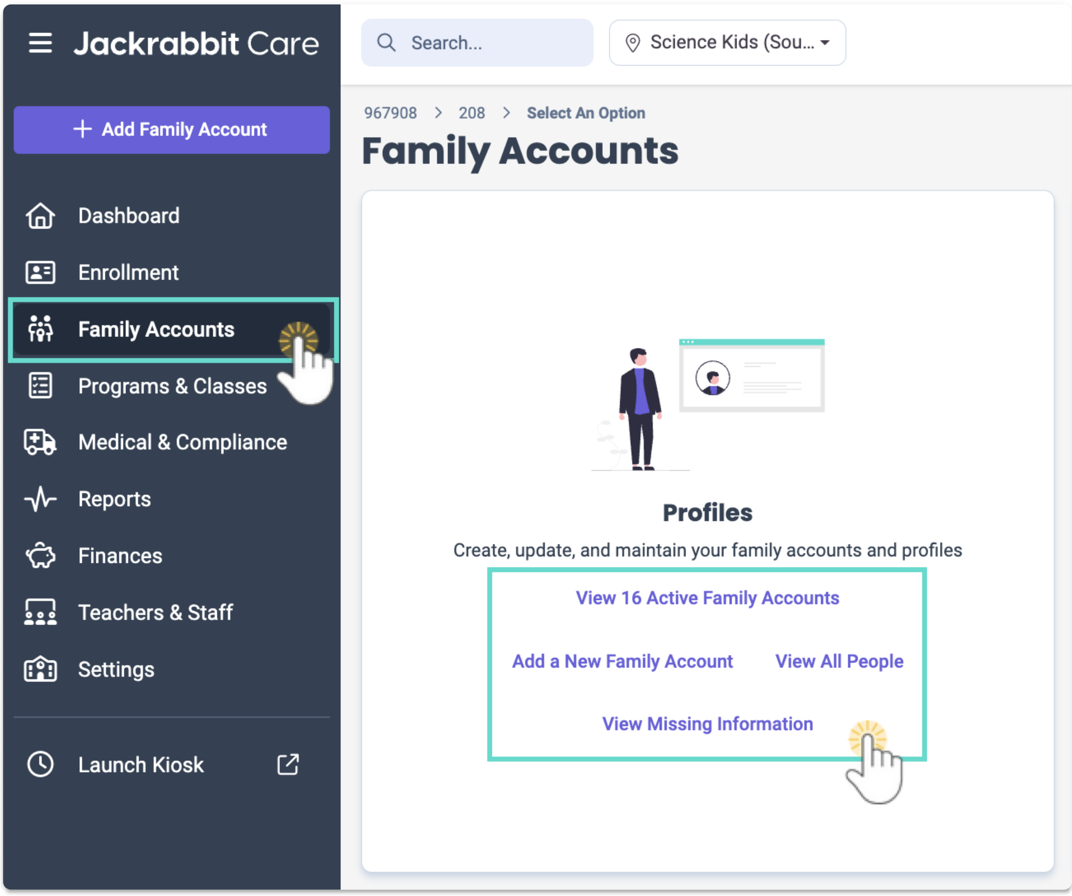
Family Accounts

Last Modified on 04/12/2024 3:38 pm EDT

Families are the heart of your business, and in Jackrabbit, it all starts with families!

- Children in a Family Account are enrolled in classes, and contacts are added to manage authorized pickups, emergency contacts, etc.
- Each Family has a Billing Profile that identifies Payers, the invoice cadence, and shows the balances due.
- Transactions (fees and credits) are posted to Family Accounts, and invoices are automatically generated based on their Billing Profile.
- Payment information is added to individual Family Contacts.

To work with families, go to the left menu and select **Family Accounts** and then one of the many links on the Profiles card, or select **Reports** (left menu) to access all reports for Family Accounts.



View # Active Family Accounts

To work with Family Accounts already in your system, you'll use the **View # Active Family Accounts** link on the *Profiles* card to open the *Family Accounts* page.

The *Family Accounts* page automatically displays Active families (families with children currently enrolled). A card for each Family can be expanded to show high-level information about the family at a glance. See additional families by doing one of the following:

- Show all families by clicking the **red X** icon next to *Status Active*.
- Set a status such as *Active*, *Inactive*, or *All* by clicking the **Filter** icon .
- Archived families can only be viewed using the **Actions** menu > **View Archived Accounts**.

Click on a Family Name to open their *Family Account* page, where information is organized into five tabs:

- **Details** - Profiles for children and contacts are found on the *Details* tab on the *Family Account* page.
  - Learn more about **Work with Family Accounts - Children**.
  - Learn more about **Work with Family Accounts - Contacts**.

- **Billing** - The *Billing* tab on the *Family Account* page stores the Billing Profile(s) associated with the family. The Billing Profile defines when a bill is automatically sent and when it's due.
  - Learn more about the **Billing Profile**.

- **Transactions** - The *Transactions* tab shows the steps of the automatic billing process.
  - Learn more about **Working with a Family's Transactions**.

- **Invoices** - View a history of invoices sent to the family with the invoice amount, the date it was sent, when the invoice was due, and who the designated Payer was. The list can be sorted to show the most recent invoices first or the oldest invoices first.

- **Audit Log** - Under the *Audit Log* tab, you will see registration actions taken for a family account listed from *Most Recent* to *Least Recent*. Use filter icon to change the Date Range.

Add a New Family Account

To add a new Family Account to your system, select the **Add a New Family Account** link on the *Profiles* card. If you are not on the Family Accounts page, you can use the **+ Add New Account** button on the **Left Menu** to start the workflow.

- Learn how to **Add a New Family Account**.

Once a child is no longer enrolled at your facility, you can archive the family and keep their data in your system.

- Learn how to **Archive a Family Account**.

View All People

The View All People link opens a list of Contacts by Child in your system, allowing you to ensure staff knows who can pick up a child or who to call in case of an emergency.

- Learn more about **View All People - Contacts by Child**.

View Missing Information

The View Missing Information option opens a list of all children or contacts who are missing information, helping you to keep family information as up-to-date as possible.

- Learn more about **View Missing Information - See Who's Information Isn't Complete**.

Reports

To see all Family Accounts reports, go to **Reports** (left menu) > the **Real Time Reports** card, and click the **Family Accounts** link. Here, you can:

- Go to **View All People - Contacts by Child**.
- Go to **View Missing Information - See Who's Information Isn't Complete**.
- See app usage and **Invite Parents/Contacts to Download the CircleTime Mobile App**.

Help is just a few clicks away! Go to **Jackrabbit Care Support - Resource Center** to select the help option that works best for you.