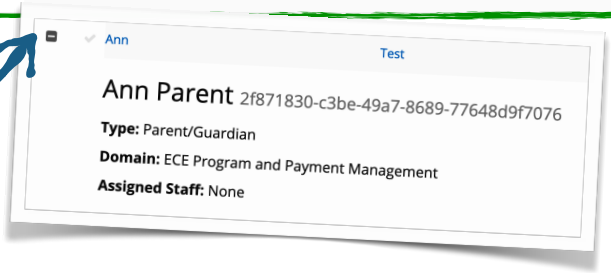
You should arrive at this page shown below. The ‘advanced’ contact search feature will allow you to do a more detailed search.

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.





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.

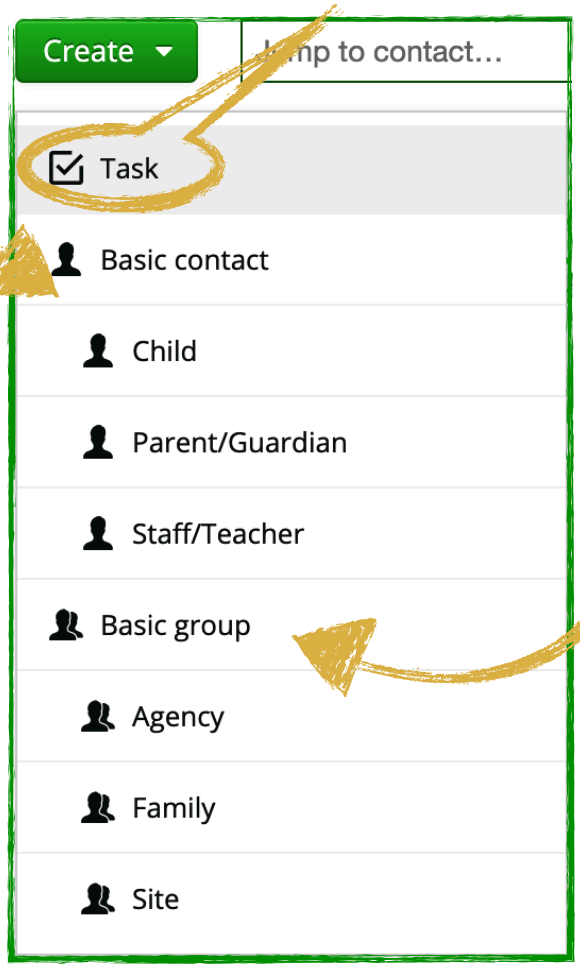
We will discuss in detail how to create a contact and the minimum required information needed to create these contact profiles in the next section.

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 group to create a multi-individual profile.
You ***only need*** to use the **family** contact type.

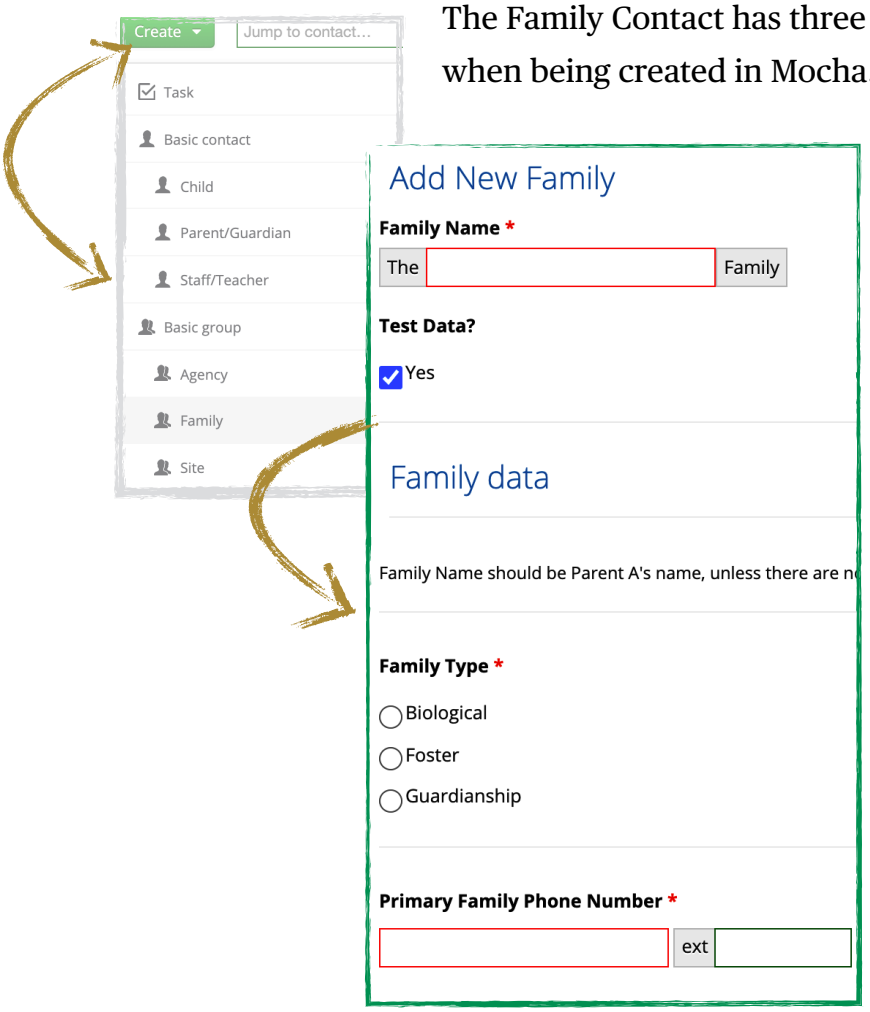
Choose one of the listed contact types under basic contact to create an individual/person profile. Could be a **child**, a **parent/guardian** or a **staff/teacher**.

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'.

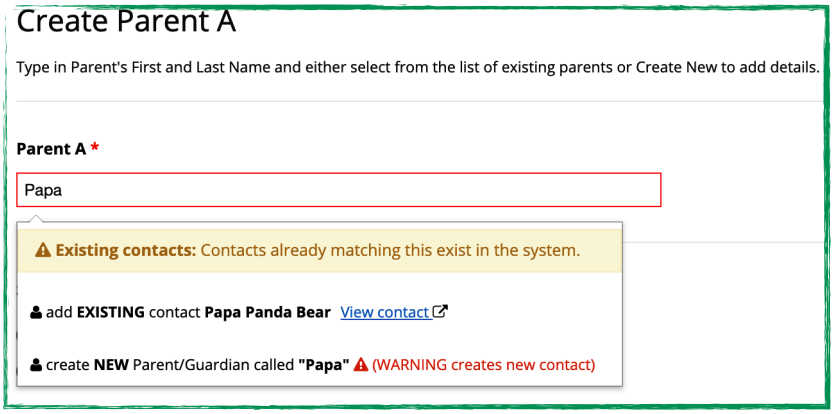


The Family Contact has three sections that needs to be filled out when being created in Mocha. First you will find, 'Add New Family' section, second you'll enter 'Family Data' section , and finally you'll need to add parent/Guardian(s) and a child (children).

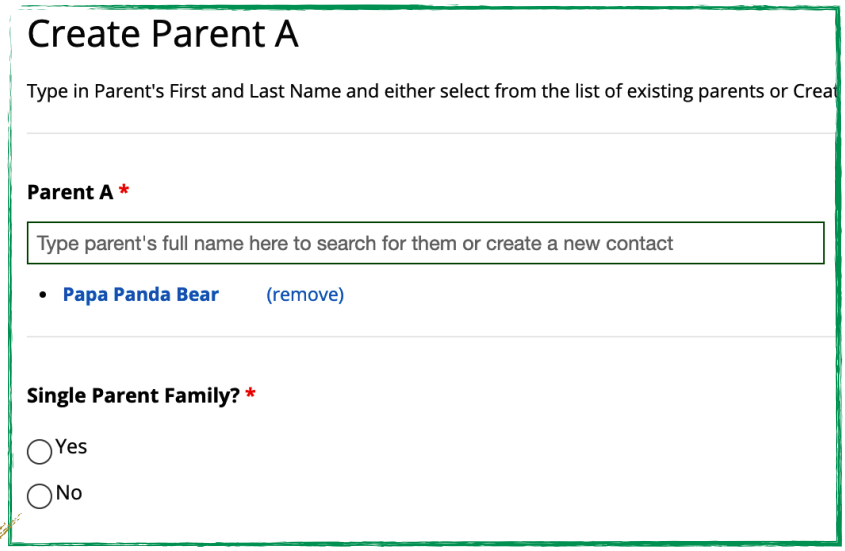
The required fields to create a family are listed here below,

- 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.



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.

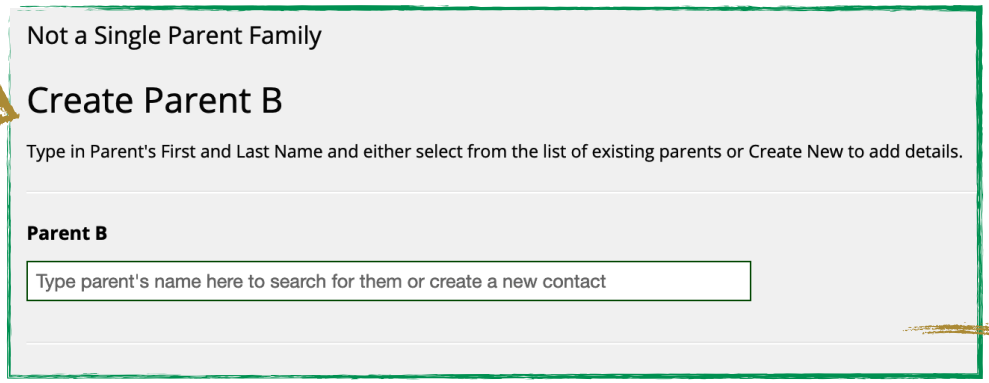


The name 'Papa Panda Bear' appears below 'Parent A' box. You can click on the name to go to their profile.

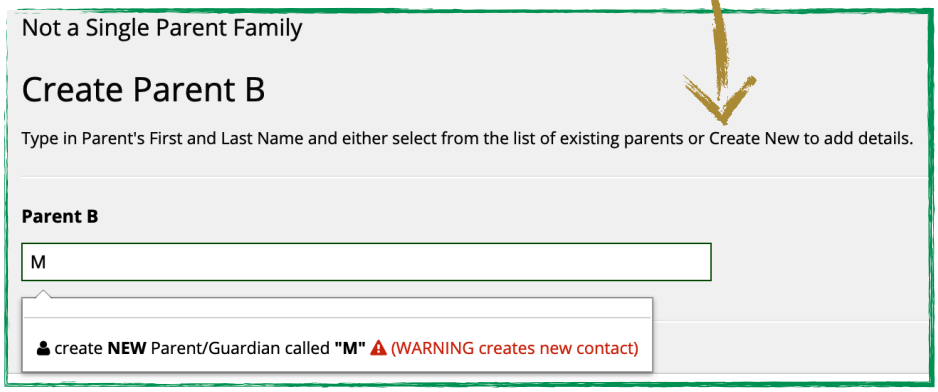
You also have the option to remove the parent/guardian here.

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',

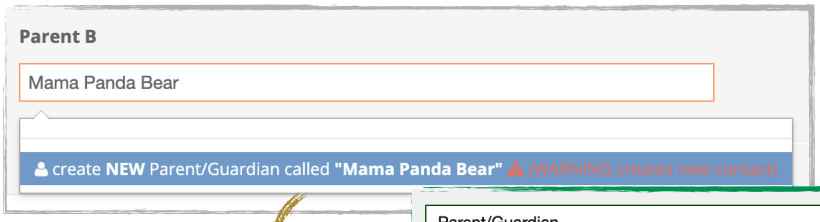


Step 5 : This time let's create a **NEW** 'Parent B' but first type the first initial to see if the parent is already in Mocha.



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.

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

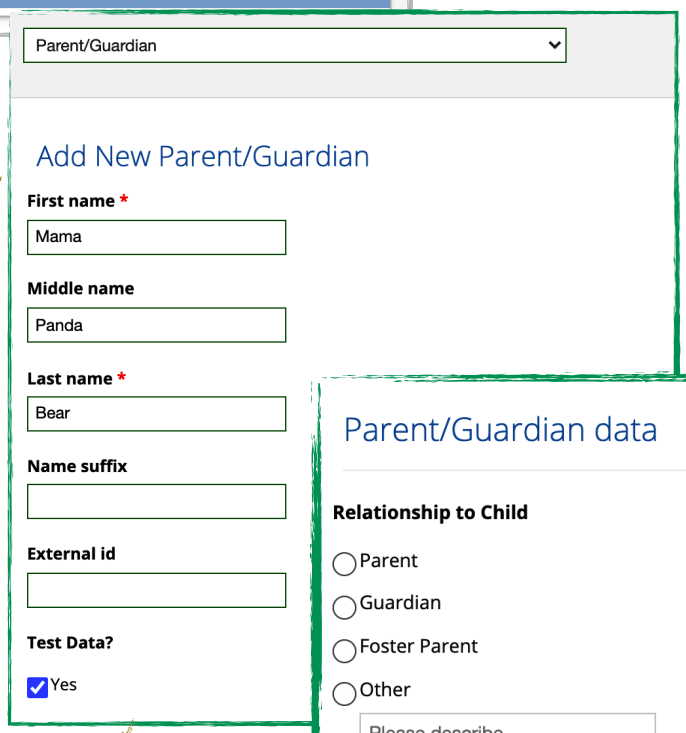


A window will open in the center of your screen.

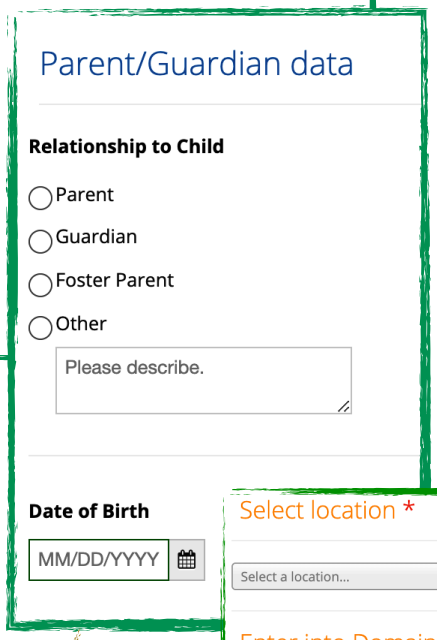
This is the same form you will use if/when you ***Create Basic Contact: ‘Parent/ Guardian’.***

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;

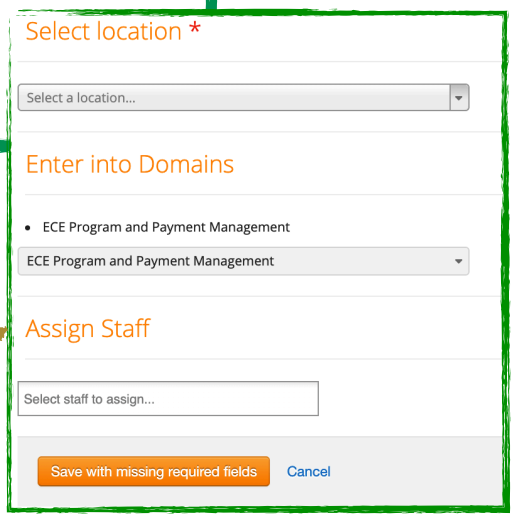


The second part of the form is titled ‘*Parent/ Guardian Data*’



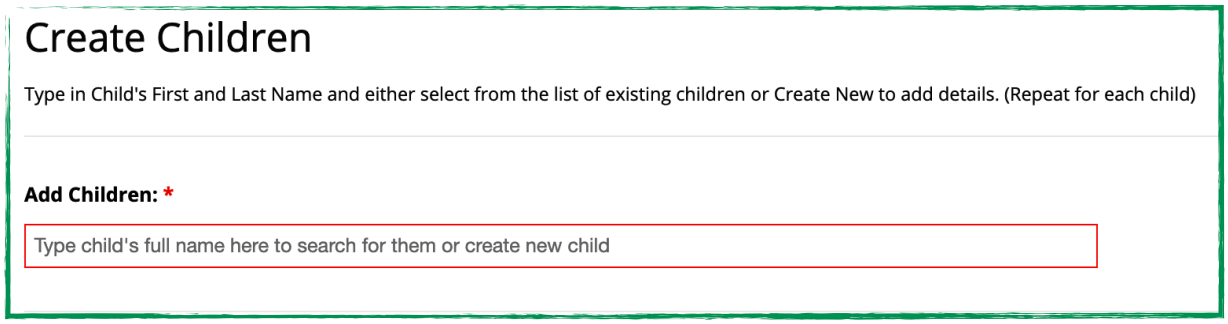
The last section of the form requires you to ‘Select Location’. However, as an FCC, you should only be able to see your Center’s name listed in the location’s box.

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.

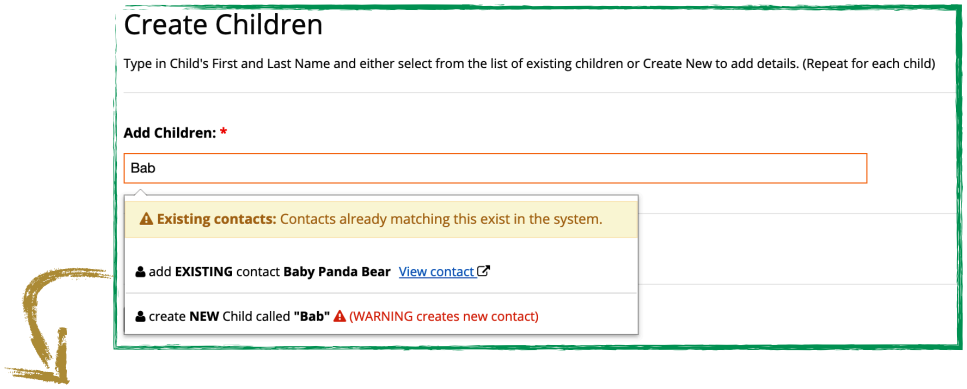


Once you complete filling out the details, the name of the new parent/guardian contact you created will appear below the box ‘Parent B’.

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

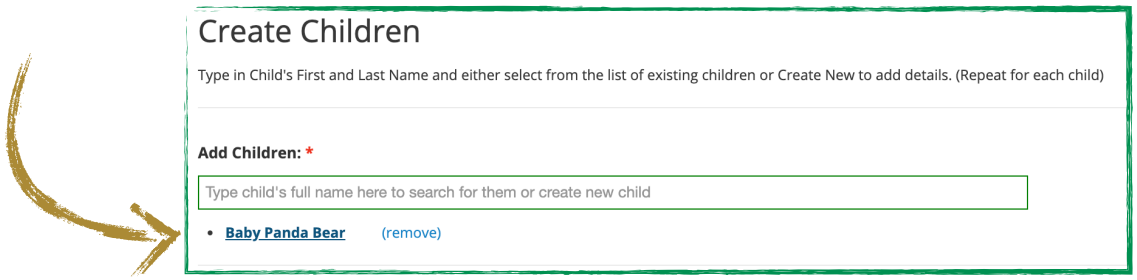


Follow similar steps as above, when adding/creating the Parent/guardian into the family group contact. Add two children into the family, one existing child and a second create a new child contact for this family.

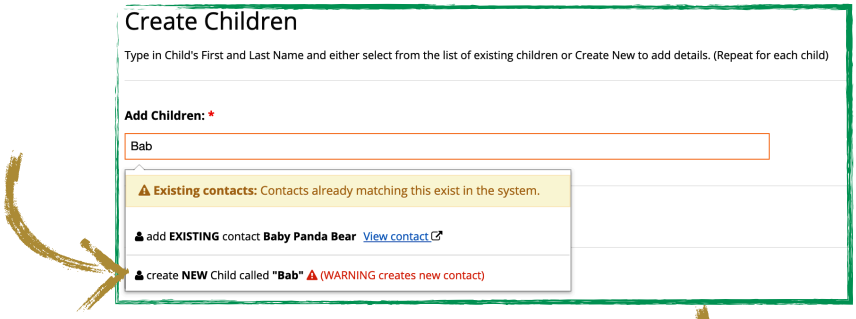


If adding **EXISTING** child contact, type their name or initials on the search bar and they will appear in the drop down menu.

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



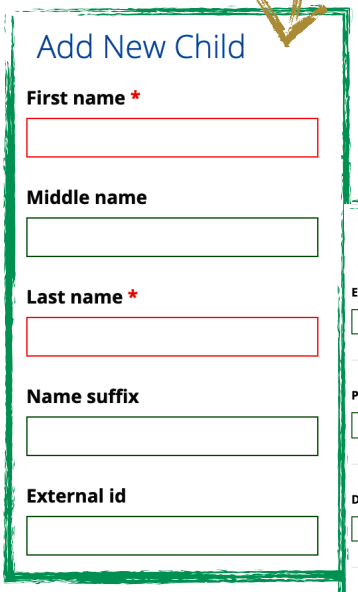
When adding a child contact into the family profile and the child is not in Mocha yet, click on the selection ‘create NEW child called ..’ from the drop down menu.

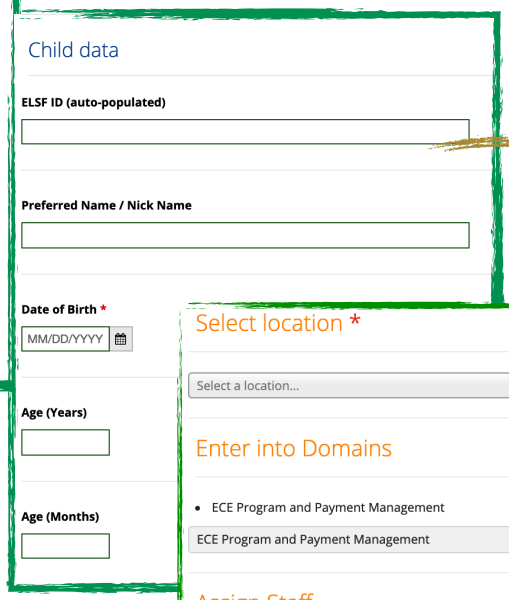


A window will open in the center of your screen.

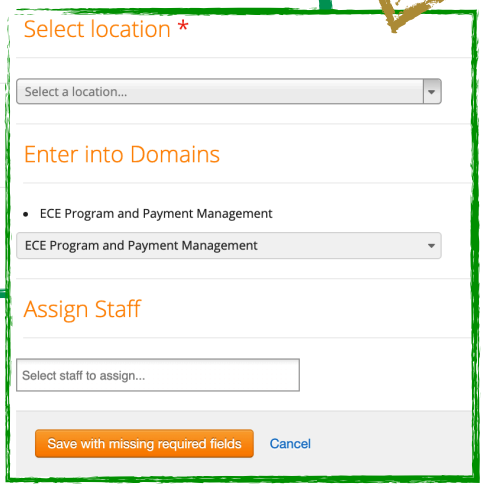
This is the same form you will use if/when you ***Create Basic Contact: Child***

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

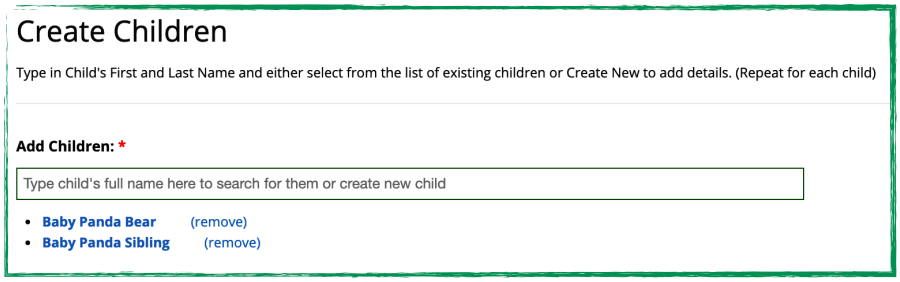


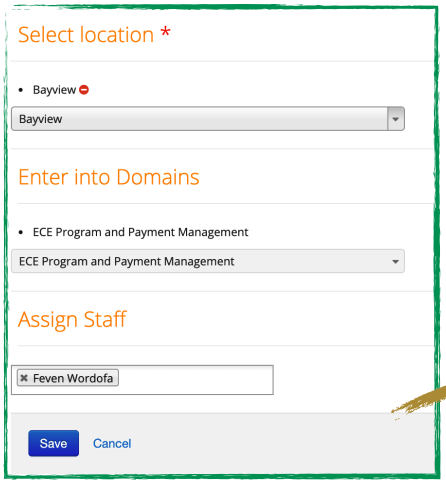


Last section here is the part you ‘Select Location’ and ‘Assign Staff’ if you’d like. Then click save.



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

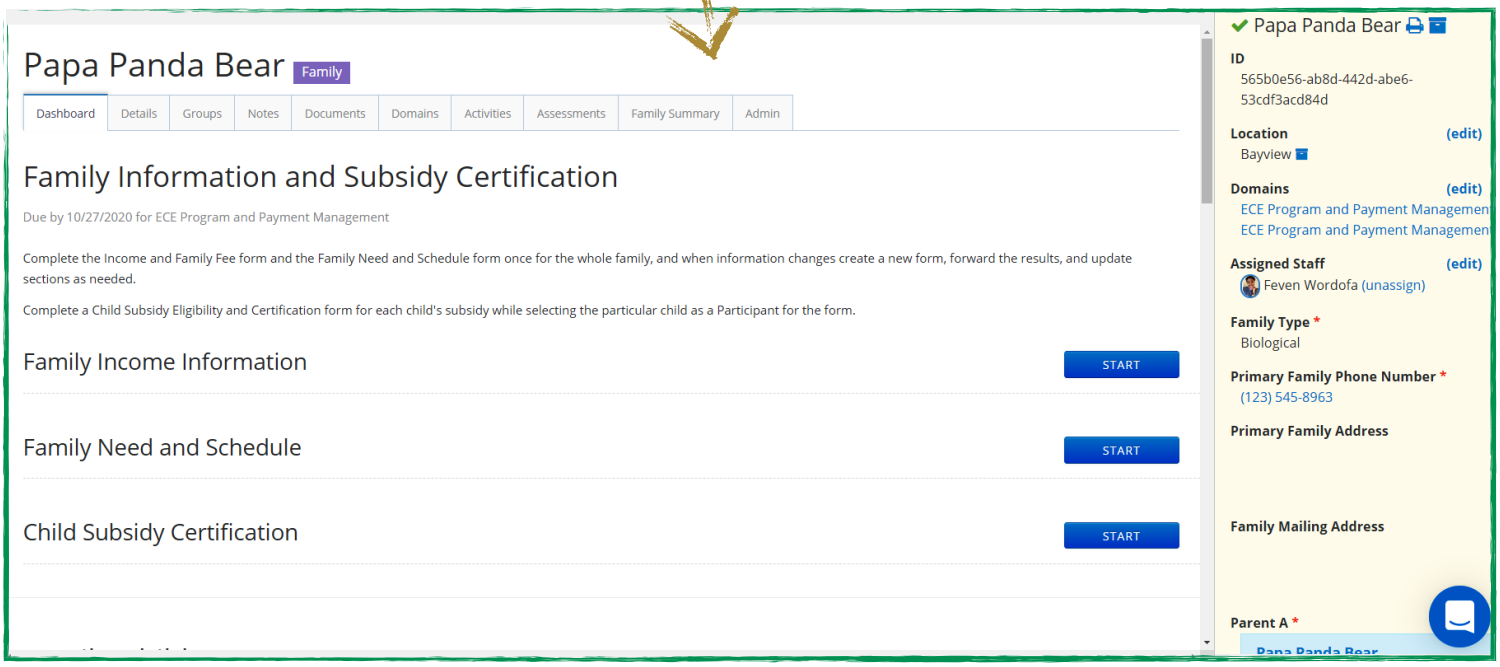




Step 8: Final step is to fill out the rest of the creation form and click save.

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.



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.

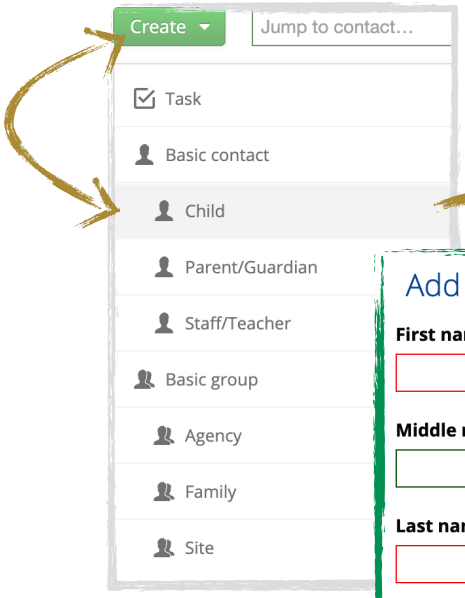
Create Basic Contact : Child

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

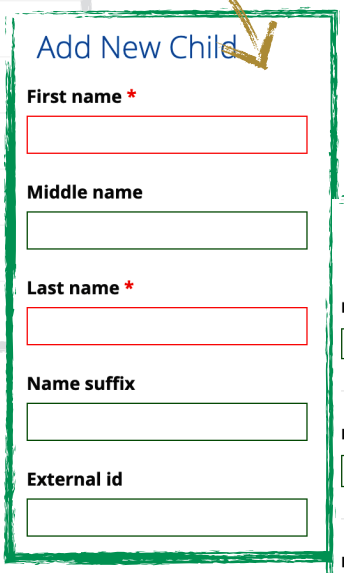
The recommended workflow in creating a 'Child' Contact is through a 'Family' Contact as shown earlier.

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

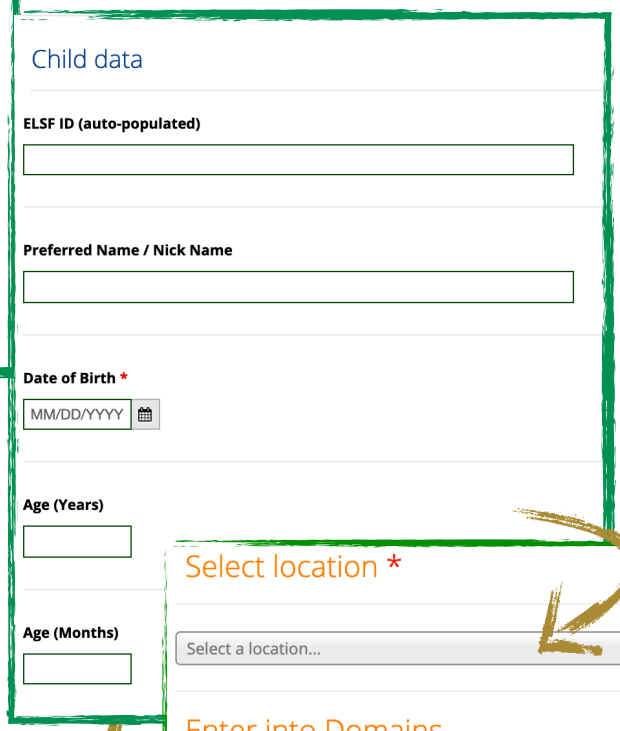
Step 2 : Click on '**Child**' on the drop down menu under 'Basic Contact' type.



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;



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.

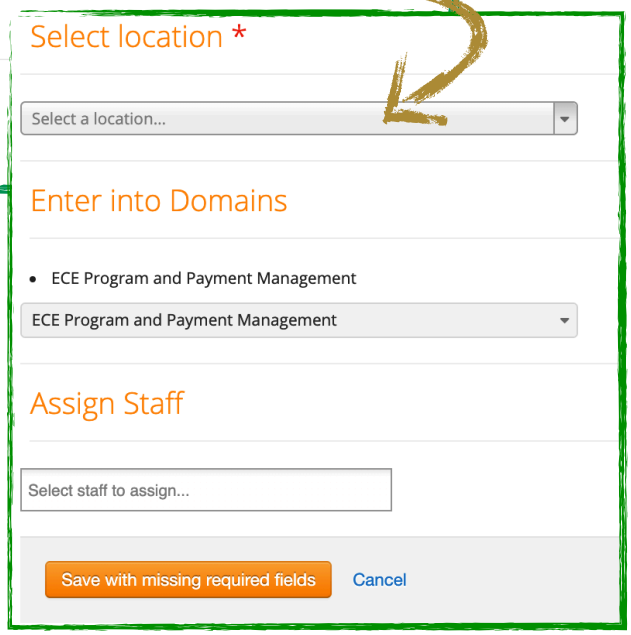


List of required fields for Child data:

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

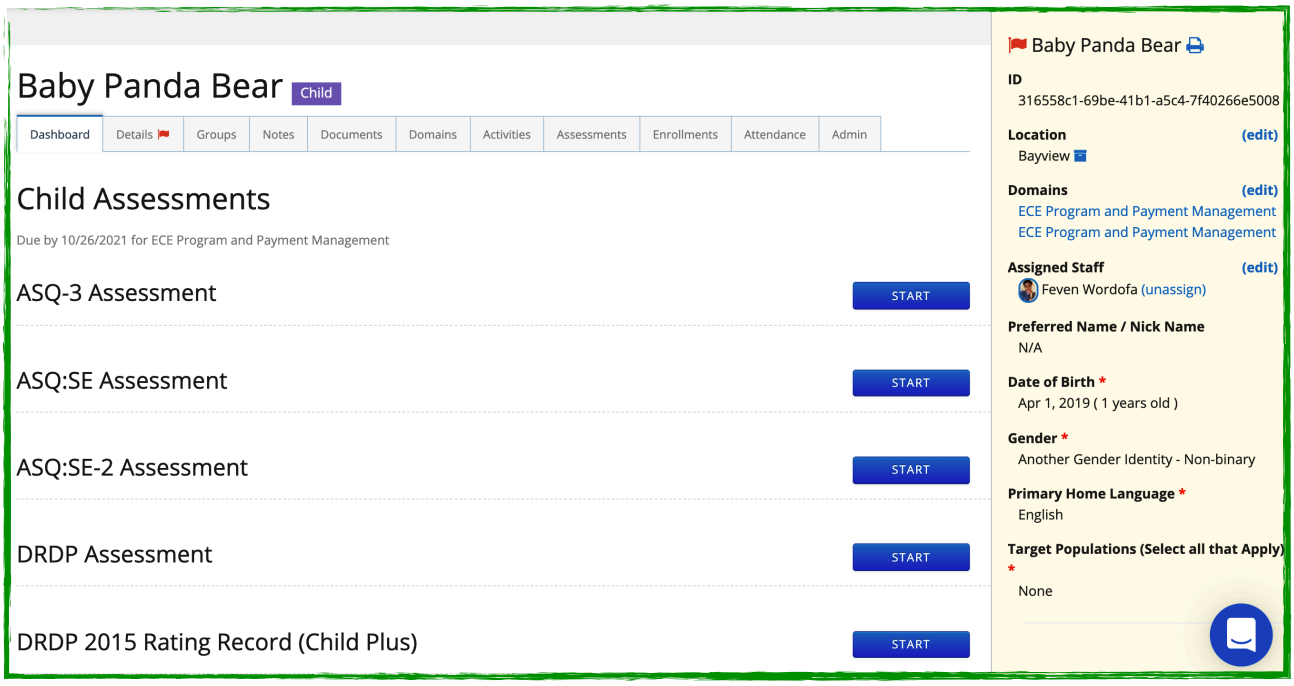
The last section of the form requires you to 'Select Location'. However, as an FCC, you should only be able to see your Center's name listed in the location's box.

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.



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.

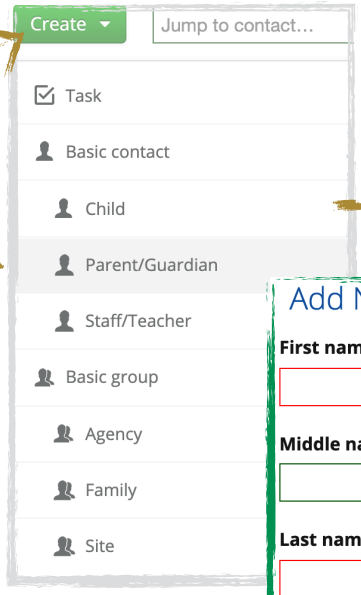
Attendance: The attendance tab will allow you to select the month and year to download and view monthly attendance report.

Create Basic Contact : Parent/Guardian

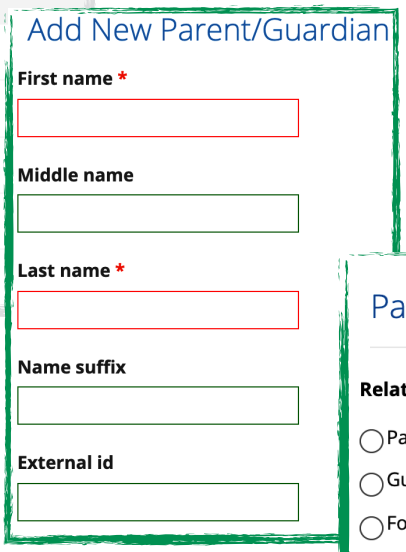
The recommended workflow in creating a 'parent' Contact is through a 'Family' Contact as shown earlier.

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

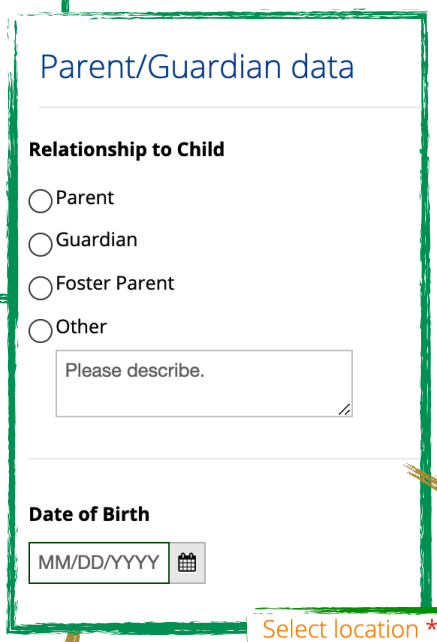
Step 2 : Click on '**Parent/Guardian**' on the drop down menu under 'Basic Contact' type.



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;

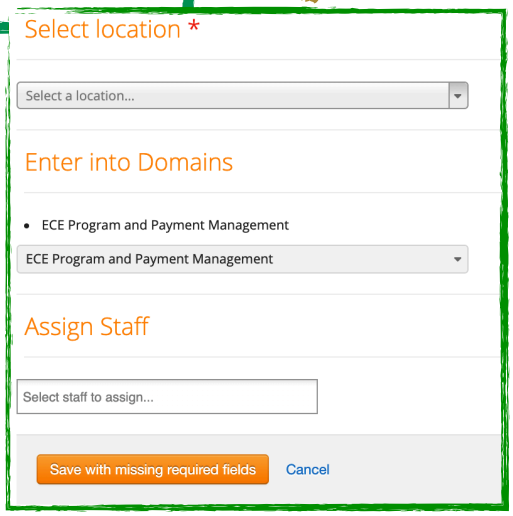


The second part of the form is titled '*Parent/ Guardian Data*' ; under this section there are other information asked to complete in creating a 'Parent Contact' type.



List of fields for Parent/Guardian data:

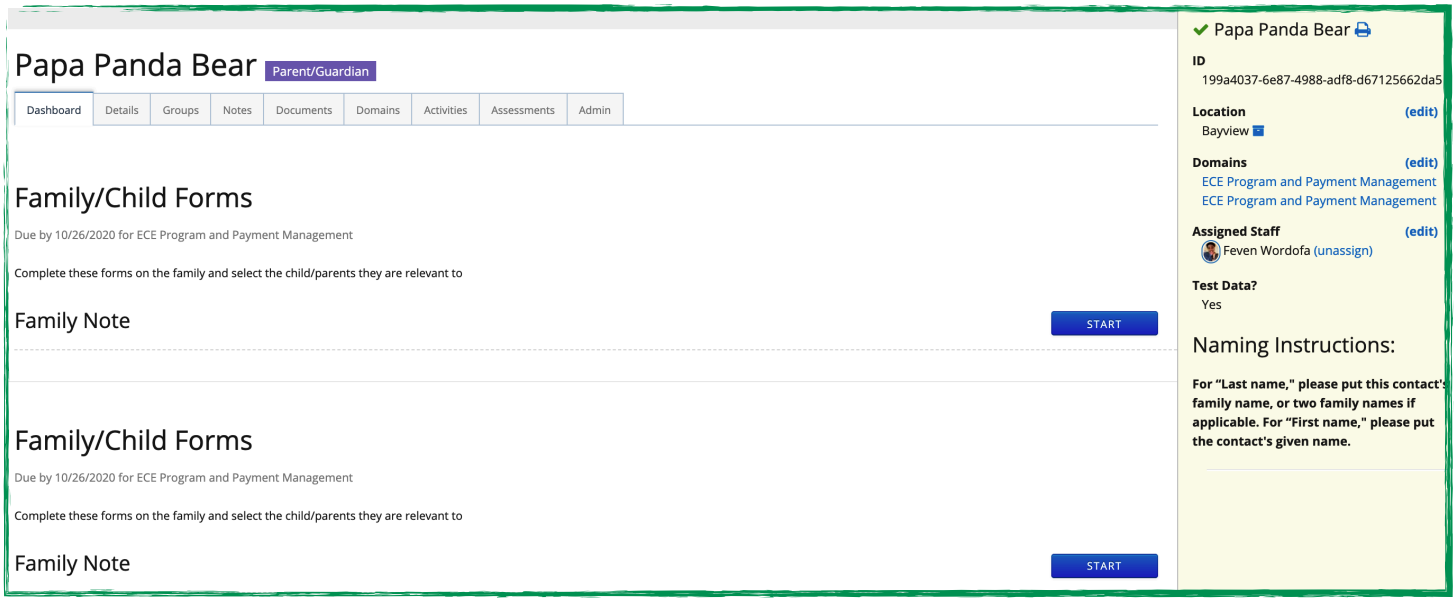
- Relationship to Child
- Date of Birth
- Gender
- Marital Status
- Single parent
- Homelessness status
- Address
- Email + Phone number



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

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'.



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.

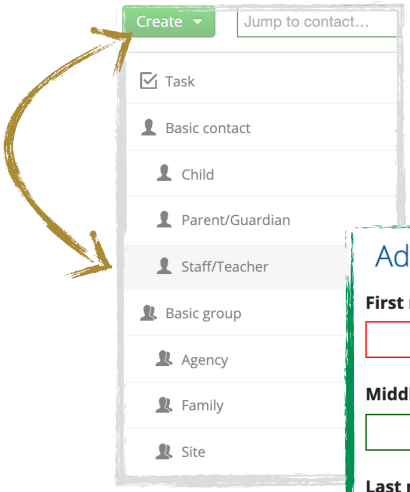
Activities : The Activities tab gives you a list of all activity forms for this contact type, as well as the option to record a new Activity. Forms found under this tab are forms that are assign to a parent/guardian contact type like '*NOAs*' & '*Work/school schedule*' forms.

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.

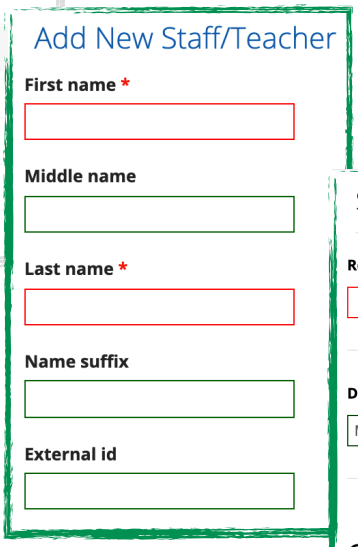
Create Basic Contact : Staff/Teacher

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

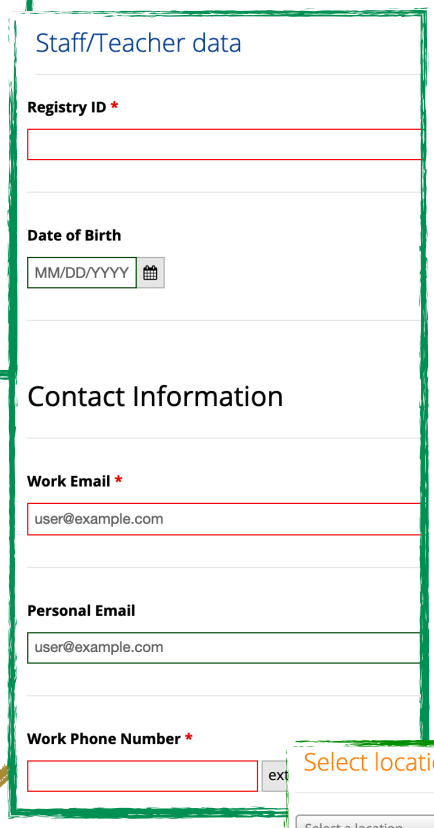
Step 2 : Click on '**Staff/Teacher**' on the drop down menu under 'Basic Contact' type.



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



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

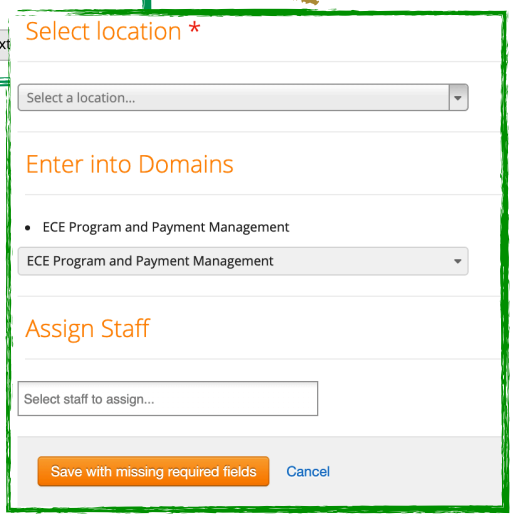


List of required fields for Staff/Teacher data

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

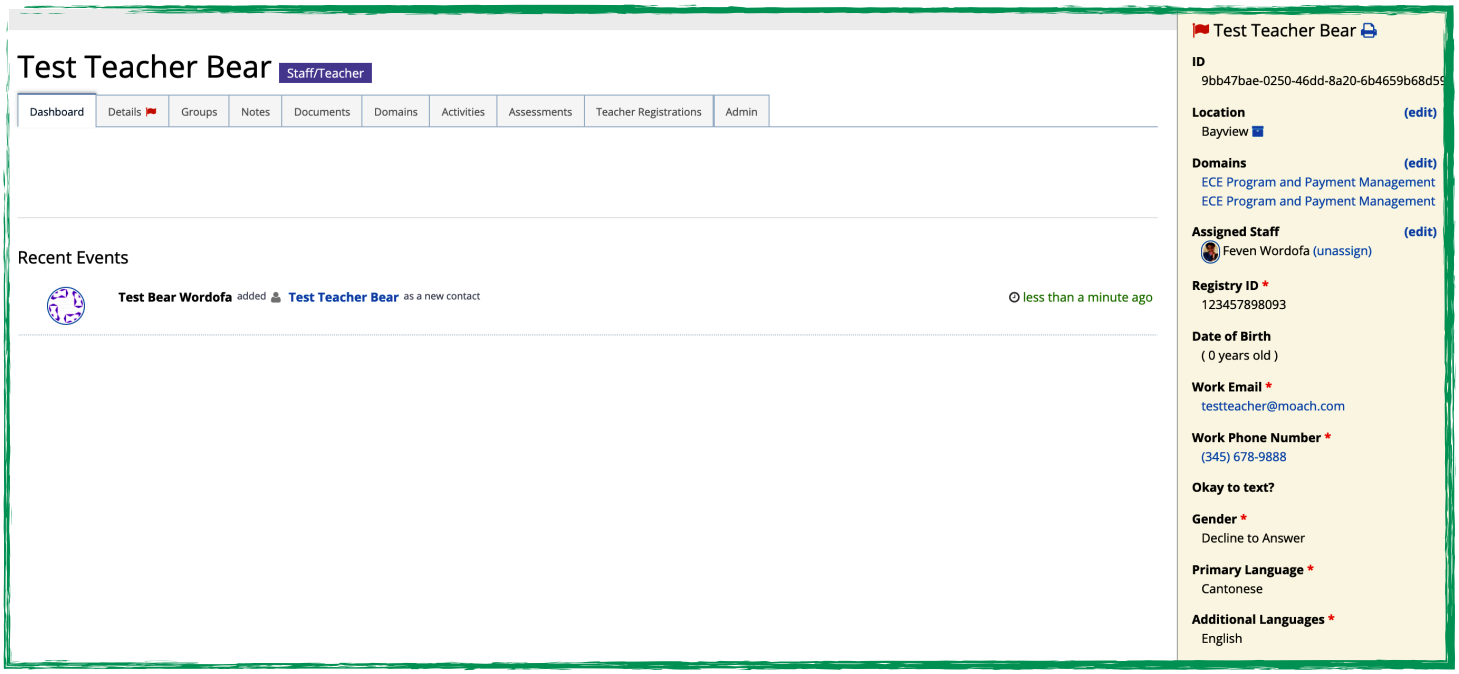
The last section of the form requires you to 'Select Location'. However, as an FCC, you should only be able to see your Center's name listed in the location's box.

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.



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.



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

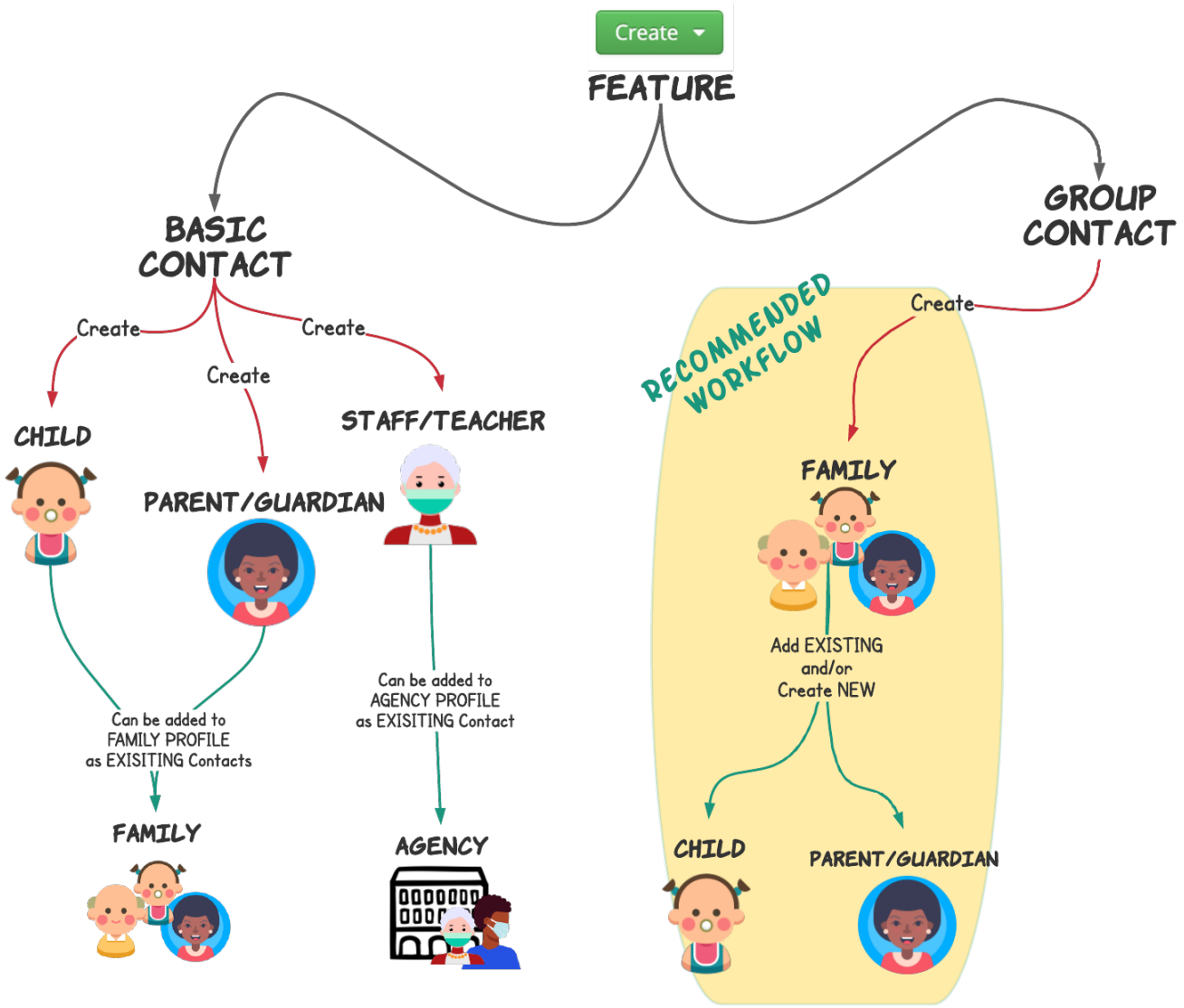
Activities : The Activities tab gives you a list of all activity forms for this contact type, as well as the option to record a new Activity. Example of forms found under this tabs are forms that are specifically assigned to a staff/teacher contact type like 'Help Desk Contact Notes'.

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.*

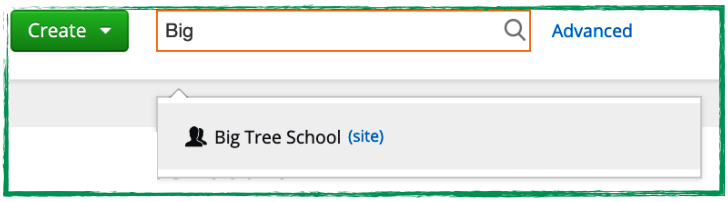
5 *Enrollment*

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

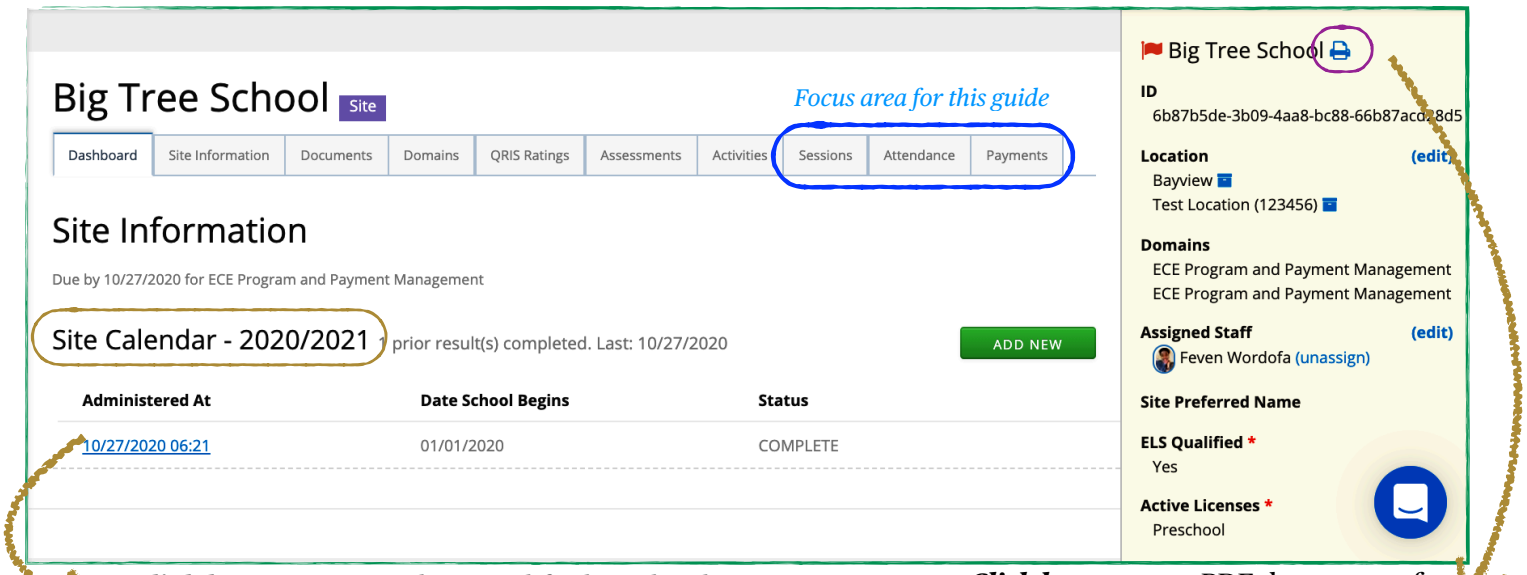
Sessions can be created by the site supervisor, FCC owner or anyone in the program that has a permission to do so. So let's create some sessions for an Agency/Site so we can enroll children and take attendance, count meals and track their pick-up and drop-offs.

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



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

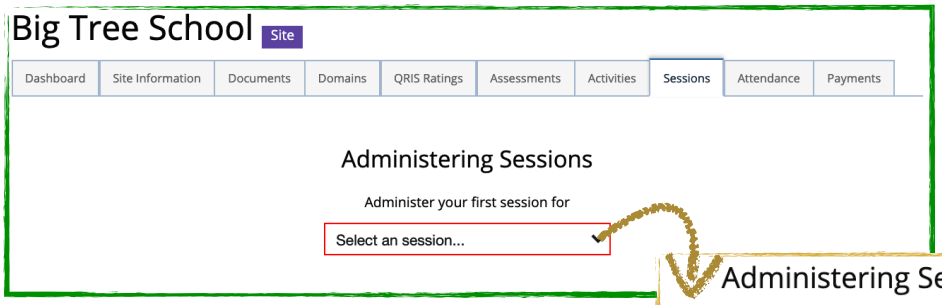
Step 2: You will land on the selected Agency/Site's profile. This is Big Tree School's dashboard.



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.

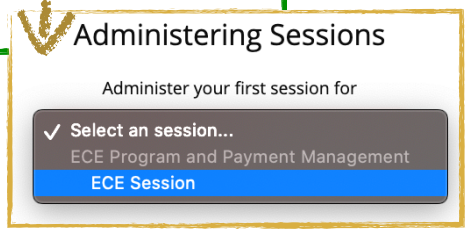
Click here to get a PDF document of either the Site contact details or the Site's entire file.

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

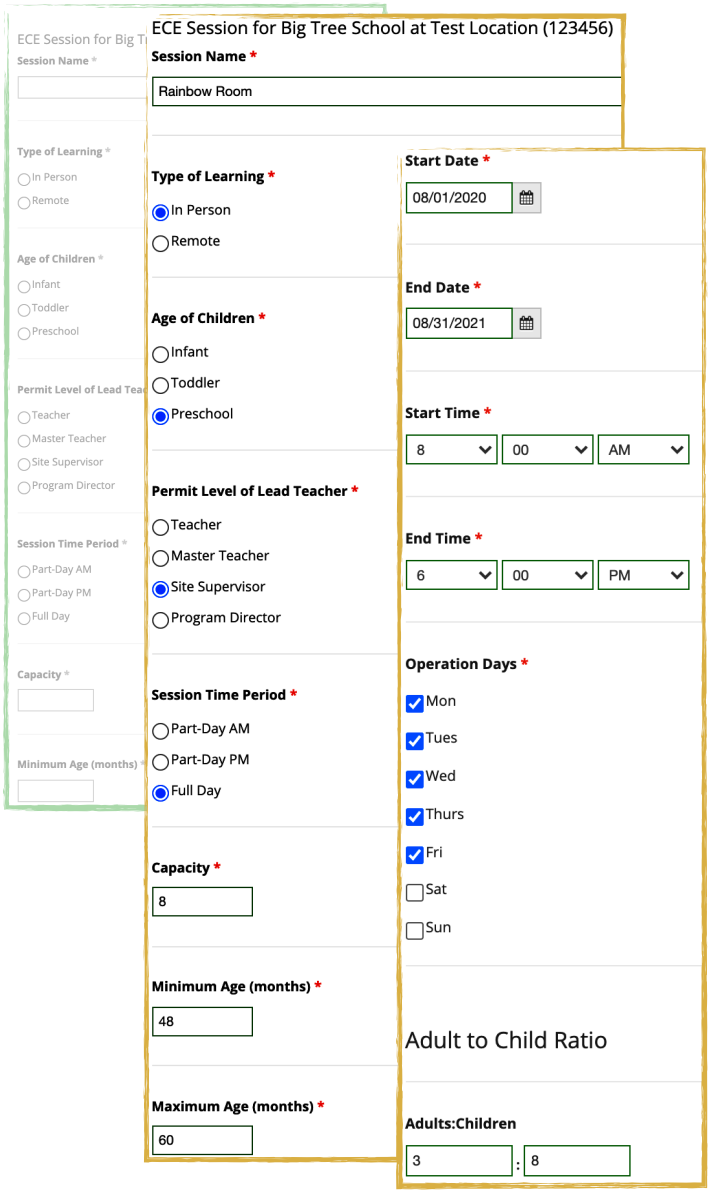


In this case, there are no sessions administered in Big Tree School. You should be seeing a note that says ***"Administer your first session for.."***

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.



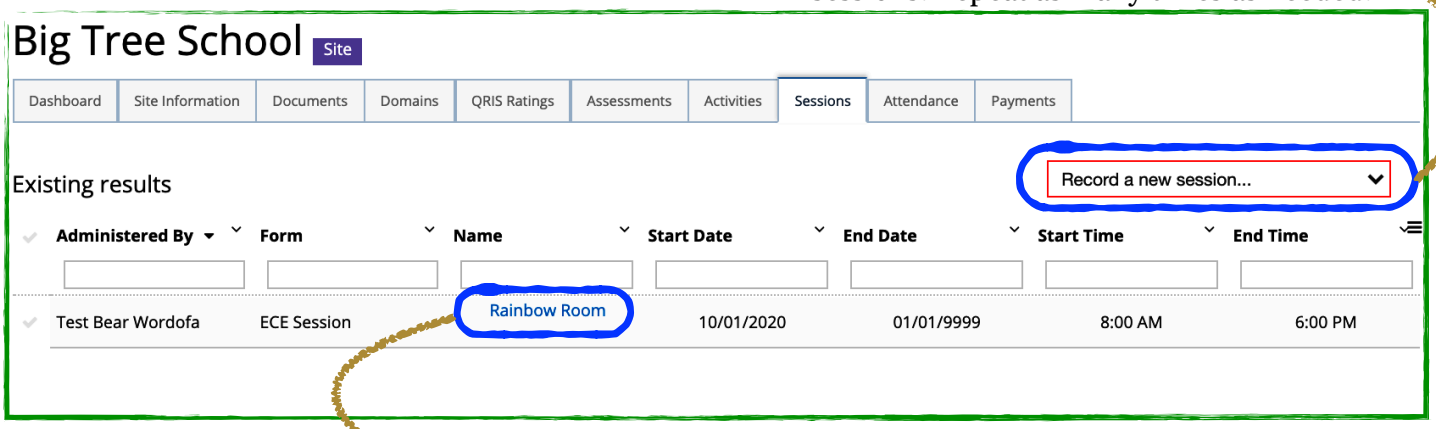
In order to create a session, you need the following information ;

- 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;

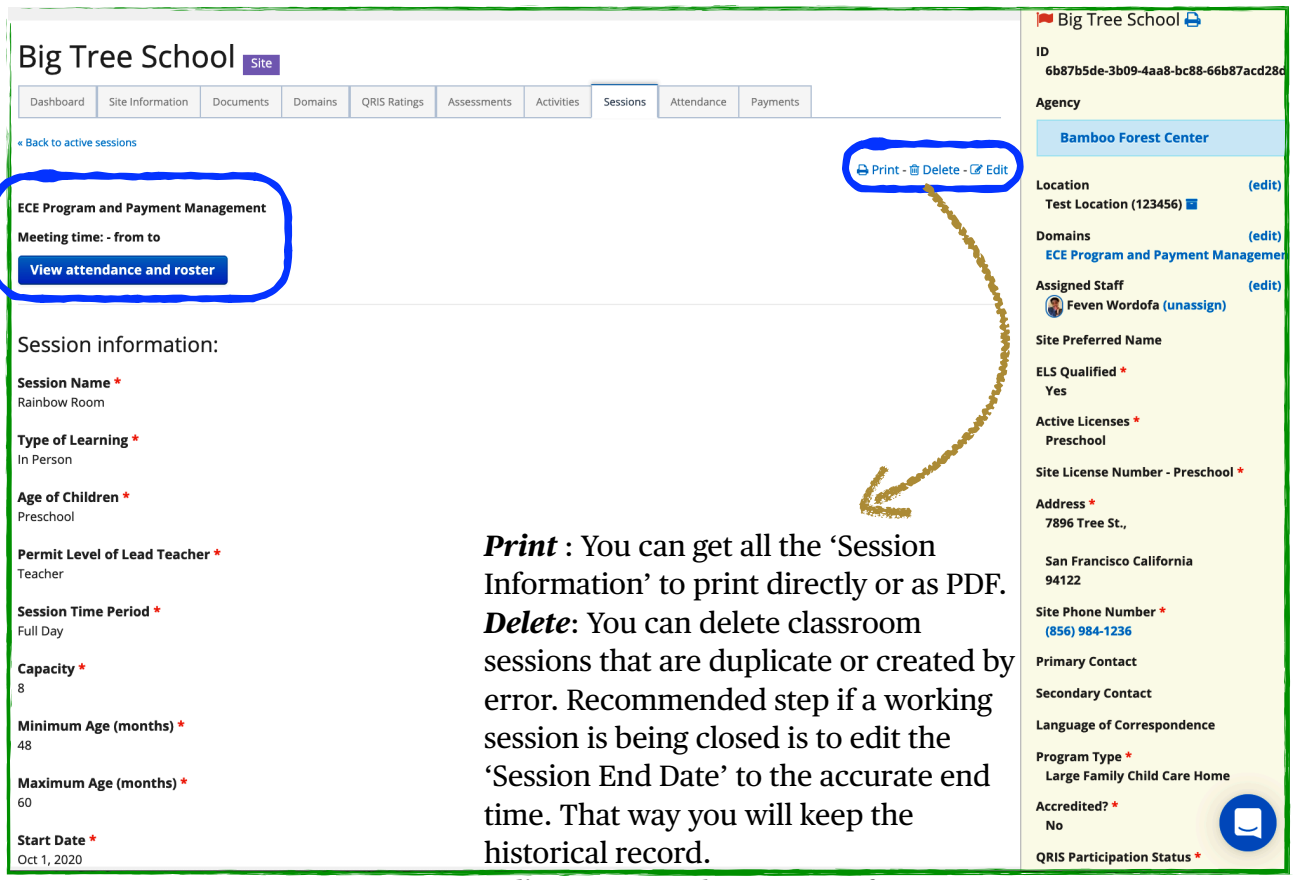
You can **click here** to keep adding classroom sessions. Repeat as many times as needed.



Click here to open the classroom session

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

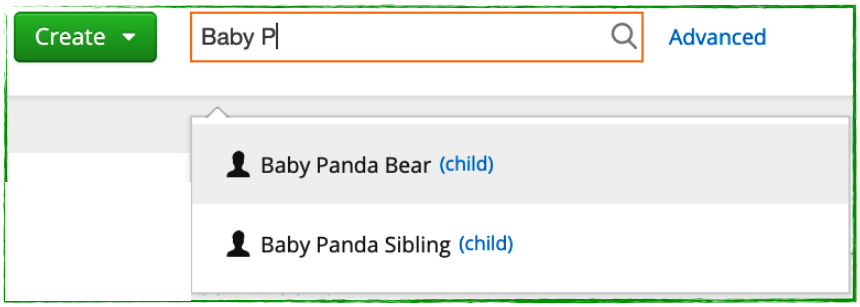
You can view/manage attendance and roster here. But first we have to enroll some children in the classroom session first. That will be our next section!



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

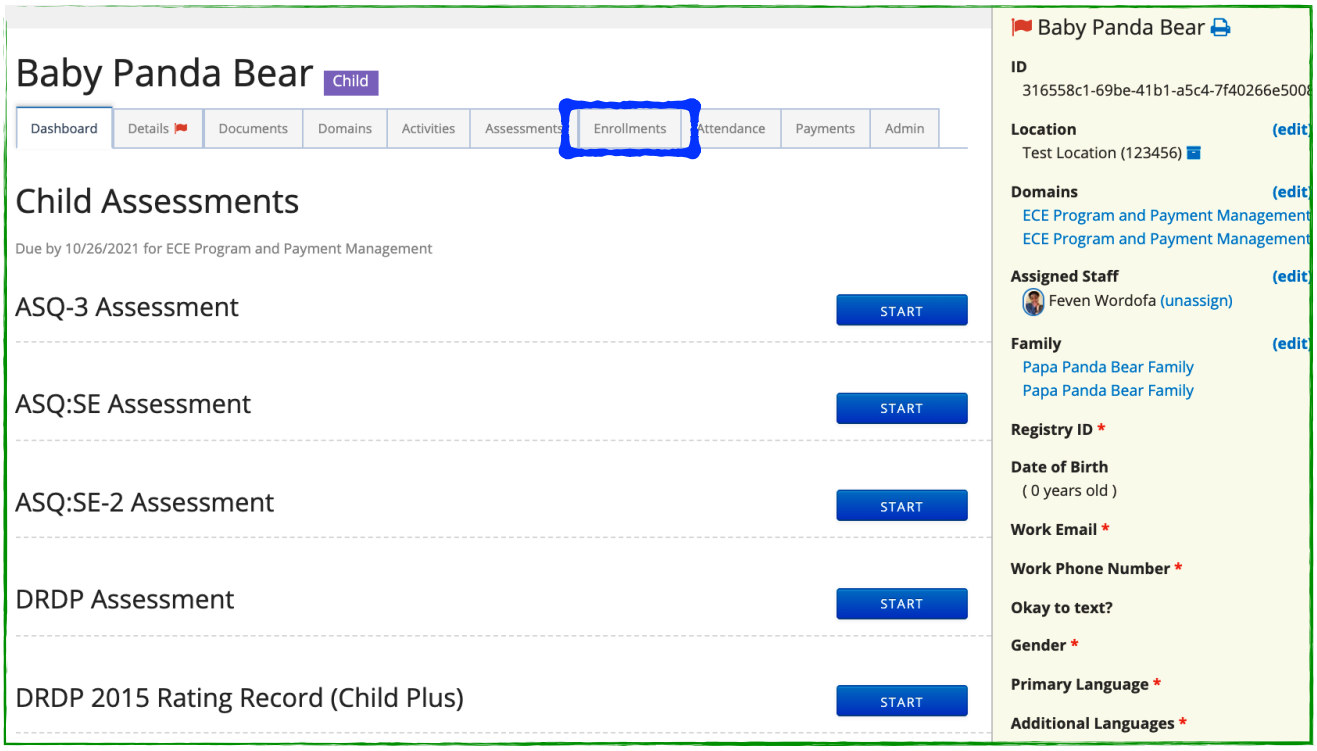
Enrolling Children into Sessions

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



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

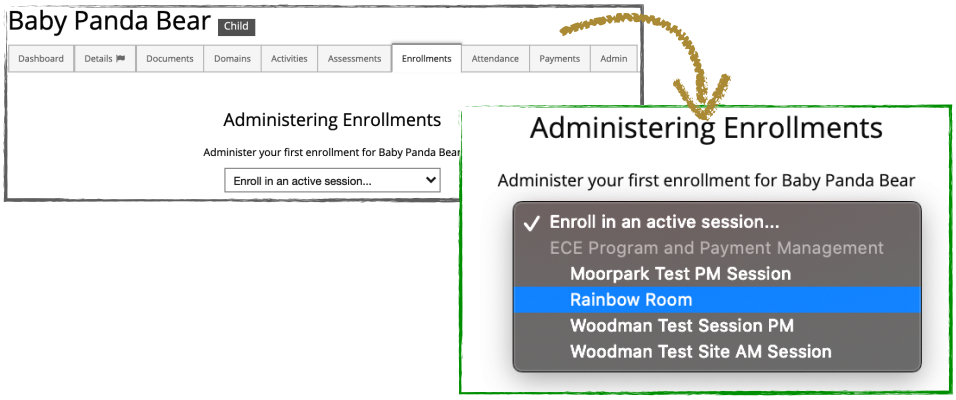
Step 2: You will land on the selected Child's profile. This is Baby Panda Bear's dashboard. Please refer to earlier section to review details on each of these tabs. For now we will just use the 'Enrollments' page.



Step 3: Click on 'Enrollments' tab

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.

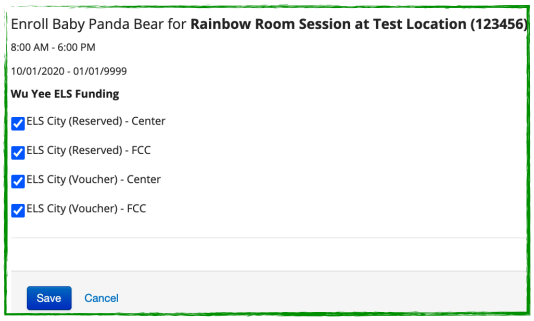
Step 4 : Click on the drop down arrow in the 'Enroll in an active sessions...' box. A list of sessions will drop down - Select the newly created classroom session, **'Rainbow Room'**.

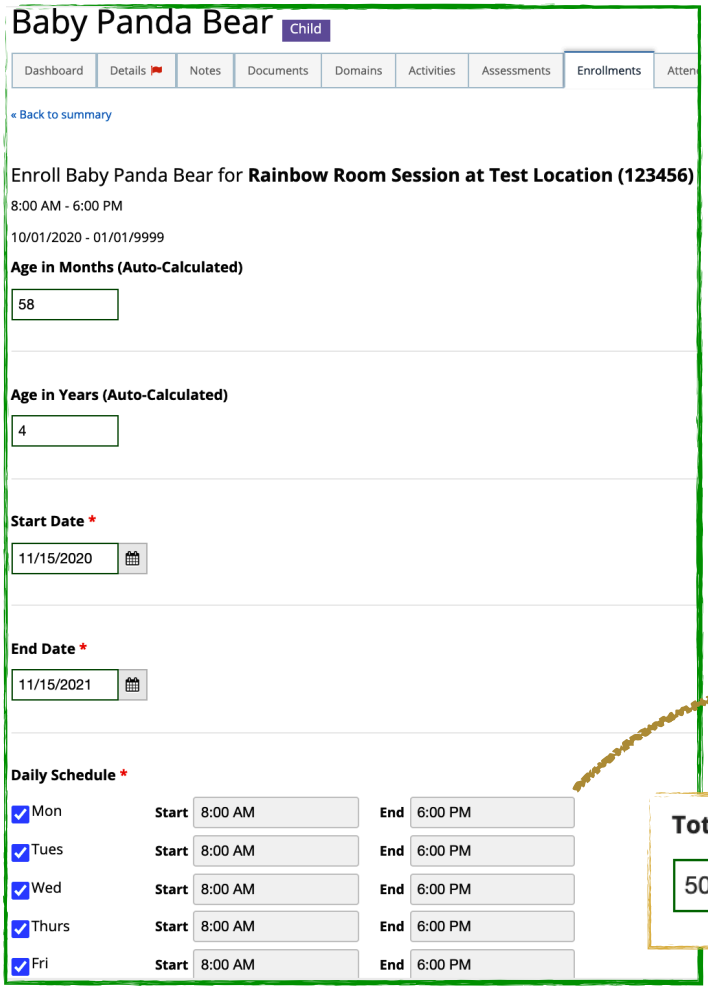


NOTE - IF YOU DON'T SEE THE CLASSROOM SESSION YOU CREATED, CHECK THE LOCATION WHERE THE CHILD IS ENROLLED IN.
THE CHILD MUST BE ENROLLED IN THE SAME LOCATION THAT THE SESSION IS CREATED UNDER.

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

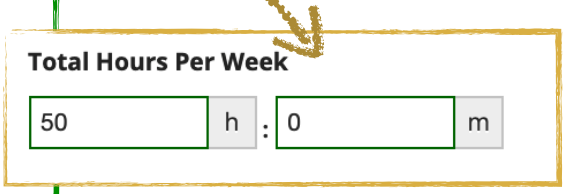




Step 6 : You will land on the session registration form. Fill out all the fields.

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.

PFA Funding

- [x] 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
- [x] Preschool
- [x] Three Years and Older
- [x] Exceptional Needs
- [ ] Limited and Non-English Proficient
- [x] At Risk of Abuse/Neglect
- [ ] Severely Disabled

Adjustment Hours

- ( ) Half Time
- ( ) Three Quarter Time
- (•) Full Time
- ( ) Full Time Plus
- ( ) Variable Schedule

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

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

$ 64

Registration Fee

$ 0.00

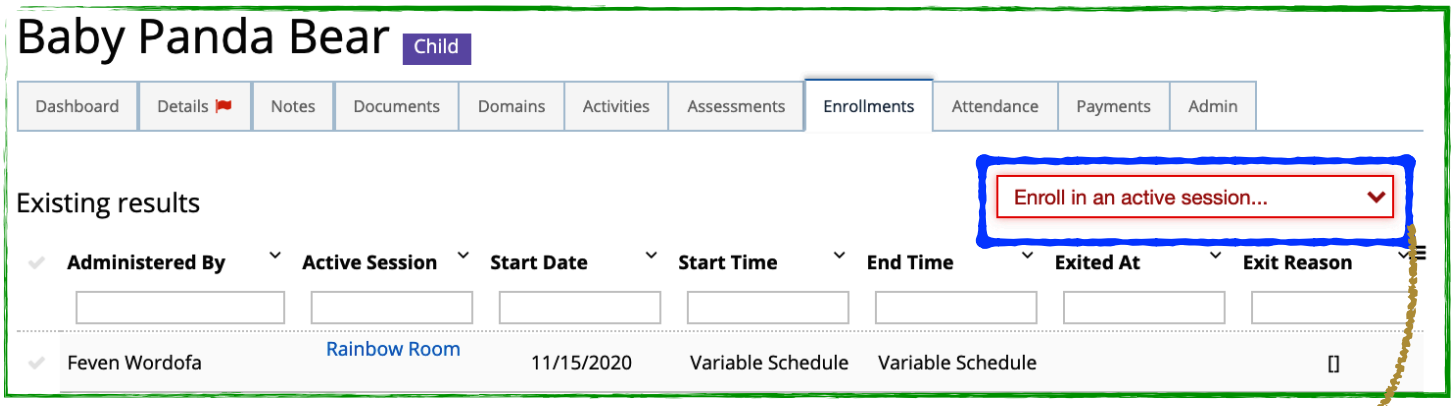
Funding Source(s) - Autocalculated

PFA 12-month 5 days

Save Cancel

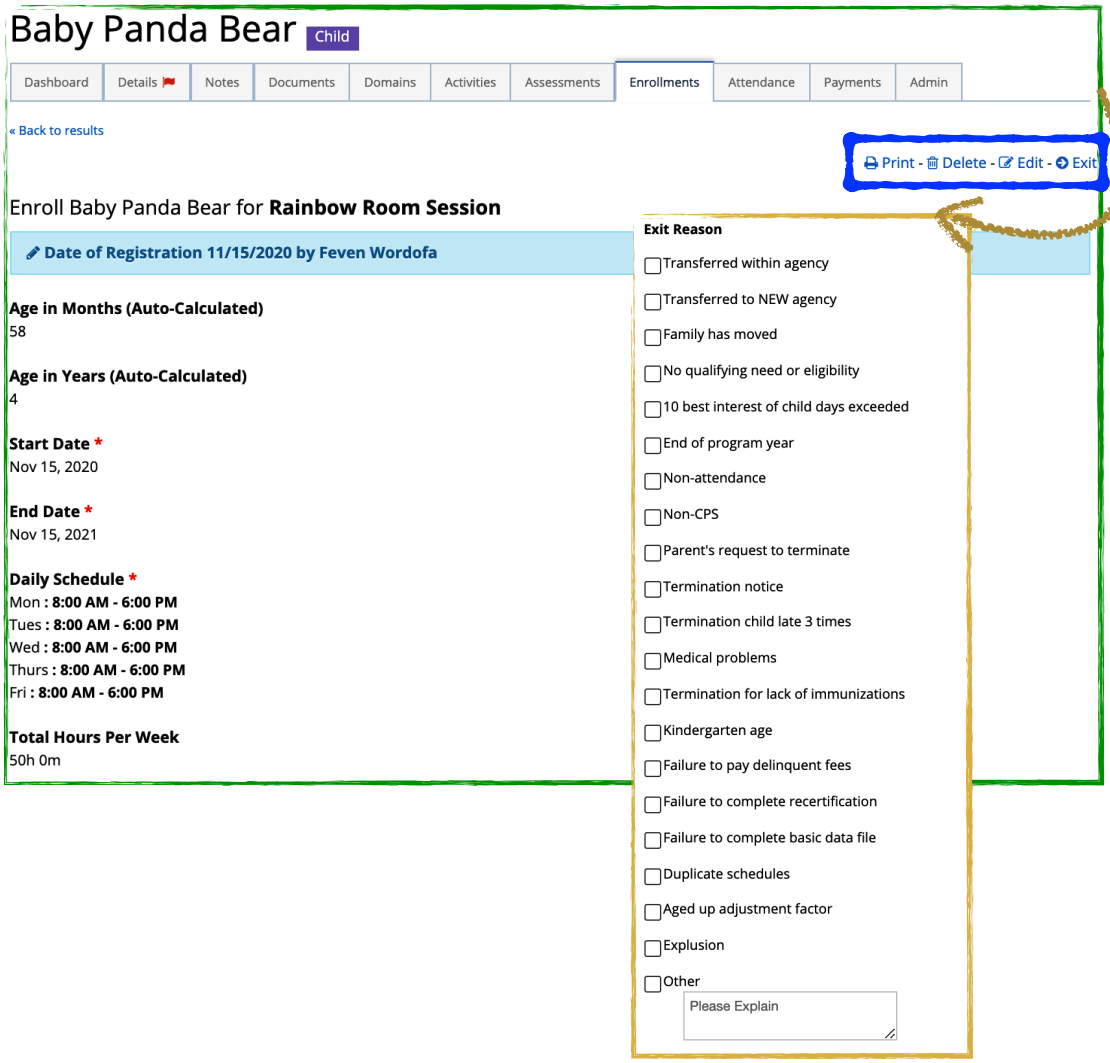
Family fee will be auto-calculated based on information collected on family size and income during the eligibility and certification process.

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'.



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.



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

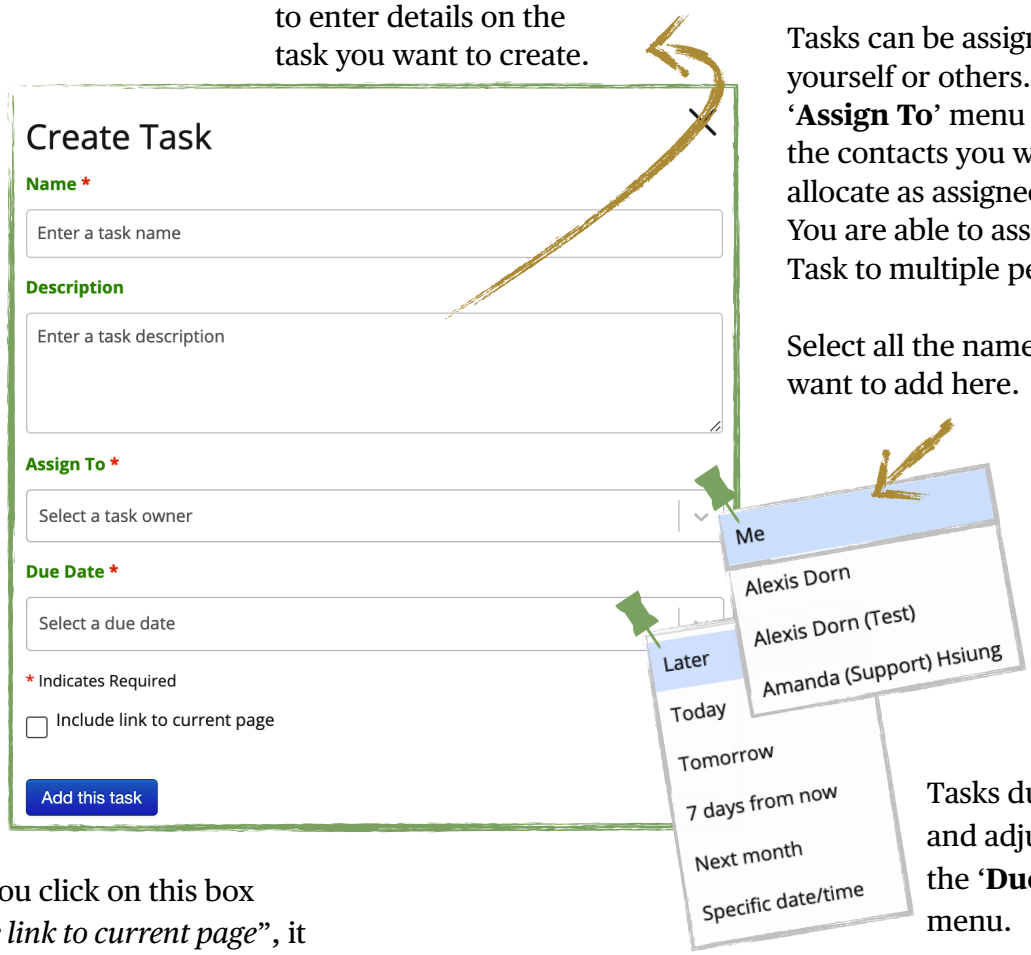
Step 1 : Click on the '**Create'** button on the left of the top navigation bar.

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.

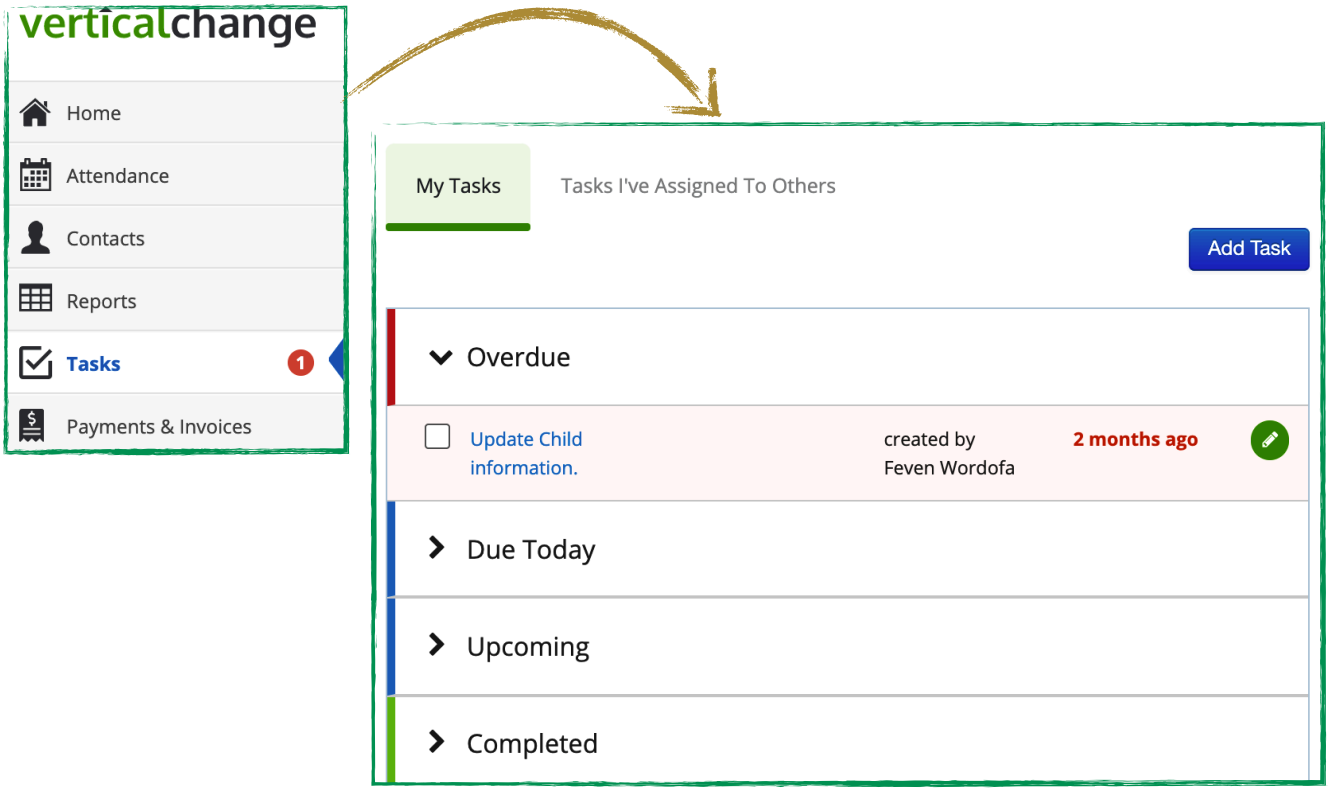


Tasks due dates can be set and adjusted here under the '**Due Date**' dropdown menu.

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.

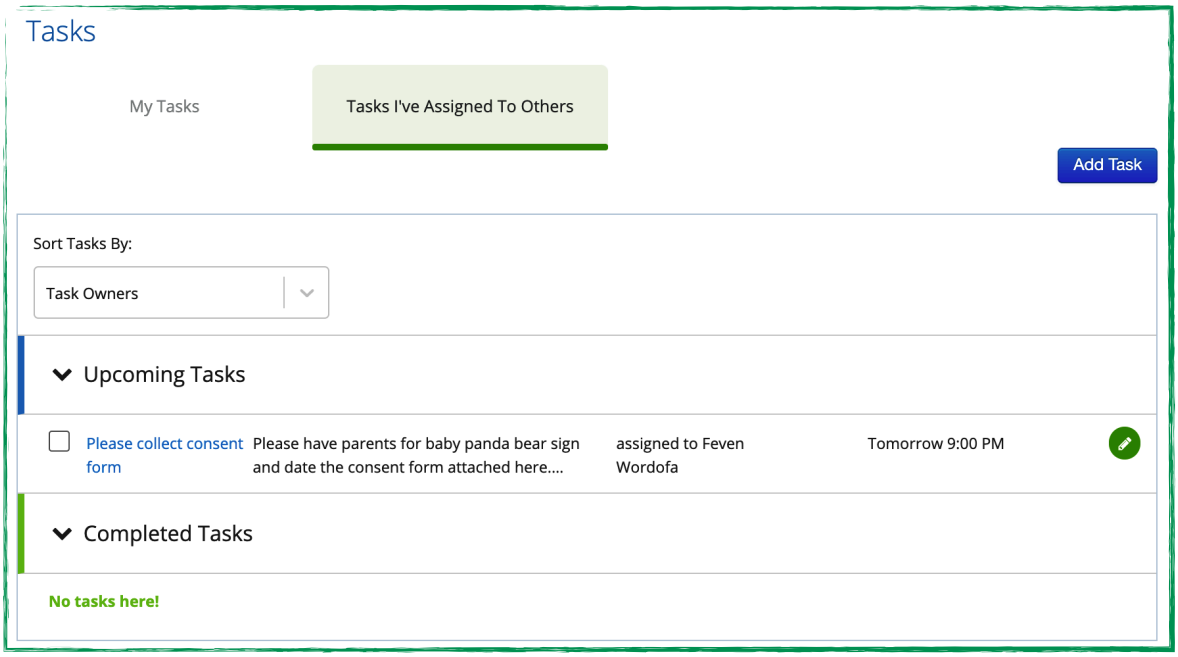
Step 3 : Once you complete your entry, click on '**Add this task**' button to save your task assignment. You will see a 'successful!' confirmation flag.

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;

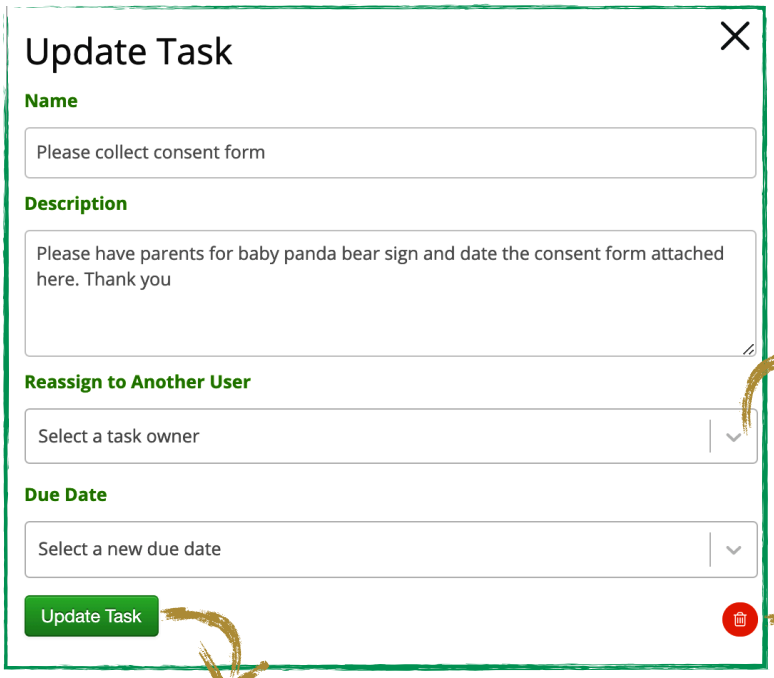


Here you will see your tasks under 'My Tasks' listed in four categories; '*Overdue*', '*Due Today*', '*Upcoming*' and '*Completed*'. You can click on each of the categories and a list of task will appear.

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.

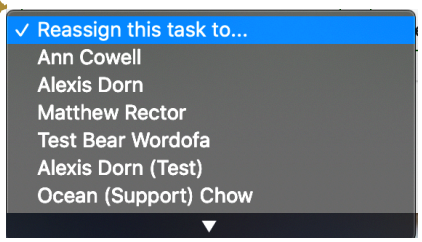


Step 5 : Click on anywhere in upcoming tasks listed or you can click on the green edit icon to open & review the task;



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

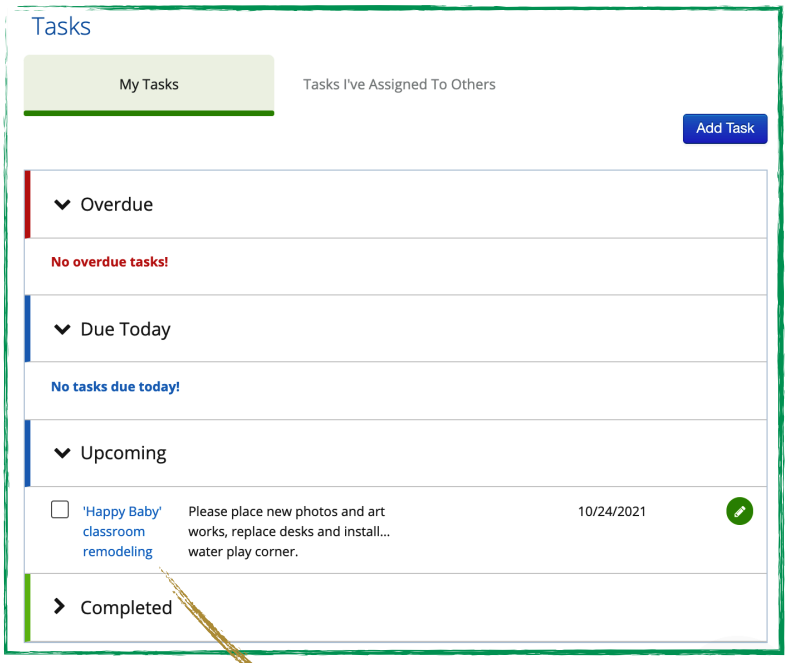
You can also reassigned the task to others by clicking on the arrow as shown below. And make changes to the due date as well.



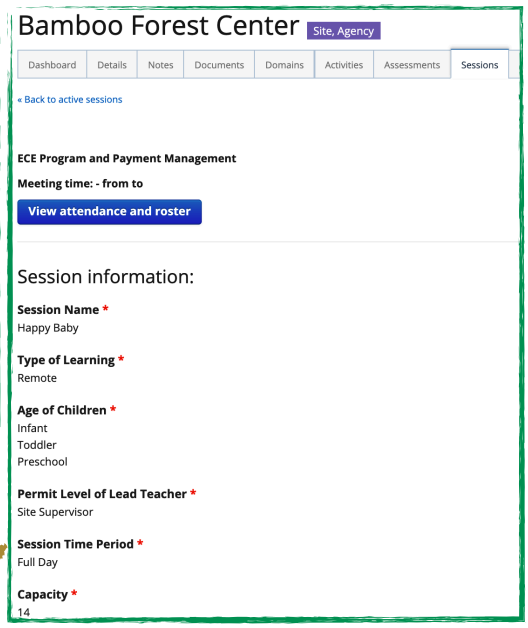
You can finalize and save your updated task by clicking on 'Update Task' here.

Click here to delete a task.

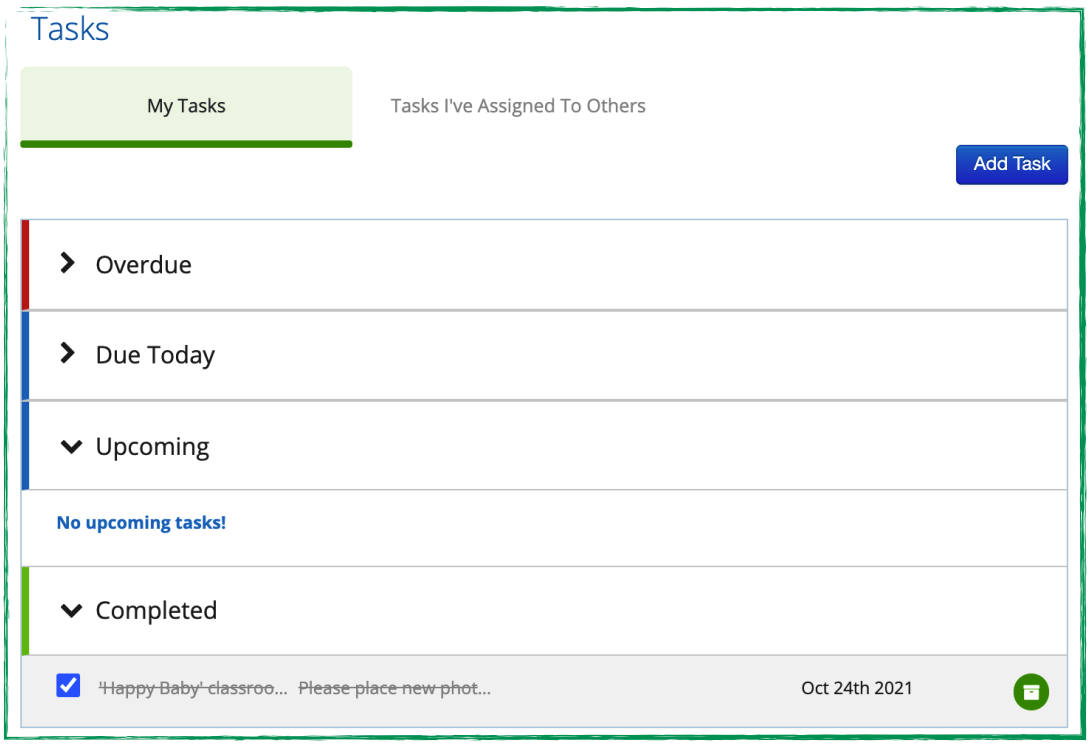
Step 6 : Go back to 'My Tasks' and Click on the hyperlinked blue letters to see if the location where the update needs to be made that's included in this task.



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.



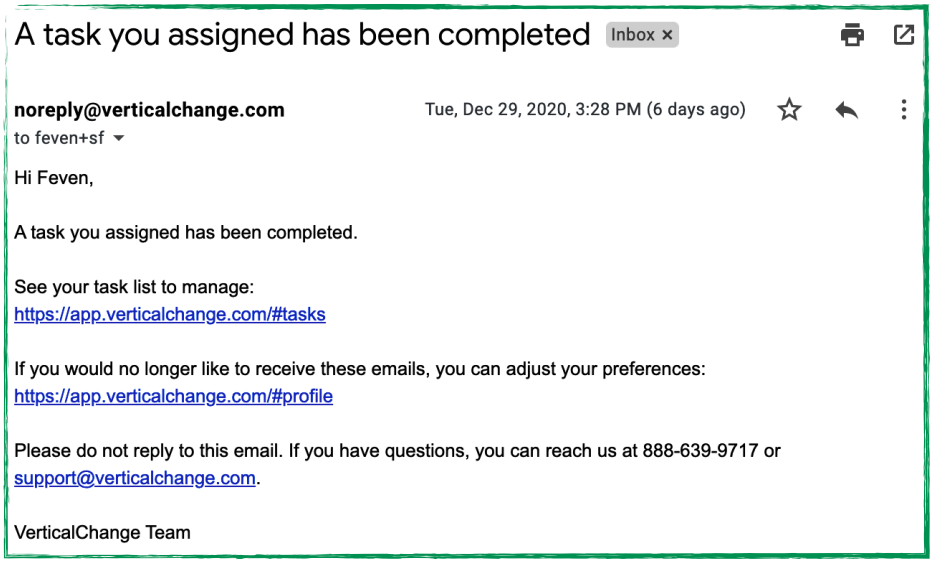
Step 7 : Once you complete the task, you can simply click on the check box next to a task to close/ complete a task.



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.

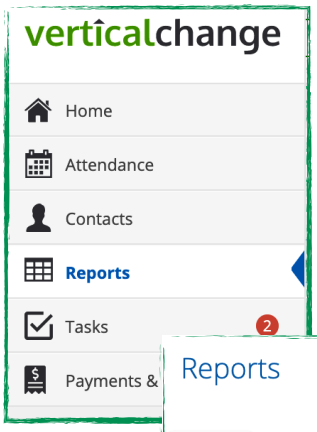
Step 8: Finally, you will get an email notifying you or the person who assigned the task that it has been completed.



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.

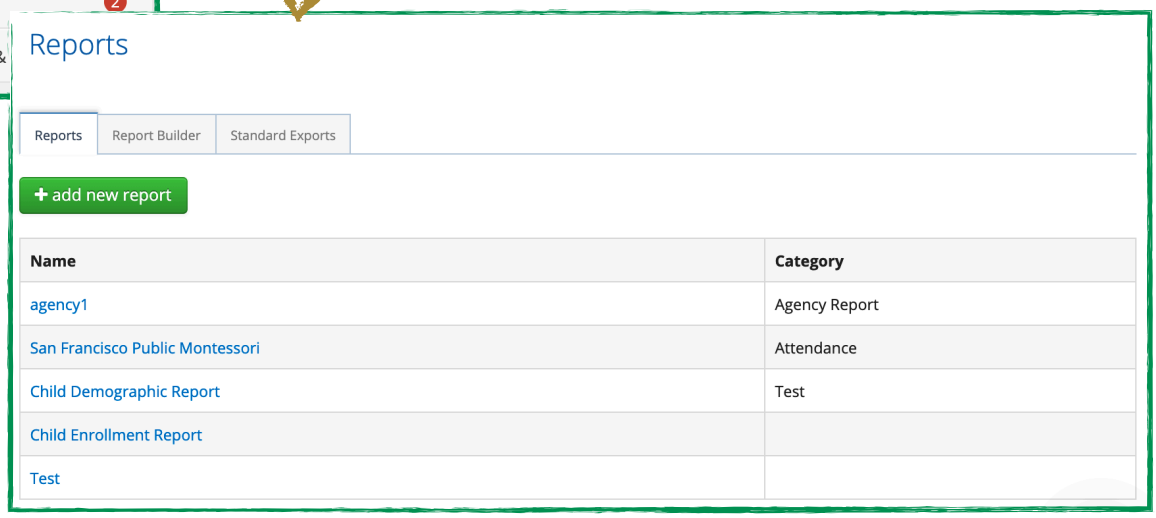
Reports

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.***



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.

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

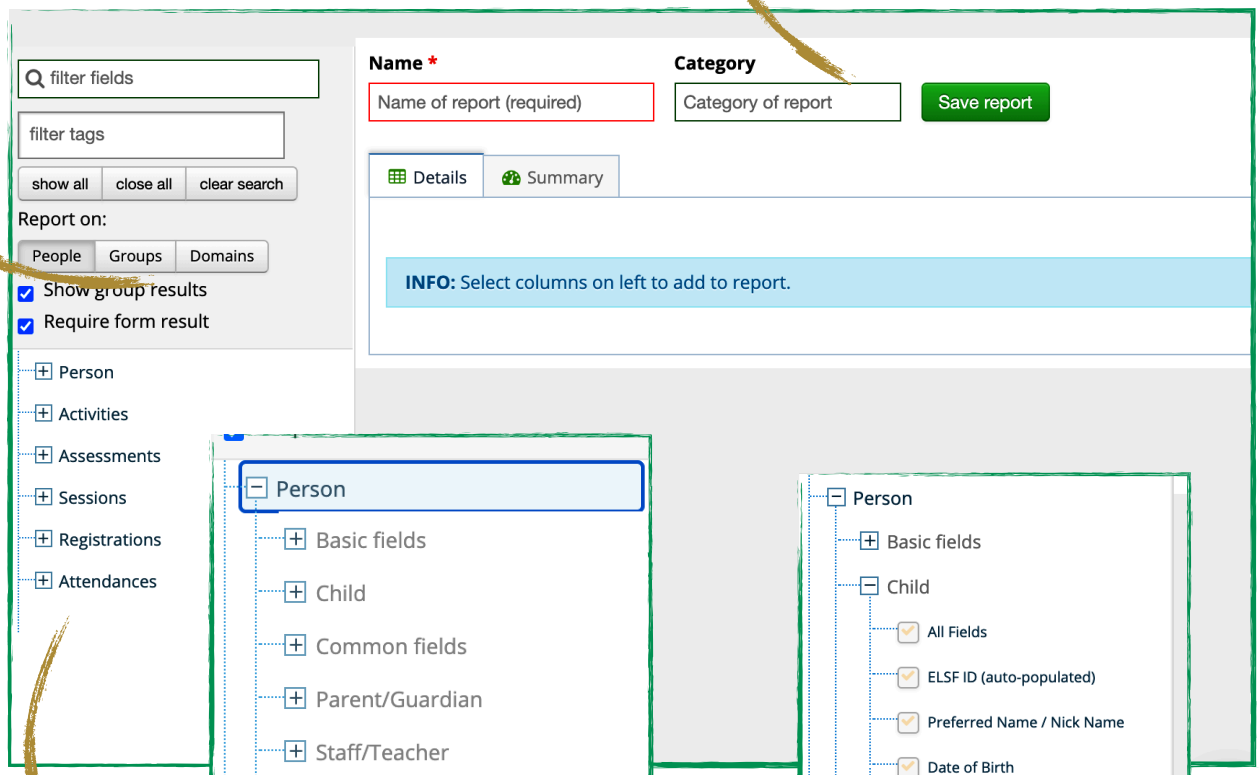
Report Builder: This is where you find all your data collected through the various forms in Mocha. From here you can select different data fields and build your own reports.

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

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

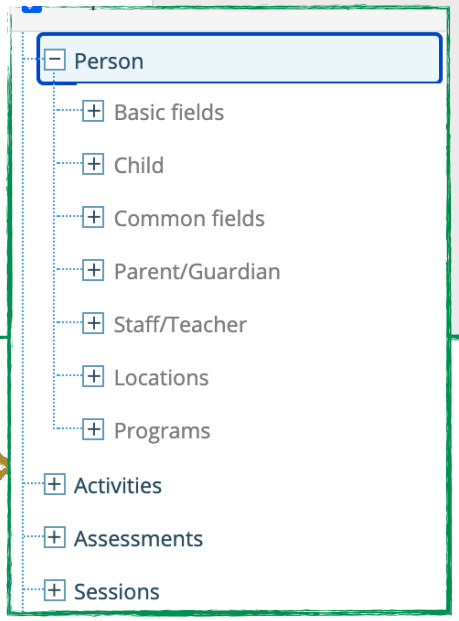
Here decide at what level you want to pull data from;
People (*Child, Staff/teacher or Parent/Guardian*)
Group (*Agency, Site or Family*)
Domains (*QRIS or Other*)

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



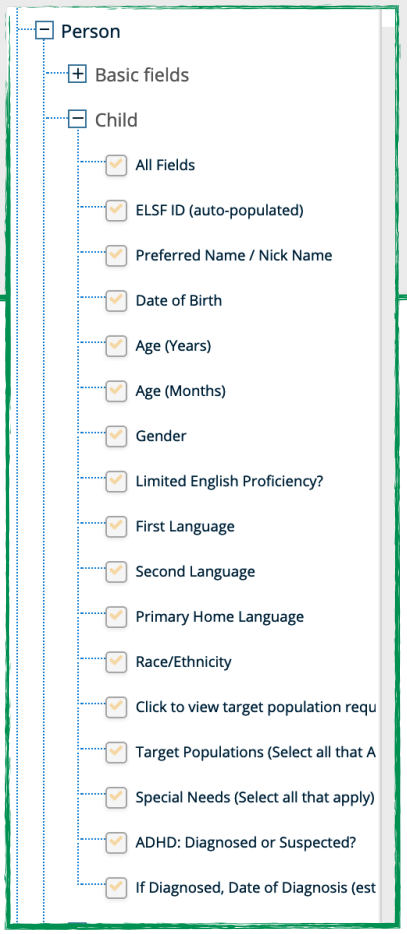
So let's stay on the 'People' or Basic contact level view;

The left side of you 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***..

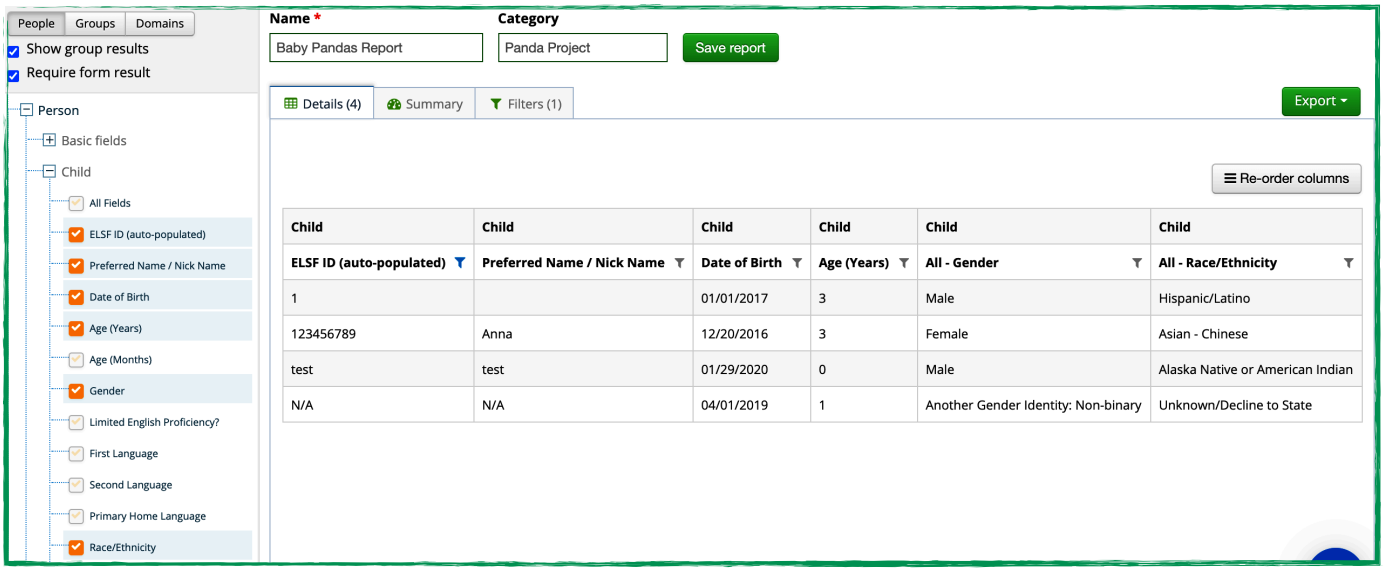
Click on Child...



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;

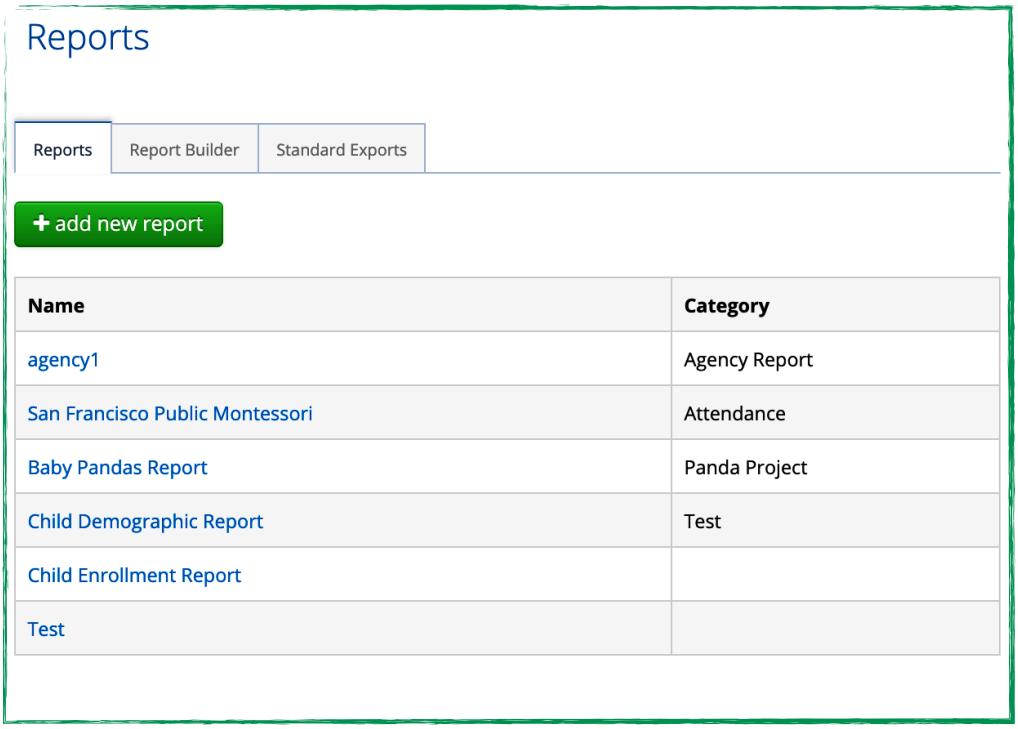
As soon as you start click on the fields on the left, column of data with list of child level data will appear,



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.



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