

Create & Manage Document File Types

Last Modified on 04/12/2024 2:21 pm EDT

It's easy to keep track of required documents and files in your family accounts. A File Type is created under the **Medical & Compliance** menu and can be added as a required document for an [Online Registration form](#).

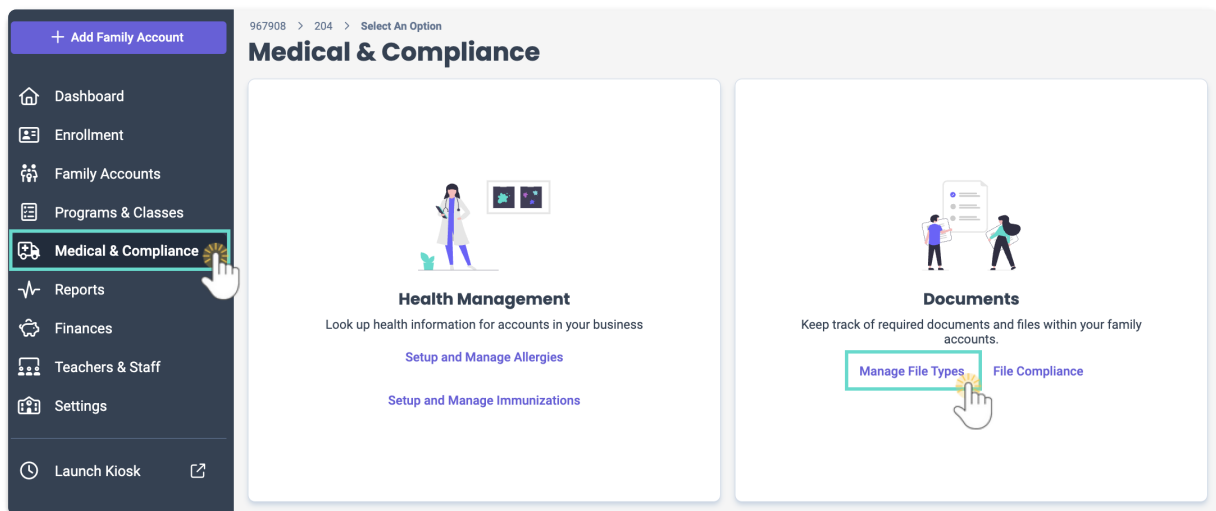
All uploaded document files, whether submitted online by parents or added by an Owner or Administrator, are stored and found by going to **Family Account > Child > Files** tab.

Create a New File Type

Follow these steps to add a File Type. Add as many as you need for your Online Registration form.

1. Go to **Medical & Compliance** (left menu) > **Manage File Types**.

Note: Be sure you have a site selected at the top of the page.



2. Click the **+ New File Type** button to open the File Type window.
 - Enter a required **File Type Name**.
 - Select a required **Category** from the drop-down list.
 - Enter **Instructions or Description**.
 - Enable and add an **Expiration** date when applicable.
3. Click **Create File Type**. A popup message will confirm it's been added to the **File Type** page. Now it's ready to be used for the Online Registration form!

File Type

Request documents that caregivers are required to submit.
Ex. I.D, Birth certificates, immunization records, etc. File formats accepted JPG, PNG, or PDF, 10MB max.

File Type Name *

Category *

Instructions or Description

92 of 500 characters

Enable Expiration
When enabled, the system will notify you when the file needs a new version to be uploaded
☒

When? *

[Cancel](#)
[Create File Type](#)

Edit a File Type

File Types can be updated as needed.

1. Go to **Medical & Compliance** on the left menu.
2. Click the **Manage File Types** link located on the **Documents** card to open the **File Types** page.
3. Click the **Edit** link on the File Type card you wish to make changes to.

Manage File Types

[MANAGE](#)
[COMPLIANCE](#)

[+ New File Type](#)

Name: A-Z

Birth Certificate

Edit

COVID Record

Edit

Medical Issues

Edit

Pediatric Contact Information


Edit

4. Click **Save File Type** to complete the changes. A popup message will confirm it's been successfully updated.

Manage File Types

Located under the **Compliance** tab, the **Manage File Types** grid lists the files that have been uploaded for children during the Online Registration process.

Use the following features found on the Compliance tab:

- Use the **Column Menu** icon  to sort, filter, add, or remove columns, or set the column position. Click the column header and drag and drop it to the top of the report to group the report by that column type.
- Click **Export To Excel** or **Print** the grid as needed.
- If an expiration date was set when a File Type was added, see an Expired badge **Expired** when it is set for renewal.
- Click the child's first or last name to go to their Details page, or click a contact's name in the Uploaded By column to go to their Details page.

Manage File Types





MANAGE
COMPLIANCE

+ New File Type

Help With Grids

Export To Excel
Print

Drag a column header and drop it here to group by that column

Photo	Child First Name	Child Last Name	File Type	Updated Date	Uploaded By	Expiration Date
	Joseph		Birth Certificate	04/09/2024	Sheldon Jennings	n/a
	Marissa		Birth Certificate	02/12/2024	Frank Lemonnis	12/01/2023 Expired
	Bradley		Birth Certificate	02/12/2024	Kim Nats	12/01/2023 Expired
	Medina		Birth Certificate	02/12/2024	John Waters	n/a