

Getting Started with CareMonkey

Welcome to the CareMonkey family! As you begin to explore and use the system, we hope that you will make good use of this implementation guide to walk you through the setup of the major functions you will use at first, as well as providing you with best practices where applicable.

CareMonkey Implementation Schedule

| Sales Handoff | Week 1 | Week 2 | Week 3 | Week 4-6 | Week 7+ |
|--------------------|--------|---------------|----------|----------|-----------|
| INTERNAL DISCOVERY | SETUP | SYSTEM REVIEW | ROLL OUT | ADOPTION | EXPANSION |

While you use this guide to understand the capabilities of CareMonkey, you will also be provided with a recommended staged roll out plan for your school community. This plan will act as your checklist to walk you through the timeline of system set up, training, and eventually launch across your school. A visual aid for this roll out timeline can be found [HERE](#).

Since each school site may use the system differently, this guide will be best used in conjunction with on-site trainings with your administrative team and staff, as well as direct communication with your CareMonkey Customer Success Manager (CSM). It is expected that this guide will be used as a step by step handguide to your implementation and should be followed in order to help provide a smooth start up process.

Contents:

- i. [First Steps](#)
- ii. [Getting Your School Data in CareMonkey](#)
 1. [IO Classroom Data Sync](#)
 2. [Manually Adding Users to CareMonkey](#)
 - a. [Adding a Single Staff Member](#)
 - b. [Adding Staff in Bulk](#)
 - c. [Adding a Single Student](#)
 - d. [Adding Students in Bulk](#)
 - e. [Adding Student Contacts in Bulk](#)
- iii. [Administrative Level Users](#)

1. [Adding Administrators to CareMonkey](#)
- iv. [Uploading Student and Staff Photos](#)
- v. [Organization and eForm Settings](#)
 1. [General Organization Settings](#)
 2. [Staff Privileges](#)
 3. [Configurations](#)
 4. [Upload Logo](#)
 5. [eForm Categories](#)
- vi. [Creating Groups](#)
 1. [Student Groups](#)
 2. [Staff Groups](#)
- vii. [Creating and Sending eForms](#)
 1. [eForms vs. Templates](#)
 2. [Naming conventions](#)
 3. [Building Your Own eForm](#)
 4. [Using NYC Prebuilt eForm Templates](#)
 5. [Building Your Own Templates](#)
 6. [Creating an Approval Process](#)
 7. [Archiving eForms](#)
- viii. [Viewing and Reporting on eForm Responses](#)
 1. [Visual Breakdown](#)
 2. [Excel Export and Table View](#)
 3. [All Form Responses for One Student](#)
 4. [Self Service eForm Responses](#)
- ix. [Activating eForms for Staff and Guardians](#)
 1. [Activating eForms for Staff Users](#)
 2. [Activating eForms for Guardians](#)
- x. [User Account Management](#)
 1. [Activating an Account as a User](#)
 2. [Updating Contact Information as a User](#)
 - a. [Reporting on Contact Information Changes](#)
 3. [Updating Default Site Language](#)
- xi. [Training and School Roll Out](#)
 1. [Preparing for Start of School](#)

2. [Staging Release](#)
3. [Creating Dummy Accounts for Parents/Staff](#)
4. [Training](#)

First Steps

When you first implement your school with CareMonkey, you will need to have administrative level user accounts activated to assist in the set up and data import for the remainder of your school. These initial users will be responsible for the first wave of setup at your school, and as such should be someone who is willing and able to take control over these procedures. This could be your Principal, AP, or staff member that you will have acting as a system administrator. More often than not, this user will be the current point of contact for the CareMonkey team.

Once your school is ready to move forward with the implementation process, this identified administrator will receive an email notification from the CareMonkey Customer Success Team with a link to set themselves up as the first user account in the school. When they gain access to the school, this user will perform the initial steps to import your students and remaining staff members.

After this primary user has gained access to their account and imported the initial student and staff data, they will work with the Customer Success team to set up a time for an administrative level training. This training will wait until your account is set up to provide you with the opportunity to use and view your own school information to better understand navigation and usage.

Note: This initial email link from the CareMonkey team will expire after 48 hours. If you do not use this link in time, you will need to request a new link from your CSM to gain access to the system

Importing Student/Staff Data

After your school/site user accounts are created, you will need to import your staff and student data to populate your system. You will have a few different ways to pull this data into your CareMonkey system depending on the type of integration you are using. If you are a user of the

IO Classroom system, you will be able to set up an automatic data import. If not, you will have the ability to import your data files for your school to get all of your student and staff information into the system.

Note:

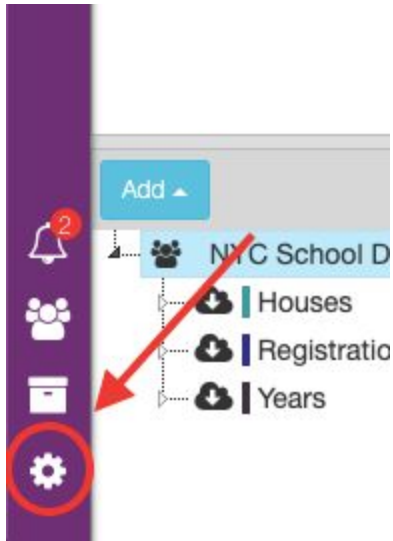
Importing your data into the system is one of the most important initial steps to using the CareMonkey portal . Your ability to send out documentation to parents, guardians, and staff rely on the fact that your information is as up to date and accurate as possible. It would be in your best interest to review your guardian and staff contact information to better understand where your gaps exist. This can be used to develop internal strategies to gather and upload any missing contact data that you will need to distribute eForms to your school community.

IO Classroom Data Sync

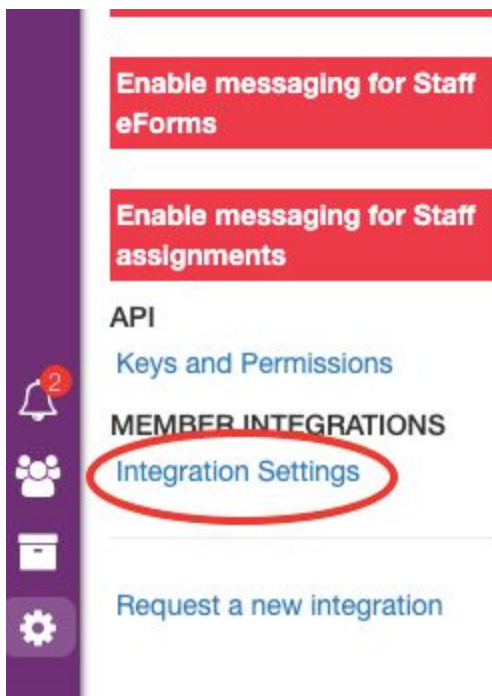
For our NYC users who also use the IO Classroom/Skedula portal, you will be able to set up an automatic data sync that will pull your student enrollment and contact information, as well as your staff users into CareMonkey.

Below you will find a step by step guide showing you how to set up the initial IO Classroom data sync.

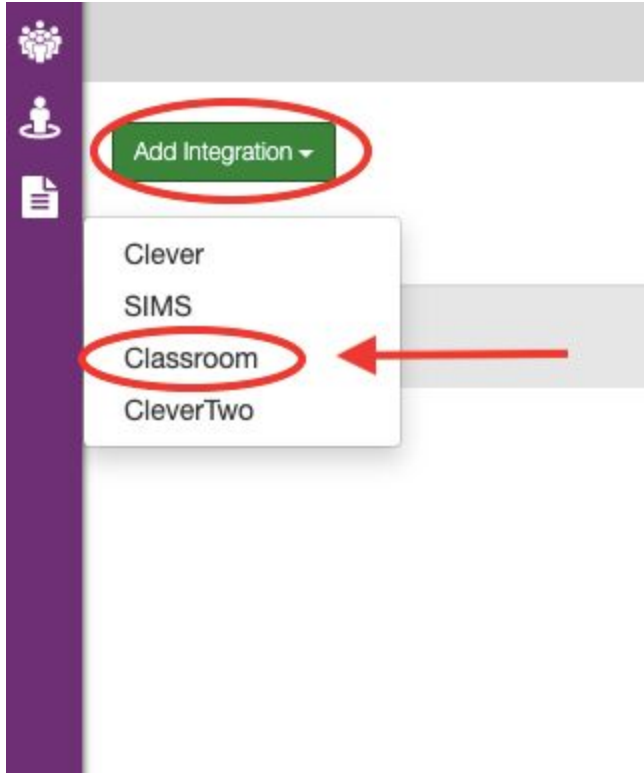
- 1) While logged into your CareMonkey account, click on “Settings” (the gear icon) in the bottom left corner. This is where you will manage your data import, as well as settings that will be addressed in a later section.



- 2) On the Settings page, select “Integration Settings” from the left side control panel below the header for Member Integrations.



- 3) You will then see a green drop down button that says “Add Integration”. As an IO Classroom user, you will select the Classroom Integration.



- 4) A window will appear which will ask you to fill in information such as how often you would like to sync your data, your school DBN number, your IO Classroom login information, and the active term you are looking to sync.

New Integration Configuration

| | |
|-------------------------------------|---------------------------------------|
| Integration Type | Classroom |
| Run Sync Frequency ▾ | |
| DBN (School Id) | Classroom School Id |
| IO Classroom Username | Classroom Username |
| IO Classroom Password | Classroom Password |
| Active Term ▾ | |
| <input type="button" value="Save"/> | <input type="button" value="Cancel"/> |

- 5) After entering your information, you will be able to view your integration set-up, and can edit it at any point by returning to this page and clicking the yellow pencil “Edit” icon on the right side of the screen.



Once this process is complete, you will need to wait 24-48 hours for your first sync to process. After this time has passed, all student information and staff accounts from your IO Classroom portal will be in your CareMonkey system.

Best Practices: IO Classroom Sync

As you begin importing your data for IO Classroom, it is important that you select a run frequency that matches your needs. Since you are pulling in both student and staff data, it is not recommended that you use the manual sync option at first. While your school is getting used to

the system, you would not want to rely on a user manually syncing your data. Setting to one of the automated sync times of two hours, six hours, or once per day will save you time, and will leave you confident that your data is always up to date if you need to send out an important form or document to students or staff. Running the IO Classroom data extractor regularly will also be a part of keeping this data up to date.

As an administrative team at your school, it would also be in your best interest to look through your staff user account pages in IO Classroom and ensure you do not still have inactive staff, or more importantly staff that no longer work at your school, before this first data import into CareMonkey. If you find that you do have non-active staff in IO Classroom, remove their user accounts to prevent inaccurate data from importing into CareMonkey.

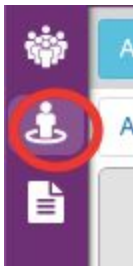
NOTE: For student information from ATS, CareMonkey will reference the RCON file. Parents or guardians identified as contact code 1 and 2 will be flagged as capable of receiving eForms and communications sent by the school. You can review this in spreadsheet format by downloading the file from ATS or opening the download from IO Classroom.

Manually Adding Users to CareMonkey

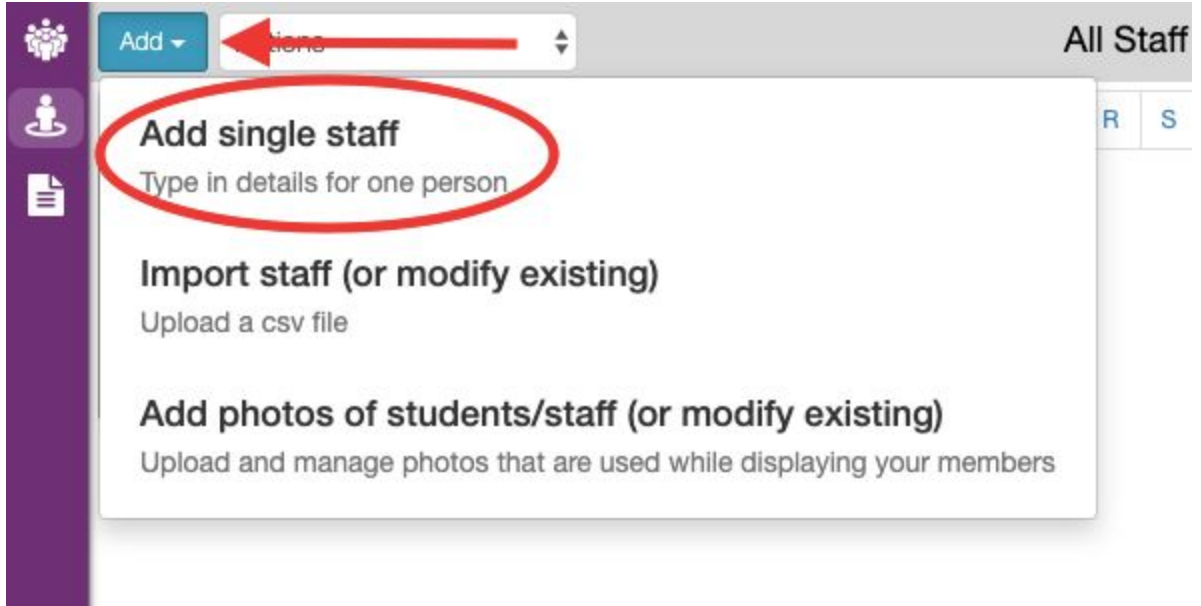
If you are not using an automatic integration tool to import your student and staff data into CareMonkey, you will always have the option to manually import your information into the system. These additions can be done for single students or staff members at a time, or you have the ability to upload in bulk using a CSV format.

Adding a Single Staff Member:

1. Access the “Staff” tab of your CareMonkey account from the panel on the left side of the screen.



2. Once on the “Staff” page showing you all staff at your school, click on the blue “Add” button in the top left corner of the page. You will see a drop down appear, you will select the option to “Add Single Staff”.



3. A pop up will appear asking you to fill in some essential information about this new staff member.

The screenshot shows a "New" staff member form. It has a blue header with the word "New" and a close button (X) in the top right corner. The form contains the following fields:

- Name* (required):
- Email Address* (required):
- Cell Phone Number: Example: +1405551234
- ID: Example: 102934

Below the fields is a checkbox: Manage this profile locally (use only if CareMonkey will not be used for this profile)

Underneath is the section "Add this member to the following eForms" with a table:

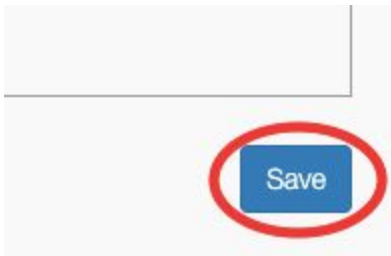
| eForm Name | Status | Actions |
|--|--------|---------|
| <input type="checkbox"/> Check all | | |
| <input checked="" type="checkbox"/> test 2 | | |

At the bottom of the form are "Cancel" and "Save" buttons.

Note: The only fields that are required to add them to your site are for Name and Email Address. For the name field, it is best practice to use the format “Firstname Lastname” to ensure that staff manually created in the system follow the same naming convention as staff that may be automatically imported if you are using an established integration. You do not need to worry about adding a Cell Phone Number or an ID.

You will also see a checkbox for this profile to be managed locally, if this is checked off this user will not receive messages or eForms from the system. If necessary, you can also quickly add this user to any existing eForms by checking them off at the bottom of the page.

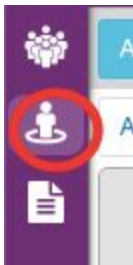
4. Once the information for the user has been added, you will click the blue “Save” button in the bottom right corner of the screen.



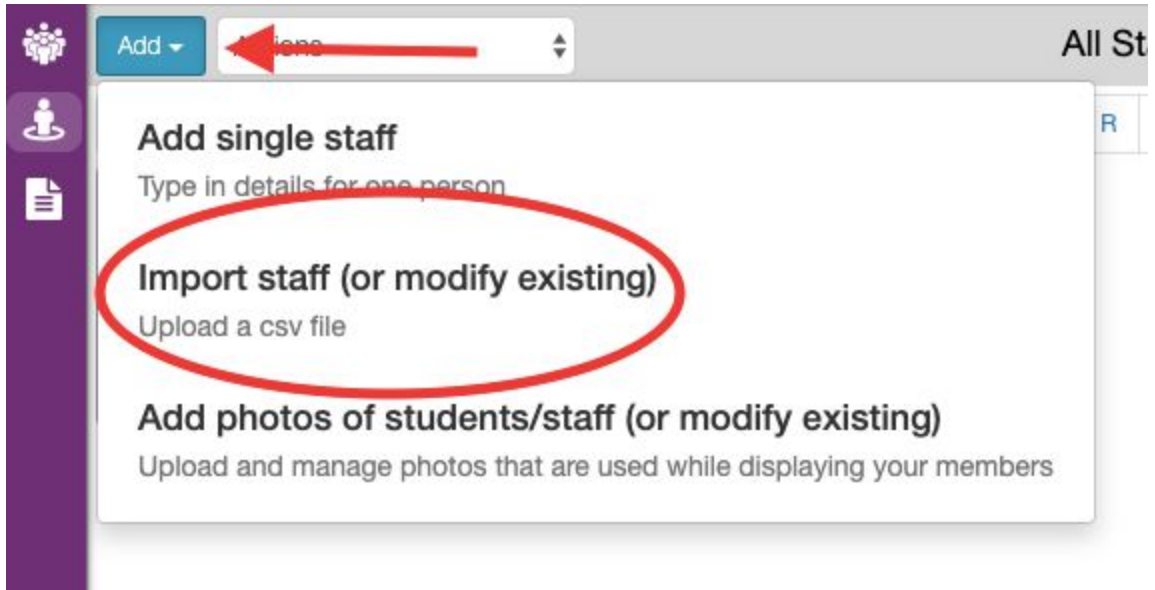
This staff member will now be present in your Staff page.

Adding Staff Members in Bulk:

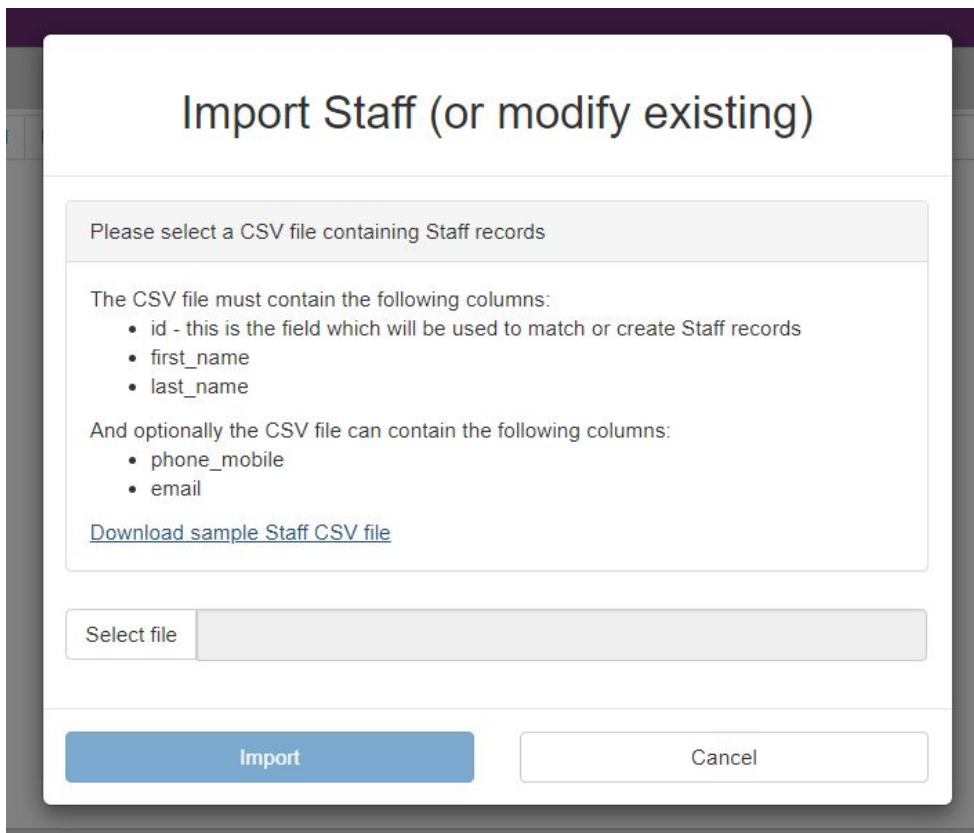
1. Access the “Staff” tab of your CareMonkey account from the panel on the left side of the screen.



2. Once on the “Staff” page showing you all staff at your school, click on the blue “Add” button in the top left corner of the page. You will see a drop down appear, you will select the option to “Import Staff (or modify existing)”.



3. A pop up window will appear asking you to select a file from your computer to upload into the system, with the option to view a sample of what the CSV should look like.



Note: The template will look like the example here:

| | A | B | C | D | E |
|----|-------|------------|------------|--------------------|-------------------------------|
| 1 | id | first_name | last_name | phone_mobile | email |
| 2 | 91205 | Christina | Hodkiewicz | (555) 902-8450 | venicecruickshank@example.com |
| 3 | 97773 | Stevie | Heaney | (555)111-5296 | lynnhand@example.com |
| 4 | 91309 | Latonia | Lynch | (555) 627.534.2186 | meagangreenfelder@example.com |
| 5 | 96822 | Cliff | Botsford | (555) 881-980-3361 | |
| 6 | 94361 | Porsche | Stracke | (555) 955-690-1512 | virginia@example.com |
| 7 | 95619 | Jane | Morney | (555) 223-872-9995 | clint@example.com |
| 8 | 98723 | Steven | Morar | (555) 920-217-7524 | earnest@example.com |
| 9 | 90077 | Maynard | Abernathy | (555) 354-6868 | kristielangworth@example.com |
| 10 | 99242 | Spencer | Bashirian | (555) 519-098-8192 | joel@example.com |
| 11 | 92483 | Lino | Veum | (555) 370.840.8641 | twandawitting@example.com |
| 12 | 94685 | Len | Abernathy | (555) 257-970-8185 | rodrigo@example.com |
| 13 | | | | | |

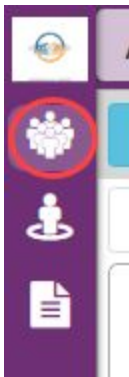
Best Practices:

Although only the first three fields in this import are labeled as “required” it would be in your best interest to include the staff email address as well to ensure that when they are added, they will be able to register and access eForms sent by the school.

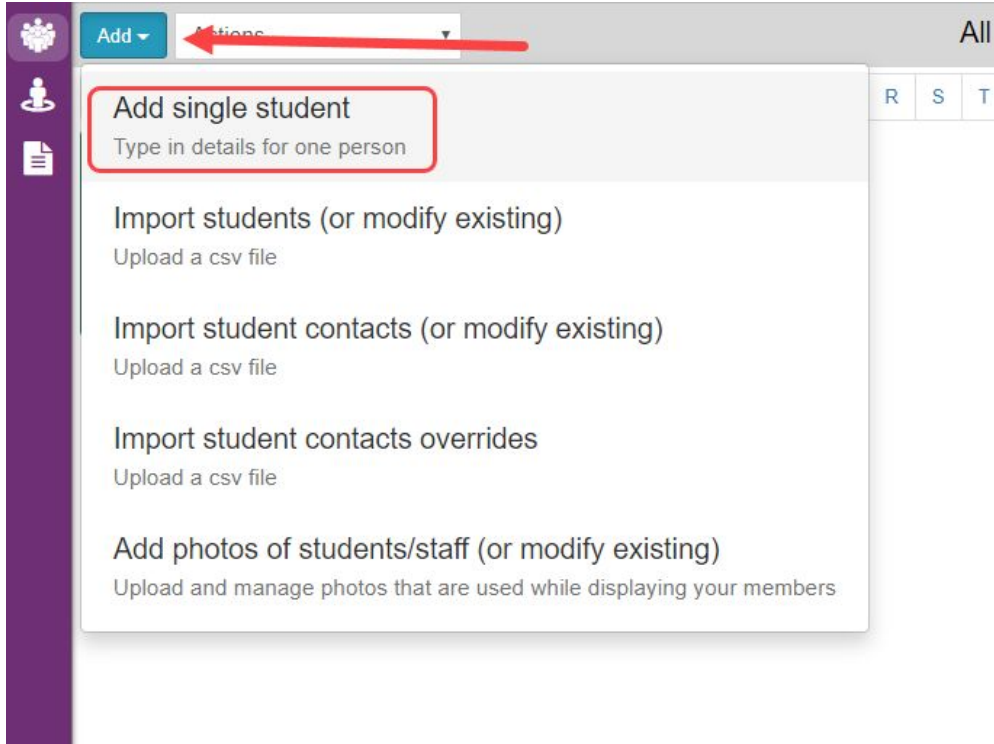
4. After you select the file from your computer, you will then click the blue “Import” button at the bottom of the window. These staff members will now be present in your Staff page.

Adding a Single Student

- 1) Start by accessing the Student tab from the left hand side of the page.



- 2) On the Student page, click on the blue “Add” button, and select the option to “Add single student”.



- 3) You will be given a pop-up window asking for a student first name, last name, and ID number.

New Student

First name

Last name

Student id

After entering the information in the pop-up window, click the blue Create button.

- 4) A card for this student will now appear on the Student tab. To add contact information for this newly created student, click the three line icon on their profile card in the Student page.





- 5) In the student profile page, you will click on the blue button on the right side of the page to "Add Contact".

A screenshot of the "Details for Steve Jobs" student profile page. The page has a blue header with the title "Details for Steve Jobs". Below the header, the page is divided into sections. The "Student" section includes "Student ID: 1010101 edit" and "Manual Tags set: none add / remove". Below this is the "Contact Permissions for Student Record and eForm Access" section, which contains a table with columns for "Contact", "Username", and "Last Comms". The "Contact" column has a blue "Add Contact" button circled in red. Below the table, it says "No contacts found". At the bottom of the page, there is a note: "Red emails indicate the last email sent did not deliver correctly." and a link: "Edit Groups and eForms".

- 6) A window will appear for you to add the first and last name of this contact. You will be prompted to search existing contacts to see if there is a match. (This will be used if you are manually adding a student that his siblings or relatives in the school).


New Contact for Student Steve Jobs

First name 

Last name 


Search Existing Contacts

Please select one of the contacts or "Create New Student Contact" from the following list

| Contact Name | Related Students |
|--|------------------|
|  Create New Student Contact | |

Create

If this is a new contact you will be prompted to create them as a new contact by selecting the contact and clicking the blue "Create" button.

| Contact Name | Related Students |
|--|------------------|
|  Create New Student Contact | |

Create

- 7) You will then be prompted to finalize the contact information for the guardian including the email address or cell phone number that you have on record.

Edit Contact Details of Steve Campbell

First Name

Steve

Middle Names

Middle Names

Last Name

Campbell

Email

Email

Cell Phone

Number

You will also verify what relationship this guardian has to the student, and will identify what type of permissions they will have to view or update the student record.

Permissions on Student Records

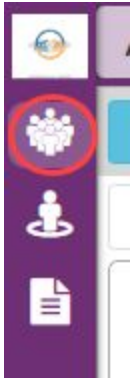
| Student Name | Relationship | Permission |
|--------------|-------------------------------|---|
| Steve Jobs | <input type="text" value=""/> | <input type="button" value="View and Update"/> <input type="button" value="No Permission"/> |

- 8) After the information has been added, click the blue “Save” button at the bottom of the page.

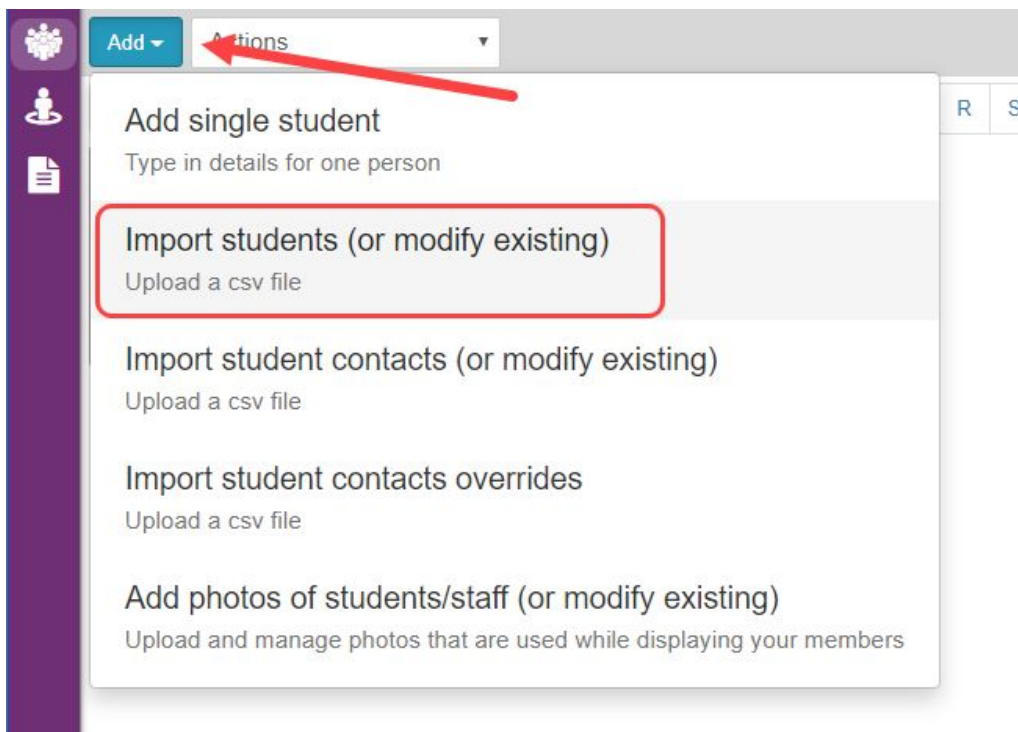
Save

Adding Students in Bulk

- 1) Start by accessing the Student tab from the left hand side of the page.



- 2) On the student page, click the blue Add button in the top right corner. From the drop down menu, select "Import Students (or modify existing)".



- 3) On the next page you will see the required fields that you are required to have in your .csv to upload your students. There is a selection in the middle of the page to download a sample file to show you the required format of each field.

Import Students (or modify existing)

Please select a CSV file containing Students records

The CSV file must contain the following columns:

- id - this is the field which will be used to match or create Students records
- first_name
- last_name

And optionally the CSV file can contain the following fields. These fields need to contain the data of the Students.

- dob - date of birth in the format YYYY-MM-DD
- gender
- middle_names
- preferred_first_name
- preferred_last_name
- phone_mobile
- email

[Download sample Students CSV file](#)

Select file

The sample file will look like the example below.

| | A | B | C | D | E | F | G | H | I | J | K | L | M |
|----|------|------------|-----------|-----------|--------|-------------|----------------------|---------------------|-----------------|-----------------------------|---|---|---|
| 1 | id | first_name | last_name | dob | gender | middle_name | preferred_first_name | preferred_last_name | phone_mobile | email | | | |
| 2 | 4795 | Tristan | Ratke | 8/9/2006 | M | | | | (555) 807-5325 | | | | |
| 3 | 4794 | Trinity | Crooks | 7/2/2005 | F | | Trin | | (555) 680-9775 | | | | |
| 4 | 5270 | Tabitha | Smith | 6/21/2003 | F | Tyler | | Smyth | (555) 141-7170 | argeliafriesen@example.com | | | |
| 5 | 4793 | Stephanie | Smith | 1/17/2002 | F | | | | (555) 823-8544 | | | | |
| 6 | 4792 | Osias | Smith | 11/9/2005 | M | | | | (555) 126-8510 | refugia@example.com | | | |
| 7 | 4955 | Laura | Waelchi | 6/9/1996 | F | Jones | | | (555) 294-3861 | alisha@example.com | | | |
| 8 | 4791 | Jade | Kozey | 7/21/1998 | F | | | | (555) 602-0205 | ernie@example.com | | | |
| 9 | 4790 | Daniel | Metz | 9/30/2007 | M | Able | Dan | Metzz | (555) 763-2977 | freedawaniawski@example.com | | | |
| 10 | 4954 | Christian | Ryan | 2/6/1995 | M | | | | (555) 511-4389 | randellbrekke@example.com | | | |
| 11 | 4953 | Amy | Pfeffer | 12/7/1998 | F | | | | (555) 383-5087 | roselle@example.com | | | |
| 12 | 4952 | Alex | Armstrong | 10/4/1998 | M | | | | (555) 9091-3197 | | | | |
| 13 | | | | | | | | | | | | | |

Note:

The sample template you can download, and the information in the middle of the pop up window, will show you the desired format of each piece of information in this upload. You will need to make sure that you follow the format as it is laid out in these fields to make sure that your file upload is successful and accurate. The phone number field, for example, will need to include parentheses around the area code in order to be read correctly by the system.

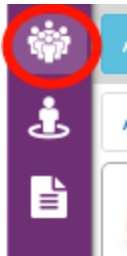
- 4) After you have the file formatted correctly, you will select it from your computer, and click the blue "Import" button at the bottom of the window.



Adding Student Contacts in Bulk

Following the initial upload of students into your system, you will then be able to do a bulk upload of contacts containing the email addresses and cell phone numbers for their parents and guardians.

- 1) Access the Students tab from the left hand side of the page in CareMonkey.



- 2) In the Students page, click on the blue Add button in the top left hand corner. From the drop down menu that appears, select the "Import student contacts (or modify existing)" option.

The image shows a software interface with a purple sidebar on the left containing icons for a group of people, a single person, and a document. At the top, there is a grey header bar with an 'Add' button and a search field containing the text 'itions'. A red arrow points from the search field to the 'Add' button. A dropdown menu is open, listing several options:

- Add single student**
Type in details for one person
- Import students (or modify existing)**
Upload a csv file
- Import student contacts (or modify existing)**
Upload a csv file
- Import student contacts overrides**
Upload a csv file
- Add photos of students/staff (or modify existing)**
Upload and manage photos that are used while displaying your members

On the right side of the interface, there is a partial view of a user profile card with a photo and the name 'Osi'. Above the profile card are tabs labeled 'R' and 'S'. The word 'All' is visible in the top right corner of the header bar.

3) A popup window will appear providing you with information needed in your CSV upload.

Import Student Contacts (or modify existing)

Please select a CSV file containing Student Contact records

The CSV file must contain the following columns:

- id - Contact id. The column used to match Student Contact records
- first_name
- last_name
- member_id - the student id this contact is associated with
- relationship_code - [Available relationship codes and descriptions](#)
- permission - either "view_and_update" or "no_permission"

And optionally the CSV file can contain the following columns:

- phone_mobile
- email

When a contact is related to multiple students, multiple rows for the same contact should be added (the final row's values will be used). Rows with the same "id" are considered to be the same contact.

The member_id column should match the student id. Either from an integration or imported via the student CSV import.

[Download sample Student Contact CSV file](#)

Select file

Import Cancel

One of the required fields in this upload is a relationship code indicating how the guardian is connected to the student. Clicking on the blue link for "Available relationship codes and descriptions" will provide you with the list of codes CareMonkey will use to identify guardians.

The CSV file must contain the following columns:

- id - Contact id. The column used to match Student Contact records
- first_name
- last_name
- member_id - the student id this contact is associated with
- relationship_code - [Available relationship codes and descriptions](#)
- permission - either "view_and_update" or "no_permission"

And optionally the CSV file can contain the following columns:

This will provide you with the following codes. These are the only codes /relationships that can be uploaded:

CareMonkey_relationships

| code | description |
|-------------|-----------------------------|
| PAM | Mother |
| PAF | Father |
| FAM | Other Family Member |
| GRP | Grandparent |
| REL | Other Relative |
| SWR | Social Worker |
| RLG | Religious/Spiritual Contact |
| CHM | Childminder |
| FOF | Foster Father |
| FOM | Foster Mother |
| HTC | Head Teacher |
| STF | Step Father |
| STM | Step Mother |
| TCH | Teacher |
| DOC | Doctor |
| CAR | Carer |
| OTH | Other Contact |

For your own reference, you will also be able to download a sample template for the CSV file at the bottom of the window.

This template will have the following fields:

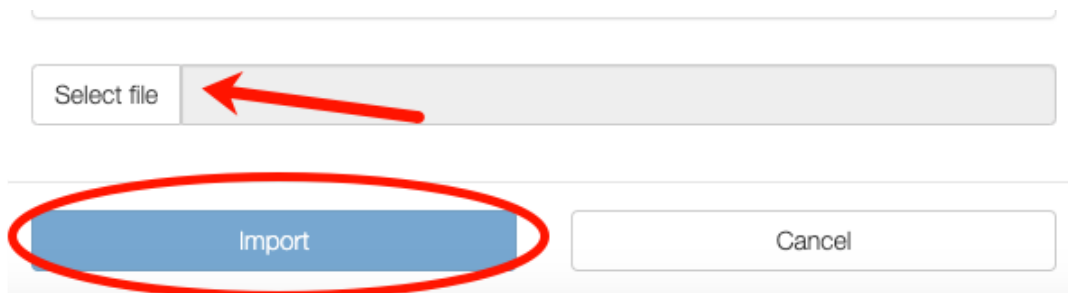
SampleImportContacts

| id | first_name | last_name | member_id | relationship_code | permission | email | phone_mobile |
|----|------------|-----------|-----------|-------------------|-----------------|--------------------|--------------|
| 44 | Jane | Ratke | 4795 | M | view_and_update | jane@test.com | 412123123 |
| 44 | Jane | Ratke | 4794 | O | no_permission | jane@test.com | 412123123 |
| 45 | Jake | Smith | 5270 | F | view_and_update | jake@test.com | 412123124 |
| 45 | Jake | Smith | 4793 | F | view_and_update | jake@test.com | 412123124 |
| 45 | Jake | Smith | 4792 | F | view_and_update | jake@test.com | 412123124 |
| 46 | Moli | Smith | 5270 | M | view_and_update | moli@test.com | 412123125 |
| 46 | Moli | Smith | 4793 | M | view_and_update | moli@test.com | 412123125 |
| 46 | Moli | Smith | 4792 | O | no_permission | moli@test.com | 412123125 |
| 47 | Sierra | Smiggles | 4792 | M | view_and_update | sierra@test.com | 412123126 |
| 48 | Carla | Waelchi | 4955 | M | view_and_update | | 412123127 |
| 49 | Betty | Kozey | 4791 | M | view_and_update | | 412123128 |
| 50 | Iris | Metz | 4790 | M | view_and_update | metz.iris@test.com | |
| 51 | Bryan | Ryan | 4954 | F | view_and_update | b.ryan@test.com | |
| 52 | Iris | Pfeffer | 4953 | M | view_and_update | | |
| 53 | Ami | Armstrong | 4952 | M | view_and_update | ami@test.com | |

Note:

The first column of this import file will be the “Contact Id”. This is a unique identifier for each parent and guardian that exists in the system. A parent or guardian will have the same contact ID number for each student they are attached to, meaning if a parent has two or three children in the school they will display multiple times with the same contact ID.

- 4) After developing your import file, select the file from your computer using the “Select File” button, followed by the blue “Import” button at the bottom of the window.



Administrative Level Users

After you have imported your school data, including students and staff users, you may identify additional users that will have administrative level access to the system.

There are two classifications of administrative users on CareMonkey, a General Administrator, and a Super Administrator. They share the same functions in the system for the most part, but the Super Administrator has some additional tools the General Admin does not. However, many of these Super Administrator tools do not currently apply to NYC clients. The main difference is that Super Administrators have the ability to edit and modify other administrators in CareMonkey.

Below you will see a chart showing the functions of General Administrators and Super Administrators:

| Administrative Function | General Administrator | Super Administrator |
|---|-----------------------|---------------------|
| Can create forms. | ✓ | ✓ |
| Can send SMS text messages and view the school balance. | ✓ | ✓ |
| Can send emails. | ✓ | ✓ |
| Can grant ability to take roll for attendance on a fieldtrip. | ✓ | ✓ |
| Can add rights to staff. | ✓ | ✓ |
| Can make forms active. | ✓ | ✓ |
| Can create or modify other administrators. | | ✓ |
| Can view/generate API keys. (Non-NYC) | | ✓ |
| Can setup and disconnect payments through Stripe. (Non-NYC) | | ✓ |
| Can mark Synergetic contact updates as applied. (Non-NYC) | | ✓ |

Adding Administrators to CareMonkey

Adding a new administrator to CareMonkey will first require that they already exist as a staff member in your system. This will mostly be handled by your IO Classroom data sync as long as they were listed as a staff member in your school. If they were not present during your initial data import, you have the option to add them manually. Click [HERE](#) to view that section of this user guide.

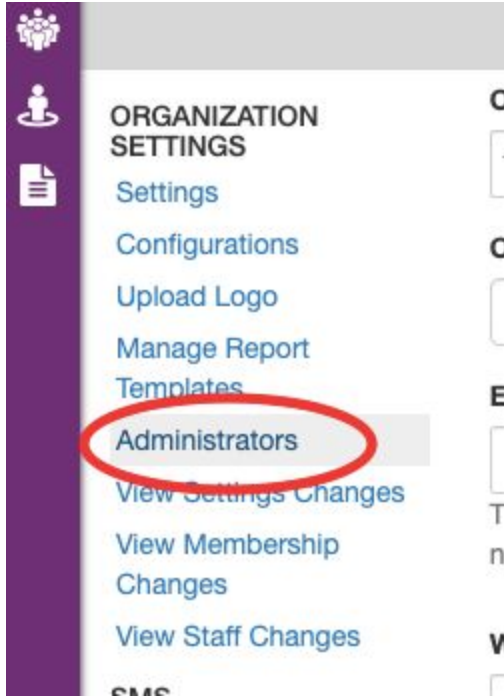
NOTE: To add a user as an administrator you will need their unique CareMonkey “username”. This will NOT be the email address of the user. These can be found by navigating to the homepage and selecting the Staff tab. If you click on the three lines icon on the bottom right of the staff profile picture, you will be provided with their unique username.

Follow the steps below to identify an existing staff member as an administrator:

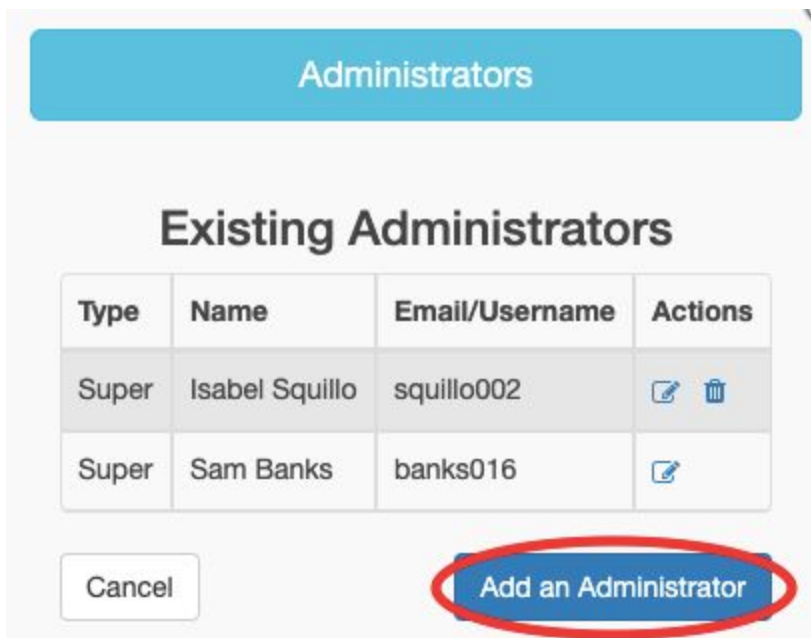
- 1) While logged into your CareMonkey account, click Settings (the gear icon) in the bottom left corner of the screen.



- 2) In the Settings page, select the Administrators tool on the left side of the page under “Organization Settings”.



- 3) A pop up window will appear showing you the list of administrative users that are present in your school. To add a new administrator you will click on the blue “Add an Administrator” button in the bottom right corner of this window.



- 4) A new window will appear asking you to enter the username of the individual that you would like to add as an administrator. This will **NOT** be the email address of the user, it

will be the unique username generated by the system.

After entering the username of the individual, you will select the type of administrator you would like them to be (General or Super). If you are unsure what type of administrative privileges you would like to give to a user, you can revisit the table of rights provided to a General Administrator as opposed to a Super Administrator [HERE](#).

New Administrator

Username*

A user with this Username must already exist within this organization

Administrator Type

Super Administrator

General Administrator

General Administrators can do everything except:

- Create or modify other administrators
- View or generate API keys
- Setting up or disconnecting payments through Stripe
- Marking Synergetic contact changes as applied

Cancel **Create Administrator**

5) Finally, you will click the “Create Administrator” button.

At any point, you can always go back and edit existing administrators by going back to the Settings page and clicking on the Administrators tool. In the first window that appears, you will see a list of all current users listed as admins. On the right side next to each of them you will see an edit icon as well as a delete icon. Using these you can remove administrative privileges from a user, or change the type of administrative access they have.

Existing Administrators

| Type | Name | Email/Username | Actions |
|-------|----------------|----------------|---|
| Super | Isabel Squillo | squillo002 |   |

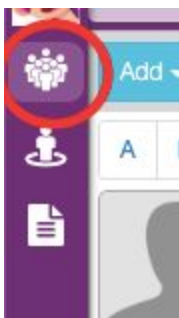
Uploading Student and Staff Pictures

Uploading your student and staff pictures to your site will allow for a quick and easy visual reference when it comes to adding students to digital forms, or for tracking who has yet to respond to a form. These photo uploads are done in bulk, and can be performed multiple times to ensure that new students, or students that have new pictures taken every year can be updated quickly and efficiently.

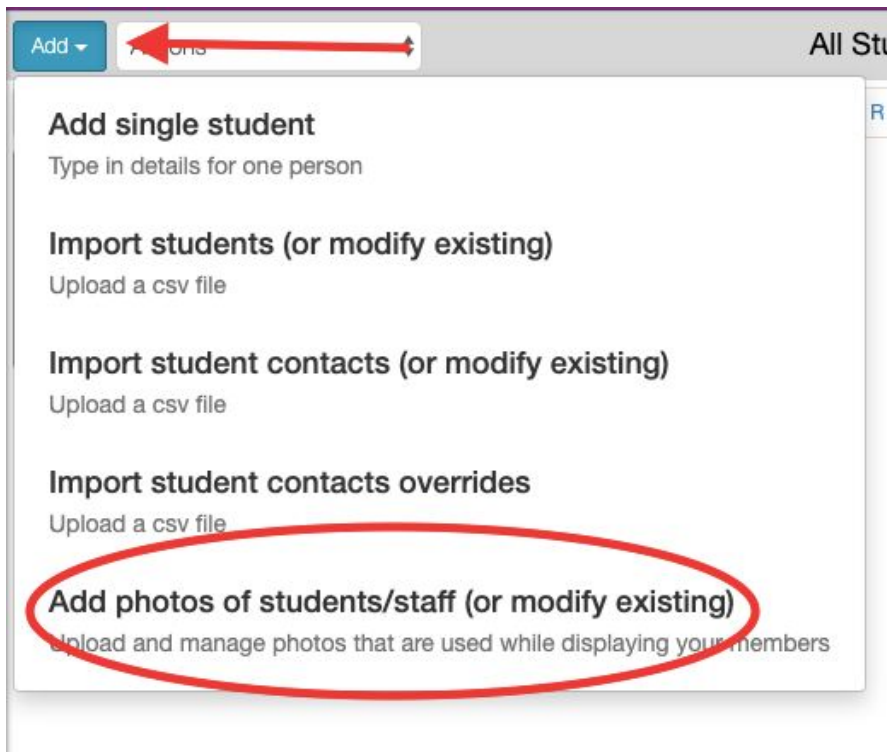
Note: Bulk uploads of student photos are done by matching the file name of each picture to the student ID number for each profile in CareMonkey. As long as your student photos are labeled as StudentID#.jpg, your photos will auto-connect to the correct students. The same is true for staff photo uploads, and will instead use the file name FirstName_LastName.jpg, allowing you to follow the same procedure for both uploads.

Below are the steps you need to follow to add your student photos:

- 1) From the CareMonkey home page, click on the “Students” tab on the left side of the screen.



- 2) When on the Students tab, click on the blue drop down tab that says, “Add”. In this drop down menu you will be given a few options for what you would like to upload, you will select the option that says, “Add photos of students/staff (or modify existing)”.



- 3) On the “Upload Profile Photos” page, you click on the green button that says, “Add Files”. You will then be able to search your computer for a file folder of all student photos from the school. You will also be able to manually drag and drop these picture files into the space at the bottom of the page.

Upload Profile Photos

You can upload your student photos here to display on each care profile.

1. This page has opened in a new tab so that the upload can take place in the background.
2. Photo filename should be: profile-id.jpg (eg. if student's ID is 123456 then the photo file should be named 123456.jpg for that student).
3. Ensure you have loaded the profile-id into the Profile ID field of the Profile Requests.
4. **Upload photos by:**
 - o Clicking the green 'Add files...' button, navigating to the folder with all the photos and either clicking upload or right clicking to select all within that folder.
- or
- o Dragging and dropping image files from a File Explorer window to this current screen (Chrome browsers will only recognise the first 100 files dropped in, so please use the technique above if you have more than 100 files).

5. Once photos are dragged in or selected by clicking the green 'Add files...' button, they will resize automatically
6. Press 'Start upload' button to upload the photos

During the upload, images will be reduced in size, cropped to the centre and automatically matched to the correct care profile based on the Profile ID.

+ Add files... **Start upload** **Cancel upload** **Delete** **Delete all**

Drag and drop photos into here then click Start Upload above

We're

4) Once your folder has been selected, you will click the blue, "Start Upload" button.

Upload Profile Photos

You can upload your student photos here to display on each care profile.

1. This page has opened in a new tab so that the upload can take place in the background.
2. Photo filename should be: profile-id.jpg (eg. if student's ID is 123456 then the photo file should be named 123456.jpg for that student).
3. Ensure you have loaded the profile-id into the Profile ID field of the Profile Requests.
4. **Upload photos by:**
 - o Clicking the green 'Add files...' button, navigating to the folder with all the photos and either clicking upload or right clicking to select all within that folder.
- or
- o Dragging and dropping image files from a File Explorer window to this current screen (Chrome browsers will only recognise the first 100 files dropped in, so please use the technique above if you have more than 100 files).

5. Once photos are dragged in or selected by clicking the green 'Add files...' button, they will resize automatically
6. Press 'Start upload' button to upload the photos

During the upload, images will be reduced in size, cropped to the centre and automatically matched to the correct care profile based on the Profile ID.

+ Add files... **Start upload** **Cancel upload** **Delete**

Note: If you choose to use the drag and drop method for adding photos, you will need to limit

the amount you do in batches. The browser will run into some slower loading and processing times if you use more than 100-200 photos at a time.

Organization and eForm Settings

The options found in this section of the guide will help establish some of the standardized information about your school site, and will be broken into Organization Settings and eForm Settings.

Your Organization settings will focus on the way your school site will operate within CareMonkey, including school logos, default parent permissions, and certain display information.

Your eForm settings here will focus on how your forms and documents will be classified, and will help you later in your implementation to better organize forms and documents you have in the system.

General Organization Settings

These settings control display information about your school/site, as well as allow you to set certain staff privileges. These settings are accessed by clicking on the Settings (gear) icon in the bottom left hand corner of the page. On this page you will fill out the basic information related to your school, with a few fields designated as required by an asterisk.

Your main required fields are:

Organization Name: This is your school name or number. It will show on the site and in documents you send out as the name of your school.

Organization Type: This is a dropdown field with a number of options. You will want to select Education (Non-Tertiary).

Administrator Name: This is the name of the primary administrator at your school, more often than not it will be the Uber Administrator or principal. This name will appear on emails sent to guardians and school staff.

Administrator Email: This will be the email used to send out eForms and communication to parents and other staff. It is encouraged that this be a school/office email account linked to the main office, not necessarily the personal or work email of the primary administrator. (For example mainoffice@elementaryschool.com). A benefit of using a generic email here is that if it

is shared, multiple people can check for any bounce backs from incorrect emails or phone numbers.

Additionally, you will have required fields for country, state, time zone, and currency that are required fields.

Staff Privileges

Below your general organization settings, you will see a section for applying additional user rights for your staff members.

Staff Privileges

- Allow staff to create eForms
- Allow staff to send SMS messages
- Allow staff to send Emails
- Allow staff to take roll calls

Checking off these unique staff user rights will allow ALL of your teachers and non-administrative staff to perform a specific function. Until they are checked off, these user privileges like create an eForm, or sending SMS texts to parents are **ONLY** available to administrators.

Note:

When staff are provided the ability to create their own eForms, an administrator will still be required to enable them before they are sent.

Best Practices: Staff Privileges

It is highly recommended that your staff are not given the ability to create their own eForms until the administrative team at the school has been well trained on the use of the system and internal processes have been identified and agreed upon. You would need to ensure that a procedure is identified for naming conventions, eForm categories, and how you would like to centralize the collection of the data gathered from your eForms. The goal in this practice is to

ensure that you are able to have a consistent procedure among all school staff to distribute and collect eForms distributed to anyone in your school community.

Configurations

This section is accessed from the Settings page by selecting “Configurations” from the left side panel. In your Configurations page, you will choose what type of access parents have to update student record information, as well as what type of default access parents will have to the system. One thing to keep in mind, these are global settings for your whole school, but you will always have the ability to update individual students manually through the student profile if you have a specific need to.

The first section is focused on student record information specifically. This contains information such as address, emergency contact information, and health or safety alerts. (Example below).

| Configurations | | |
|--------------------------------------|------------|-----------|
| Student Record Configuration | | |
| Personal Details | Don't Show | View Only |
| Addresses | Don't Show | View Only |
| Parent/Guardian Contacts | Don't Show | View Only |
| Other Emergency Contacts | Don't Show | View Only |
| Emergency Information | Don't Show | View Only |
| Dietary Requirements | Don't Show | View Only |
| Medical Conditions and Safety Alerts | Don't Show | View Only |

Note: If any of the above configurations are set to "View and Edit" then student records verification will be automatically enabled. This means all contacts will be asked (via email/SMS) to verify the correctness of the student record information.

For each information type you can choose the options, “Don’t Show”, “View Only”, or “View and Edit”. If anything is set to the “View and Edit” option, it automatically enables parents or guardians to verify and edit their information.

At the bottom of the page, you will also have access to define the default permissions for parents and guardians.

| Default Contact Permissions | |
|-----------------------------|---|
| Mother | <input type="button" value="No Permission"/> <input type="button" value="View and Update"/> |
| Father | <input type="button" value="No Permission"/> <input type="button" value="View and Update"/> |
| Parent | <input type="button" value="No Permission"/> <input type="button" value="View and Update"/> |

This will allow you to limit which parent or guardian has the ability to make responses to digital eForms. These are general settings applied to all students in the school, but each student can be managed individually if you need to make specific changes.

Best Practices: Student Record Configuration

The information that pulls in for your students will be coming directly from ATS. Specifically CareMonkey will pull in emergency contact information, guardian information, and address information from ATS. It would be advised to not allow parents to make direct updates to this information through their CareMonkey accounts as this would cause a mismatch between the official ATS records and what shows in the student profile page.

With this information in mind, CareMonkey suggests that you set the student profile configurations to “Don’t Show”. This will prevent parents from making updates to contact information in the CareMonkey profile, which will not feed directly back to ATS.

| Configurations | |
|--------------------------------------|---|
| Student Record Configuration | |
| Personal Details | <input type="button" value="Don't Show"/> <input type="button" value="View Only"/> <input type="button" value="View and Edit"/> |
| Addresses | <input type="button" value="Don't Show"/> <input type="button" value="View Only"/> <input type="button" value="View and Edit"/> |
| Parent/Guardian Contacts | <input type="button" value="Don't Show"/> <input type="button" value="View Only"/> <input type="button" value="View and Edit"/> |
| Other Emergency Contacts | <input type="button" value="Don't Show"/> <input type="button" value="View Only"/> <input type="button" value="View and Edit"/> |
| Emergency Information | <input type="button" value="Don't Show"/> <input type="button" value="View Only"/> <input type="button" value="View and Edit"/> |
| Dietary Requirements | <input type="button" value="Don't Show"/> <input type="button" value="View Only"/> <input type="button" value="View and Edit"/> |
| Medical Conditions and Safety Alerts | <input type="button" value="Don't Show"/> <input type="button" value="View Only"/> <input type="button" value="View and Edit"/> |

It would be best to provide your parents and guardians with the Blue Card eForm, and set it to notify staff at the school who can update ATS with the information they provide. This will be

covered in a later section.

Upload Logo

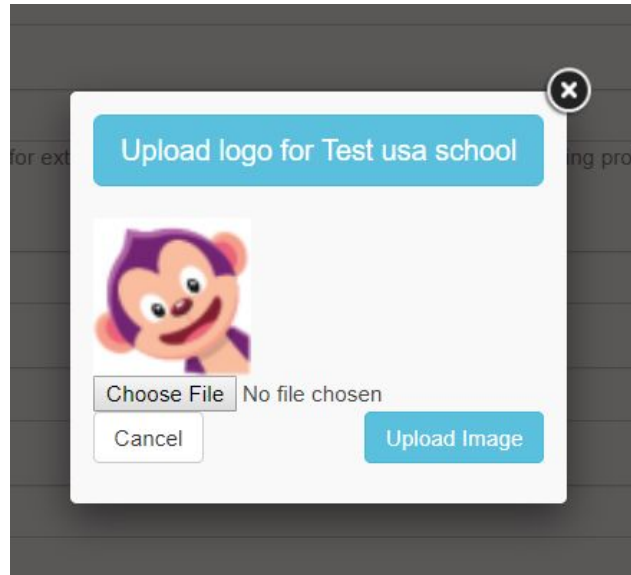
This function will allow you to add your school logo to any eForms or communications that are sent out through CareMonkey.

Follow the steps below to add your school logo:

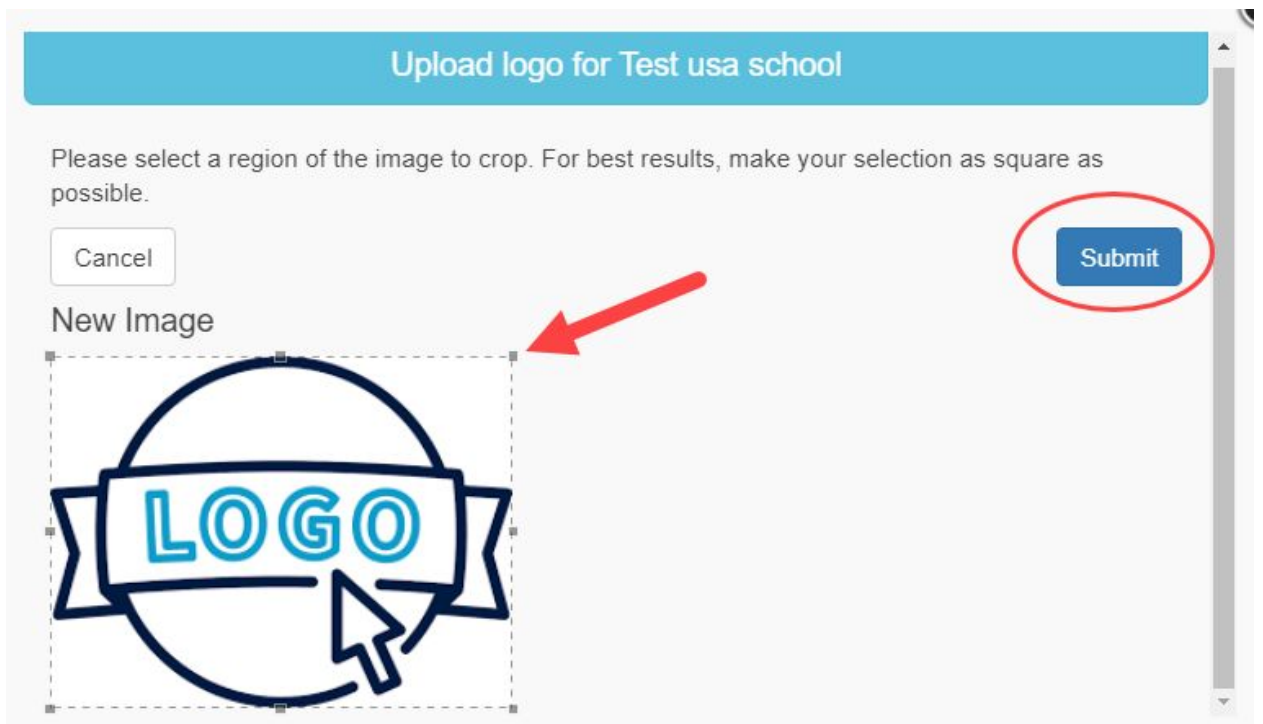
- 1) From the Settings page (accessed through the gear icon in the bottom left corner), click the “Upload Logo” option from the left side navigation panel.



- 2) A new window will pop up. In that window, you will click on the option to “Choose File”. This will allow you to search your computer for a saved image of your school logo.



- 3) After selecting your logo, click on the blue “Upload Image” button. You will be asked to re-size and fit the image.



Using the tools provided on the screen you can shrink or expand your selection to include your entire logo. Once you are satisfied, you will click the blue “Submit” button in the top right corner of the pop up window.

Note:

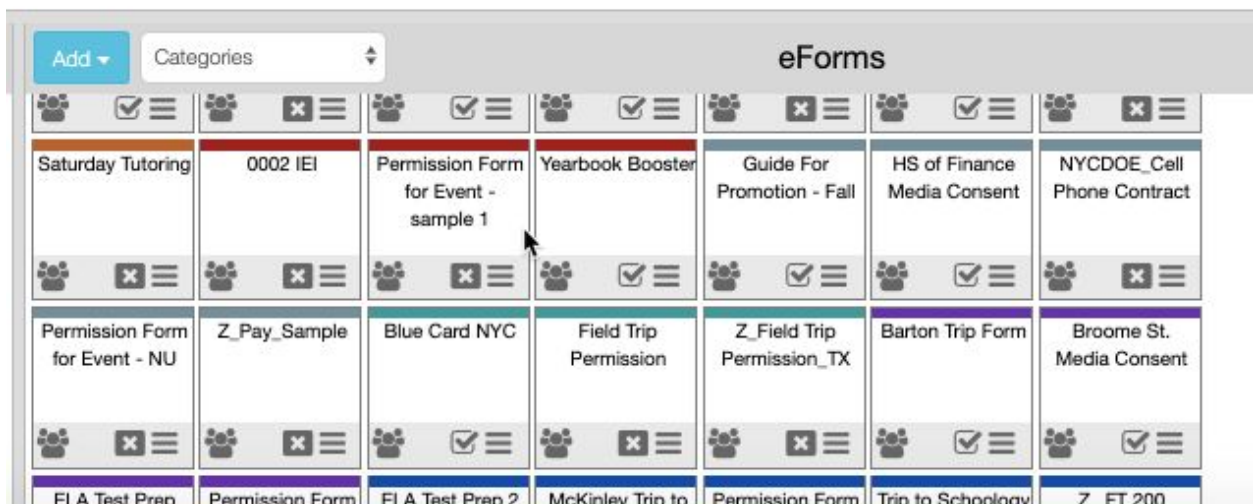
It is recommended that the image you use for your logo upload is square.

eForm Categories

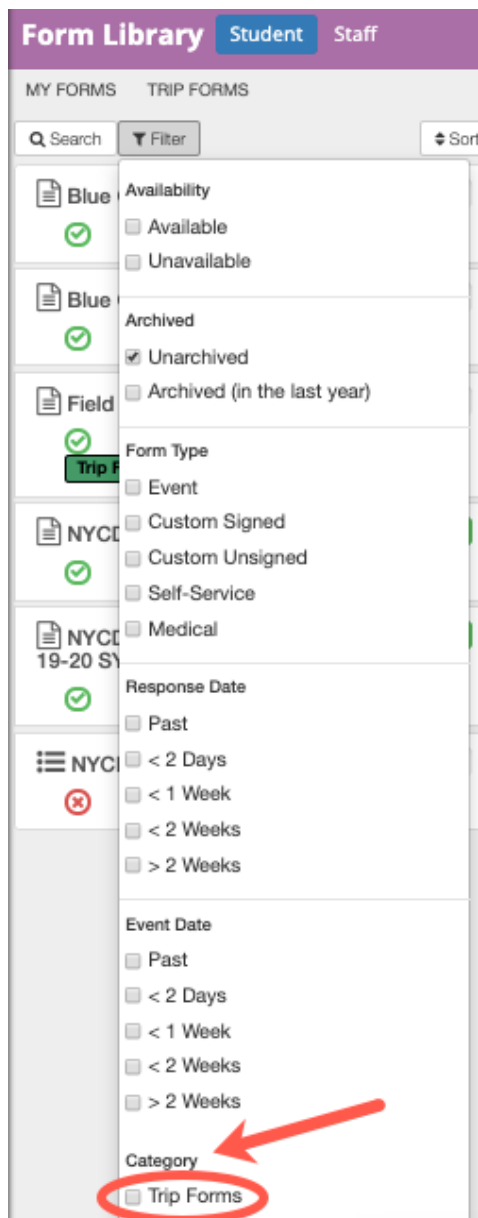
As you begin creating more eForms for use at your school site, it is advised that you start classifying your forms in unique categories. This will allow you to color code forms that are related to a certain topic or function at your school. For example forms for newly admitted students, or newly hired staff may appear bordered in green when you look at your staff or student eForms. These categories will also make it easier for you to filter and search the site for specific forms you are looking for.

Building out your eForm categories will allow you to use the category names as a filtering tool later when you look to distribute an eForm to staff or parents and guardians, or if you are looking to view responses to eForms.

In your eForms section on the student or staff pages you will see the option to group your documents by category type. This will organize your forms in a way that all of those with a similar color are a part of the same category.



When you later view eForm responses, you will be able to use the name of the categories you have created to quickly filter your eForms to find the ones that you need.



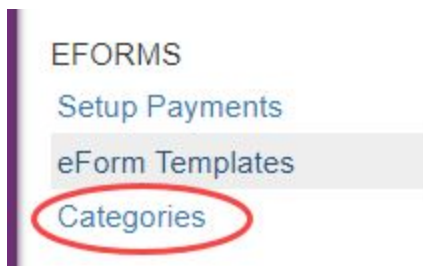
Note:

Because your eForm categories will be so important in organizing your digital documentation, It is recommended that the categories used by your school are created and used consistently from the beginning. It will be easier to use a standardized practice from the start of your implementation, than it would be to develop a new procedure and labeling process after a number of your forms have already been created and labeled. If your school allows staff to create forms, this should be shared with them as well so all forms will be categorized

consistently.

To add eForm categories, follow the steps below:

- 1) From the Settings page (accessed through the gear icon in the bottom left corner), click on the Categories tool in the EFORMS section.



- 2) You will be brought to a page allowing you to “Migrate Colors to Categories”, as well as add “New Categories”

ORGANIZATION SETTINGS

- Settings
- Configurations
- Upload Logo
- Manage Report Templates
- Administrators
- View Settings Changes
- View Membership Changes
- View Staff Changes
- SMS
- Manage SMS
- EFORMS
- Setup Payments
- eForm Templates
- Categories

Form Categories

These are used to help classify, sort and filter Forms in the Form Library.

We recommend only having approximately 10 categories used for student forms and 10 categories used for staff forms.

It is possible to migrate all of your existing eForm colours over to categories. This is a one-off function and can then be edited after it has been done.

This is recommended if you are currently using colours as a method of categorisation.

[Migrate Colours to Categories](#)

| Name | # forms |
|--------------|---------|
| New Category | |

The Migrate Colors to Categories button will allow you to create color coded categories for each of the forms you have already created. This would be best used if you had started creating your own school specific forms, but had not yet assigned categories to your school.

- 3) Clicking the “New Category” option will allow you to create a new eForm category for your school. Only Administrators can create new categories.

ORGANIZATION SETTINGS

- Settings
- Configurations
- Upload Logo
- Manage Report Templates
- Administrators
- View Settings Changes
- View Membership Changes
- View Staff Changes
- SMS
- Manage SMS
- EFORMS
- Setup Payments
- eForm Templates
- Categories

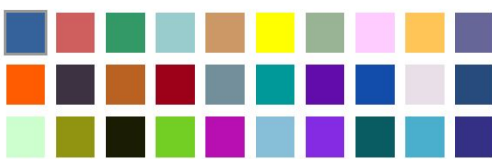
MESSAGING

- Enable messaging for Students eForms
- Enable messaging for Staff eForms
- Enable messaging for Staff assignments

New Category

Name:*

Select the colour to use for the category



Add Forms to this Category

Student Forms

Sample Student Contact Form

Staff Forms

test 2

[Create Category](#)

As you create a new category, you will be able to choose a unique color for each category type, as well as have the ability to add existing forms to the category you are creating.

- 4) Once you have filled in your new category name, assigned a color, and chosen any existing forms to fill in that category, you will click the green Create Category button at the bottom of the page.

Sample Student Contact Form

T-Shirt Size Question

Staff Forms

test

test 2

Create Category

Best Practices: eForm Categories

The goal of using the eForm categories in CareMonkey is to make your process of searching for and using forms, easier. With that in mind it is recommended that you try to limit the number of staff and student forms to ten each. It would be best to think about the intended use of each form you are sending home and create a category that fits with these uses, or even thinking about forms that require a similar workflow, or are sent home at the same time.

For example, "School Forms" could be a less effective category name since all of your forms would fit within it. "Student Permission Slips" could be a good category name since it is specific enough for anyone to know what types of forms are in it, but not broad enough to be open for staff to add items here that do not fit with the theme. "New Student Forms" would also be a good category name, since this category is specific enough for you to know it will contain all of the eForms required for a newly admitted student such as a school handbook, a behavior policy form, and a uniform size form.

A few recommended categories to use are:

- Trip Forms
- Consent Forms
- Memos
- Flyers
- Staff Request Forms

These samples follow the guidelines of being specific enough to let you know exactly what types of forms are contained in each, but not so specific that it will prevent you from properly managing your eForms as you begin to create and use more.

We suggest that you copy this [form](#) and add the specific categories for your school so your entire staff understands the categories.

Creating Groups

Creating groups for staff members and students in CareMonkey will allow you to easily add entire groups of individuals to new eForms that need to be sent out. This will make things easier if you need to send out forms to an after school club or sports team, for example. Instead of manually dragging students into the forms, you can make a group for them in CareMonkey and simply add the group to the form. If you have multiple permission slips or event forms going home to these groups, it will help you save time.

Student Groups

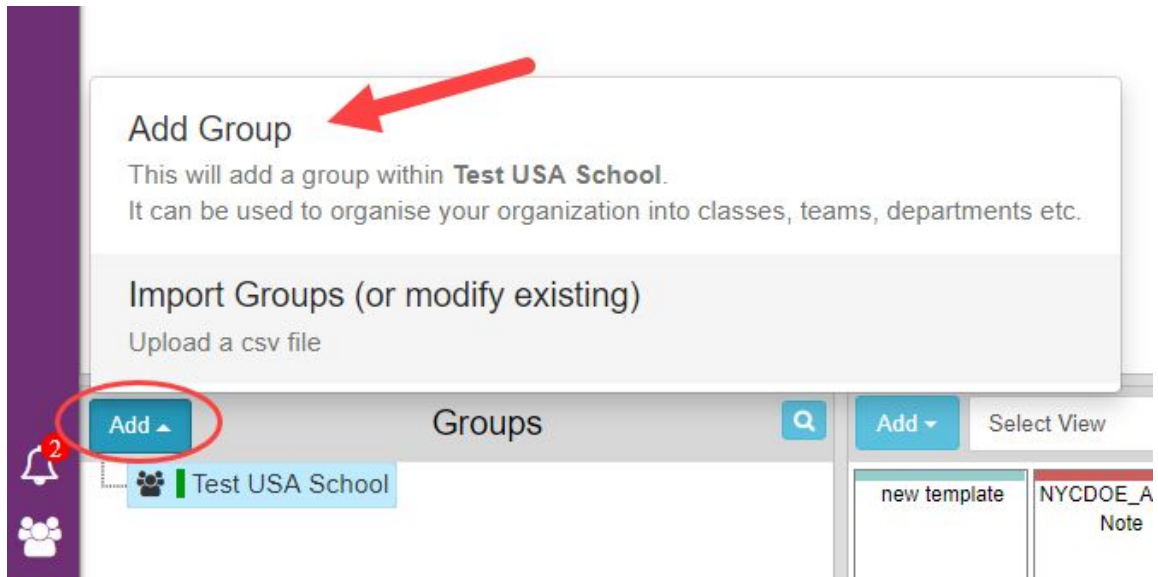
SIS Created Groups - IO Classroom schools will have groups of students imported from IO Classroom. This will include official class groups, courses and sections, and cohort groups. These groups cannot be edited in CareMonkey, but will be updated with each data sync.

Manual Creation

1. Start by navigating to the Students tab located on the left side of the page on your CareMonkey home page.



2. At the bottom left hand side of the page, you will see a section labeled Groups. To the left of this will be a blue button labeled “Add”. To manually create your group, you will select the “Add Group” option from this drop down.



3. On the next screen you will begin by entering the basic information for your group. You will start by entering the name of the group, a timezone, the “Parent Group” that this will live under, and whether or not staff members assigned to the group will share contact information.

Add a subgroup

| | |
|--|---|
| Group Name* Example: Year 7A | Timezone* (GMT-05:00) Eastern Time (US & Canada) |
| Parent* Test USA School | |
| <input checked="" type="checkbox"/> Display staff contact details to other staff | |

Below the basic group information, you will be presented with a checkbox to “Display staff contact details to other staff”. This will allow the staff members at your school to see the name and contact information of other staff members who are assigned to this group.

Note: The “Parent” group function will allow you to use this to create smaller subgroups within your school. For example, your official class groups will be a subgroup of all of the students in your school. Using this logic, you will be able to further identify smaller subgroups of students that may require unique eForms to that group. For example, Clubs may be used as a parent group with subgroups of Chess Club, and Debate Club.

4. At the bottom of the page you will identify how you will choose to add students to your groups.

Member Selection

Drag and Drop (Manual Group)

To add members you must drag and drop the individual members or groups onto this sub-group.

Filtered Members (Smart Group)

Drag and Drop (Manual Group): This option will allow you to simply click and drag student cards into the group adding them one at a time, or in batches by clicking multiple student profiles until they turn green then dragging them to the group name. This group will not be updated automatically, students can only be added or removed manually.

Filtered Members (Smart Group): This option will eliminate the manual work involved in dragging and dropping. Using this option will allow you to set filtering parameters that will automatically flag a student as belonging to this group. This can include student profile flags, such as being the oldest member of a family if they have multiple students in the school, as well as flagging them based off of responses to other eForms. These groups will be automatically updated as student data changes to meet the criteria.

Filtered Members (Smart Group)

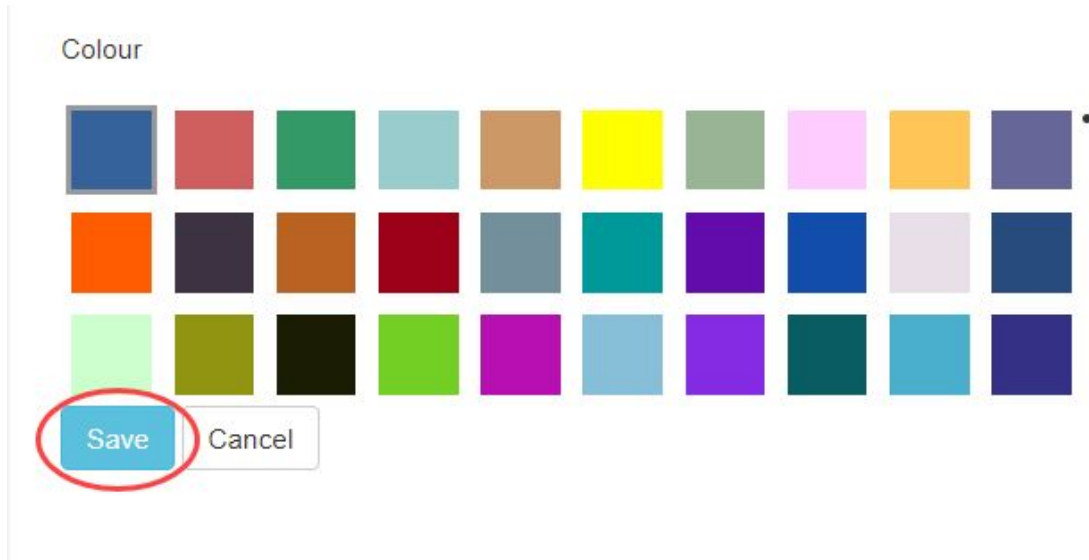
By selecting this option, only members that have these specific attributes will be included.

The screenshot shows a configuration interface for a 'Filtered Members (Smart Group)'. It features a tree view of attributes that can be used to filter members. The 'eForm responses' section is checked, and 'eForm - Sample Student Contact Form' is selected. Other attributes include 'Hierarchy' (All members in Test USA School), 'Request' (is the eldest in the family, has email problem, has a profile, this member is also a group carer, is locked down for privacy reasons, is managed locally, does not have a profile, this member is marked as a student), and 'Manual tags'.

Profiles must have ALL these attributes (if unchecked, a profile can match any of these attributes)

Note: Below the selections in the Filtered Members area, you will be able to check off a box indicating if a student needs to fit all of the attributes that you selected if you had chosen more than one. If the box remains unchecked, they will be selected if they meet “any” of the attributes you have selected.

5. The last steps to this process are to select a color coding for the group by choosing from the available options. Once this has been selected you will click the blue “Save” button at the bottom of the page to officially create the group.

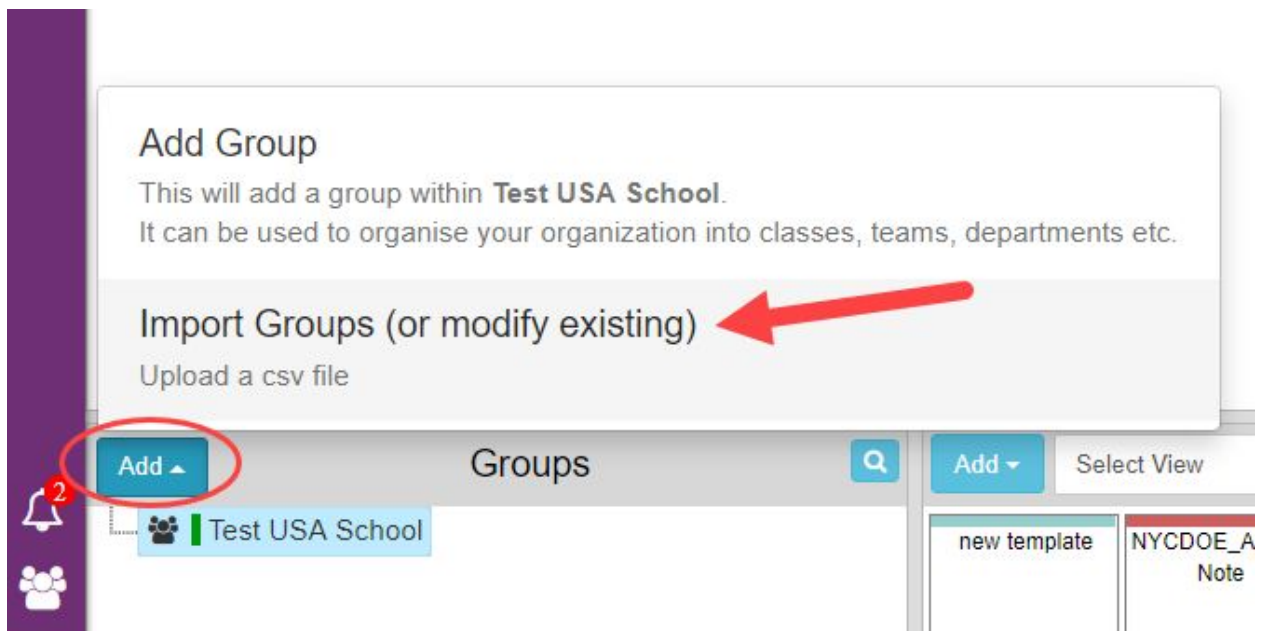


CSV File Upload

1. Navigate to the Student page by clicking on the Student icon on the left side of the screen.



2. At the bottom left hand side of the page, you will see a section labeled Groups. To the left of this will be a blue button labeled “Add”. To do a CSV import, you will select the “Import Groups (Or Modify Existing)” option.



3. You will be shown a page giving a description of the file layout you will need to add this group. If you would like to download a template to use, you can click on the option to “Download sample Groups CSV file”.

Import Groups (or modify existing)


Please select a CSV file containing Groups records

The CSV file must contain the following columns:

- group_name - this is the field which will be used to match or create Groups records.
 - '/' in the name allows multi-level group. example: 'Year 9/Class A' would create a top level 'Year 9' group with a sub group 'Class A'
 - When the name is empty in a row it means the top level staff assignments

And optionally the CSV file can contain the following fields. These fields need to contain the data of the Groups.

- member_ids - coma separated list of imported student ids
- staff_ids - coma separated list of imported staff ids

[Download sample Groups CSV file](#) 

Select file

Import

Cancel

It will download and Excel file template that will look like this:

| | A | B | C | D |
|---|------------------------------------|--|---------------|---|
| 1 | group_name | member_ids | staff_ids | |
| 2 | | | 94685 | |
| 3 | School Captains | 4,791,479,552,704,950 | | |
| 4 | Middle School/Year 9/Maths Methods | 47,955,270,495,449,500,000 | 94685 | |
| 5 | Middle School/Year 9/Physics | 4,795,527,049,534,950 | 94685 | |
| 6 | Middle School/Year 9/English | 47,954,794,479,347,900,000,000,000,000 | 9,682,291,205 | |
| 7 | | | | |
| 8 | | | | |
| 9 | | | | |

Note: The upload will ask for staff ID #'s which your staff will not have when they are pulled from the IO Classroom/Skedula portal. Instead of using this staff ID, you can use the format Firstname_Lastname to attach a staff member.

4. Once you have the file completed and filled in using the template, you will be able to click the "Select File" option to search for the file on your computer.

Download sample Groups CSV file

Select file

5. After selecting the file, you will be able to select the blue “Import” button to upload it into CareMonkey.

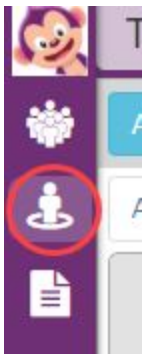
Import

Adding Staff to Groups

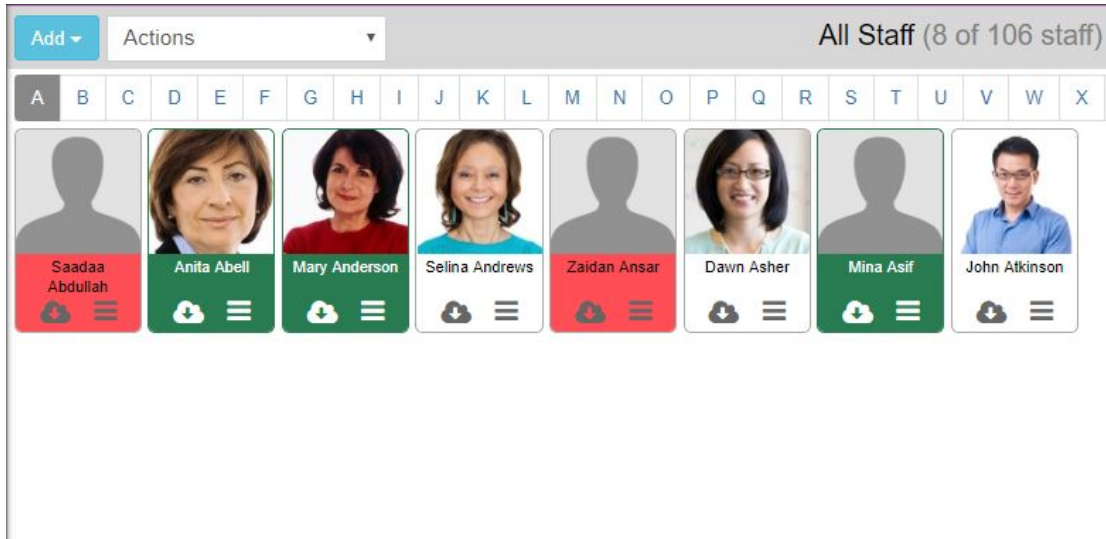
In order for staff to see students in a group, or for them to see responses for students in a group, they will need to be added to the group itself. There are three ways for this to be done, the first is clicking and dragging staff members to the group, the second is to individually add a staff member to multiple groups, and the third is to add multiple staff members to a single group through the edit group page.

Click and Drag Method

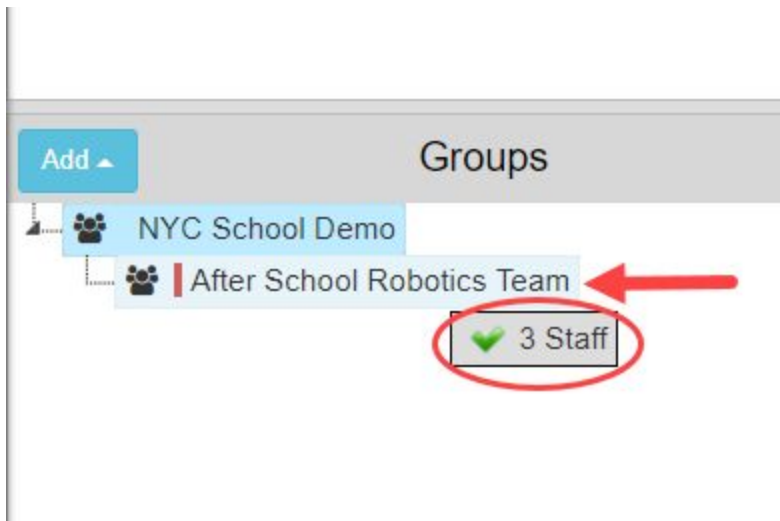
1. Navigate to the Staff page in CareMonkey by clicking the Staff icon on the left side of the screen.



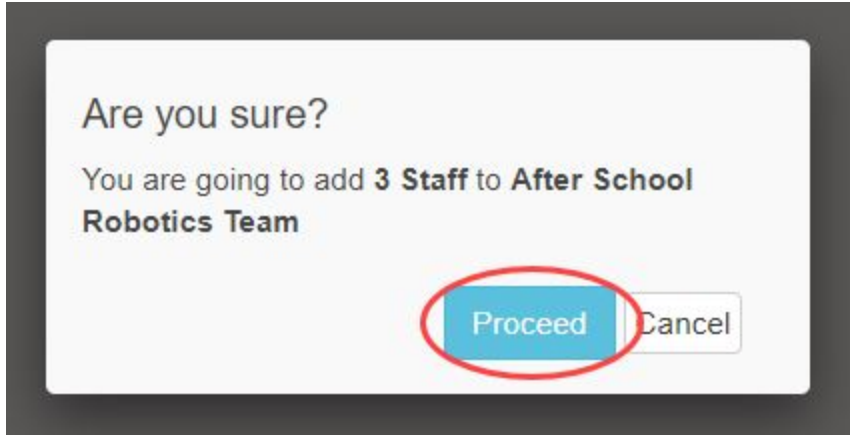
2. Highlight the staff you would like to add to a group by clicking on their profile pictures. This will turn their profile card a green color indicating they are selected.



3. Drag the staff members into the named group folder at the bottom left hand side of the page. You will see a green check mark indicating you have selected a folder.

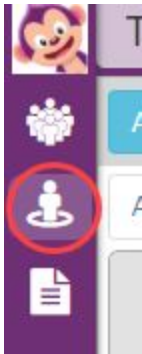


4. Release the mouse and a pop up window will appear asking if you are sure you want to add the user(s) to the group. Clicking "Proceed" will add the users to the group you selected.



Staff Profile Method

1. Navigate to the Staff page in CareMonkey by clicking the staff page on the left side of the screen.



2. On the staff profile card, click on the three lines at the bottom right hand corner. This will open the staff member profile page.



3. At the bottom of the profile page, you will see a blue line of text to "Edit Groups and eForms" for this user. Clicking on this will open a window showing all student groups and

eForms created at the school.

Details for Mary Anderson

View Member Changes
Injury Reports
Private Notes
Add manual tag
Remove manual tag
Groups and eForms
Set Managed Locally
Make an Administrator

Staff
Staff ID: Not Set
Manual Tags set: **none** add / remove

Permissions for eForm Access

| Contact | Username | Last Comms |
|---|-------------|------------|
| Mary Anderson manderson@example.com (Self) | anderson002 | Never |

Red emails indicate the last email sent did not deliver correctly.

Edit Groups and eForms

4. Go down the list and check off any of the groups or eForms you would like to add this user to.

Add this member to the following staff groups

- Check all
- After School Robotics Team

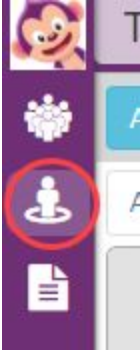
You do not have any eForms.

Save

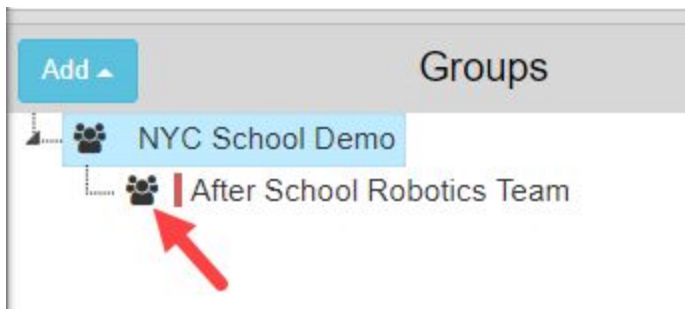
Once they are all selected, click on the blue Save button at the bottom of the page.

Edit Group Method

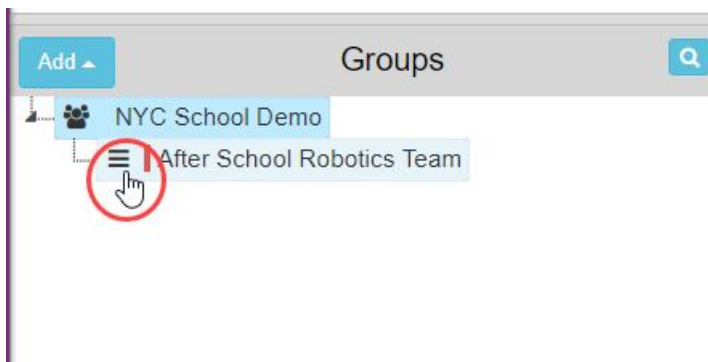
1. Navigate to the Staff page in CareMonkey by clicking the staff page on the left side of the screen.



2. In the bottom left corner of the screen you will see the groups section with all of the student groups at the school. Each group will have an icon that looks like three people standing next to each other.



Hover your mouse over this icon and it will turn into three lines. Click on the three line icon.



3. A small pop up will appear showing you the details about the group. At the top of this window you will click the option to View/Edit Group Details.

| | |
|-------------------------------|---|
| View/Edit Group Details | |
| Drag and Drop Group | |
| Members | 0 |
| Members with Care Profiles | 0 |
| Members without Care Profiles | 0 |
| Staff assigned to this group | 0 |
| Sub Groups | 0 |

4. On the next page you will see the option to “Assign Staff” located in the Manage Group section. Click on the Assign Staff button.

| |
|------------------------------------|
| MANAGE GROUP |
| Upload group image |
| Bulk Add Members |
| Archive Group |
| Delete group |
| Assign Staff |
| REPORTS |
| Generate Report |

5. Click on the name of your organization on the left side of the page and you will be given a list of all staff in the school. You will then be able to go through the list and check off each staff member that you will like to be added to the group.

After School Robotics Team — Assign Staff

STAFF GROUPS

Search groups and forms









NYC School Demo →
After School Robotics Team

STAFF FORMS

NYCDOE_Copy Center Request 19-20 SY
NYCDOE_Technology Support Request SY 19-20

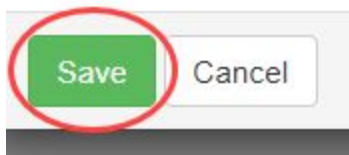
STAFF (106) SELECT ALL

Search by name

| | | |
|---|-----------------|-----------------------|
|  | Saadaa Abdullah | <input type="radio"/> |
|  | Anita Abell | <input type="radio"/> |
|  | Mary Anderson | <input type="radio"/> |
|  | Selina Andrews | <input type="radio"/> |
|  | Zaidan Ansar | <input type="radio"/> |
|  | Dawn Asher | <input type="radio"/> |
|  | Mina Asif | <input type="radio"/> |
|  | John Atkinson | <input type="radio"/> |

Save Cancel

- Once selected, you will click on the green Save button at the bottom of the page to save these additions to the group.



Creating and Sending eForms

eForms vs Templates

When you begin using CareMonkey to create and send documents out to your staff and parents, you will need to understand the differences between the terms eForm and Template. This will become a more important question once you start looking to add your own documents

to the CareMonkey site.

eForms:

These are the digital documents that you are sending out to staff members and guardians. The eForms that you send out could be created from the ground up each time, or they could be built from a pre-developed school template.

Templates:

These are essentially drafted versions of eForms that you can use whenever you need. The template will always exist at your school, and can be modified and sent out if they need to be. Templates are normally forms that you will want to access and use at multiple points throughout the school year and are designed to prevent you from re-creating them as an eForm each time you need to use them. Examples of documents best built as templates would include general permission slips, field trip forms, Blue Card forms, etc. Building an eForm from an existing school template will allow you to make small changes such as adjusting the name of a field trip, or adding a new question for dietary restrictions, without forcing you to develop a brand new eForm.

Best Practices: Build an eForm or a Template?:

As you begin to think about your school workflows, you will need to begin asking your administrative team what type of documentation will need to exist as a school based template, and what can be created as stand alone eForms. The key to this discussion is an understanding of your current school workflow for sending out documentation, specifically of what you are sending home, and how often are you going to send it.

When you look at your school based documentation, you will want to think about how frequently you will be sending it out to either parents and guardians, or staff members. As a general rule of thumb, something that may be sent out multiple times with small revisions or updates is a great candidate for a school based template. A permission slip sent home to parents for a field trip is a great example of this. The structure of the form will be the same, but you will want to make small changes to account for the location, dates, and reasoning behind the field trip. The outline will exist as a template, but when you go in to fill in the details you can always update anything you would need to.

Template and eForm Naming Conventions

Getting ready to start creating new templates and eForms at your school site will require you to start thinking about a standardized practice of naming conventions for your documentation stored in CareMonkey. It can be very easy to give documents a basic name once you start using the system because you want to release it quickly to parents or staff, you may be on a time crunch, or you may not realize how many times you are going to end up using that form. However, over time, the form section may start to look crowded and documents may become

hard to find. For these reasons, as you start creating and naming the forms that exist in your site, there are a few things that you should keep in mind to develop a standardized naming convention.

If you do not create a system of standardization it will become increasingly difficult to find the documents or responses that you are looking for as the school year progresses, and as you start using the system in later school years. For example, take something simple like a media consent form, or a student contract. For year one, it may be easy to simply name it “School Name: Behavior Contract”. However, once you start moving from year to year it will be difficult to search for and review archived responses on previously used forms. This will get increasingly more difficult for more frequently used forms like field trip permission slips sent home to parents.

Your best practices for a naming conventions will need to include as much identifying information as possible without becoming confusing or frustrating. Some key information you include in your form name would also be reliant on the type of form you are sending out. A permission slip for a field trip should at the very least have the school year and the location of the trip, but could also benefit from a date or a month indicating when the trip is taking place, and the course or subject area the field trip relates to.

Example: Field Trip to the Brooklyn Botanical Garden

Poor Naming Convention:

2019: Field Trip Garden

Good Naming Convention:

Spring 2019 FT: Brooklyn Botanical Garden (Earth Science) Permission Slip

This naming process becomes slightly easier for the pre-built in NYC templates that are available to all users. Since the templates are already named, they will default to the template naming convention that can then be slightly edited or modified to better suit your needs at the school. You can also delete the name of these pre-built templates entirely when you choose to use them to fit with a more standardized school naming convention.

Note: The more descriptive you are in your title, the easier it will be to search for each eForm. This will also make it abundantly clear to the parents what form they are looking to sign by simply seeing the title of the document.

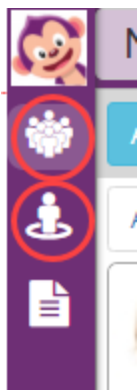
Build Your Own eForm

After looking through the pre-built templates, you may recognize that they do not cover all of your needs as a school community. If this is the case, you will have the option of building your own one off eForms that you can send out to guardians and staff at the school.

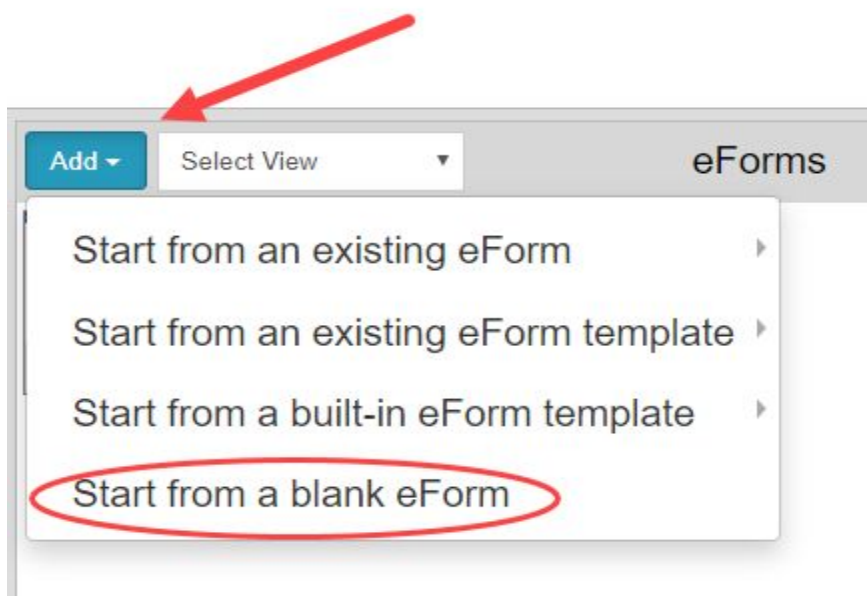
Note:

The ability to create an eForm is limited to your administrative users by default. If you choose to provide the ability to create eForms to your staff they will be able to make their own, but an administrator will still be required to enable the form before it is sent out. This will act as a check for the administrative team to “approve” the forms before they are sent.

- 1) Depending on the type of eForm you would like to send out, you will need to start from either the Student tab (for student forms), or the Staff tab (for staff forms). Select the appropriate group from the navigation tools on the left hand side of the page.



- 2) Once in the appropriate page, at the bottom of the screen you will see the eForms section. Click on the blue “Add” button in this section. You will be presented with a drop down selection with four different options to start with.



Start from an existing eForm: If you have eForms already in the system, you will be able to use this option to make adjustments or duplicates of that form. Since you can make updates and edits to the unique copies.

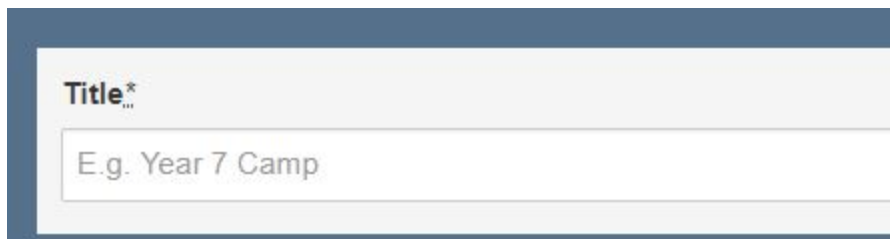
Start from an existing eForm template: As you progress through the school year you may make your own school specific eForm templates that you would like to draw from. This is where they will live.

Start from a built-in eForm template: These built-in eForm templates are the NYC specific templates that are by default available in the system. This is where you will find your Blue Cards and field trip forms.

Start from a blank eForm: This option will allow you to create a single use eForm that can be immediately sent out to a selected group.

Creating your own eForm will require you to select the “Start from a blank eForm” option. We have created this eForm Creation Template to assist you in the creation of new forms and templates.

- 3) At the top of the next page you will enter a title that matches with your school identified naming convention.



A screenshot of a form field with a blue border. The field is labeled "Title*" and contains the text "E.g. Year 7 Camp".

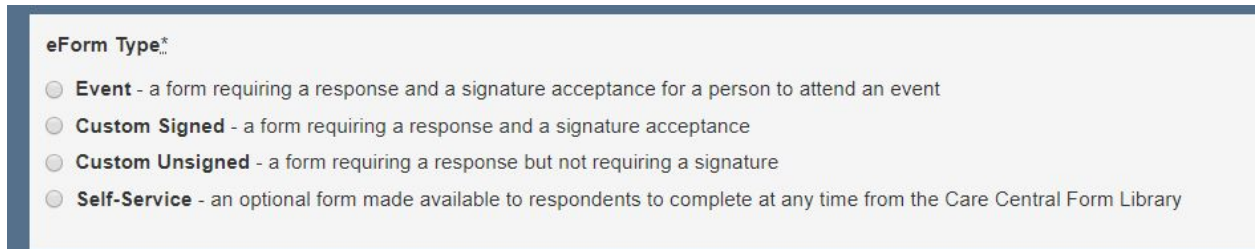
- 4) Select an eForm category that this new form will belong to.



A screenshot of a form field with a blue border. The field is labeled "Categories" and contains three radio button options: "Staff Memos" (red square), "Consent Forms" (blue square), and "Trip Forms" (green square). Below the options, there is a note: "To change the categories that are available, [access categories in the settings section.](#)"

If you would like to manage your school categories, you can access them by clicking on the blue link provided at the bottom of this section.

- 5) You will next choose the eForm type that you would like to use, as well as brief descriptions for what each of the eForm types do.



The screenshot shows a form titled "eForm Type:" with four radio button options:

- Event** - a form requiring a response and a signature acceptance for a person to attend an event
- Custom Signed** - a form requiring a response and a signature acceptance
- Custom Unsigned** - a form requiring a response but not requiring a signature
- Self-Service** - an optional form made available to respondents to complete at any time from the Care Central Form Library

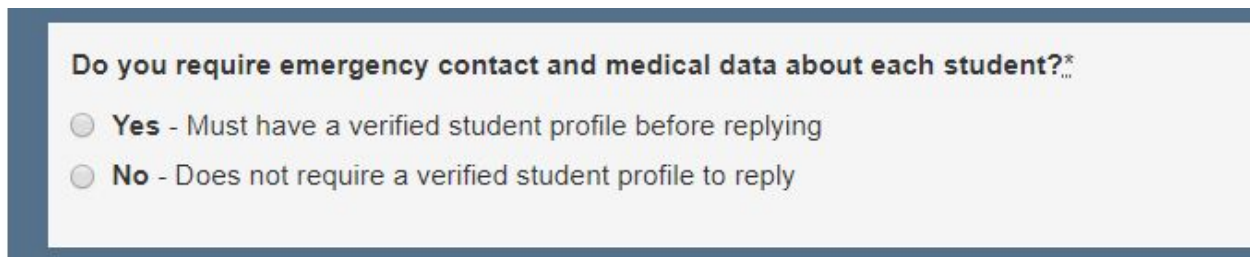
Event: requires a user to respond and sign acceptance to attend an event

Custom Signed: requires a user to respond and sign acceptance

Custom Unsigned: requires a response, but does not require a signature

Self-Service: an optional form that is made available for use at any time in the CareCentral form library

- 6) You will next see a question asking "Do you require emergency contact and medical data about each student?". You will need to ensure that this is checked off to "No" for each of your forms. Checking "Yes" will initiate users to enter medical information about themselves before being prompted with the form they need to fill out.

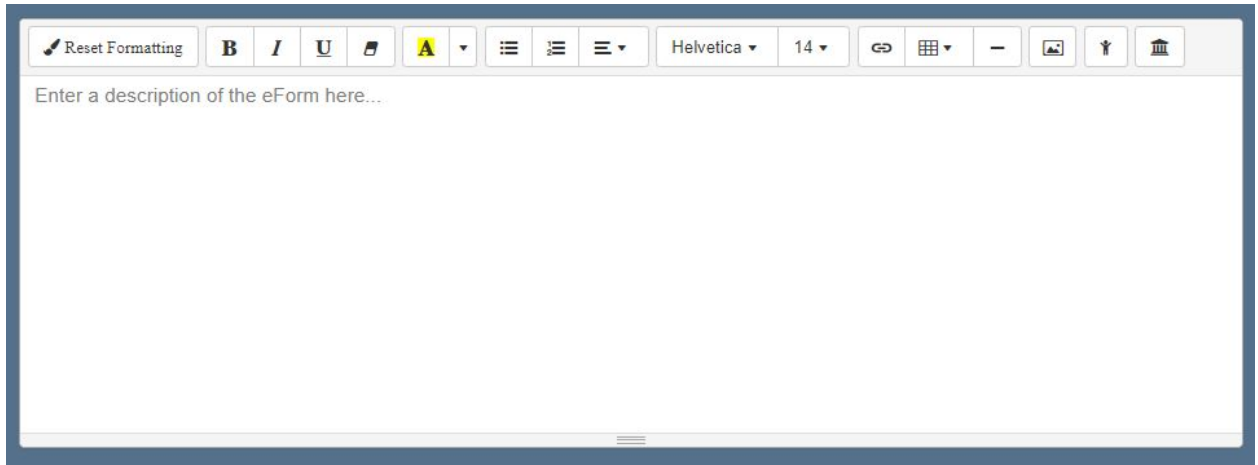


The screenshot shows a question titled "Do you require emergency contact and medical data about each student?*" with two radio button options:

- Yes** - Must have a verified student profile before replying
- No** - Does not require a verified student profile to reply

Note: It is recommended that you always select NO in this section. Student medical information by default will not be in the system, and asking parents to confirm this information could create a conflict between what is in CareMonkey and the official documentation for the student.

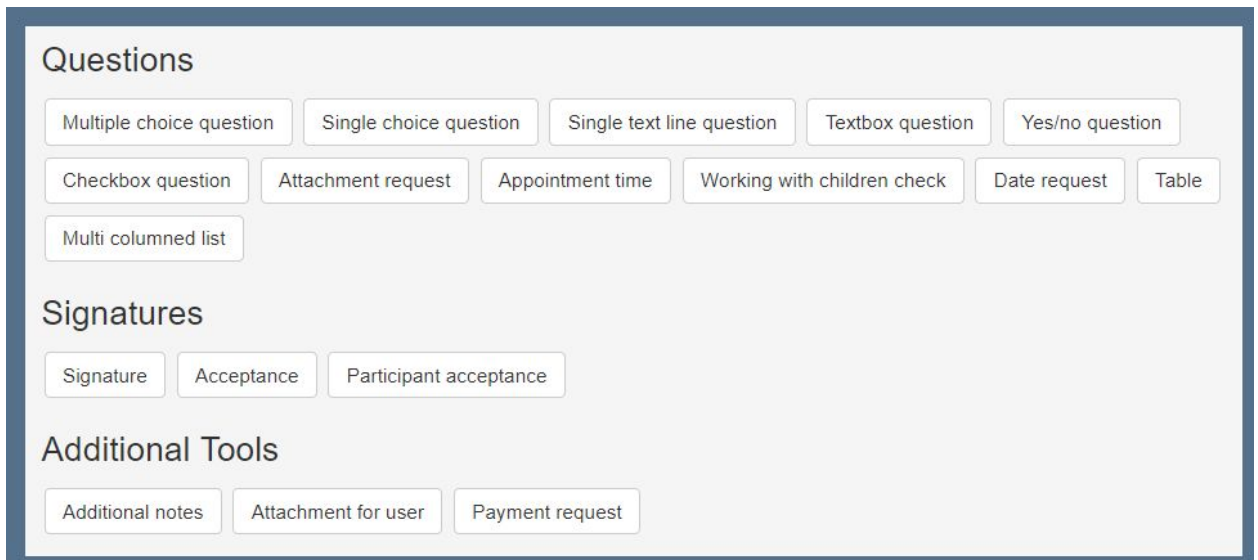
- 7) You will next be provided with a blank description box where you can enter any information you would like to about the form you are sending home. This is optional, but will allow you to better explain to the parents what the eForm is about and why they need to sign it.



The screenshot shows a text editor interface. At the top, there is a toolbar with various icons for text formatting: 'Reset Formatting', bold (B), italic (I), underline (U), strikethrough (ABC), text color (A), bulleted list, numbered list, and indent. It also includes font settings for 'Helvetica' and '14', and icons for link, table, decrease indent, image, user, and trash. Below the toolbar is a large text area with the placeholder text 'Enter a description of the eForm here...'. A small hamburger menu icon is visible at the bottom center of the text area.

This description box will give you the text editor tools that you would need such as the standard text size, bold, underline, and italicize, as well as the ability to insert links to external websites, insert images, and automatically insert the name of the user creating the form or the name of the school.

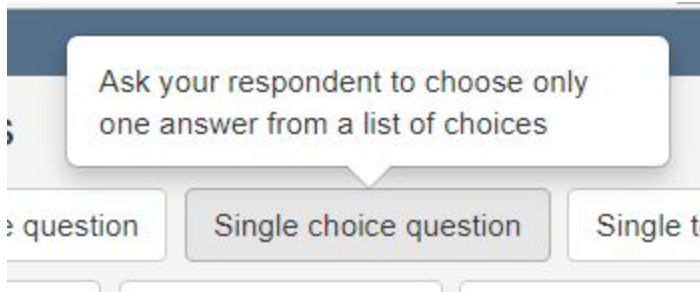
- 8) The next step to building your own eForm is to add the “question” fields you would like to appear on the form. You will see multiple types of questions that you can use, each will have their own unique functions to allow you to create any type of school based form that you would like.



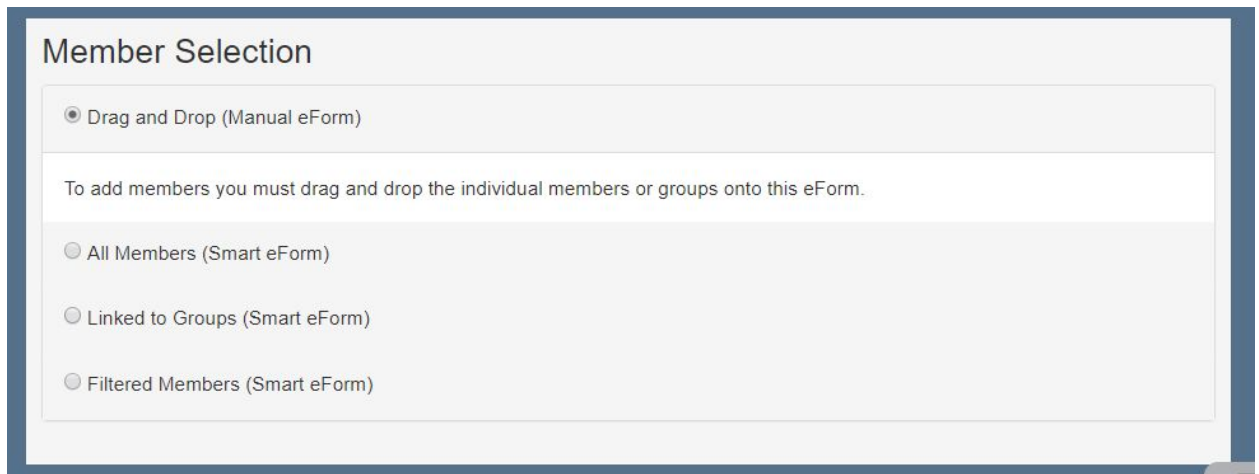
The screenshot shows a 'Questions' selection interface. It is divided into three sections: 'Questions', 'Signatures', and 'Additional Tools'. Each section contains several button options for different question types or tools.

- Questions:** Multiple choice question, Single choice question, Single text line question, Textbox question, Yes/no question, Checkbox question, Attachment request, Appointment time, Working with children check, Date request, Table, Multi columned list.
- Signatures:** Signature, Acceptance, Participant acceptance.
- Additional Tools:** Additional notes, Attachment for user, Payment request.

Note: You can see a description of each of the available question types by hovering your mouse over the selection on the page. These brief descriptions will help you gain a quick understanding of the type of responses these question types will allow you to collect.



- 9) One of the final options you have when creating an eForm is to choose how you will identify who will receive the form.



These functions include:

Drag and Drop:

This option allows you to manually select the users that you want to be added to this form. You will select them from either the student or staff pages by clicking on the user profiles to highlight them, and dragging them into the form. Only the users you select in this way will receive the eForm.

All Members:

This option will automatically add every user to the eForm. If it is a form created for students, all parents and guardians will receive it, and if it is a staff form, all of the staff will receive it. Choosing this option would be useful for schoolwide forms that need to go

to all members, as it will be sent to any new staff or students that enter the school after the start of the school year.

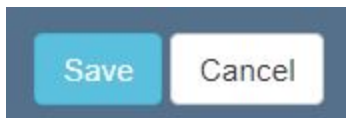
Linked to Groups:

This option is similar to the “All Members” function, but instead of sending to all users in the school, it will send the document to all members of a group that you have created. This is another useful “Auto Form”, as you can add a new student to a group, and you will know that their guardians will automatically receive it.

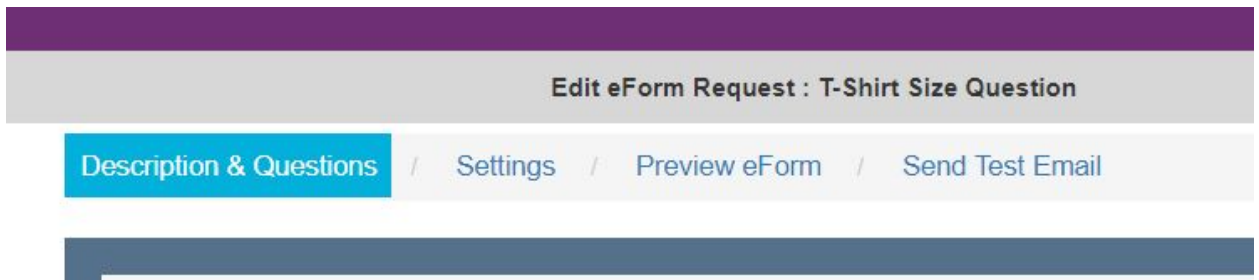
Filtered Members:

This option will allow you to automatically add users to the group based off criteria that you can select. This will allow you to develop a unique set of users that is created based off of responses to previous eForms, manual tags that have been added to the profile, or groups that the user belongs to. You will be able to add as many criteria as you would like to develop this group and can define if a user needs to only have one or all of your selections to receive your eForm.

- 10) Once you are done building this eForm, click the blue “Save” button at the bottom of the page.



This will direct you to the eForm Settings page. At the top of the eForm Settings page you will see a few tabs that you can switch through to finalize setting up your eForms, and preview what you have created so far.



- 11) The first option on the eForm Settings page is to identify when users will no longer be able to submit their responses or edit responses that have already been entered, along with how frequently users will receive reminder emails to complete the form if they have not yet done so.

Responses can be accepted and changed up until

Example: 12 July 2019

Frequency of reminder Emails

- Every 2 Days
- Every Day
- Every 2 Days
- Every 3 Days

Note: If you would like this form to be edited at any time, you can choose to leave the date field empty.

- 12) Your next option is a simple checkbox asking you to “Enable” the eForm you are working on. Checking this box off allows the system to begin receiving responses from users.

Enabled

Once enabled, the request becomes visible and emails begin sending

It would be best practices to check off this box after you have finished identifying the remaining settings on this page. You would not want users to receive emails to complete a form that you are still working on.

- 13) The next option gives you the option to add responses to this eForm to the user profile page. This would make parent/guardian responses to the form viewable by teaching staff with CareMonkey accounts.

Add eForm replies to the profile

If selected, replies are added to profiles as additional information. This information can then be accessed by staff on mobile devices (online mode only) and the secure website. If not selected, replies are only available to be viewed by administrators.

Note: This would be useful in preventing you from taking the extra step to find the form and search for responses from specific users as it will place them directly on the student or staff profile page.

- 14) Next, you will be given an option for staff members to see the contact details for other staff that are attached to this form.

Display staff contact details

Enable this to allow staff to be able to see other staff contact details who are attached to this eForm

This function could be exceptionally useful for field trip forms, as it would give staff the ability to see the other staff members that would be attending the field trip.

- 15) You are then given the option to set up a user, or multiple users, to receive email notifications when an eForm is submitted.

Send email notification when an eForm response is submitted or changed to:

Email addresses entered here will receive an email notification whenever a response to this eForm is received or changed.
For multiple emails, use a comma to separate (eg. john@example.com, smith@gmail.com).

Note: This option would be exceptionally useful if you choose to send out contact update forms to parents and guardians. When responses come in from the guardians, staff members can be instantly notified that they have updates that need to be added to ATS to update the official student record.

- 16) If you would like, you also have the ability to automatically archive the eForm after a certain date. Archiving the form will make it no longer active, and you will not be able to send out the form again.

Automatically archive this eForm on

Example: 24 July 2019

If a date is entered here, the CareMonkey system will automatically archive this eForm after the date has passed.

This function would be useful for time sensitive documentation that you want to send out such as field trip forms. Once the field trip has passed, you would not need to re-send the permission slips for that specific form. Automatically archiving the eForm would help keep your forms organized and orderly.

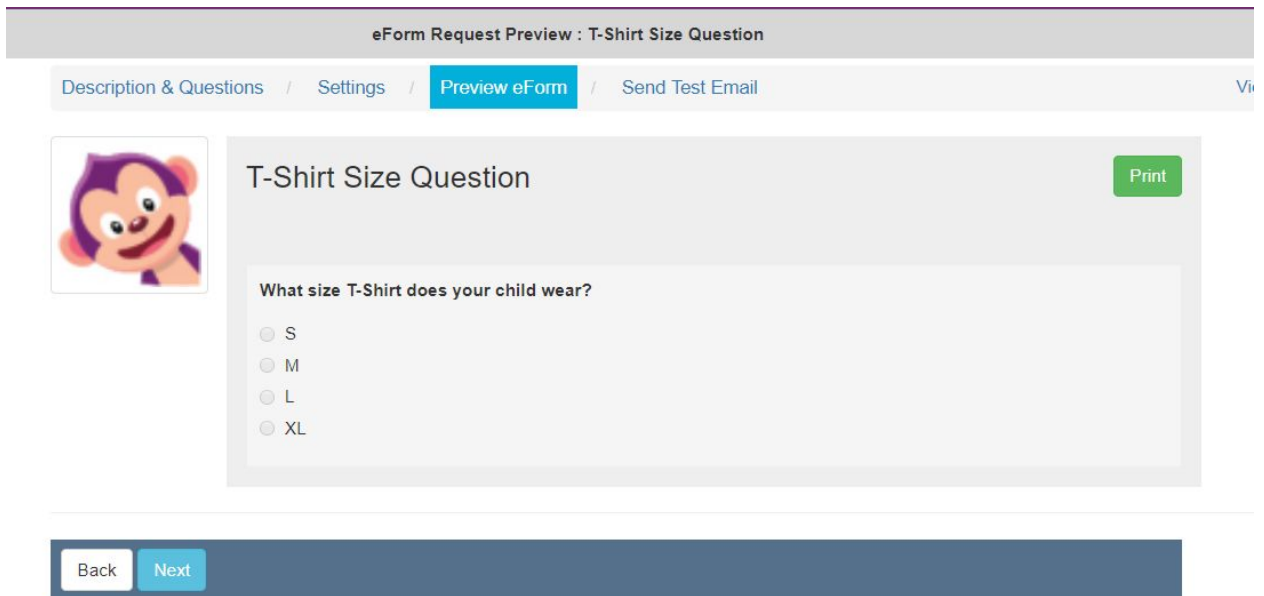
- 17) The last option you will have on this page will allow you to choose a color for this form when it displays in the “eForms” window on the student or staff pages.



18) At the bottom of the page, you will click the blue “Save and Preview” button to finalize the changes you have made on the eForm Settings page.



19) After clicking the “Save and Preview” button, you will be brought to see a preview of the eForm.

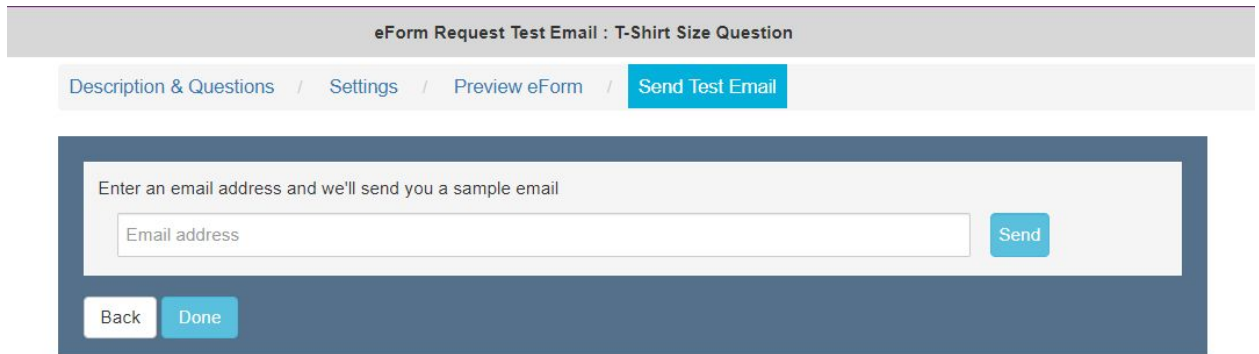


This is the same view you would get if you had selected the Preview eForm tab at the top of the page.

Clicking the green “Print” button in the top right of the page will let you see a printable version of the digital eForm if you would like to generate and keep a hard copy for your own records.

After previewing the eForm here, you can either click the blue “Next” button to move on to send yourself a test email, or you can go back to the “Description and Questions” tab, or the “Settings” tab to continue making updates to the eForm.

20) The final option here is to send yourself a test email of the eForm that you have created.



eForm Request Test Email : T-Shirt Size Question

Description & Questions / Settings / Preview eForm / Send Test Email

Enter an email address and we'll send you a sample email

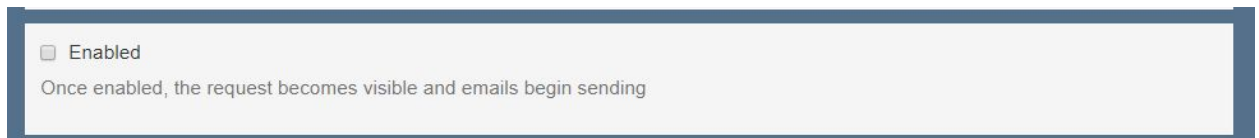
Email address

Send

Back Done

This is an optional step, but it is encouraged that you send yourself test emails at first to confirm that the eForm you send matches the expectations that you have.

21) If you had not yet “Enabled” your eForm, navigate back to the eForm Settings page and ensure that it is to begin sending updates to parents, guardians, and staff members to complete the form that you are sending out.



Enabled

Once enabled, the request becomes visible and emails begin sending

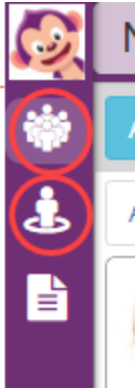
NYC Pre-built Templates

When you begin to look at developing your school documentation in CareMonkey, you should first look through the pre-built templates that are available for you to use and edit as you wish to send eForms home to guardians, as well as out to staff.

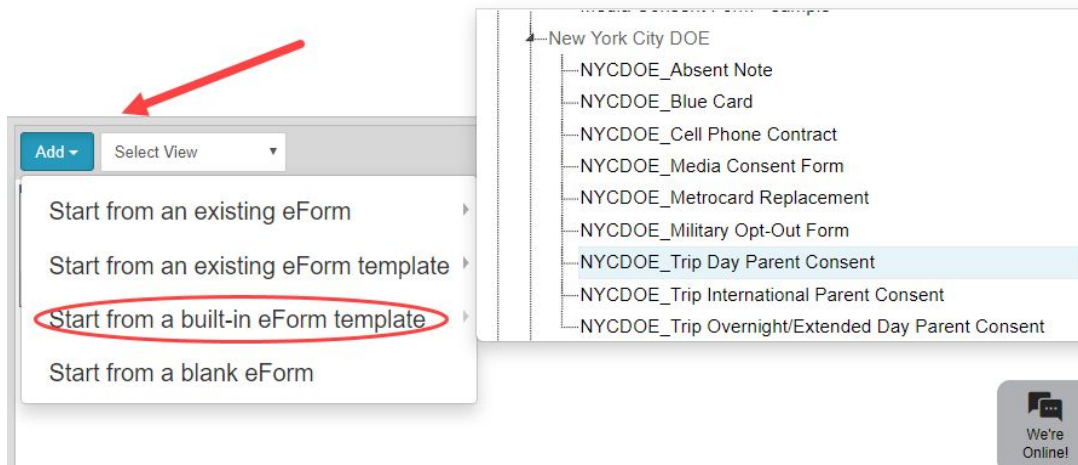
You will find a link [HERE](#) to our internal documentation on best practices surrounding the existing template library at your disposal.

To use the pre-built templates, follow the steps below:

- 1) Depending on the type of eForm you would like to send out, you will need to start from either the Student tab, or the Staff tab. Select the appropriate group from the navigation tools on the left hand side of the page.



- 2) In the appropriate page, at the bottom of the screen you will see the eForms section. Click on the blue “Add” button in this section. You will be presented with a drop down selection with four different options to start with. For the built in templates, you will see the “Start from a built-in eForm Template” option. To the right of this selection, you will see all of the built-in NYC specific eForm templates for students and guardians, as well as staff. Choose the template for the documentation you would like to distribute.



The next page you will see will have all of the information for the eForm already filled out, but you will be able to make whatever edits you would like to the new eForm you are creating.

Note: This will not change the template itself, it will only change the eForm that you are trying to send out. Remember that templates are available for you to use and edit whenever you see fit. At the top of the page you will identify a title for the eForm that you would like to send. Naming conventions should be specific and standardized to ensure that forms do not get lost or confused during searches.

- 3) At the top of the next page you will enter a title that matches with your school identified naming convention.



A screenshot of a form field. The field is labeled "Title*" and contains the placeholder text "E.g. Year 7 Camp". The field is set against a light blue background with a dark blue border.

- 4) Select an eForm category that this new form will belong to.



A screenshot of a "Categories" section. It lists three categories with checkboxes and colored squares: "Staff Memos" (red square), "Consent Forms" (blue square), and "Trip Forms" (green square). Below the list is a note: "To change the categories that are available, [access categories in the settings section.](#)"

- 5) You will next see the eForm type that this pre-built template aligns to. Since you are using a template that is already built to suit your needs, you should not edit the eForm type here.
- 6) You will next see a question asking "Do you require emergency contact and medical data about each student?". You will need to ensure that this is checked off to "No" for each of your forms. Checking "Yes" will initiate users to enter medical information about themselves before being prompted with the form they need to fill out.

Do you require emergency contact and medical data about each student?*

- Yes - Must have a verified student profile before replying
- No - Does not require a verified student profile to reply

Note: It is recommended that you always select NO in this section. Student medical information by default will not be in the system, and asking parents to confirm this information could create a conflict between what is in CareMonkey and the official documentation for the student.

- 7) You will next be provided with a description box that will contain information related to the form that you selected.

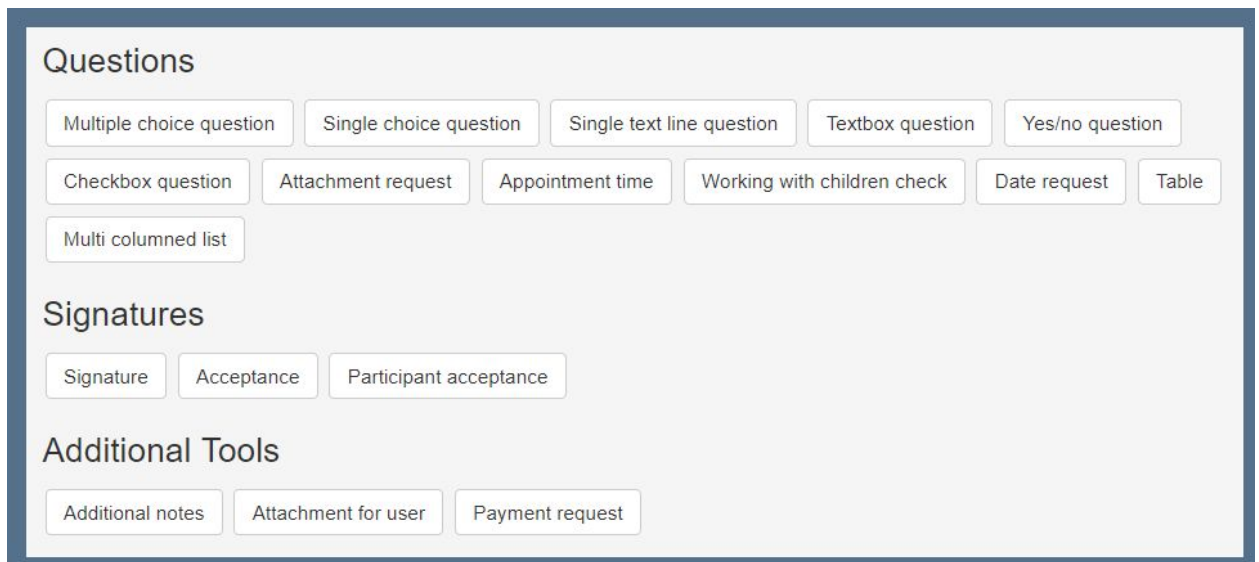
The screenshot shows a web form titled "Parent Notification Form" with a sub-heading "Day Trip". At the top left is the NYC Department of Education logo. At the top right, it says "Chancellor's Regulation A-670", "Attachment No. 2", and "2 Pages". Below the title, there are several input fields with placeholder text in blue: "Name: @Profile_Name", "Class: <Insert Class Name>", "School (list additional trip sponsors when applicable): <Insert School Name>", "Trip Date: <Insert Trip Date>", "Trip Coordinator: <Insert Trip Coordinator>", "Destination: <Insert Trip Destination>", "Departure Site: <Insert Departure Site>", "Departure Time: <Insert Departure Time>", "Return Site: <Insert Return Site>", "Return Time: <Insert Return Time>", "Mode of Transportation: <Insert Transportation Mode>", "Purpose of Trip: <Insert Trip Purpose>", "Specific Clothing / Equipment Required for this Trip: <Insert Special Requirements>", and "This trip will include the following physical and sports activities (e.g., swimming, horseback riding, ice skating, skiing, boating, etc.): <Insert physical and sports activities>". A rich text editor toolbar is visible at the top of the form area.

You will see on some of these pre-built forms that some of the text will be highlighted in a blue color. This is text that you will customize to fit the situation.

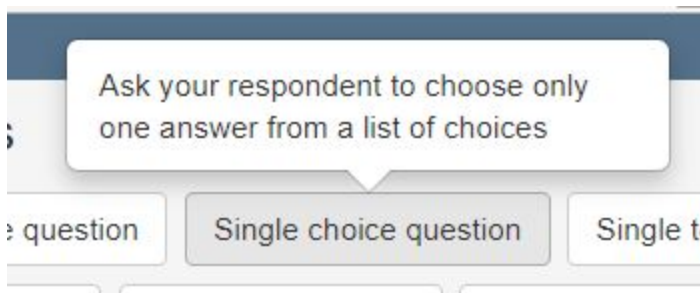
- 8) You will next see a list of questions that are built in as part of the eForm template. It is not necessary to change these questions, but if you would like to edit existing questions, you can scroll through and adjust wording in questions, or delete questions entirely by using the red “X” icon to the right hand side of the questions.



You may also want to add questions that would be more specific to your school. Scrolling to the bottom of the page you will see the “Questions” section where you can select the question types that you would like to add.

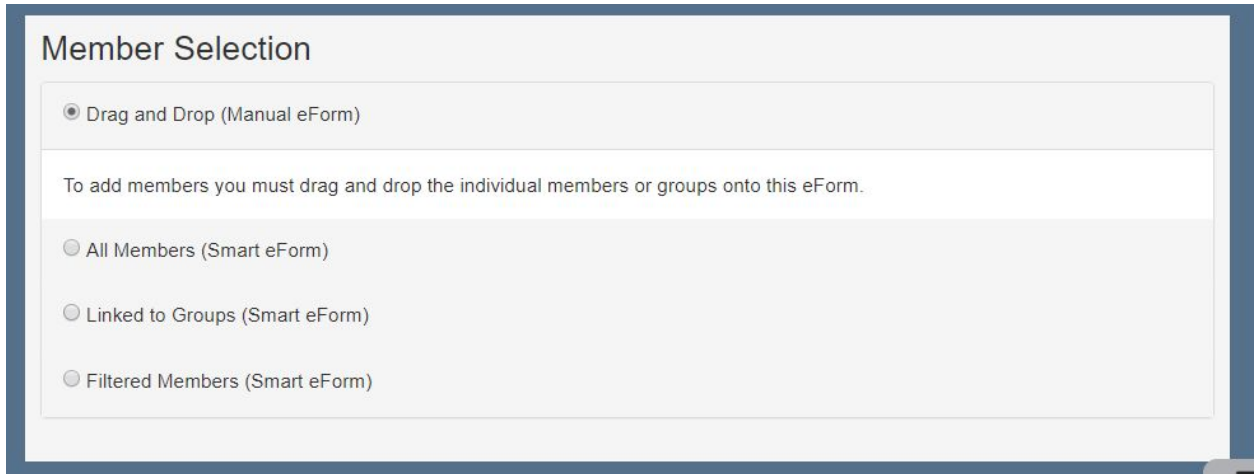


Note: You can see a description of each of the available question types by hovering your mouse over the selection on the page. These brief descriptions will help you gain a quick understanding of the type of responses these question types will allow you to collect.



You can also visit our documentation on the different question types [HERE](#).

- 9) One of the final options you have when using the pre-built template for an eForm is to choose how you will identify who will receive the form.



The screenshot shows a 'Member Selection' interface with four radio button options. The first option, 'Drag and Drop (Manual eForm)', is selected. Below it is a text box that reads: 'To add members you must drag and drop the individual members or groups onto this eForm.' The other three options are 'All Members (Smart eForm)', 'Linked to Groups (Smart eForm)', and 'Filtered Members (Smart eForm)'.

These functions include:

Drag and Drop:

This option allows you to manually select the users that you want to be added to this form. You will select them from either the student or staff pages by clicking on the user profiles to highlight them, and dragging them into the form. Only the users you select in this way will receive the eForm.

All Members:

This option will automatically add every user to the eForm. If it is a form created for students, all parents and guardians will receive it, and if it is a staff form, all of the staff will receive it. Choosing this option would be useful for schoolwide forms that need to go to all members, as it will be sent to any new staff or students that enter the school after the start of the school year.

Linked to Groups:

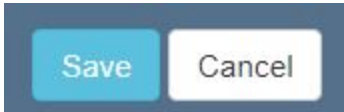
This option is similar to the “All Members” function, but instead of sending to all users in the school, it will send the document to all members of a group that you have created. This is another useful “Auto Form”, as you can add a new student to a group, and you will know that their guardians will automatically receive it.

Filtered Members:

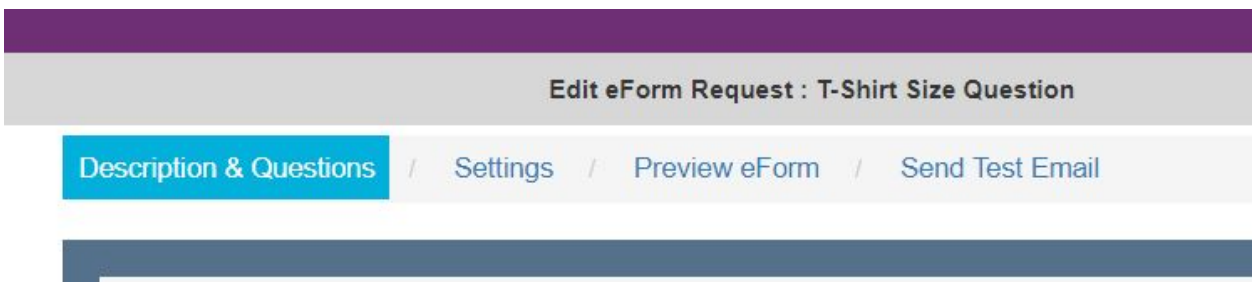
This option will allow you to automatically add users to the group based off criteria that

you can select. This will allow you to develop a unique set of users that is created based off of responses to previous eForms, manual tags that have been added to the profile, or groups that the user belongs to. You will be able to add as many criteria as you would like to develop this group and can define if a user needs to only have one or all of your selections to receive your eForm.

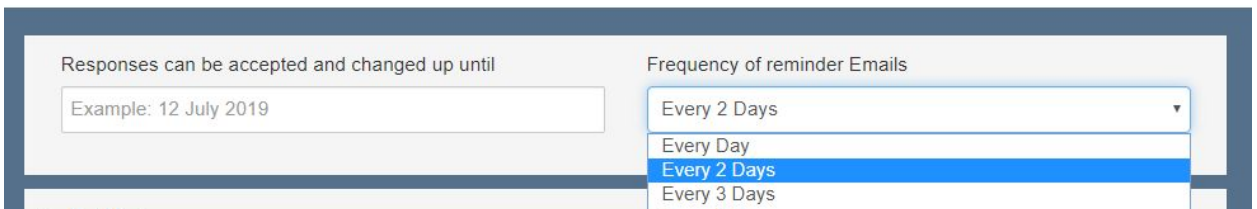
- 10) Once you are done building this eForm from the template, click the blue “Save” button at the bottom of the page.



This will direct you to the eForm Settings page. At the top of the eForm Settings page you will see a few tabs that you can switch through to finalize setting up your eForms, and preview what you have created so far.



- 11) The first option on the eForm Settings page is to identify when users will no longer be able to submit their responses or edit responses that have already been entered, along with how frequently users will receive reminder emails to complete the form if they have not yet done so.



Note: If you would like this form to be edited at any time, you can choose to leave the date field empty.

- 12) Your next option is a simple checkbox asking you to “Enable” the eForm you are working on. Checking this box off allows the system to begin receiving responses from users.

Enabled

Once enabled, the request becomes visible and emails begin sending

It would be best practices to check off this box after you have finished identifying the remaining settings on this page. You would not want users to receive emails to complete a form that you are still working on.

- 13) The next option give you the option to add responses to this eForm to the user profile page. This would make parent/guardian responses to the form viewable by teaching staff with CareMonkey accounts.

Add eForm replies to the profile

If selected, replies are added to profiles as additional information. This information can then be accessed by staff on mobile devices (online mode only) and the secure website. If not selected, replies are only available to be viewed by administrators.

Note: This would be useful in preventing you from taking the extra step to find the form and search for responses from specific users as it will place them directly on the user profile page.

- 14) Next, you will be given an option for staff members to see the contact details for other staff that are attached to this form.

Display staff contact details

Enable this to allow staff to be able to see other staff contact details who are attached to this eForm

This function could be exceptionally useful for field trip forms, as it would give staff the ability to see the other staff members that would be attending the field trip.

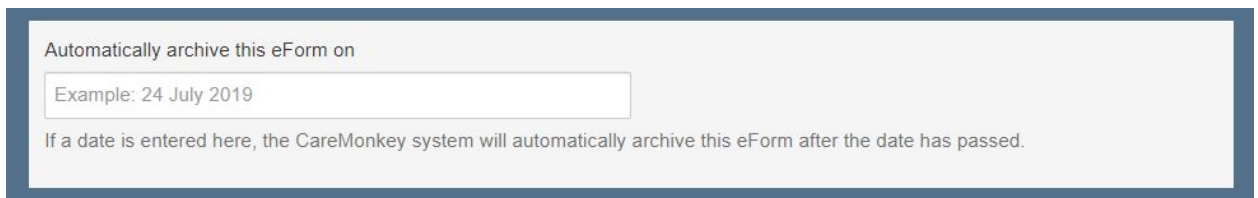
- 15) You are then given the option to set up a user, or multiple users, to receive email notifications when an eForm is submitted.

Send email notification when an eForm response is submitted or changed to:

Email addresses entered here will receive an email notification whenever a response to this eForm is received or changed. For multiple emails, use a comma to separate (eg. john@example.com, smith@gmail.com).

Note: This option would be exceptionally useful if you choose to send out contact update forms to parents and guardians. When responses come in from the guardians, staff members can be instantly notified that they have updates that need to be added to ATS to update the official student record.

- 16) If you would like, you also have the ability to automatically archive the eForm after a certain date. Archiving the form will make it no longer active, and you will not be able to send out the form again.



Automatically archive this eForm on

Example: 24 July 2019

If a date is entered here, the CareMonkey system will automatically archive this eForm after the date has passed.

This function would be useful for time sensitive documentation that you want to send out such as field trip forms. Once the field trip has passed, you would not need to re-send the permission slips for that specific form. Automatically archiving the eForm would help keep your forms organized and orderly.

- 17) The last option you will have on this page will allow you to choose a color for this form when it displays in the “eForms” window on the student or staff pages.



Select the colour of eForm box on the Main Screen

A grid of 30 color swatches is displayed, arranged in three rows and ten columns. The colors include various shades of blue, red, green, orange, yellow, purple, and grey.

- 18) At the bottom of the page, you will click the blue “Save and Preview” button to finalize the changes you have made on the eForm Settings page.




Save and Preview Back

- 19) After clicking the “Save and Preview” button, you will be brought to see a preview of the eForm.

eForm Request Preview : T-Shirt Size Question

Description & Questions / Settings / **Preview eForm** / Send Test Email



T-Shirt Size Question Print

What size T-Shirt does your child wear?

S
 M
 L
 XL

Back Next

This is the same view you would get if you had selected the Preview eForm tab at the top of the page.

Clicking the green “Print” button in the top right of the page will let you see a printable version of the digital eForm if you would like to generate and keep a hard copy for your own records.

After previewing the eForm here, you can either click the blue “Next” button to move on to send yourself a test email, or you can go back to the “Description and Questions” tab, or the “Settings” tab to continue making updates to the eForm.

20) The final option here is to send yourself a test email of the eForm that you have created.

eForm Request Test Email : T-Shirt Size Question

Description & Questions / Settings / Preview eForm / **Send Test Email**

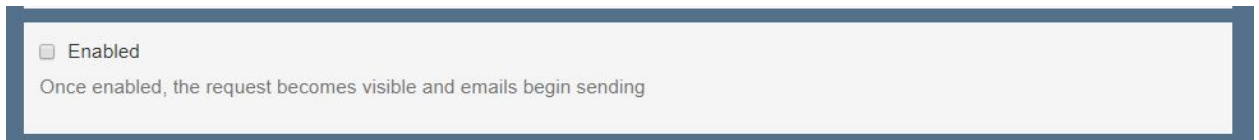
Enter an email address and we'll send you a sample email

Email address Send

Back Done

This is an optional step, but it is encouraged that you send yourself test emails at first to confirm that the eForm you send matches the expectations that you have.

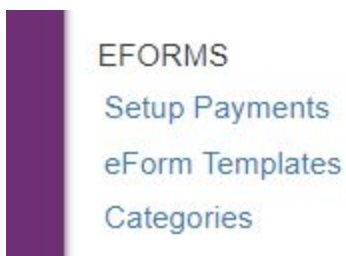
- 21) If you had not yet “Enabled” your eForm, navigate back to the eForm Settings page and ensure that it is to begin sending updates to parents, guardians, and staff members to complete the form that you are sending out.



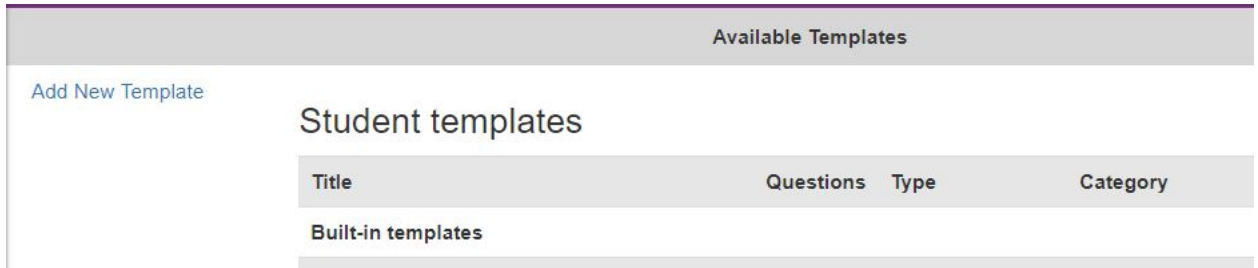
Building Your Own Template

For some of the more common documents that are distributed at your school, you may not want to manually create a new eForm each time. Once you take the time to designate these frequently used documents, you will be able to develop them into an eForm Template that you can use whenever you need to in the same way you have been using the pre-built NYC templates.

- 1) Access the Settings page by clicking the gear icon in the bottom left hand corner of the page.
- 2) In the Settings page you will select the “eForm Templates” option from the navigation panel on the left side of the screen under the EFORMS section.



- 3) You will see a list of all of the pre-built NYC templates on this page. In order to add a new template you will click on the “Add New Template” button in the top left of the page.



- 4) You will then see the same page you would see when creating an eForm. At the top of the page you will enter a title that matches with your school naming convention. It may be useful for you to develop a unique naming convention for templates that you have created as opposed to the ones that were pre-built for you.
- 5) You will be prompted to enter a Template Category. This will identify how the template will be displayed when it is used to create an eForm.

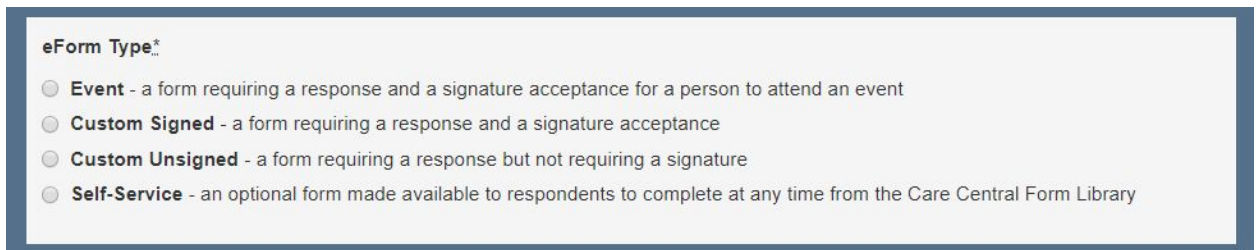


Note: It would be recommended that these Template Categories are simple. A good example would be “Staff/ School DBN” or “Student/School DBN”. This would make the template easy to find when using it to create a new eForm.

- 6) Select a Template category that this new form will belong to. These will match with your school defined eForm categories.



- 7) You will next choose the Template type that you would like to use, as well as brief descriptions for what each of the eForm types do.



The screenshot shows a form titled "eForm Type:" with four radio button options:

- Event** - a form requiring a response and a signature acceptance for a person to attend an event
- Custom Signed** - a form requiring a response and a signature acceptance
- Custom Unsigned** - a form requiring a response but not requiring a signature
- Self-Service** - an optional form made available to respondents to complete at any time from the Care Central Form Library

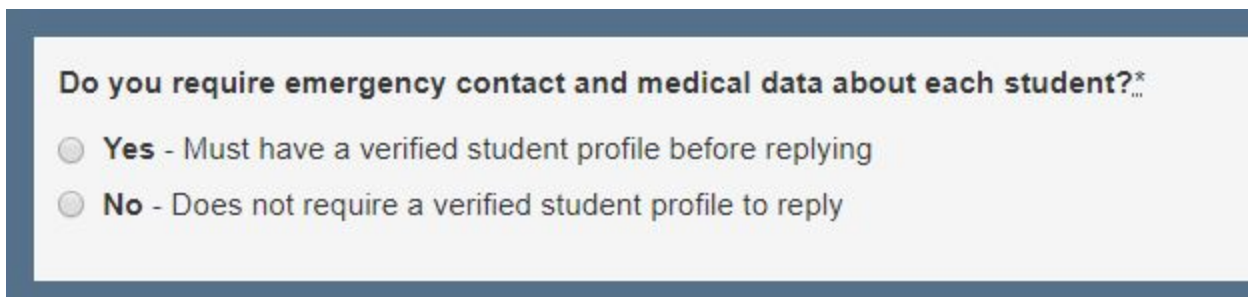
Event: requires a user to respond and sign acceptance to attend an event

Custom Signed: requires a user to respond and sign acceptance

Custom Unsigned: requires a response, but does not require a signature

Self-Service: an optional form that is made available for use at any time in the CareCentral form library

- 8) You will next see a question asking "Do you require emergency contact and medical data about each student?". You will need to ensure that this is checked off to "No" for each of your forms. Checking "Yes" will initiate users to enter medical information about themselves before being prompted with the form they need to fill out.



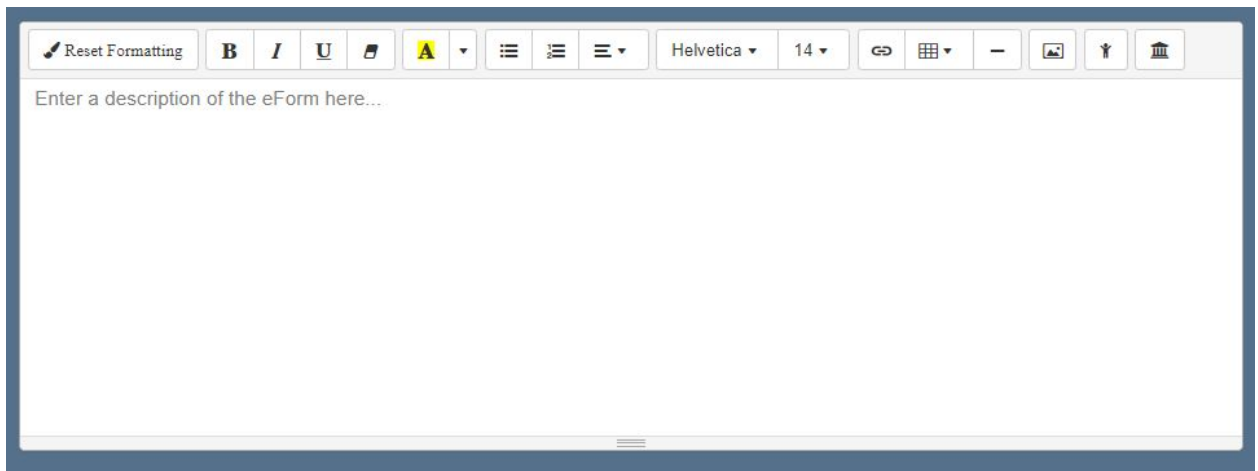
The screenshot shows a question: "Do you require emergency contact and medical data about each student?*" with two radio button options:

- Yes** - Must have a verified student profile before replying
- No** - Does not require a verified student profile to reply

Note: It is recommended that you always select NO in this section. Student medical information by default will not be in the system, and asking parents to confirm this information could create a conflict between what is in CareMonkey and the official documentation for the student.

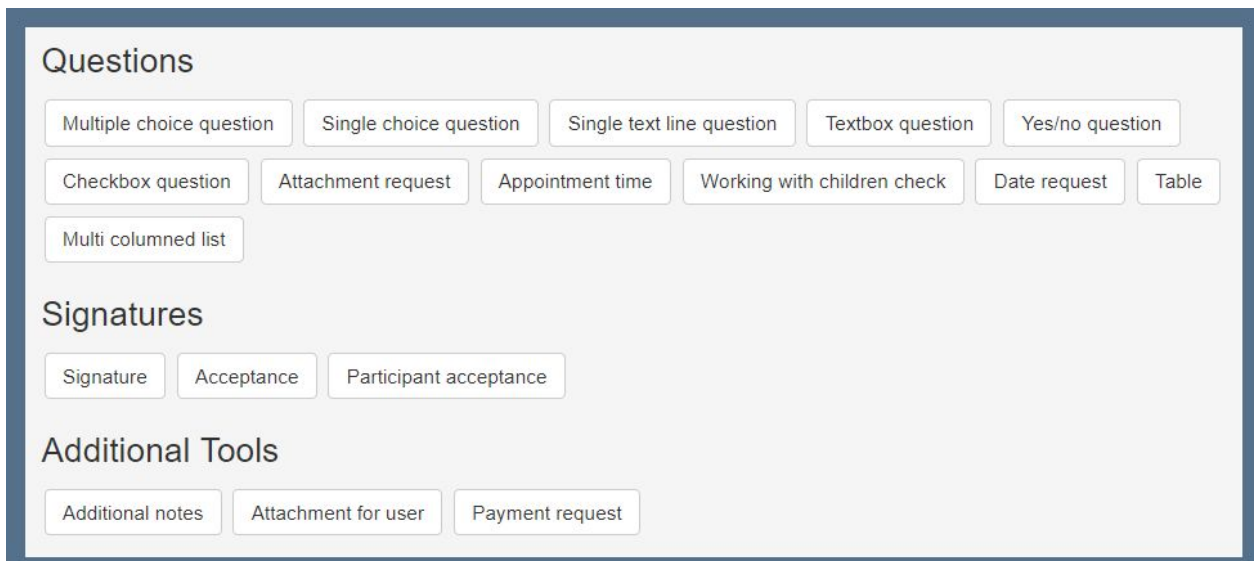
- 9) You will next be provided with a blank description box where you can enter any information you would like to about the form you are sending home. This is optional, but will allow you to better explain to the parents what the eForm is about and why they need

to sign it.



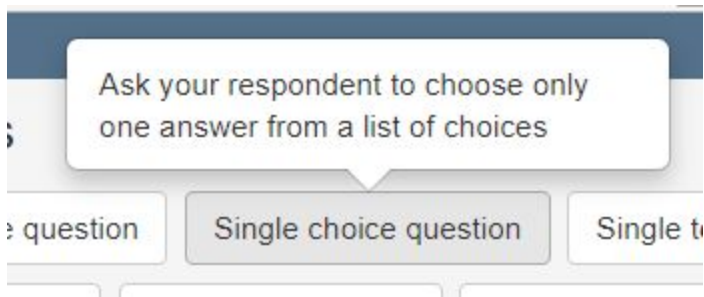
This description box will give you the text editor tools that you would need such as the standard text size, bold, underline, and italicize, as well as the ability to insert links to external websites, insert images, and automatically insert the name of the user creating the form or the name of the school.

- 10) The next step to building your own Template is to add the “question” fields you would like to appear on the form. You will see multiple types of questions that you can use, each will have their own unique functions to allow you to create any type of school based form that you would like.

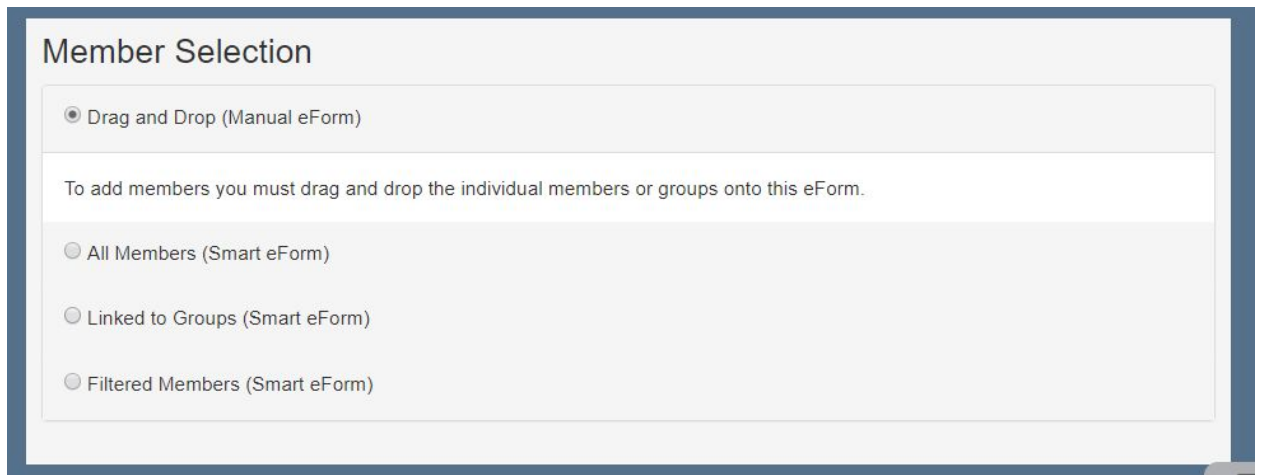


Note: You can see a description of each of the available question types by hovering your mouse over the selection on the page. These brief descriptions will help you gain a quick understanding of the type of responses these question types will allow you to

collect.



- 11) One of the final options you have when creating a new template is to choose how you will identify who will receive the form.



These functions include:

Drag and Drop:

This option allows you to manually select the users that you want to be added to this form. You will select them from either the student or staff pages by clicking on the user profiles to highlight them, and dragging them into the form. Only the users you select in this way will receive the eForm.

All Members:

This option will automatically add every user to the eForm. If it is a form created for students, all parents and guardians will receive it, and if it is a staff form, all of the staff will receive it. Choosing this option would be useful for schoolwide forms that need to go to all members, as it will be sent to any new staff or students that enter the school after the start of the school year.

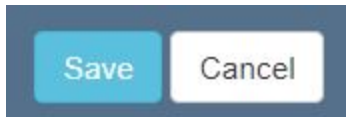
Linked to Groups:

This option is similar to the “All Members” function, but instead of sending to all users in the school, it will send the document to all members of a group that you have created. This is another useful “Auto Form”, as you can add a new student to a group, and you will know that their guardians will automatically receive it.

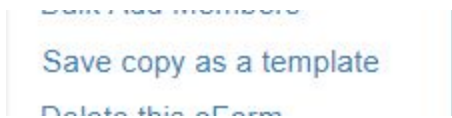
Filtered Members:

This option will allow you to automatically add users to the group based on criteria that you can select. This will allow you to develop a unique set of users that is created based off of responses to previous eForms, manual tags that have been added to the profile, or groups that the user belongs to. You will be able to add as many criteria as you would like to develop this group and can define if a user needs to only have one or all of your selections to receive your eForm.

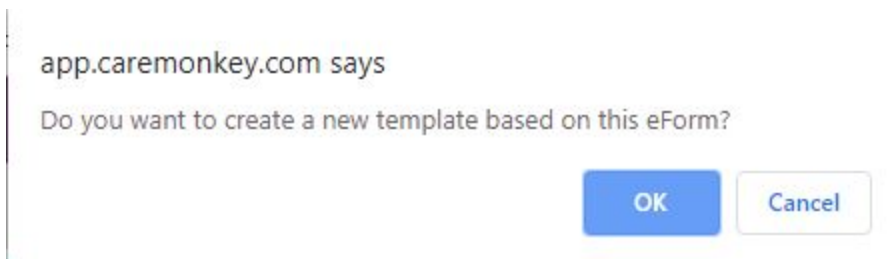
- 12) Once you are done building this template, click the blue “Save” button at the bottom of the page.



- 13) Once this has been saved, you will be brought to the eForm management page. On the right hand side of the screen you will see an option to “Save copy as a template”.

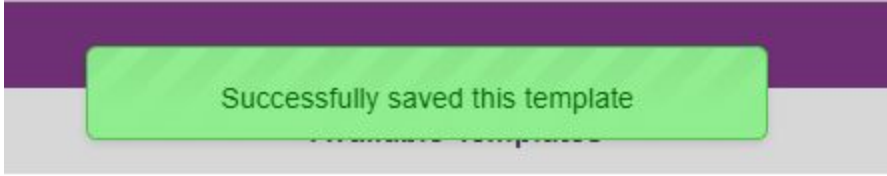


Clicking on this option will provide you with a pop-up window confirming that you would like to save this as a template to use later.



Click “OK” and you will successfully save the template.

- 14) You will be brought back to the list of built-in templates at your school. And a successfully saved message will display at the top of the page.



Scrolling down on this page, you will see any templates that you have created will provide you with the option to view, edit, and delete that you do not have with the default templates.

| | | Form | City DOE | | | | | |
|--------------|---|--------|------------|-----------|----------------------|----------------------|----------------------|------------------------|
| new template | 1 | Custom | Staff/Test | Sam Banks | View | Edit | Copy | Delete |

Creating an Approval Process

Approval processes will allow you to develop a system where key staff members in the school are notified and required to respond to for submissions before they move on to a new stage, or before they are approved. For example, you would be able to have your staff submit request forms that would first need to be reviewed and approved by the Assistant Principal, then will be passed to be reviewed and approved by the Principal before officially being approved.

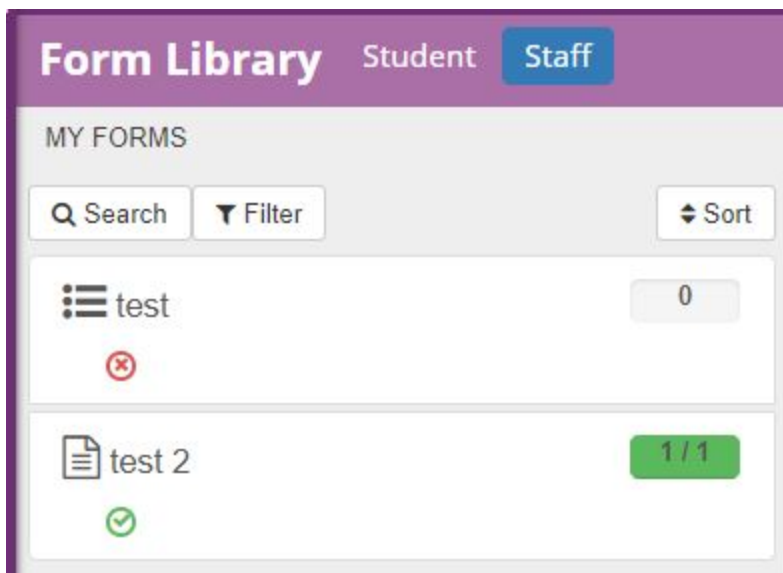
Using this function will allow you to completely digitize a process that requires an extended paper trail, where a document will need to be passed to multiple staff and signed, and allows you to fully report on and follow the audit trail of each submitted form.

The first step to this process would be to create a self-service eForm that will require an approval process. Once this form is created, you will follow the steps below to create the full process the eForm needs to follow.

- 1) Access the Form Library by selecting the icon from the left hand side of the page.



- 2) Navigate to the Staff or Student tab that contains the self service form that you are creating an approval process for. Once on the appropriate Form Library tab, click on the form that you would like to develop into an approval process.

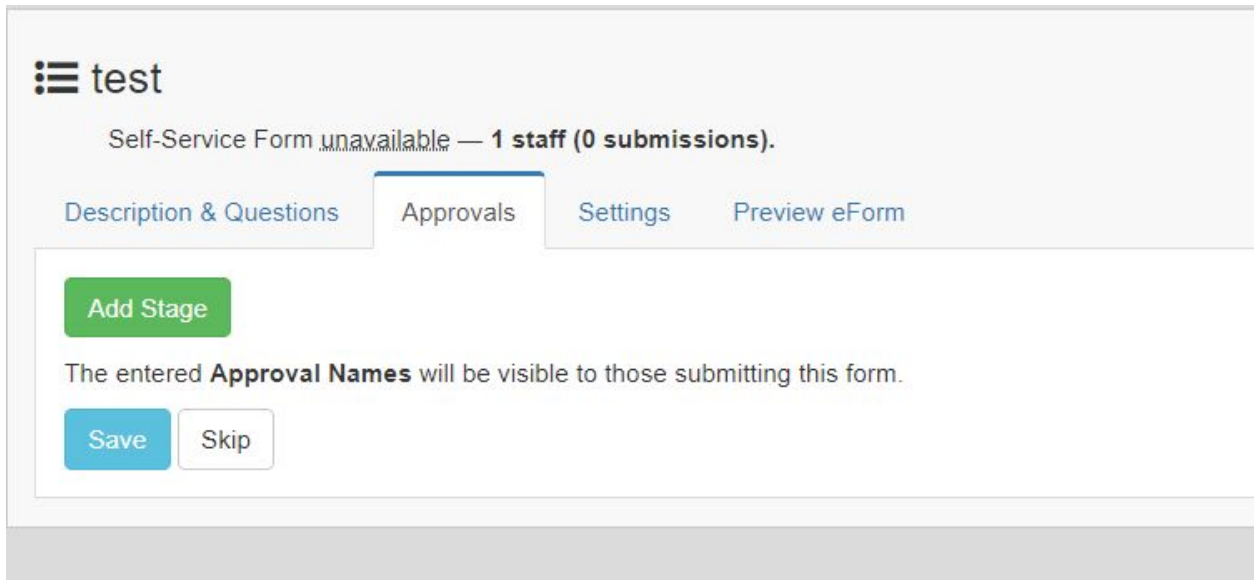


Note: You have the ability to filter or search for the form by name using the tools at the top of the page.

- 3) After selecting the form, on the right side of the page you will see the “Edit Form” button. Click on this, and you will see the page shifts to allow you to edit the content of the form.



- 4) To add the approval process, you will click on the “Approvals” tab at the top of the page, followed by the green “Add Stage” button that appears.



- 5) When you add a stage, you will start by identifying the name of the approval stage. You could label this as simply as “Stage 1, Stage 2, etc”, but it is suggested that you label each stage by the approval you need to move the form forward. The example provided in the field by default will have “Principal’s Approval” for example. Using this specific naming convention for your stages will make them easier to track and audit later in your reporting.

Self-Service Form unavailable — 1 staff (0 submissions).

Description & Questions Approvals Settings Preview eForm

☰ Approval Stage Name

eg. Finance Approval, Risk Management Approval, Final Approval, Principal's Approval

Approving Group

--- Select an approving group ---

Notify submitter when approval stage is completed?

Should submitter be allowed to select approvers from this group?

Delete

Add Stage

The entered **Approval Names** will be visible to those submitting this form.

Save Skip

Your next field is an “Approving Group” for the current stage that is a drop down selection. Here you will see staff groups that you have created. It is suggested that you create these groups for the different administrative levels in your school. For example, your principal should exist in a “Principal” group. [HERE](#) you can access the section of this guide on creating staff groups.

Note on Approving Groups: When developing groups to use for these approval processes, it would be in your best interest to ensure that even groups with a single user are created. A “Principal” group for example would only have one person in it, but in the event that the principal is out for a period of time you will simply be able to add new users to that group instead of changing the entire approval process for a short time. You may also want to consider adding users such as a principal’s secretary to this group to provide assistance in maintaining and following the approval process of forms that you are distributing. The end goal of these approval groups is to prevent your processes from becoming blocked behind a single user if they are unable to respond to every form in a timely manner.

The remaining two options here are check boxes you can select from.

The first will allow the submitter of the eForm to receive an email notification when their form has moved on to the next stage in the approval process.

The second will allow the submitter to select who will provide the approval from the group of users you selected. For example, if you have an “Assistant Principal” user group, this will let a staff member select the assistant principal for their subject area or grade level to approve the form. This streamlines the process by notifying only the users who should approve the submitted form and not clogging the mailboxes of those who should not.

After you fill in the information you would like for this approval stage, you have the option of either adding a new stage to this approval process through the green “Add Stage” button, or you can save this approval process through the blue “Save” button.

Note: You can add as many approval stages that you would like to an eForm. It is suggested that as you start to use this process, ensure that the submitters of these forms are getting notified when their forms are approved or passed on to the new approval stage. If this is not done, your staff may not know when one of these forms is completed.

Archiving eForms

After an eForm has been sent out to parents, guardians, or staff, there may be no reason to keep that form showing as active in your school. You have the ability as an administrator to archive your used eForms to ensure that they are no longer showing. Once this is done, only administrators will be able to pull the response data for that form.

A perfect example of this would be a field trip eForm. Once the trip has ended, you will no longer need to keep the form active, and you will not need to frequently check the parent responses to the form. Archiving this will allow you to view it when needed, but will not make it appear.

Some additional examples of forms you should archive include:

- Parent consent forms for events that have passed.
- Notifications, newsletters, or flyers that have been sent home through CareMonkey.

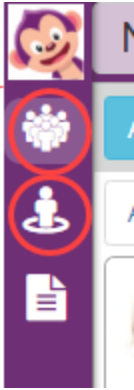
Since the data from archived forms can only be viewed by administrators, there are forms that are sent home that would be in your best interest to keep open for your staff to see the responses.

Some examples of forms that you should not archive include:

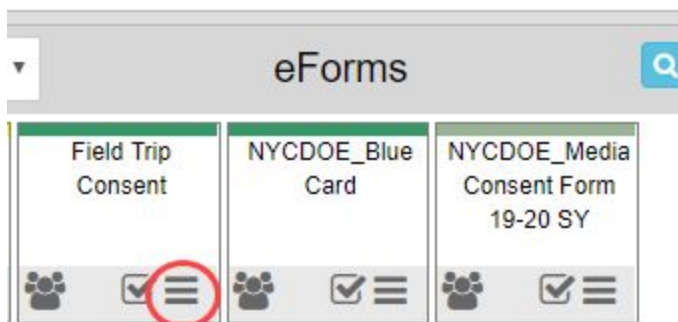
- Blue Card forms.

- Event forms before the event has ended.

- 1) To archive your eForm, you can start by going to either the Student or Staff tab on the left side of the screen. Choose the appropriate group based on the eForm you would like to archive.

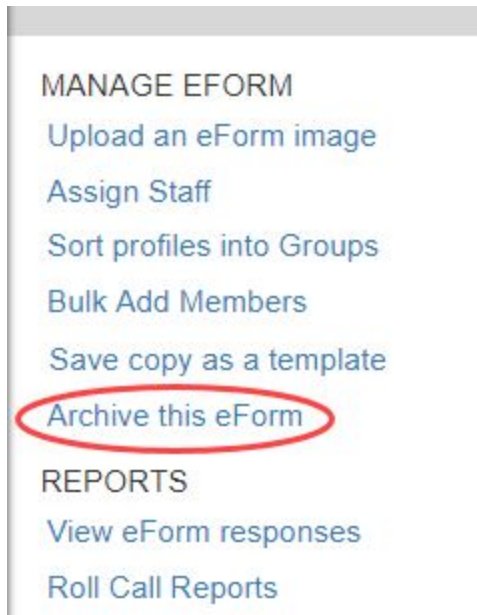


- 2) At the bottom of the page you will see the eForms section. Look through the list until you find the eForm you wish to archive, and click on the three line icon in the bottom right corner of the eForm window.

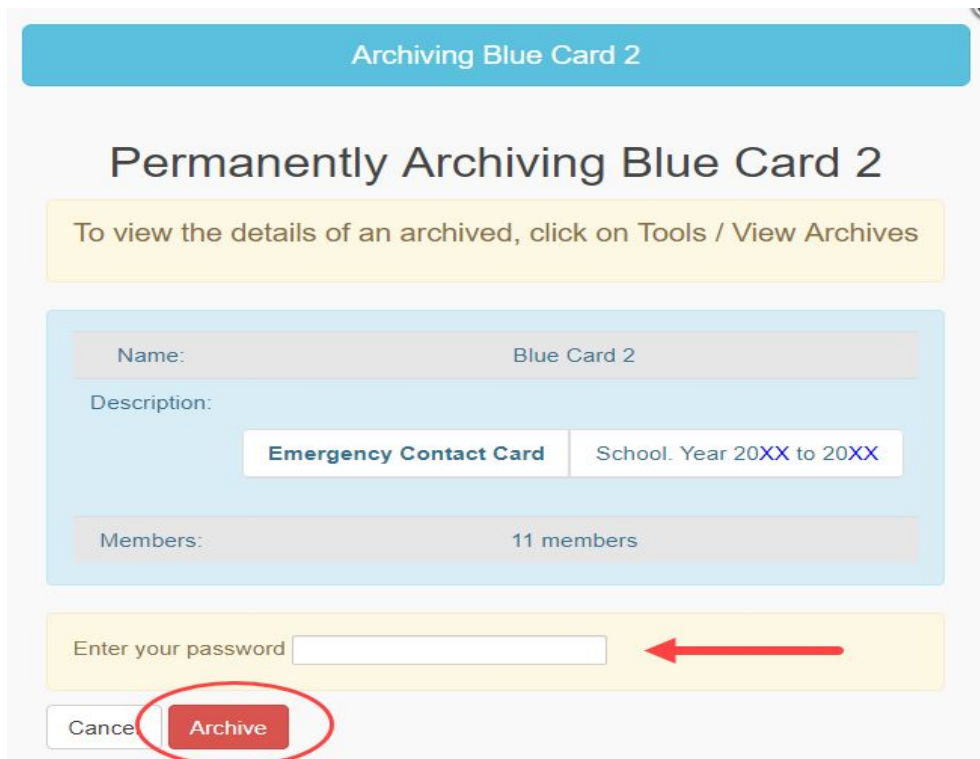


This will bring you to the eForm settings page.

- 3) From the eForm settings page you will select the “Archive this eForm” tool from the left side navigation panel.



- 4) A pop up window will appear showing you the details of the eForm including the title, a description if you added one, and the number of members assigned to that eForm. If this is the one you would like to archive, you will be asked to enter your CareMonkey password and click the red “Archive” button at the bottom of the page.



Viewing and Reporting on eForm Responses

In CareMonkey, you will have multiple ways to view the responses submitted by parents or staff members. The method you use to view your form data will depend on what you would like to understand about your form responses.

Viewing all responses for a single form (visually through the student/staff page or through excel)

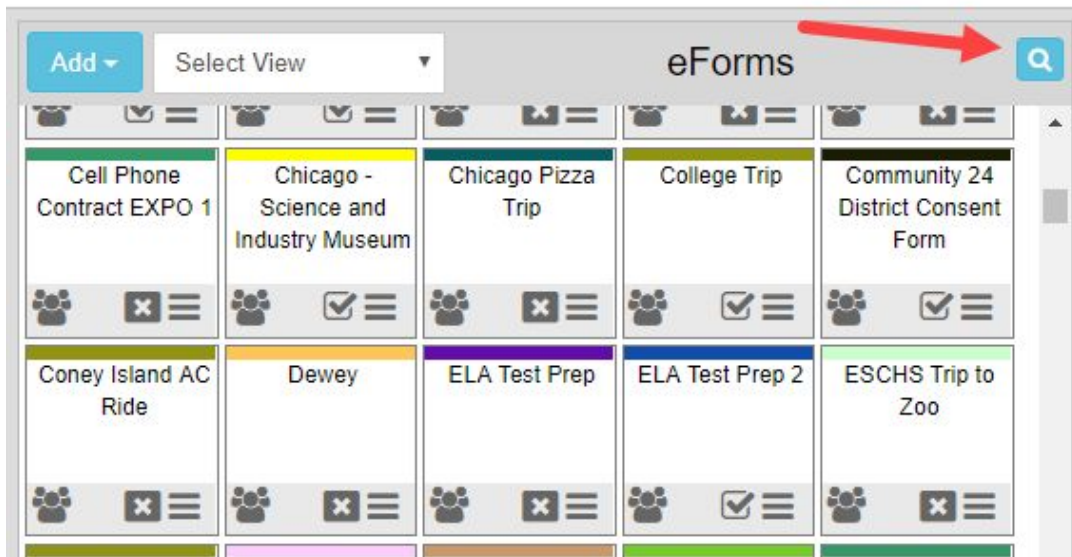
At any point, you can easily view all responses for a single eForm submission. This would be the process you follow to see all responses for something like a field trip permission slip or a media consent form. You can see these responses in two different ways. One as more of a visual breakdown allowing you to see a simple complete or incomplete, or you can download responses through an Excel file that can be exported or printed if you would need a hard copy to bring responses to an off-site field trip.

Visual Breakdown

- 1) If you are looking for a student form access the Student page by clicking the “Student” tab on the left side of the page, you will see a list of all students in the school. If it is a staff form, click on the “Staff” tab on the left side of the page.



- 2) At the bottom of the page you will see a list of all eForms that have been sent out to these students/staff. Scroll through the list, or use the search bar in the form field to find the form you are looking for.



- 3) Click on the center of the form card and you will be presented with a list of only the students/staff who have been attached to this form.



- 4) On each profile page, you will see a color coded indicator letting you know if they have responded to the form yet.

Yellow: The form was sent but the user has not yet responded.



Green: The form was sent and the user submitted a response.



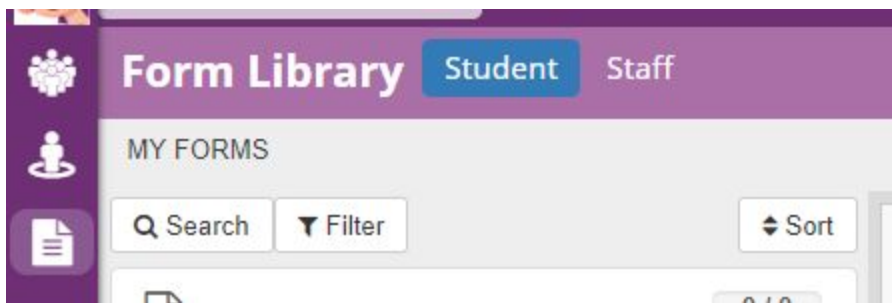
- 5) After responses for the form come in, you can use the filter tool at the top of the student and staff pages to narrow down the number of profiles on the screen. This can be used to filter for complete or incomplete forms, as well as the option to see those who accepted or declined permission on something like a consent form.

Excel Export and Table View

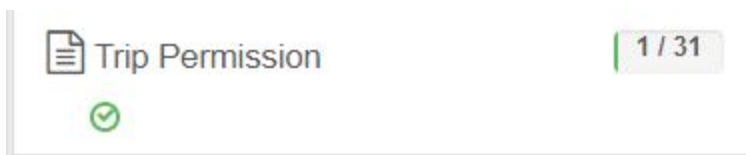
- 1) To access the Form Library, select the “Form Library” tool from the left hand side of the page.



- 2) On this page you will be able to select either staff forms or student forms using the selector at the top of the page.



- 3) After selecting the form type, you will see a list of all forms on the left side of the page. Next to each form you will see how many responses you have received out of the total number it was sent to.



- 4) Click on the name of the eForm you want to view. On the right side of the page you will see all of the current responses to the form in a table format.

Trip Permission » Active Responses

General Permission available — 31 staff (1 response).

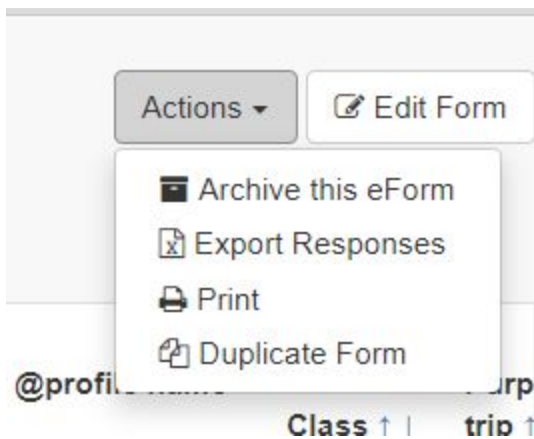
Responses ▾ Members Supervisors

| Responded by mobile | Originating group/eform | Status | Approver | Approval stages | Yes, i give permission for @profile name | Class | Purp trip |
|---------------------|-------------------------|-----------|-----------|-----------------|--|-------------|-----------|
| ↓ ↑ | ↑ ↓ | ↑ ↓ | ↑ ↓ | ↑ ↓ | ↑ ↓ | ↑ ↓ | ↑ ↓ |
| l.com | 9179682219 | Responded | Principal | 2 of 2 | Accept | AP calculus | Zo trip |

Actions

Note: You can filter responses in this table view by clicking on the arrows next to each column header.

5) In the top right corner of the page you will see the Actions drop down field.



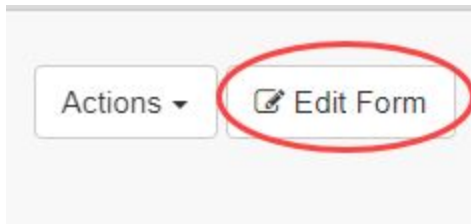
Archiving this eForm: Will allow you to keep a digital record of eForm responses that an administrator can access whenever they need to.

Exporting Responses: This option will allow you to download all responses as an Excel file. It is worth noting that any signature field will export to the file as simple indicator of whether or not the signature came in.

Print: You will be able to print responses from the page. This will work like a print screen feature within the browser and will not print all responses at once.

Duplicate Form: This will allow you to quickly make a copy of the current form that could be saved and sent out later.

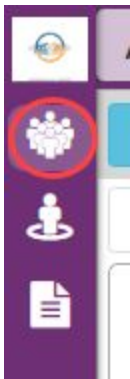
- 6) The Edit Form button will let you make any updates you would like to the current form you are looking at.



Note: If you make updates to the existing form like deleting a question, you will still keep all of the responses for that question that had been entered up to that point. If you add a question, users can still access and update their responses as long as the form is still active.

Viewing all form responses for a single student

- 1) Access the student page by selecting the Student tab from the left side of the page.



- 2) Once in the Student section, click on the three small lines in the bottom right of the user's profile. This will open all of the information about that user.



- 3) When the profile page opens, you will see a list of options on the left side of the page. From this area you will choose to view “all eForm responses”

A screenshot of a web interface titled "Details for Isla Backhaus". On the left is a vertical menu with options: "View/Edit member", "Archive this Member", "View Member/Profile", "All eForm Responses" (circled in red), "View Audit Trail", "View Member Changes", and "View Changes". On the right is a profile card with a photo of Isla Backhaus, her name, birth date "5 October 2004", and "Profile ID: (Edit)". Below the photo are fields for "Profile last updated: 29 November 2019" and "Parent Contacts: mph+demoadu". At the bottom, it says "Manual Tags set: none add / remove" and "Isla Backhaus is in the following group: AP Calculus".

- 4) On the next page you will see a list of all eForms that are tagged to this user. To the right of each form, there will be an indicator if there are any completed forms labeled as “Responded” or partially completed forms labeled as “Part Responded”.

| eForm Responses | Response Date | Response |
|-----------------------------|---------------|-----------|
| PS 14 Cell Phone Contract | 28 June 2019 | Responded |
| Barr Trip to Europe | 28 June 2019 | Responded |
| Broome St. Media Consent | 28 June 2019 | Responded |
| Kappa Trip To Europe | 28 June 2019 | Responded |
| HS of Finance Media Consent | 27 June 2019 | Responded |
| NYCDOE Trip to Zoo | 27 June 2019 | Responded |
| Sant School Trip to the Zoo | 27 June 2019 | Responded |

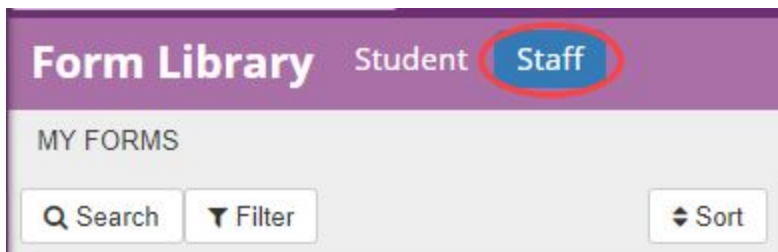
- 5) Clicking on the response for each form will show you a digital version of the form that was sent, including answers to each form question, and parent signatures.

Viewing self service form submissions

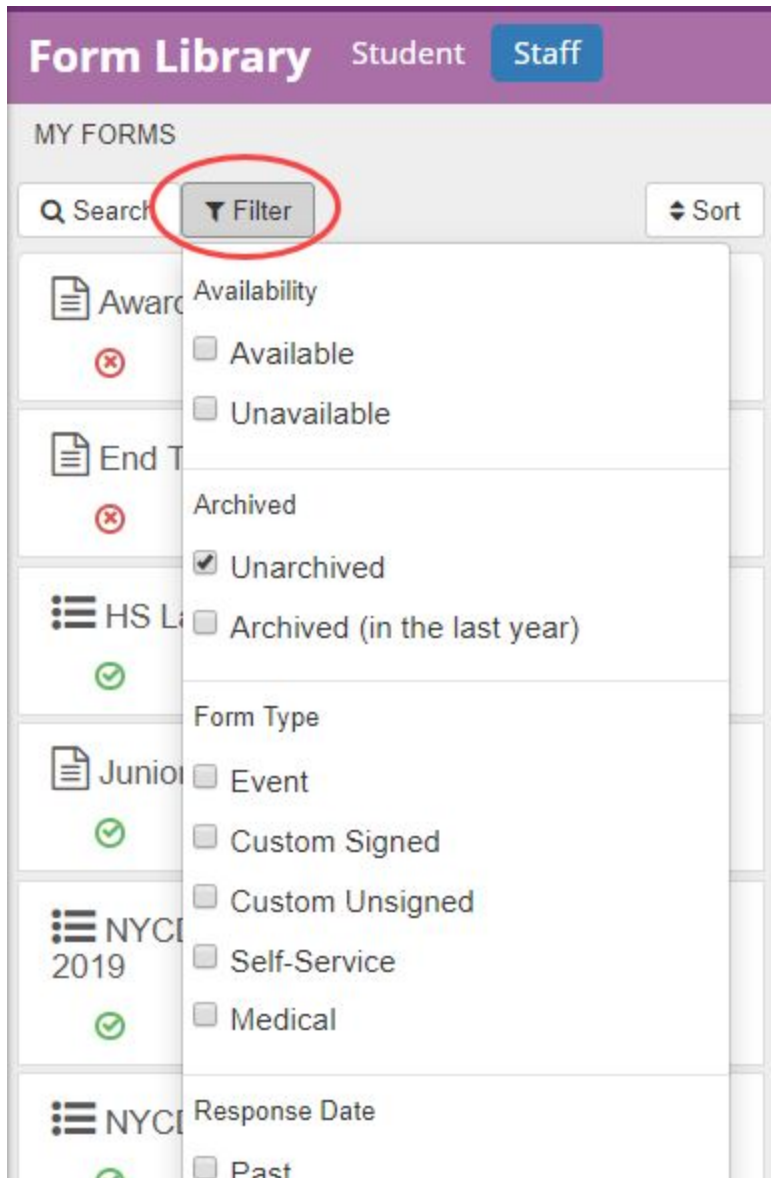
- 1) To access self service forms submitted by staff members you will need to access the Form Library. To do so select the “Form Library” tool from the left hand side of the page.



- 2) In the top left hand corner of the Form Library, you will select “Staff” to view all staff forms that have been created.



- 3) To easily identify self service forms, you can use the filter option at the top of the page.



To filter for your self service forms you would want to check off the boxes for “Unarchived” and “Self Service”. This will display currently active self service eForms.

- 4) Selecting one of the eForms from the left side of the page will let you see the response information for each submitted form. This will all be based on the required fields that you set up for each form.

Form Library Student Staff Add Staff Form

MY FORMS

Search Filter Sort

- Awards Ceremony Memo 0 / 0
- End Term Party 0 / 0
- HS Law Custom Staff Form 1
- Junior Honor Society 0 / 0
- NYCDOE_Copy Center Request 2019 22
- NYCDOE_Supply Request 2019 6
- NYCDOE_Supply Request 2020 2

NYCDOE_Supply Request 2020 » Active Submissions

Self-Service Form available — 31 staff (2 submissions).

Submissions Members

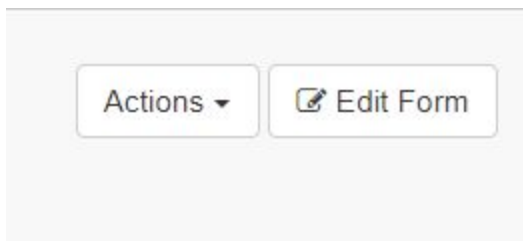
| Title | Member | Member id | Submitted by | Submitted at | Responded by mobile | Originating group/form | Status | Approver | Approval stages | Date needed by | Intended for which class(es) or programs | Delivery location |
|----------------------------------|------------------|-----------|------------------|---------------------------|---------------------|------------------------|------------------|---------------|-----------------|-----------------|--|-------------------|
| NYCDOE_Supply Request 2020 79247 | Peter Bencivenga | | Peter Bencivenga | 2019-05-14 11:00:45 -0400 | 9179682219 | | Pending approval | Supply Person | 2 of 2 | 14 May 2019 EDT | Art | 210 |
| NYCDOE_Supply Request 2020 79626 | Peter Bencivenga | | Peter Bencivenga | 2019-05-17 11:03:49 -0400 | 9179682219 | | Pending approval | Supply Person | 2 of 2 | 20 May 2019 EDT | Art | 210 |

Actions Edit Form

Actions

For self service forms with approval status, you will see the current status of the form such as Approved, Pending Approval, or Rejected. You will also be able to track who is responsible for replying to these forms through the current “Approver” status.

- In the top right corner of the page, you will have the same Actions and Edit Form options you have when viewing responses to other types of eForms through the Form Library. You will be able to archive, print, export, duplicate, and make edits to the existing form through these tools.



Note: Making any edits to an eForm that is currently in use will not alter the submissions already in the system. Deleting a question, for example, would not cause responses to that question to be removed. They will stay on the site and can be reported on.

Settings for Staff and Guardian Activation

After you have completed the other processes in this guide, your last step will be to ensure that your staff and parent groups are activated so they can register their accounts and begin responding to eForms you send out. Parent and staff groups can be activated in bulk, and most importantly they do not have to be activated at the same time. This will be useful to keep in mind

if you would like to attempt a soft roll out of the product to your teaching staff using staff forms first, and later spreading the system out to your parents once you have developed confidence in your process and procedures.

In this section you will see two separate processes. The first will be the steps to activate your staff and allow them to see the student groups they are responsible for, and the second will be to activate the parent groups. Both of these processes will end with your user groups receiving an email to activate and log into their respective accounts.

Best Practices: Staff and Guardian Activation

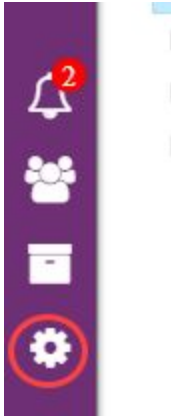
Following the steps outlined in this section will result in your end user groups receiving email notifications from CareMonkey, and will provide them with their username and a temporary password for them to log into the system. It is recommended that when this activation is completed, staff and parents have a simple form available for them to complete. If they do not, they will be logging into a system, but there will be no further action to allow them to see and use the form functionality.

A simple eForm that can be sent to them could simply be a form that requires a signature, or it could be a standard form that would be normally distributed during that time of year. For parents and guardians, this could be a media consent form or a student handbook that they would simply need to accept and sign for. You could provide your staff with something just as simple, such as a staff handbook that you would like them to sign and show acceptance for. You could also provide your staff with a personnel emergency contact update, as it would be important information for you to gather at the start of a school year, but will also be simple enough for the staff to fill out.

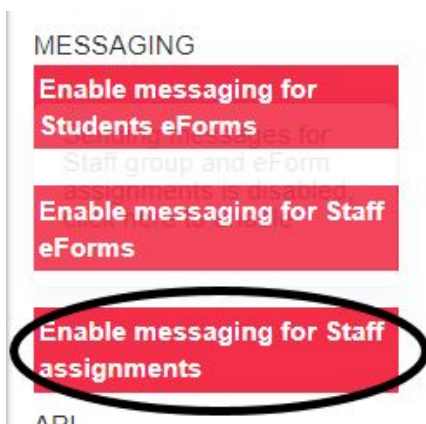
Activating eForms for Staff Users

As mentioned earlier, activation for staff users is a two step process. Step one will allow the staff member to see the class or grouping assignments that they are responsible for, and the second will allow them to access and respond to eForms.

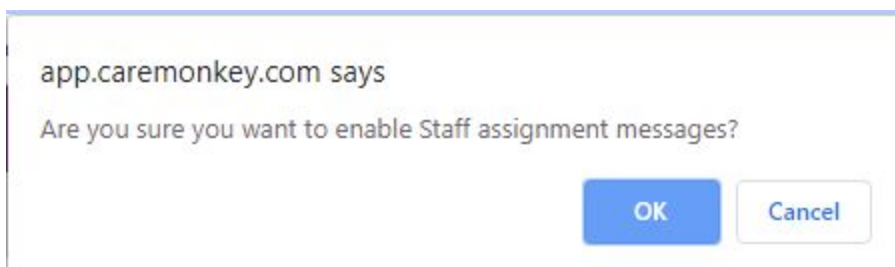
- 1) Go to the Settings page by clicking the gear icon in the bottom left corner of your home screen.



- 2) In the Settings page you will see three red tools under the Messaging section. You will start by clicking the red button to “Enable messaging for Staff assignments”. This will send out a message to staff members that will inform them of the groups in CareMonkey that they are tagged to. (The default for this will be their class assignments).

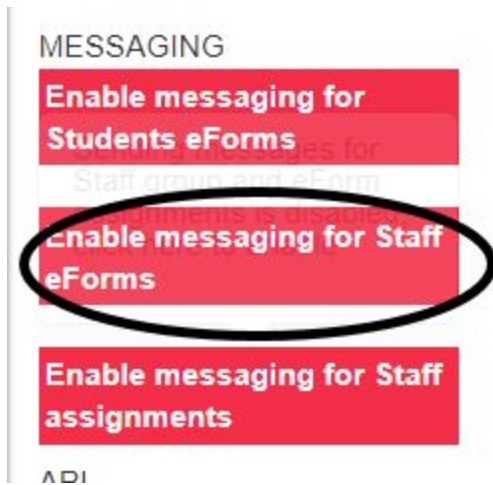


- 3) Once clicked, a pop-up message will appear asking if you are sure you want to enable messaging for staff assignment messages. Clicking OK will enable them.



- 4) After enabling the Staff assignment messaging, you will select the option to “Enable messaging for Staff eForms”. In the same way as before, you will get a pop up message asking if you are sure you would like to enable messaging for staff eForms. Click OK to

enable your staff to receive messages for eForms to their email accounts.

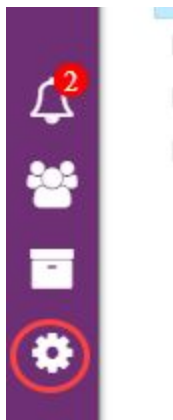


Note: This last step to enable messaging for staff eForms will send each of the staff in the school a registration email with their CareMonkey username and a temporary password that will allow them to login to the system for the first time. The users will be asked to create a new password upon login.

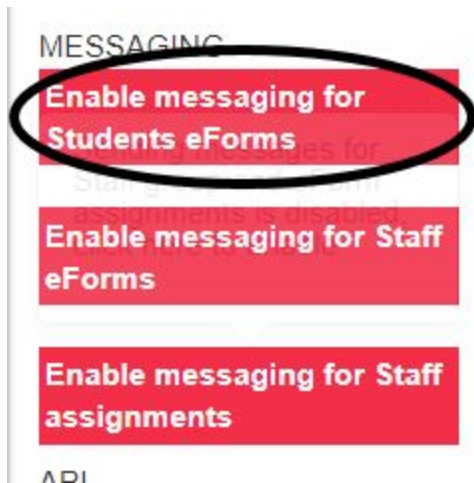
Activating eForms for Guardians

Activating accounts for parent users will only require you to active messaging for forms to the parents.

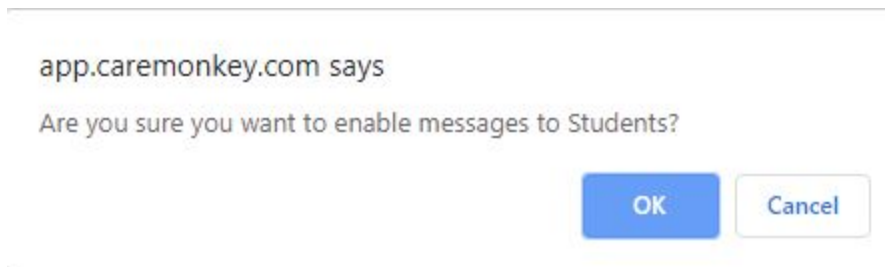
- 1) Go to the Settings page by clicking the gear icon in the bottom left corner of your home screen.



- 2) In the Settings page you will see three red tools under the Messaging section. You will start by clicking the red button to "Enable messaging for Students eForms".



- 3) Once clicked, a pop-up message will appear asking if you are sure you want to enable messages to Students. Clicking OK will enable them to receive eForms that are sent by the school.



User Account Management

After the school has decided to enable eForm usage for parents and staff, users will get information emailed to them providing instructions on how to log in for the first time using their CareMonkey usernames and temporary passwords that are generated by the system. These usernames are automatically assigned by the system (usually in the format "LastNameXXX" where XXX is a 3 digit number).

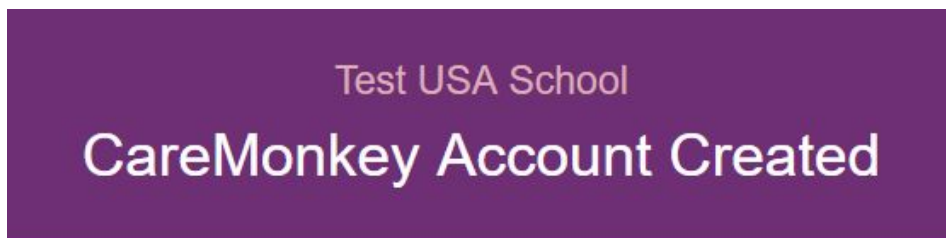
These accounts are created automatically whenever a student or staff contact is created, this could be through an automated import, or if they are created manually. Once created, the username is automatically generated along with an "initial password", these details are then sent to the contact in an email as below. These emails are only sent when student and staff messaging are switched on. These emails are resent once every 7 days or until the user signs-in and changes their initial password (this interval is not currently configurable).

Once users are able to log in, they have the ability to manage their own contact information as well as change the display language of the site. You will also have some ability to report on the changes these users are making to their contact information.

Activating an Account as a User

When you choose to send out the activation notifications to your staff and parents, they will get an email to their email address on file to tell them to set up their user accounts. Below you will see the process they will need to follow to successfully log in.

- 1) After a user group has been enabled on the Organization Settings page, all users in that group will receive an email to their inbox providing them with their login credentials for CareMonkey. This will include their CareMonkey username and a temporary password.



Hi Bobby,

A new CareMonkey account has been created for you to access information for **Test USA School**. You can sign-in to this account by navigating to <https://www.caremonkey.com>, clicking Sign-In and using the username and password below.

As a security measure, you will be required to change your password the first time you sign-in.

Username: flay001
Password: Zs2EEsL3L



- 2) Clicking on the blue "Sign In" button in this email will bring the user to the CareMonkey sign-in page. They will be asked to sign in with the username and password that were provided in this email.



Sign in

Sign in

 Log in with Clever

[Forgot password?](#)

[Resend Confirmation email](#)

3) Signing in for the first time will prompt the user to set up a new password.



Resetting your password for flay001

Before login, please change your password.

Please enter a new password below

- 4) After setting this new password, the user will be logged into their account. This first time they fully log into the site, they will be prompted to confirm the contact information that is on file for them.

My Account ▾

Edit Contact Details of Bobby Flay

Email

Cell Phone

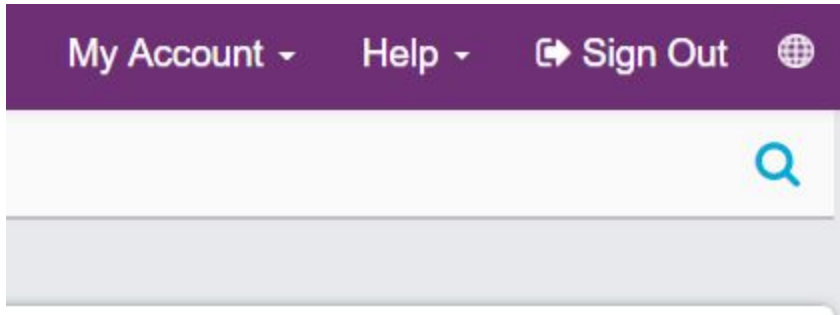
Save Cancel

The email address will default to the one that is on record in the system. For staff members this will be the email on file in the IO Classroom/Skedula portal, for parents this would be the contact information that pulled from ATS.

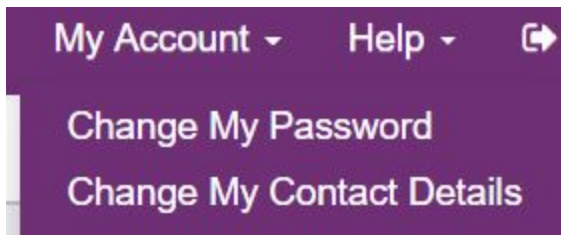
If updates are unnecessary, they can cancel out of this window, or if updates are being made, they can use the blue “Save” button to update the records in the system.

Updating Contact Information as a User

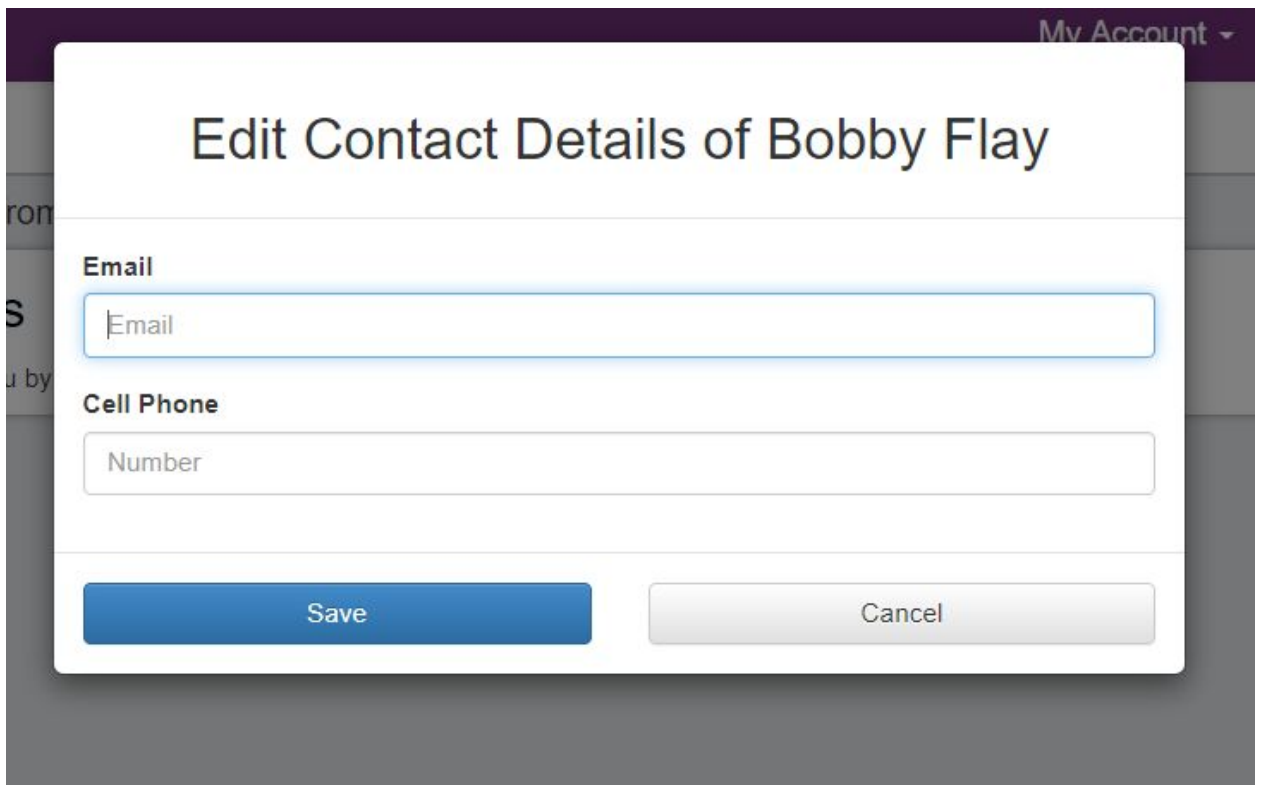
- 1) When a parent user is logged into their CareMonkey account, they will access the My Account tab at the top right of the page.



2) In the My Account tab, they will click on Change My Contact Details.



3) The same pop up window they saw when they first logged into their accounts will appear allowing them to update the email address and phone number associated with them.



After the contact information has been updated, the user will click on the blue “Save” button.

Reporting on Contact Information Changes

As parents begin to activate and confirm their contact information in CareMonkey, you will have the ability as an administrator to view all of those changes in order to make the appropriate updates to the official record for the student in ATS.

- 1) Start on your CareMonkey home page and select the Reports/Archives tab from the navigation panel on the right side of the page.



- 2) From this page you will select the option for “CSV Export Override Student Contacts” from the left side of the page.

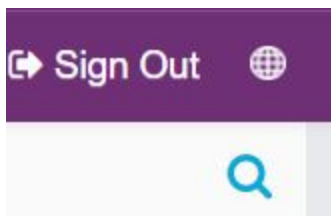


- 3) This will automatically download and begin to open an Excel document that will display the student ID number, the updated email address, and the updated cell phone number depending on what the parents had changed.

Updating Default Site Language

For parents who would prefer the site to display in their home language, they can follow the steps below.

- 1) While logged into their CareMonkey accounts, they will click on the small globe icon located in the top right hand corner of the screen.



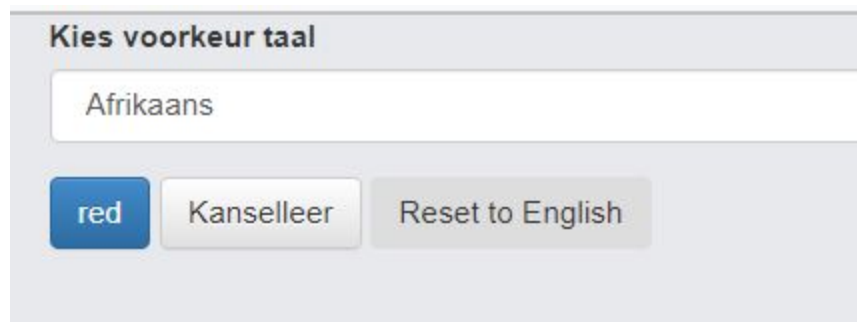
- 2) They will be presented with a dropdown menu in the middle of the screen allowing them to select the language that they prefer the site be displayed in.



- 3) Once they make their selection from the menu, they will click the blue “Save” button below the dropdown field.



Note: If the user would like to reset their default language to English, they can click on the globe icon again. There will be a new button present for them that says “Reset to English”.



Training and School Roll Out

Preparing for Start of School

Making sure you are ready for the start of the school year goes beyond knowing how to use the tools in the CareMonkey system. To truly be ready for the school year, you will want to ensure

that everything you plan on distributing to your parents and staff is built and available to send out as soon as you need it.

At the beginning of the school year, this will include familiarizing yourself with all of the pre-built templates that are available to NYC users, as well as working with your CSM to help digitize all of your paper heavy workflows using CareMonkey. It will always be helpful to think about all of your processes that take place at the school and understand the best way to build those into a digital system.

A good way to frame your school preparation is to think of preparing for your first month of school. Creating a new eForm, or adding a template is easy enough to complete, but the first month of school should be focused on the day to day tasks of running the school effectively. Once you start moving past the first month, you can continue to expand your usage of the system and begin looking to manage additional procedures and eForms within CareMonkey.

Staging Release: Best Practices

As with all new tools, creating a detailed plan is key to ensuring a successful rollout, avoiding frustration and leading to stakeholder adoption. The CareMonkey team will provide a few recommendations for your school release, but since each school community is different, you may want to develop your own staged roll out with your Customer Success Manager.

Whichever direction you choose to go, staging release for CareMonkey can be viewed as a two part process. One version of release will be focused internally for school staff, and the other will be the release to parents and guardians of your students. It is up to your discretion as a school whether you have these occur at the same time, or if you choose to break this release into two parts, with internal staff coming first, and parent release coming afterwards.

Staff Engagement

A version of release to staff is considered a good first step as it will give you the opportunity to get used to using the system, as well as providing you with a good group that will allow you to gather feedback for ease of use or procedural steps that can be filtered back to parents later. We can offer a simple three step roll-out process to make this as easy as possible.

- 1) A good initial step for staff is to release a hardcopy letter to them, as well as announcements at faculty meetings to at least let them know the product is coming their way. A sample onboarding letter can be found [HERE](#).
- 2) You then enable the messaging for them that will inform them of the student groups they are attached to, and enable their access to digital eForms through the Settings page. These two enabled functions will send them an email allowing them to register for the site and log into their accounts.

- 3) Along with the staff registration emails, provide them with a simple digital form to fill out. This could be something simple that requires a signature, such as a consent form or a release form, or a clothing size poll for a staff t-shirt, or it could be a required form like a personnel emergency contact update. Prepare this eForm before you enable your staff, and enable the form once those registration emails have been distributed.

Providing an eForm with their registration will allow them to witness and partake in the process of seeing an email about a new form, accessing the site through their phone or a web browser, and submitting a digital eForm. This will also allow you to practice the steps to review completion of a form, and for you to track the completion by your staff members.

After these initial steps are followed you will be able to provide staff with more complex forms. This will allow you to slowly introduce them to the idea of creating their own digital forms, or for them to access and use the internal form library to fill out self-service forms for copy requests, PTO requests, etc.

Parent Engagement

Parent acceptance of a new system can be the most difficult part of any release for a school. The best steps for this are going to be heavily reliant on your understanding of the parent community that you already have in place. With this knowledge of your community, you will be able to hit on the major pain points that can be helped by making your form distribution entirely digital.

In the same way that roll-out for your staff can be handled with a simple three step process, the same can be said for your parents.

- 1) Start by sending information home to the parents. This could be handled through a hard copy, parent facing letter similar to what was sent to the staff. A sample of this parent facing form letter can be found [HERE](#). This could be supplemented by distributing the letter during back to school nights where you dedicate time to addressing the parents as a whole and really explain what CareMonkey will do for them and the school as a whole.

It would be important for you to ensure that parents have provided an email address, or at the very least a valid cell phone number. Without these, your parents will not be able to receive messages or forms from the school.

You should also identify a date that you will be sending out parent registration emails. This will let the parents know that an email sent to them by CareMonkey asking them to register for an account should not be ignored.

- 2) After parents have been informed of what is coming their way, you will need to enable the parent accounts in the same way that you did for your staff. All of your parents will be

enabled in bulk and will be able to register their accounts to see the students that they have associated with them. As parents begin officially registering their accounts, you will see the profile images of their students turning from “White” to “Blue”. Remember that a “White” color indicates there is an email address or a phone number associated with a guardian, but it has not yet been registered. “Blue” will indicate the parent has successfully logged into their account. This color coding will be a great way to start tracking some of the initial parent buy in at the school.

Note: The color coding you see on the profile cards for users will be a good gauge for how successful you have been in launching CareMonkey. You could potentially see four different colors on the profile cards of your users. These are:

Red: This will represent an “Email Delivery Problem”. This will indicate that the profile has zero contacts, meaning that no users can verify contact information or respond to sent eForms. This can be caused if all contacts have one of the following: No email address; Bouncing email; or No edit permission.

White: The student record has a parent contact with a valid email attached to it.

Yellow: This user has been manually set to be “managed locally”. This means that the user will not receive notifications or emails from the CareMonkey system.

- 3) It is advised you send a simple form out to guardians to complete as you enable eForm messaging for students. This would be a perfect time to distribute a simple form that requires no information entry other than a signature. For example, a school handbook, a behavior contract, or a media consent form would be great as it would only require a guardian to review a document provided by the school and provide their consent and signature.
- 4) After your parent community has been exposed to simple forms, you could then begin to distribute a larger, multipart form like a Blue Card. This will provide the parents with multiple question fields to fill in, but they will at this point be more confident and comfortable navigating the system because they have been exposed to a few simple forms at this point.

Creating Dummy Accounts for Staff and Parents

When you begin to think about the training and on-boarding of your staff and parent groups, it would help to create a dummy account for each user type to actively be able to demonstrate different functions in the system.

Since you have the ability to manually create both staff members and students, it is easy enough for you to create one with a personal email address (or even a simple gmail account that is only used for this purpose). Full instructions on how to manually add user accounts to CareMonkey can be found in our guide. The process for adding a staff user account can be found [HERE](#), while adding a parent or guardian account can be found [HERE](#).

The benefit of these dummy user accounts is that you have the ability to show a group exactly what they would see when they log into the system. For staff, this will allow them to see the site without additional administrative privileges that you will have access to as an administrator, and you will not have to worry about performing a function during a training that they will not have access to in their own live sites.

You will also have the added benefit of having a test account for any documentation or functions you would like to roll out to your school community. A staff dummy account will let you walk through a full approval process for a copy center request before it is made available to the rest of your staff. A parent or guardian facing dummy account would be useful in viewing eForm submission rates, or contact update logs through CareMonkey.

Best Practices: Creating Dummy Accounts

If you choose to make your own dummy accounts for students and staff, make sure you identify them with a unique name to make sure they do not interfere when you choose to report on form completion. You could also create this user, and when they are not being used for training purposes they could be set to a locally managed profile. This will make sure they are not automatically selected when you send out eForms to all staff or parents.

Training

Training your staff and parents on how to use CareMonkey can be a very simple task. The biggest conversation about how to train them, what to train them on, and when to train them, all depends on the planned roll out of the system to your entire school community. For any full scale training plans, you will need to work closely with your CSM to get a better understanding of your school culture, expectations for the staff, and the goals of the administrative team with the system as a whole.

Phase 1: Administrative Trainings (Summer - Before System Launch)

This is arguably the most important step of training, and is not necessarily reliant on the content or knowledge that you will gain. The most important part of administrative level training is to identify key point people at the school who are willing to learn the system, but most importantly, these individuals will need to be responsible for the day to day use of the CareMonkey platform.

Without a strong set of point people at the administrative level, you will not be able to effectively learn the system to roll it out to parents and your remaining staff.

The content of this session will be focused on the privileges and functions an Administrator will be able to control within CareMonkey. This will include all of the school Organizational settings, creating and distributing forms and templates across the school, and the activation and management of your CareMonkey users. Without this key understanding, eForms will not effectively be sent home.

Phase 2: Staff and Parent Activation/ Introduction (Early School Year - First Week)

After understanding the basic functions and roles of an administrator in CareMonkey, you will next begin activating your parents and/or staff members. This will depend entirely on your planned roll out of the system at your school. It is in this phase of training that you will assist your community in understanding how to log into and access forms that have been pushed out to them. Since eForms that are pushed out to the community make up a large portion of usage, it is recommended that this phase be completed early.

In terms of actual training time, parents and staff will most likely need to see an example of the registration and usage processes. This would be best accomplished by using a dummy account in your school site, and demonstrating how to go from receiving the email to set your password, to logging into the site for the first time, and will end with responding to a simple digital signature form.

For your parent level users, the suggestion would be to demonstrate this process at a back to school night to ensure they have an opportunity to see what the system looks like.

Phase 3: Increasing Staff Privileges

The final phase of roll out and training would be to increase the capabilities of your staff members. Initially they will only have the ability to respond to digital eForms, but you have the option of allowing your staff to begin creating and distributing their own eForms to the parents and guardians of their students.

Here, you can also spend time focusing on some of the self-service forms that are available to your staff. If you are choosing to use the system for approval processes, this phase of training can expose to them to process of accessing and completing a self service form.