

Mocha Guide



TRAINING MATERIAL

PART 3

**ATTENDANCE
& PAYMENT**



Training Material

Part III: *Attendance & Payment*

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](#)

[Part II : Enrollment & Certification](#)

[Part III : Attendance & Payment](#)

[Part IV : Reports](#)

In partnership and collaboration,



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

<https://sfoece.org/>

verticalchange

VerticalChange

<https://verticalchange.com/>

*“ While we try to teach our children all about life,
our children teach us what life is all about!”*

Angela Schwindt



Attendance & Payment in

mocha

verticalchange

1. *Signing in*

2. *VerticalChange Help Chat*

- Send us a message
- Find your answer now

3. *Landing page / Dashboard*

- *Agency Bulletin Board*

4. *Attendance*

- Creating Sessions
- Enrolling Children to Sessions
- Taking Attendance
- Parent Portal
- Attendance Report

5. *Payment and Invoicing*

- Certify Attendance
- Approve Invoices
- Exporting Payments
- Request Certification Unlock

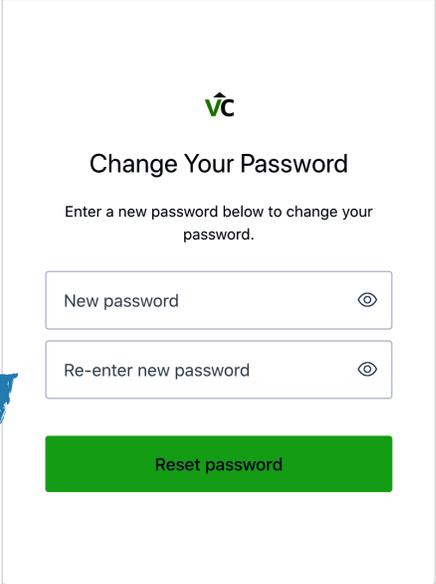
1

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.



vc

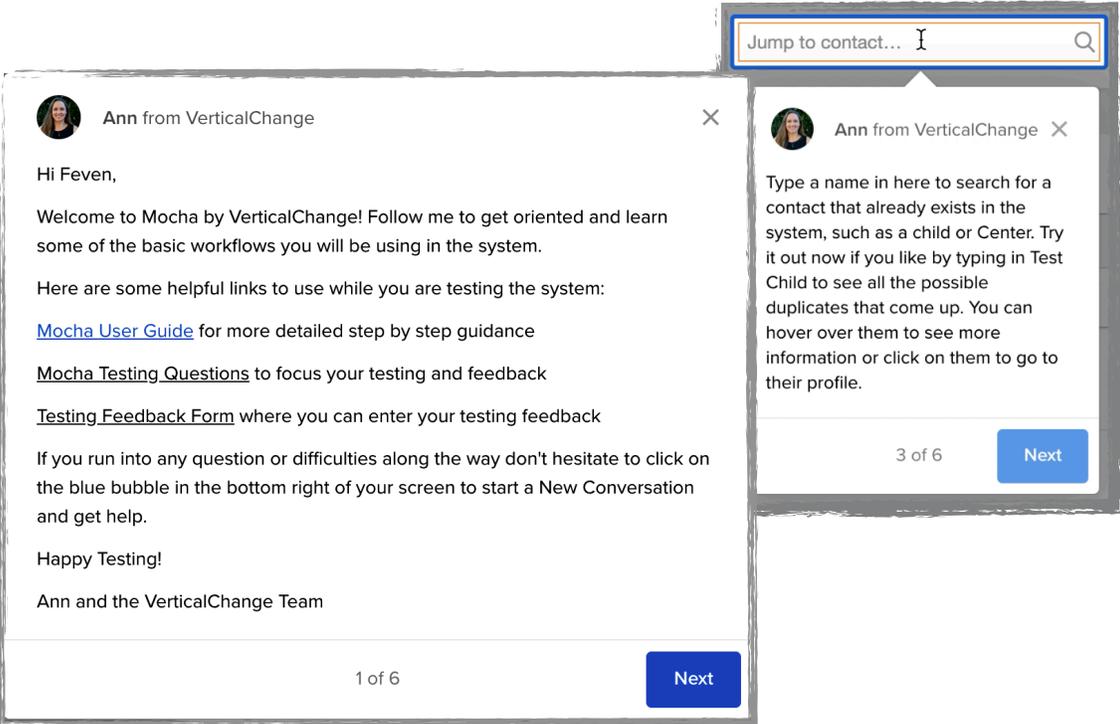
Change Your Password

Enter a new password below to change your 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... I

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

Next

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

Next

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!

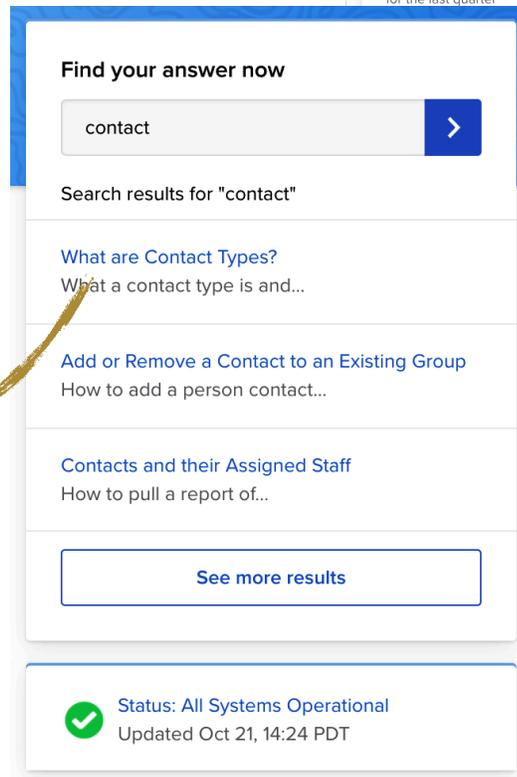
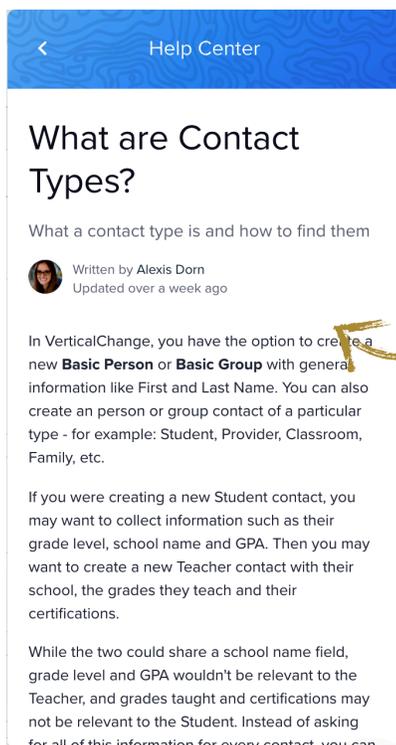
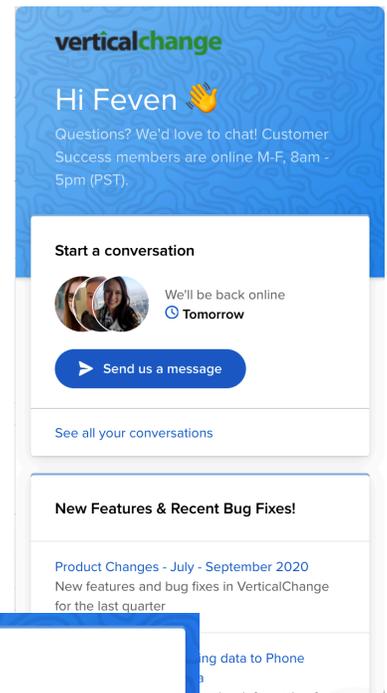
Customer Support team members are online Monday - Friday, 8:00 a.m. - 5:00 p.m. (PST). If you need assistance outside of those hours, please email us at support@verticalchange.com and we will respond to your email as soon as possible.

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.

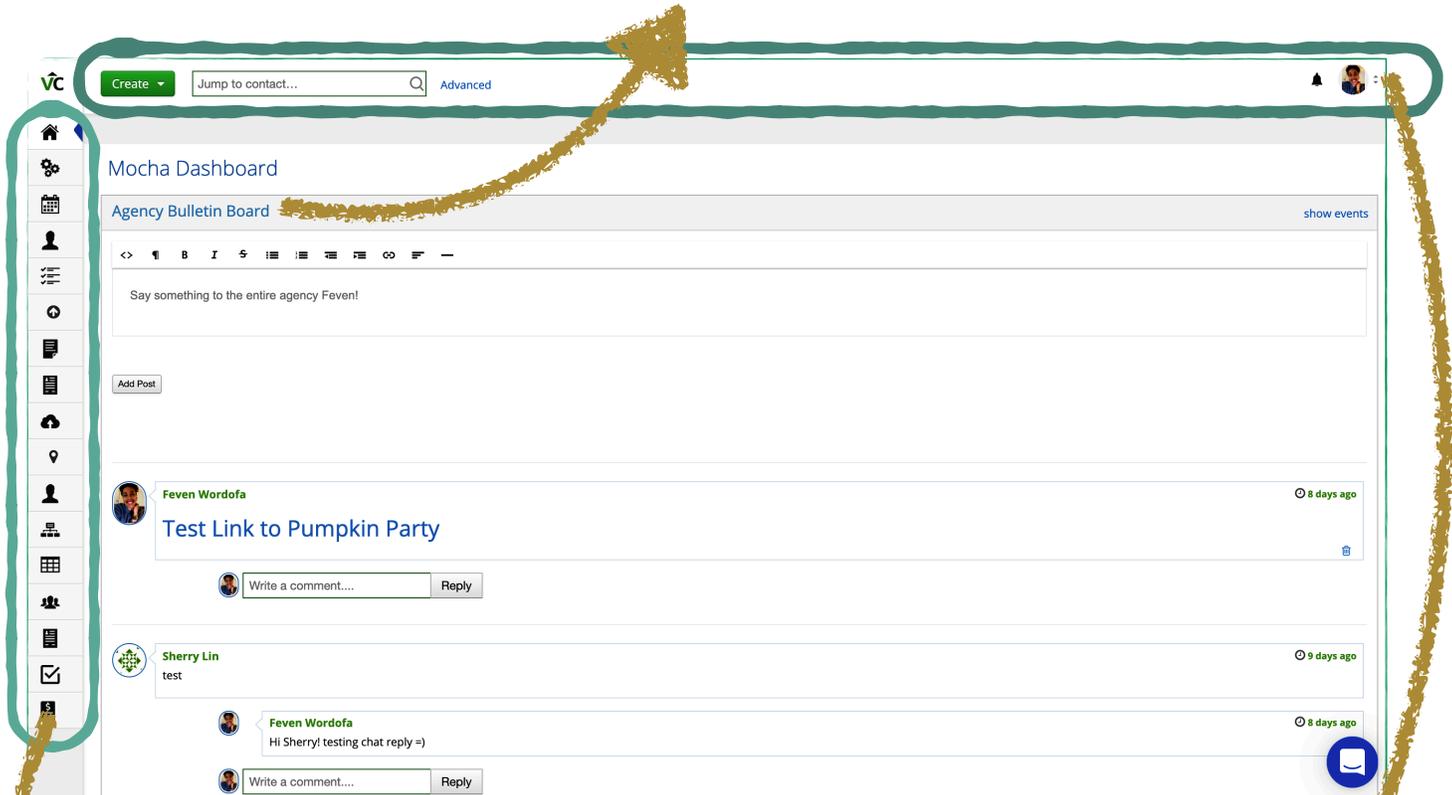


3

Landing Page / Home page

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

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.

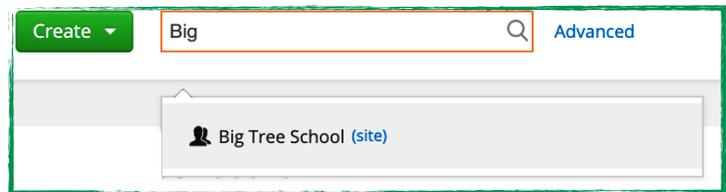
4 Attendance

Creating Sessions

The first step towards finishing enrollment and starting to take attendance is creating sessions and enrolling certified children in.

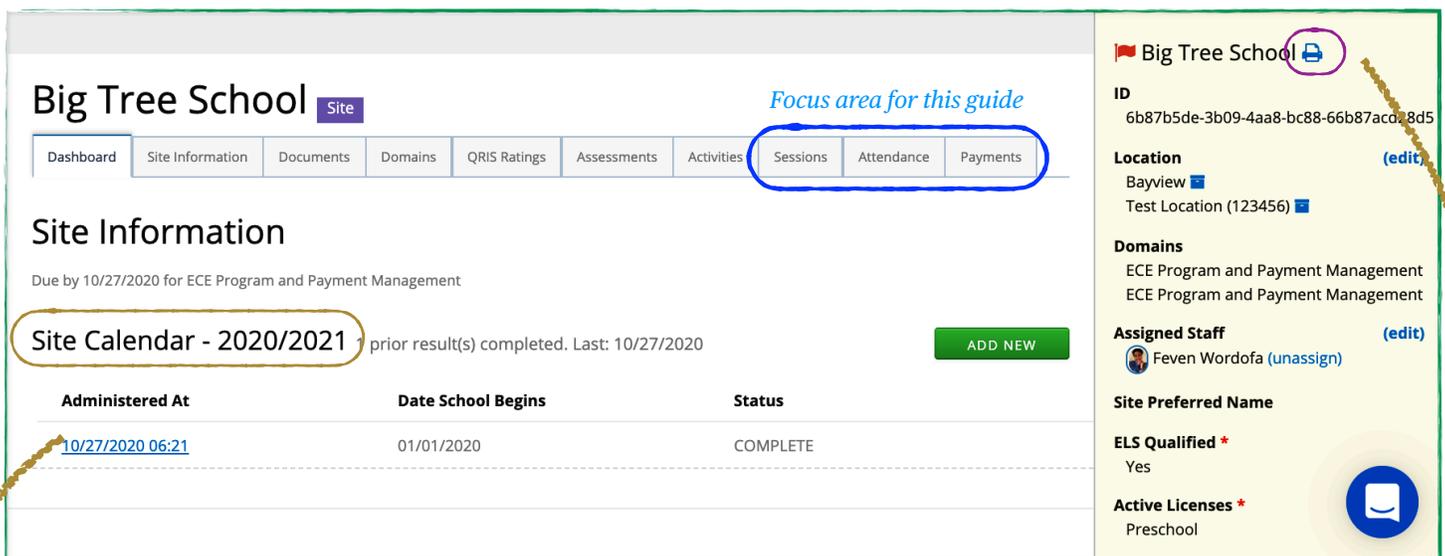
These sessions can be created by the site supervisor, lead/master teacher or anyone in the program that has a permission to do so. So let's create some sessions for a Site so we can enroll children and take attendance, count meals and track their pick-up and drop-offs.

Step 1: Search for the 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 Site's profile. This is Big Tree School's dashboard.



Big Tree School [Site](#)

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

Focus area for this guide

Site Information

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

Site Calendar - 2020/2021 [prior result\(s\) completed. Last: 10/27/2020](#) [ADD NEW](#)

Administered At	Date School Begins	Status
10/27/2020 06:21	01/01/2020	COMPLETE

Big Tree School [PDF](#)

ID
6b87b5de-3b09-4aa8-bc88-66b87acd78d5

Location [\(edit\)](#)
Bayview [+](#)
Test Location (123456) [+](#)

Domains
ECE Program and Payment Management
ECE Program and Payment Management

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

Site Preferred Name

ELS Qualified *
Yes

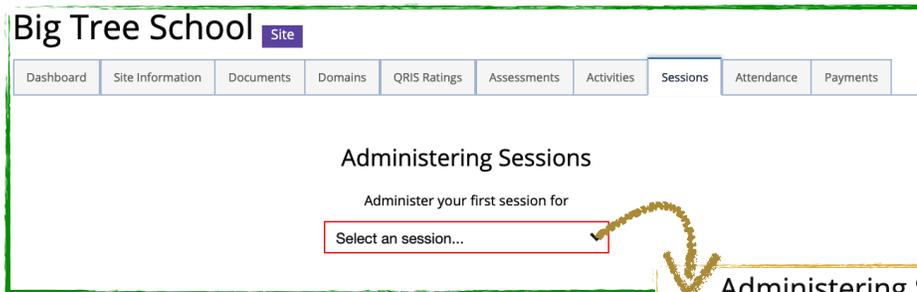
Active Licenses *
Preschool

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 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.

ECE Session for Big T
Session Name *

ECE Session for Big Tree School at Test Location (123456)
Session Name *
Rainbow Room

Type of Learning *

In Person
 Remote

Age of Children *

Infant
 Toddler
 Preschool

Permit Level of Lead Tea

Teacher
 Master Teacher
 Site Supervisor
 Program Director

Session Time Period *

Part-Day AM
 Part-Day PM
 Full Day

Capacity *

Minimum Age (months) *

Maximum Age (months) *

Type of Learning *

In Person
 Remote

Age of Children *

Infant
 Toddler
 Preschool

Permit Level of Lead Teacher *

Teacher
 Master Teacher
 Site Supervisor
 Program Director

Session Time Period *

Part-Day AM
 Part-Day PM
 Full Day

Capacity *

8

Minimum Age (months) *

48

Maximum Age (months) *

60

Start Date *

08/01/2020

End Date *

08/31/2021

Start Time *

8 00 AM

End Time *

6 00 PM

Operation Days *

Mon
 Tues
 Wed
 Thurs
 Fri
 Sat
 Sun

Adult to Child Ratio

Adults:Children

3 : 8

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 Site. You should be able to view the newly created sessions in the 'Sessions' tab in you Site. 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

ID
6b87b5de-3b09-4aa8-bc88-66b87acd28c

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

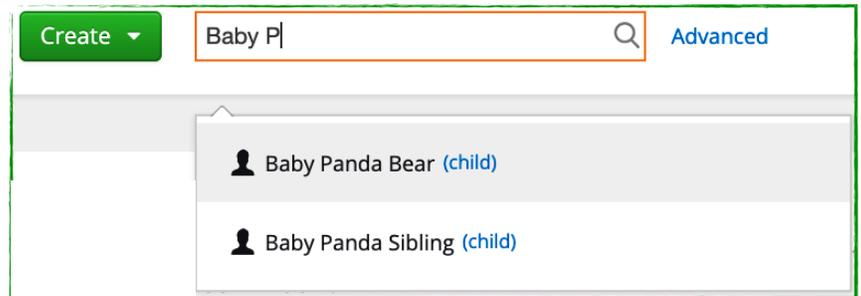
Accredited? *
No

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

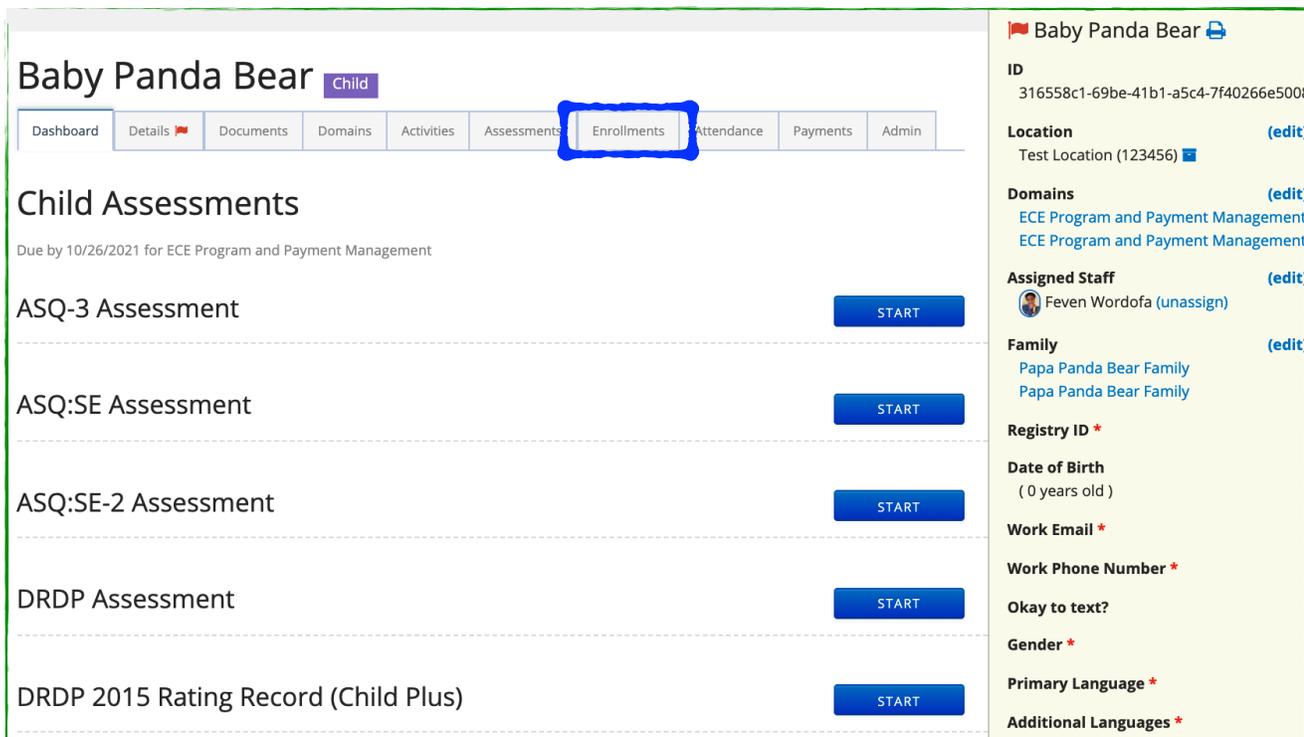
Step 1: Search for the Child you want to enroll by typing their name in the 'Jump to contact...' box.



The screenshot shows a search interface with a green 'Create' button on the left. A search bar contains the text 'Baby P' and a magnifying glass icon. To the right of the search bar is an 'Advanced' link. Below the search bar, a dropdown menu is open, displaying two search results: 'Baby Panda Bear (child)' and 'Baby Panda Sibling (child)', each with a person icon to its left.

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 [Mocha Guide: Basic Functions](#) to review details on each of these tabs. For now we will just use the 'Enrollments' page.



The screenshot displays the 'Baby Panda Bear' child profile dashboard. At the top, there's a navigation bar with tabs: Dashboard, Details, Documents, Domains, Activities, Assessments, Enrollments (highlighted with a blue box), Attendance, Payments, and Admin. Below the navigation bar, the 'Child Assessments' section is visible, listing several assessments with 'START' buttons: ASQ-3 Assessment, ASQ:SE Assessment, ASQ:SE-2 Assessment, DRDP Assessment, and DRDP 2015 Rating Record (Child Plus). On the right side, there's a sidebar with various details: Baby Panda Bear (with a print icon), ID (316558c1-69be-41b1-a5c4-7f40266e500), Location (Test Location (123456)), Domains (ECE Program and Payment Management), Assigned Staff (Feven Wordofa (unassign)), 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.

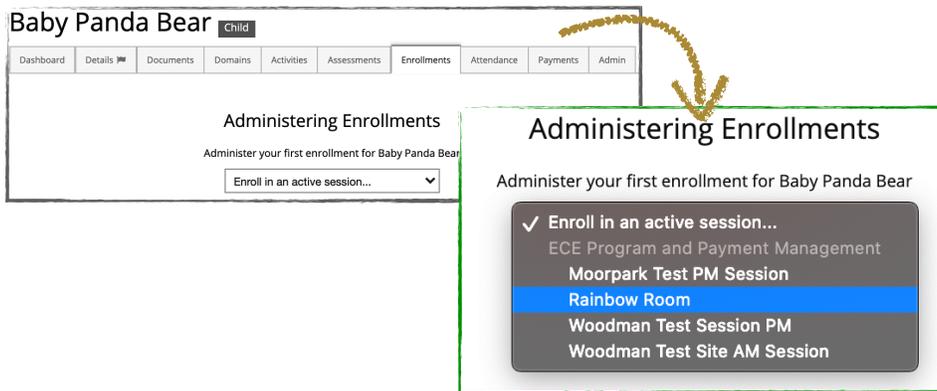
Step 3: Click on 'Enrollments' tab



The screenshot shows the 'Enrollments' tab selected in the navigation bar. The page title is 'Administering Enrollments'. Below the title, there's a prompt: 'Administer your first enrollment for Baby Panda Bear'. At the bottom, there's 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.

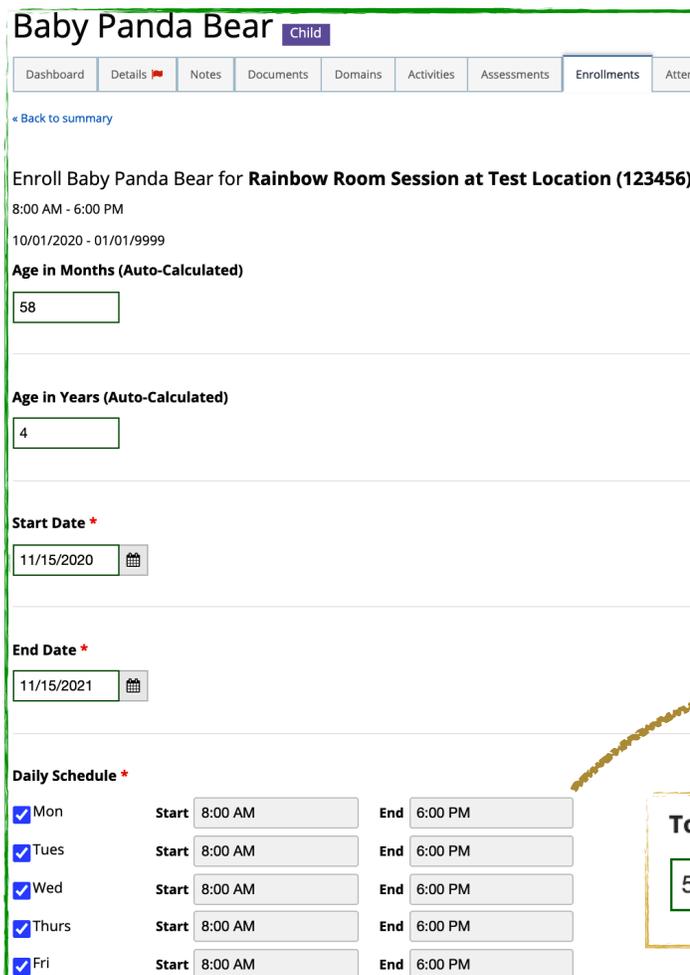
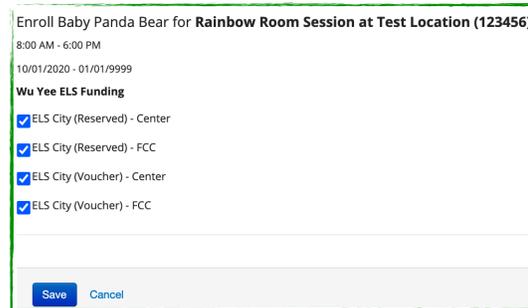
Step 4 : Click on the drop down arrow in the ‘Enroll in an active sessions...’ box. A list of sessions will drop down - Select the newly created classroom session, **’Rainbow Room’**.



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.



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.

In the future, Enrollment funding will auto-populate from Certification form once that feature is complete, for now select manually.

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

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

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

\$

Registration Fee

\$

Funding Source(s) - Autocalculated

PFA 12-month 5 days

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'.

The screenshot shows the 'Enrollments' tab for a child named 'Baby Panda Bear'. The interface includes a navigation bar with tabs: Dashboard, Details, Notes, Documents, Domains, Activities, Assessments, Enrollments (selected), Attendance, Payments, and Admin. Below the navigation bar, there is a section titled 'Existing results' with a dropdown menu that says 'Enroll in an active session...'. Below this, there is a table with columns: Administered By, Active Session, Start Date, Start Time, End Time, Exited At, and Exit Reason. The table contains one row with the following data: Feven Wordofa, Rainbow Room, 11/15/2020, Variable Schedule, Variable Schedule, and an empty cell for Exit Reason.

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.

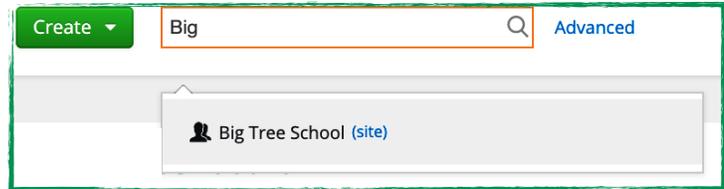
The screenshot shows the details page for the 'Rainbow Room Session' for 'Baby Panda Bear'. The page includes a navigation bar with tabs: Dashboard, Details, Notes, Documents, Domains, Activities, Assessments, Enrollments (selected), Attendance, Payments, and Admin. Below the navigation bar, there is a section titled 'Enroll Baby Panda Bear for Rainbow Room Session' with a sub-section 'Date of Registration 11/15/2020 by Feven Wordofa'. The page also displays 'Age in Months (Auto-Calculated)' as 58, 'Age in Years (Auto-Calculated)' as 4, 'Start Date' as Nov 15, 2020, 'End Date' as Nov 15, 2021, 'Daily Schedule' as 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, and 'Total Hours Per Week' as 50h 0m. On the right side, there is an 'Exit Reason' dropdown menu with a list of reasons and checkboxes, and a 'Please Explain' text area.

You can 'Print' registration info from here. The 'Delete' option will only be available for a program admin. 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.

Taking Attendance

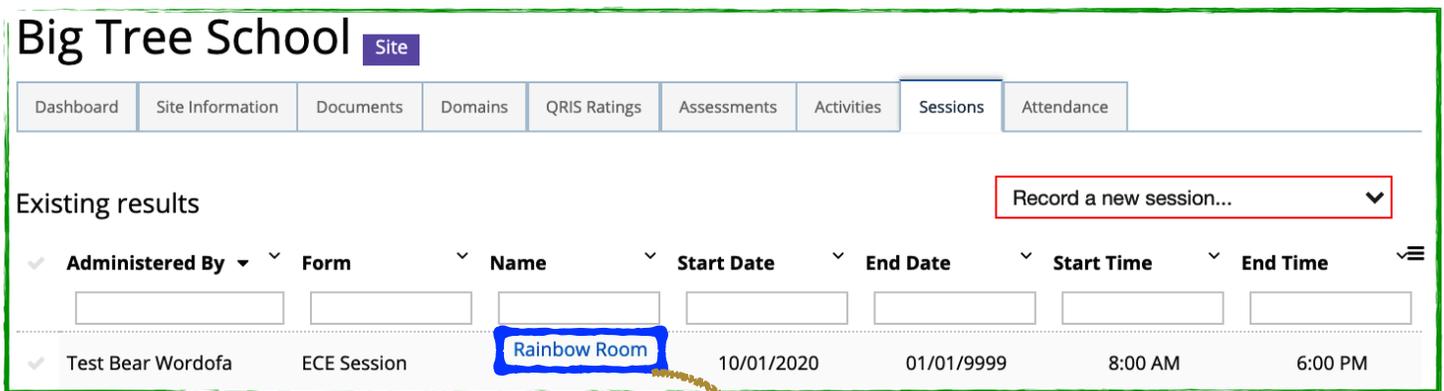
Now that we have enrolled a child into a session. We can start exploring how to take attendance and the parent portal feature.

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



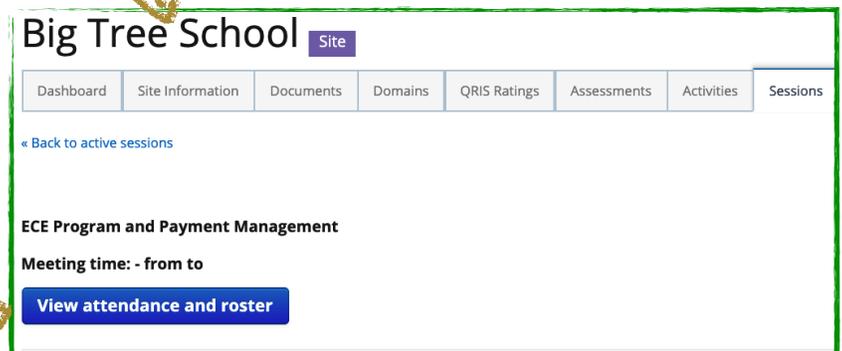
We will continue using 'Big Tree School' as an example.

Step 2: Click on 'Sessions' tab from the Site profile. You will land in the Sessions page.



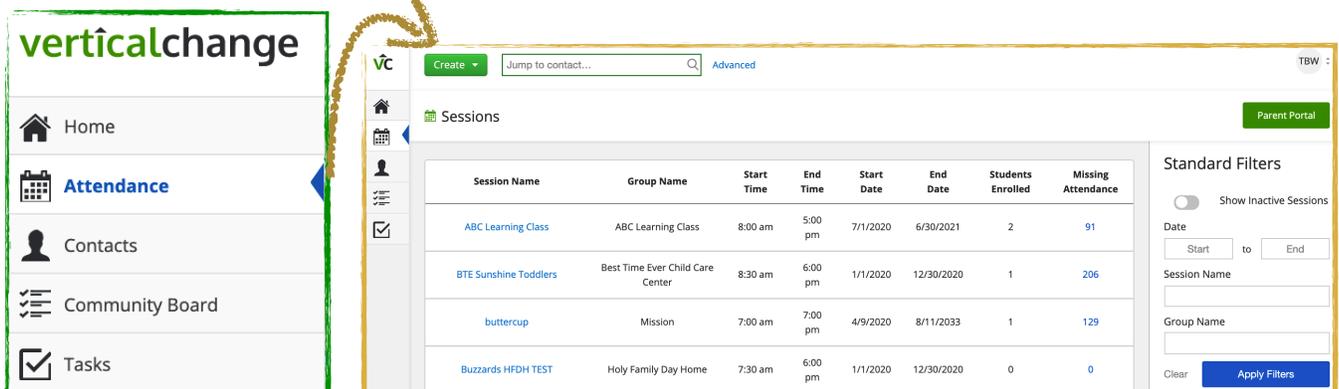
Step 3: Open a classroom session you want to take attendance on by clicking on the name.

Step 4: Once inside the session, click on 'View attendance and roster'



Another way to get to 'Attendance' is by

clicking on the side navigation bar icon. Choose the session from here.



Step 5: You will land on the **Attendance and Roster** page. Let's explore this page.

Click here to view a list of all children enrolled in this session & view their registration detail.

Click here to access the 'Parent Portal', where you can go to collect drop off and pick up signatures. We will discuss further in the next section.

Rainbow Room

Attendance Roster

View Big Tree School Back

Tuesday November 10th, 2020

Is holiday/closure?

Attended	Child Name	Start Time	End Time	Absent Reason	Lunch	Notes	Status	Actions
<input type="checkbox"/>	Bear, Baby Panda	08:00 AM	06:00 PM	Select an option	<input type="checkbox"/>		Not signed in	Exit
<input type="checkbox"/>	Bear, Toddler Panda	08:00 AM	06:00 PM	Select an option	<input type="checkbox"/>		Not signed in	Exit

0/2 Students Present
2 Invalid Entries

Submit Attendance

You will be able to see the total number of children enrolled in this classroom here. Also it shows as 'invalid entries' if there is no attendance.

Click here if you want 'Exit' a child from a session, you will be prompted to input 'Exit Reason' and 'Exit Date'.

Are you sure you would like to exit Bear, Toddler Panda from this session?

Exit Reason:

Exit Date:

Cancel Proceed

Step 6: Click on the check box next to a child's name to mark them present.

Check the box here to mark all the children in the session as present/that they've attended.

Attended	Child Name	Start Time	End Time	Absent Reason	Lunch	Notes	Status	Actions
<input checked="" type="checkbox"/>	Bear, Baby Panda	08:00 AM	06:00 PM	Select an option	<input type="checkbox"/>		Not signed in	Exit
<input type="checkbox"/>	Bear, Toddler Panda	08:00 AM	06:00 PM	Select an option	<input type="checkbox"/>		Not signed in	Exit

If you want to mark a child 'Absent', all you have to do is just select the reason from the dropdown menu. And a check mark will appear next to their name.

Select an option...

- Unexcused
- Excused - Child illness
- Excused - Parent illness
- Excused - Family emergency
- Excused - Policy-related
- Excused - Court-ordered visitation
- Excused - Other
- Suspension of Service (formerly called Limited Term Service)
- Best Interest
- Suspended

Bear, Toddler Panda 08:00 AM 06:00 PM Excused - Parer

Step 7: Once you have completed entering attendance for all the children in the session, click on **‘Submit Attendance’**.

Once you click on **‘Submit Attendance’**, you will receive a success message and the *‘Submit Attendance’* will change to **‘Update Attendance’**.

Attendance Successfully Submitted

Attended	Child Name	Start Time	End Time	Absent Reason	Lunch	Notes	Status	Actions
<input checked="" type="checkbox"/>	Bear, Baby Panda	08:00 AM	06:00 PM	Select an option	<input checked="" type="checkbox"/>		Not signed in	Exit
<input checked="" type="checkbox"/>	Bear, Toddler Panda	08:00 AM	06:00 PM	Excused - Parer	<input type="checkbox"/>		Not signed in	Exit

• 1/2 Students Present
• 0 Invalid Entries

Update Attendance

Notice there are **‘0 invalid entries’**. which means all children are either marked as attending or have an absent reason selected. In this case 1 out of the 2 children enrolled is present this day.

You have successfully taken attendance for a day in Mocha. Keep repeating this steps each day at your sessions. One piece of information that is lacking here is the *‘Status’* being *‘Not Signed in’*, this is where the **‘Parent Portal’** is used to sign-in and sign-out children during pick-up and drop-off time.

Let’s review that in the next section.

Parent Portal

To start exploring the Parent Portal. We first have to get the 'PIN' that a parent/guardian will be using to access the parent portal. You can generate this PIN or find one that's already been set up at the family's profile.

Step 1: Go to the family profile page.

From the 'Attendance and Roster' page in the session, click on '**Roster**'.

Child Name	Age in Months (Auto-Calculated)	Start Date	End Date	Daily Schedule	Start Time	End Time	Exit Reason	Exited at	Actions
Bear, Toddler Panda	24	2020-10-01	9999-01-01	Mon, Tues, Wed, Thurs, Fri	Variable Schedule	Variable Schedule			...
Bear, Baby Panda	58	2020-10-01	2021-11-15	Mon, Tues, Wed, Thurs, Fri	Variable Schedule	Variable Schedule			...

Step 2: From the 'Actions' column here, click on 'View'.

Step 3: The enrollment tab in the child's profile will open. From here click on the family contact listed on the right side of the page.

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

Family: Papa Panda Bear Family, Papa Panda Bear Family

Step 4: From the family's profile dashboard, click on 'Details' tab. You will find the 'Contact PIN' to be used at the 'Parent Portal'.

Basic Info

Name * Papa Panda Bear

External Id (Data import only)

Contact PIN 2345

Click on 'Edit', to generate a new PIN for the family by hitting the refresh icon. The first PIN generated will be the last 4 digits of the family phone number.

Now that we found the PIN for the parent/guardian to use when they sign-in and sign-out a child. Let's go back to the 'Attendance and Roster' page within a classroom session.

Step 1: From the 'Attendance and Roster' page within a classroom session, click on 'Parent Portal'.

The screenshot shows the 'Attendance and Roster' page for 'Rainbow Room'. At the top right, there is a green button labeled 'Parent Portal' which is highlighted with a blue box and a yellow arrow. Below this, there are tabs for 'Attendance' and 'Roster'. A date selector shows 'Friday November 13th, 2020' and a checkbox for 'Is holiday/closure?'. A table lists attendance records for two children: 'Bear, Baby Panda' and 'Bear, Toddler Panda'. Both are marked as 'Not signed in'. At the bottom, there is a 'Submit Attendance' button and a summary showing '0/2 Students Present' and '2 Invalid Entries'.

You will be prompted ask the parent to 'Enter Family PIN' number.

The screenshot shows a screen titled 'verticalchange' with a red 'Close parent portal' button at the top left. The main text says 'Enter Family PIN' above a four-digit PIN input field.

Step 2: Have the parent/guardian enter the Family PIN. In our example, Baby Panda Bear is from the Papa Panda Bear family. We will use the Family PIN we claimed earlier for this parent/guardian. So let's enter 2345 here.

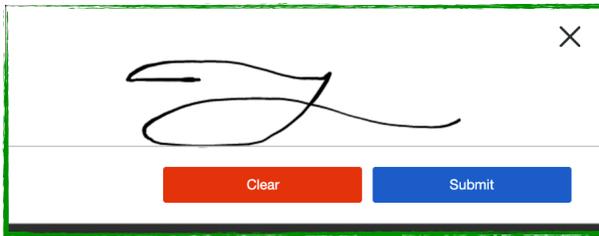
Step 3: The parent/guardian will see the name of the child 'Baby Panda Bear' and a 'Sign in' button.

Click on 'Sign in'.

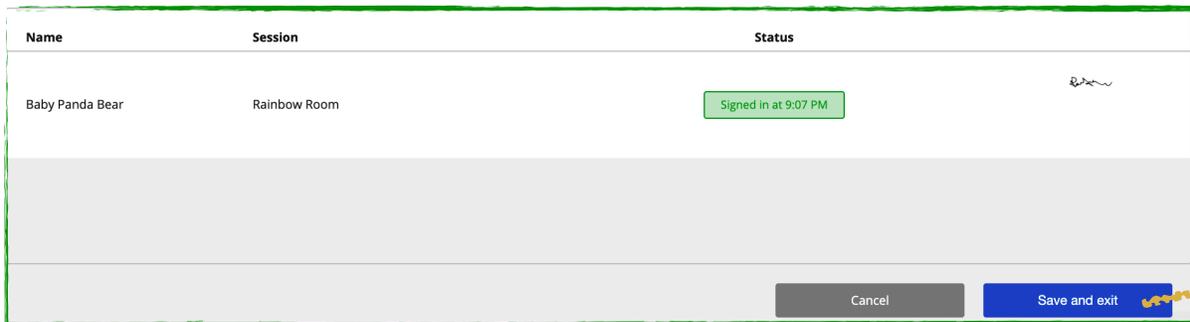
The screenshot shows a sign-in screen titled 'verticalchange' with a red 'Close parent portal' button at the top left. It displays the following information: Name: Baby Panda Bear, Session: Rainbow Room, Status: Not signed in. Below this is a large green 'Sign in' button. At the bottom, there are 'Cancel' and 'Save and exit' buttons, and a chat icon in the bottom right corner.

This formatting will look a little different depending on if viewing on a large or small screen aka a computer vs a tablet or phone.

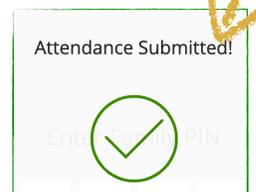
Step 4: A window will appear to capture a signature. Put in signature and click on 'Submit'.



Step 5: You'll see the status changes updates as 'Signed in' at a specific time stamp. Click 'Save and Exit'.



Once you hit 'Save and Exit', the window will go back to the 'Enter Family PIN' page. This way the next parent/guardian can sign-in and drop-off their child, using their own Family PIN.

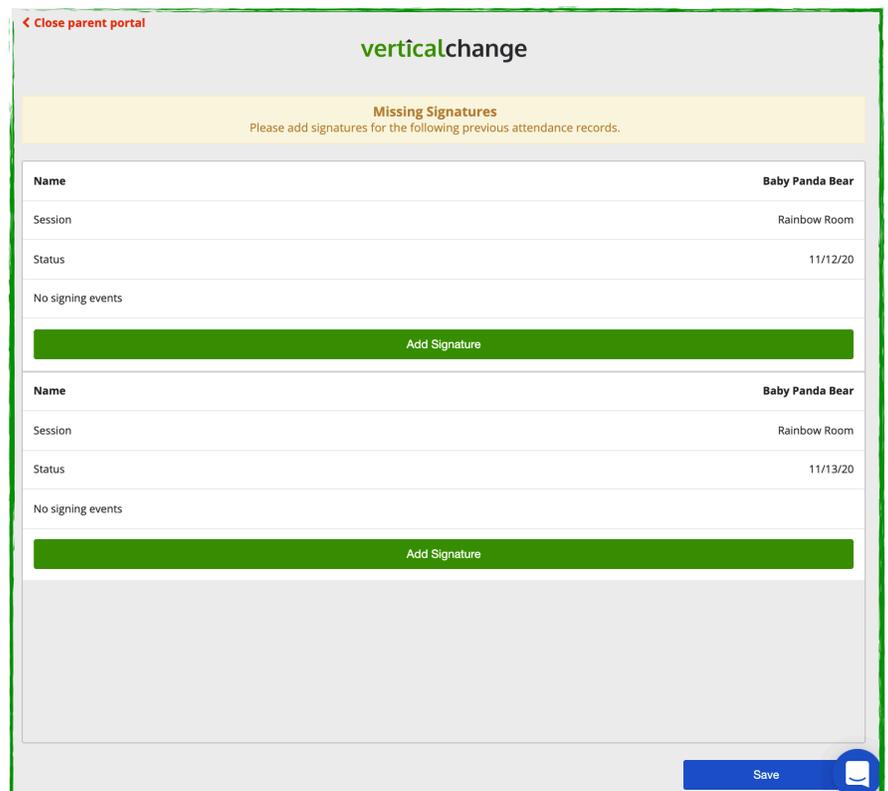


Note:

Some times, if there are missing signatures, when the parent enters their PIN the window they see is going to prompt them to add the missing signatures for the previous attendance.

Once they complete entering all the missing information, they can click on save and go to the current date.

This might look slightly different when viewed on a computer Vs a mobile device/an iPad.

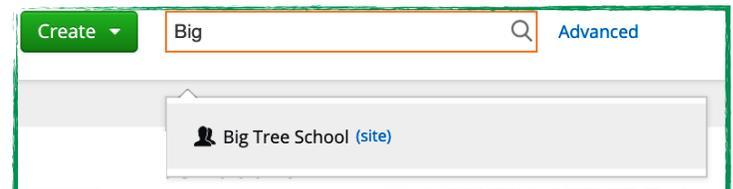


Attendance Report

Now that you have successfully created a session, enrolled children into the session, and taken attendance, now it's time to review your monthly attendance report. Check if all children are attended for and the information collected daily through out the month is accurate.

To do that we can pull an 'Attendance Report' from the Site Profile.

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



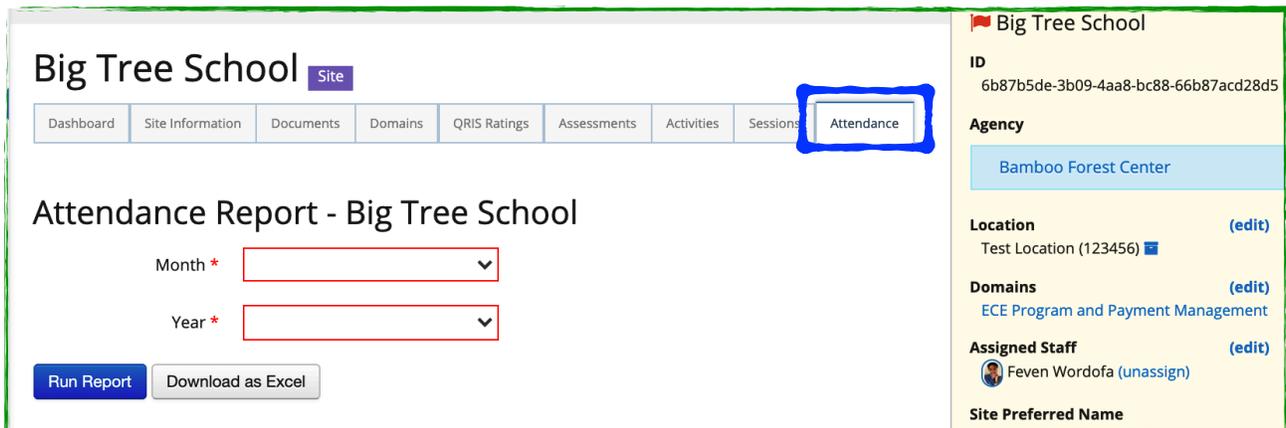
A search bar with a green 'Create' button on the left, a search input field containing the text 'Big', and an 'Advanced' link on the right. Below the search bar, a dropdown menu is open, showing a search result: 'Big Tree School (site)' with a person icon to the left.

From the site profile, click on the 'Attendance' tab.

We are still using 'Big Tree School' as an example.

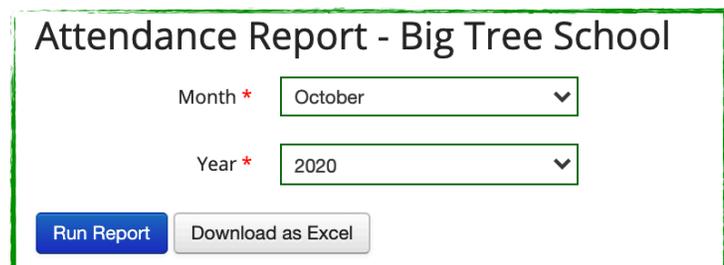
You will arrive at the 'Attendance Report' page for your Site.

Here, you are prompted to select the 'Month' and 'Year' off the attendance record you want to review.



The screenshot shows the 'Attendance Report - Big Tree School' page. At the top, there is a navigation bar with tabs: 'Dashboard', 'Site Information', 'Documents', 'Domains', 'QRIS Ratings', 'Assessments', 'Activities', 'Sessions', and 'Attendance'. The 'Attendance' tab is highlighted with a blue box. Below the navigation bar, the page title is 'Attendance Report - Big Tree School'. There are two dropdown menus for 'Month *' and 'Year *'. Below these are two buttons: 'Run Report' and 'Download as Excel'. On the right side, there is a sidebar with site information for 'Big Tree School', including ID, Agency (Bamboo Forest Center), Location (Test Location (123456)), Domains (ECE Program and Payment Management), and Assigned Staff (Feven Wordofa (unassign)).

Step 2: Go ahead and enter the month and year of the attendance record you'd want to review.



The screenshot shows the 'Attendance Report - Big Tree School' page with the 'Month *' dropdown set to 'October' and the 'Year *' dropdown set to '2020'. The 'Run Report' and 'Download as Excel' buttons are visible at the bottom.

Step 3: Click on 'Run Report'.

After a second or two you will see a summary report of attendance for the chosen month and year.

Attendance Report - Big Tree School

Month *

Year *

[Run Report](#) [Download as Excel](#)

October 2020

Attendance	33
Absences (Total)	5
Days Missing Attendance	0

Totals - Enrollments [Collapse \(-\)](#)

Total Enrollments	2
-------------------	---

Totals - Absences & Closures [Expand \(+\)](#)

Breakdown by Session [Expand \(+\)](#)

History [Expand \(+\)](#)

Step 4 : Review the information here.

You will immediately be able to review count of 'Attendance', 'Absences' and if there are 'Days Missing Attendance', meaning you forgot to record a child as either attending, provide an absent reason or mark that it was a school closure/holiday.

Here you will be able to see the total count of children enrolled in all of your sessions in this Site. For this example, we only have 2 children enrolled.so you see 'Total Enrollments' shows 2.

You can **Collapse (-)** or **Expand (+)** these fields. For example here, you can click on 'Expand (+)' the 'Totals for Absences & Closures' to see the total counts of days & reasons why children were absent or if there was a school closure.

If there are 'Days Missing Attendance', you will find the total count of missing days and also the 'Day Missing Attendance' field will be blue and hyperlinked so you can click on it and input the missing information. See image below;

Totals - Absences & Closures [Collapse \(-\)](#)

Absences - Unexcused	2
Absences - Excused: Child Illness	1
Absences - Excused: Parent Illness	0
Absences - Excused: Family Emergency	1
Absences - Excused: Policy Related	1
Absences - Excused: Court-Ordered Visitation	0
Absences - Excused: Other	0
Absences - Excused: Suspension of Service	0
Absences - Best Interest	0
Absences - Suspended	0
Holidays/Closures	1

Big Tree School [Site](#)

[Dashboard](#) [Site Information](#) [Documents](#) [Domains](#) [QRIS Ratings](#) [Assessments](#) [Activities](#) [Sessions](#) [Attendance](#)

Attendance Report - Big Tree School

Month *

Year *

[Run Report](#) [Download as Excel](#)

October 2020

Attendance	33
Absences (Total)	5
Days Missing Attendance	4

Totals - Enrollments [Collapse \(-\)](#)

Total Enrollments	2
-------------------	---

Totals - Absences & Closures [Expand \(+\)](#)

Breakdown by Session [Expand \(+\)](#)

History [Expand \(+\)](#)

Step 5 : If there are any, click on 'Days Missing Attendance' to take you to the Attendance tab with the list of Sessions. There you can see which sessions are missing attendance and fill it in.

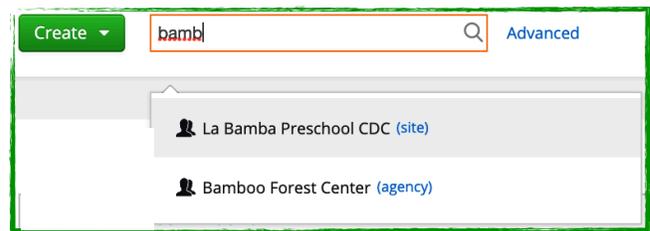
5 Payment and Invoicing

The payment and invoicing feature in Mocha helps Agencies view and manage family fees and subsidy invoices on each child based on attendance. Most of this is managed at the Agency level for centers with multiple sites or at a site level for FCCs or programs that operate under one Site. In this case the Site and Agency are the same contact in Mocha.

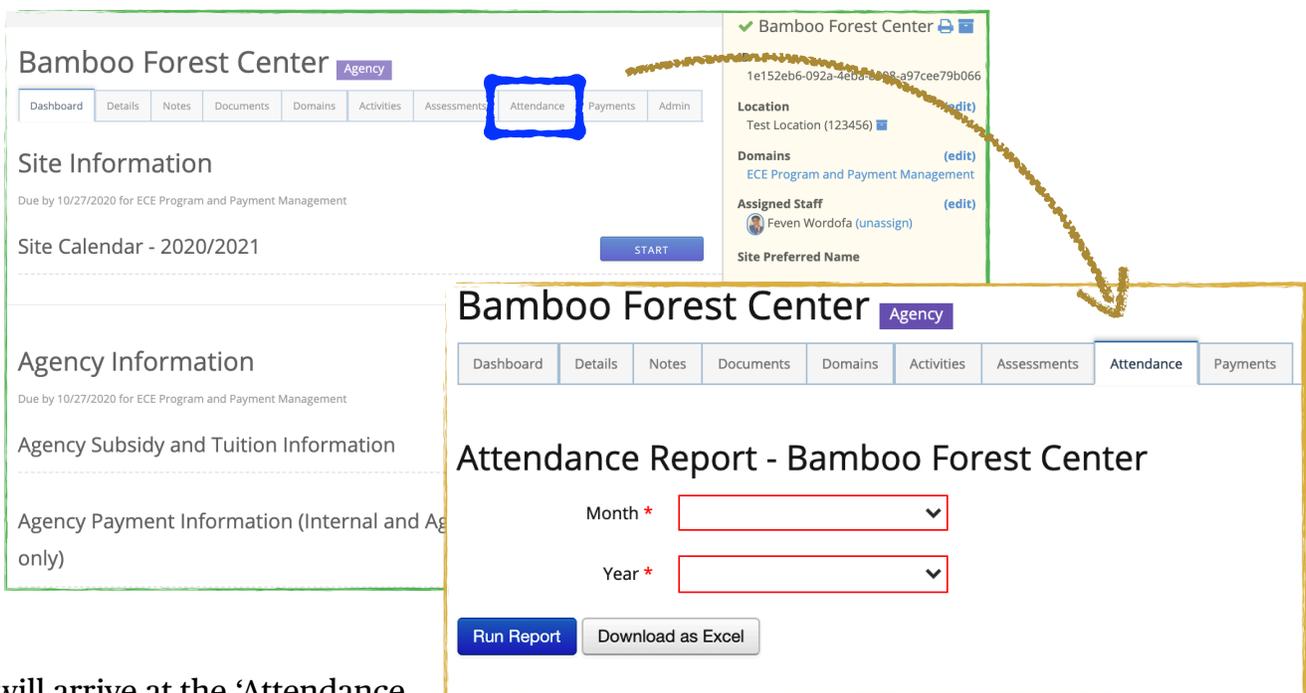
Let's start with certifying attendance at an Agency level.

Certifying Attendance

Step 1: Search for the Agency you want to certify attendance for. In this example, we will work with 'Bamboo Forest Center'.



Step 2: Once you are at the 'Bamboo Forest Center' Agency profile, click on the 'Attendance' tab



You will arrive at the 'Attendance Report' page for your Agency.

Here, similar to the previous section, you are prompted to select the 'Month' and 'Year' off the attendance record you want to review.

Step 3 : Choose the month and year and click on 'Run Report'.

Attendance Report - Bamboo Forest Center

Month *

Year *

A summary report will drop open below for the month and year of your selection.

October 2020

Not Certified

Attendance	33
Absences (Total)	5
Days Missing Attendance	0

Totals - Enrollments [Collapse \(-\)](#)

Total Enrollments	2
-------------------	---

Totals - Absences & Closures [Expand \(+\)](#)

Breakdown by Session [Expand \(+\)](#)

History [Expand \(+\)](#)

This is where you can 'Certify Attendance' which will then generate subsidy invoices for each child.

This 'Certify Attendance' feature, if you've noticed, only appears at an Agency profile. Meaning, although the same 'Attendance Report' is found on a Site profile, attendance can not be certified there.

Attendance can only be certified when there is no missing information for the month. If 'Days Missing Attendance' is hyperlinked and it is not a zero, the 'Certify Attendance' feature will be disabled here.

See image below for example,

Step 4 : Review details of the attendance report by clicking on 'Collapse(-)' and 'Expand (+)', as shown in the previous section.

Make sure all the data is accurate before certifying. Once you certify attendance, this report will be locked.

Attendance Report - Bamboo Forest Center

Month *

Year *

October 2020
Not Certified

[Attendance days missing](#)

Step 5 : Click on 'Certify Attendance' to generate invoices for each child.

You should be able to get a **Success!** flag and then see this new green banner.

Attendance Report - Bamboo Forest Center

Month *

Year *

Your attendance is in the process of being certified. Check the progress of your certification [here](#).

Step 7 :
back to

If you go
re-run the

Step 6: Click on 'here' to review the progress of your certification.

You will see the name of your Agency, dates of certification request, certification process start and end date and Status.

Active Jobs

NAME	FORMAT	REQUESTED	STARTED	ENDED	STATUS	ACTIONS
Certifying attendance for Bamboo Forest Center		11/16/2020, 9:37:30 AM	11/16/2020, 9:37:30 AM	11/16/2020, 9:37:35 AM	completed	...

You will notice if you click on 'here' early enough, status will be on 'queued' while Mocha calculates invoice and payment in the backend.

STATUS

queued

ACTIONS

...

You can click on the '...' if you wish to 'discard' this certification at this time.

'Attendance Report' for the same month/year as shown on Step 3, you will land on a modified certification page.

Bamboo Forest Center Agency

Dashboard | Details | Documents | Domains | Activities | Assessments | Attendance

Attendance Report - Bamboo Forest Center

Month *

Year *

October 2020
Certified

Attendance	33
Absences (Total)	5
Days Missing Attendance	0

Totals - Enrollments [Collapse \(-\)](#)

Total Enrollments	2
-------------------	---

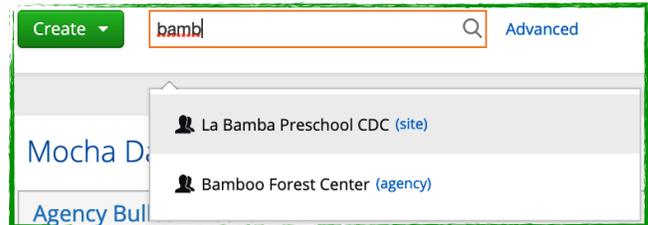
Here, instead of 'Certify Attendance' you will find a button that allows you to 'Update Certification' that was already processed.

If you already made changes, or are planning to make changes to the attendance or child enrollment data, click on 'Update Certification' to certify the changes.

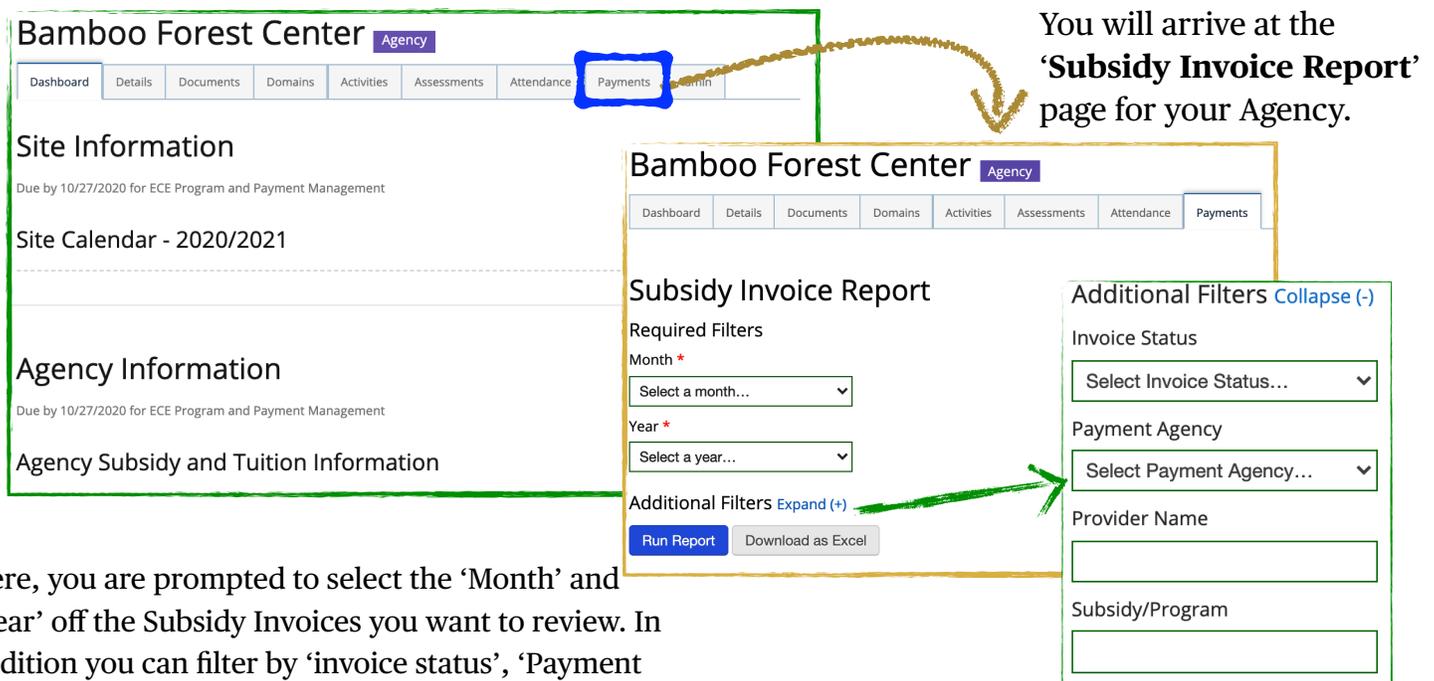
Approving Invoice Calculations

Once you complete 'Certifying Attendance' from the 'Attendance' tab in an Agency profile, next step will be to review the invoices generated by Mocha based on the submitted attendance for the selected month and then approving invoices for payments. Follow these steps;

Step 1: Go back to the Agency you just certified attendance on, from the previous section. In this example, it was 'Bamboo Forest Center'.



Step 2: Once you are at the 'Bamboo Forest Center' Agency profile, click on the 'Payments' tab.

A composite screenshot showing the navigation from an agency profile to a report page. The top part shows the 'Bamboo Forest Center Agency' profile with a navigation menu where the 'Payments' tab is highlighted with a blue box. A yellow arrow points from this tab to a larger screenshot of the 'Subsidy Invoice Report' page. This report page includes a navigation menu, a 'Required Filters' section with 'Month' and 'Year' dropdowns, and an 'Additional Filters' section with 'Invoice Status', 'Payment Agency', 'Provider Name', and 'Subsidy/Program' dropdowns. A green arrow points from the 'Additional Filters' section to a detailed view of these filters on the right. Text on the right side of the image states: 'You will arrive at the 'Subsidy Invoice Report' page for your Agency.'

Here, you are prompted to select the 'Month' and 'Year' off the Subsidy Invoices you want to review. In addition you can filter by 'invoice status', 'Payment Agency', 'Provider Name' and/or 'Program Name'

Clearly, you would want to pull invoices for the month and year you've already reviewed and certified attendance for. In our example, that was the month of October, 2020. However we will also explore what this invoice looks like for months that do not yet have certified attendance.

For now let's start with October, 2020. Or whichever month you certified on our '[Certifying Attendance](#)' section of this Guide.

Step 3 : Input the 'Month' and 'Year' of the 'Subsidy Invoice Report' you want to approve. Then click on 'Run Report'.

Subsidy Invoice Report

Month *

Year *

A dropdown summary report will set open below. Here you will be able to view and approve the full list of child invoices.

October 2020

Select Invoices	Site Name	Status	First Name	Last Name	Subsidy	Payment Agency	Days Attended	Billing Rate	Adjustment Factor	Subsidy Payment	Family Fee Paid	Monthly Payment Amount	Adjustment
<input type="checkbox"/>	Big Tree School	Approval Pending	Baby Panda	Bear	PFA 12-month, 5 days a week	Children's Council	16	\$435.00	Teacher	\$435	\$0	\$435.00	\$
<input type="checkbox"/>	Big Tree School	Approval Pending	Toddler Panda	Bear			17	\$0	Toddler-Full Time	\$0	\$0	\$0.00	\$
Total Invoice Amount													\$435.00

History [Expand \(+\)](#)

You can check the box to select an invoice for a child one at a time or you can check the box on the title row to select all the children enrolled in this agency.

The name of the child is hyperlinked and you will be able to click on it. It will open up a new tab in your computer and take you to the child's profile, 'payment' tab so you can review the details of the invoice.

Baby Panda Bear [Child](#)

Dashboard | Details | Documents | Domains | Activities | Assessments | Enrollments | Attendance | **Payments**

Child Care Payments

Month *

Year *

Input in the correct month and year for the invoice you want to review and click on 'Run Report'.

The child's version of the invoice report is live, any change will automatically be reflected in this report but not the agency report. If there is a discrepancy, the agency attendance should be updated to include the changes made after certification.

October 2020

10/01/2020 - 10/31/2020

Child: Baby Panda Bear

Parent: Papa Panda Bear

Note: This is a live report. Any changes made to a child's enrollment or attendance will be automatically reflected in this report.

Claim Number:	Will generate when payment is approved	Status:	Not Approved	Funding Source:	PFA 12-month, 5 days a week
Week	Payment Agency	Rate	Rate Amount	Proration	Total Amount
10/01/20 - 10/31/20	Children's Council	Monthly	\$435.00	1	\$435
Subtotal					\$435
Family Fee					\$64
Family Fee Paid					\$0
Family Fee Remaning					\$64
Claim Total					\$371.00

You can review invoice detail for a child from the 'Subsidy Invoice Report' and make updates/correction as needed before 'Approving Invoices'. Once you are done with editing go back to the list of subsidy invoices in your agency profile.

Step 4 : Check on one of the boxes under the ‘Select Invoices’ and then click on ‘**Approve Selected Invoices**’

October 2020

[Approve Selected Invoices](#) [Update Approved Invoices](#)

Select Invoices	Site Name	Status	First Name	Last Name	Subsidy	Payment Agency	Days Attended	Billing Rate	Adjustment Factor	Subsidy Payment	Family Fee Paid	Monthly Payment Amount	Adjustment
<input checked="" type="checkbox"/>	Big Tree School	Approval Pending	Baby Panda	Bear	PFA 12-month, 5 days a week	Children's Council	16	\$435.00	Teacher	\$435	\$0	\$435.00	\$
<input type="checkbox"/>	Big Tree School	Approval Pending	Toddler Panda	Bear			17	\$0	Toddler-Full Time	\$0	\$0	\$0.00	\$
Total Invoice Amount													\$435.00

History [Expand \(+\)](#)

You will see a flag appears stating your invoices are being approve, as shown below:

Subsidy Invoice Report

Month *

Year *

[Run Report](#)

Your invoices are being approved. Check on the status of them [here](#).

Step 5: Click on ‘[here](#)’ to review progress of your Approval.

You will see the name of your Agency, dates of approval request, approval process start and end date and Status. This is similar to the process of ‘Certifying Attendance’ as we reviewed previously.

You will see the ‘Certifying attendance’ activity is also listed here along side the ‘Approving monthly invoice’ tasks.

Active Jobs

NAME	FORMAT	REQUESTED	STARTED	ENDED	STATUS	ACTIONS
Approving monthly invoice for Bamboo Forest Center		11/16/2020, 2:07:31 PM	11/16/2020, 2:07:31 PM	11/16/2020, 2:07:47 PM	completed	...
Certifying attendance for Bamboo Forest Center		11/16/2020, 9:43:35 AM	11/16/2020, 9:43:35 AM	11/16/2020, 9:43:42 AM	completed	...

You can click on the ‘...’ if you wish to ‘discard’ this certification at this time.

Step 6 : If you go back to re-run the ‘Subsidy Invoice Report’ for the same month/year as shown on Step 3, you will land on a modified Approval page.

Here, notice the ‘**Approve Selected Invoices**’ in not as bright and active as earlier, also there is one child with a Status ‘**Approved**’ and the one not selected earlier says ‘**Approval pending**’.

Finally, you can see there is a ‘**History**’ section that now shows a list of previous invoice approvals.

October 2020

[Approve Selected Invoices](#) [Update Approved Invoices](#)

Select Invoices	Site Name	Status	First Name	Last Name	Subsidy	Payment Agency	Days Attended	Billing Rate	Adjustment Factor	Subsidy
<input checked="" type="checkbox"/>	Big Tree School	Approved	Baby Panda	Bear	PFA 12-month, 5 days a week	Children's Council	16	\$435.00	Teacher	\$435
<input type="checkbox"/>	Big Tree School	Approval Pending	Toddler Panda	Bear			17	\$0	Toddler-Full Time	\$0
Total Invoice Amount										

History [Collapse \(-\)](#)

Date	User	Action	Approved Amount
11/16/2020 02:07 pm	Test Bear Wordofa	Approved invoice	\$435.00

Step 7 : Re-run the ‘Subsidy Invoice Report’ for the month and year that has attendance that is not certified.

See image below as an example, this is pulling a Subsidy Invoice Report for the month of November 2020. Attendance has not been certified and therefore, the ‘ Approve Selected Invoices’ is disabled.

Subsidy Invoice Report

Month *
November

Year *
2020

Run Report

November 2020

Attendance for Baby Panda Bear has not been certified

Attendance for Toddler Panda Bear has not been certified

Approve Selected Invoices Update Approved Invoices

Select Invoices	Site Name	Status	First Name	Last Name	Subsidy	Payment Agency	Days Attended	Billing Rate	Adjustment Factor	Subsidy Payment	Family Fee Paid	Monthly Payment Amount	Adjustment
<input type="checkbox"/>	Big Tree School	Missing Certified Attendance	Baby Panda	Bear	PFA 12-month, 5 days a week	Children's Council		\$435.00	Teacher	\$435	\$0	\$435.00	\$
	Big Tree School	Missing Certified Attendance	Toddler Panda	Bear				\$0	Toddler-Full Time	\$0	\$0	\$0.00	\$
Total Invoice Amount												\$435.00	

History Collapse (-)

Date	User	Action	Approved Amount
------	------	--------	-----------------



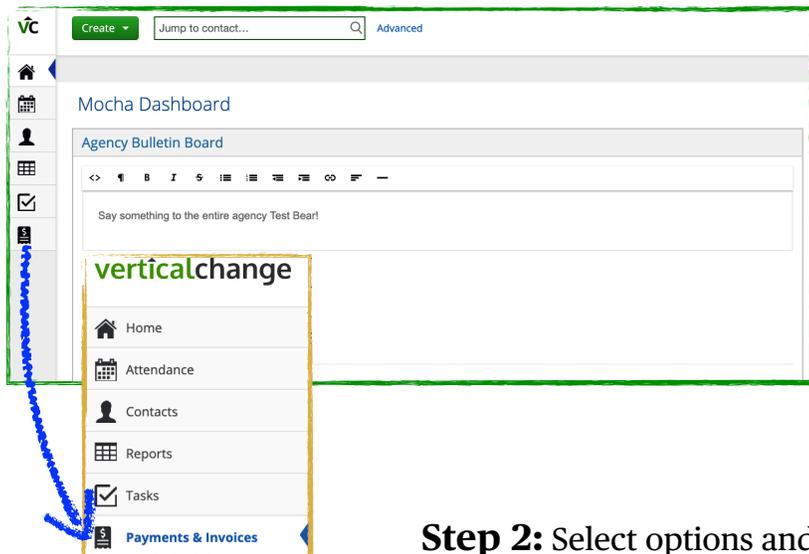
You can only;

1. Certify Attendance Report from an Agency profile (*except for FCCs*)
2. Certify Attendance Report that has no missing attendance record
3. Approve Subsidy Invoices from an Agency profile (*except for FCCs*)
4. Approve Subsidy Invoices that have a Certified Attendance

Exporting Payments

The next step in finalizing payments in Mocha is to export the payments for all the Approved Invoices we just completed. This last step will be performed from the left side navigation bar on your Mocha landing page.

Step 1: Scroll to the side navigation bar and click on 'Payments & Invoices' tab.



NOTE : NOT EVERYONE WILL HAVE ACCESS TO THIS TAB. IF NEED IT BUT DON'T SEE IT, LET US KNOW.

Step 2: Select options and click the 'Run Report' button to generate a report.

Here you find, 'Required Filters' and 'Additional Filters' options that are not required.

Put in a month/year where you have completed *certifying attendance* and *approved invoices* that were generated from the attendance. You can click 'Run Report' from here.

However, you have the options to additionally filter ;

Invoice Status : *Approved, Not approved, Processed*

Payment Agency : *WuYee , Children's Council*

Provider name : *Type in Site or agency name*

Provider type : *FCC, Center, Other*

Subsidy/program: *Type in a name &/or*

Subsidy Specialist: *Select a Specialist name*

A screenshot of the 'Subsidy Invoice Report' form. The form is titled 'Subsidy Invoice Report' and contains several filter sections. The 'Required Filters' section includes 'Month *' (set to October) and 'Year *' (set to 2020). The 'Additional Filters' section includes 'Invoice Status' (set to 'Select Invoice Status...'), 'Payment Agency' (set to 'Select Payment Agency...'), 'Provider Name' (empty text field), 'Provider Type' (set to 'Select Provider Type...'), 'Subsidy/Program' (empty text field), and 'Subsidy Specialist' (set to 'Select Subsidy Specialist...'). There is a checkbox for 'Show unpaid invoices from previous months' which is currently unchecked. At the bottom of the form is a blue 'Run Report' button.

Step 3: Click on 'Run Report' button.

A report for the selected month will be generated by Mocha.

The over all 'payment categories' and 'Total provider payment amounts' summary on the top.

October

Export Selected Invoices

Payment Categories	Total Provider Payment Amounts
Registration Fee	\$0
Total	
Family Fee Total	\$0
Provider Payment	\$870
Total	
Care Amount Total	\$870

Select All	Invoice Status	Payment Agency	Payment ID	Export ID	Claim ID	Provider ID
<input type="checkbox"/>	Authorized	Children's Council			fbf58438-eb5c-443c-93ba-07a696c86b3b	1e152eb6-092a-4eba-8098-a5
<input type="checkbox"/>	Authorized	Children's Council			fbf58438-eb5c-443c-93ba-07a696c86b3b	1e152eb6-092a-4eba-8098-a5
<input type="checkbox"/>	Authorized				8a58ff29-8079-4188-94ae-68f76f5345fe	1e152eb6-092a-4eba-8098-a5
<input type="checkbox"/>	Authorized				8a58ff29-8079-4188-94ae-68f76f5345fe	1e152eb6-092a-4eba-8098-a5

Select the invoices you want to pay by checking the box to the left of each one, or using 'Select All'.

October

Export Selected Invoices

Payment Categories	Total Provider Payment Amounts
Registration Fee	\$0
Total	
Family Fee Total	\$0
Provider Payment	\$870
Total	
Care Amount Total	\$870

Select All	Invoice Status	Payment Agency	Payment ID
<input checked="" type="checkbox"/>	Authorized	Children's Council	
<input checked="" type="checkbox"/>	Authorized	Children's Council	
<input checked="" type="checkbox"/>	Authorized		
<input checked="" type="checkbox"/>	Authorized		

Notice, once you select the invoices, the 'Export Selected Invoices' button is active.

Step 4: Click on 'Export Selected Invoices' button.

Results Downloads

Click to refresh Downloads list

Number of records	Exported	Exported by	Undo export	Download
records	11/17/2020 11:28 AM		Undo export records	Download
records	11/16/2020 02:34 PM		Undo export records	Download
records	11/16/2020 02:07 PM		Undo export records	Download

An excel spreadsheet will be generated that you can download from the 'Downloads' tab when it is ready. Note that, this generated report might take few moments depending on how large it is.

Just like that, you have officially submitted your payments for the approved invoiced based on the certified attendance of children in the site.

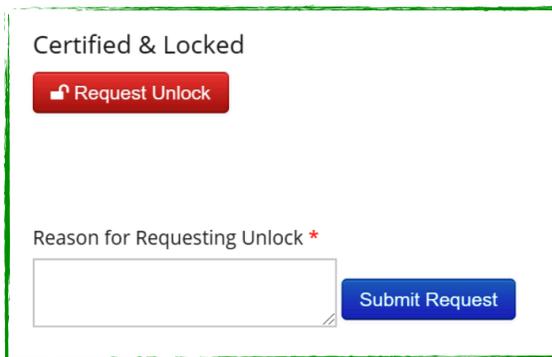
Requesting Help Desk Assistance

Once an approved invoice has been exported for payments, you will not be able to go back and adjust/edit it easily. However you will be able to ask Help Desk and ISA staff to assist you in unlocking your certified report.

In order to make an adjustment to a processed invoice, you have to first adjust the certified attendance.

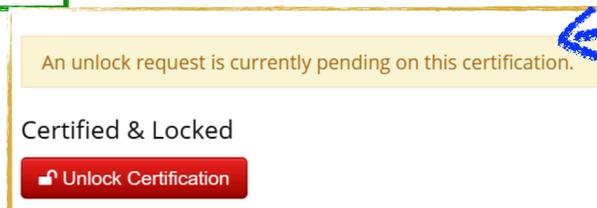
Step 1 : Follow *Step 1 through 7* under the [Certifying Attendance](#) section of this guide.

Step 2 : When you arrive at 'Attendance Report' for the selected month/year, click on 'Request Unlock'

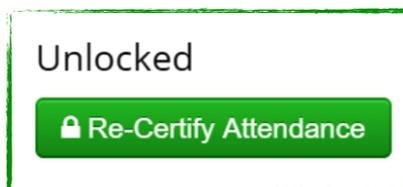


Enter the 'Reason for Requesting Unlock' in the message box below and click on '**Submit Request**'.

Help Desk and ISA staff will receive and review your message here and assist you in unlocking the certification feature.



Step 3 : Once you get this feature unlocked, finalize all the changes to child attendance, family information, and enrollment data etc., as needed.



Return to agency 'Attendance Report' and review data to ensure it is correct before clicking to '**Re-certify Attendance**'.

Then follow *Steps 1 through 4* under the [Exporting Payment](#) section of this guide.

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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