



Early Learning Ventures – Alliance CORE Onboarding/Implementation Process

OB #1

1. Meet & Greet
2. Discuss Expectations
3. ELV ORG Site
 - Knowledgebase
 - Other resources
4. ELV Shared Resources
5. Send Provider Enrollment Invitation
6. Complete Provider Enrollment Invitation
 - Provider Primary Information
 - CACFP – Turn on if using or will use
 - Signature on OB Invitations
 - Operating Hours
 - Meal Times
 - Instant Messaging
 - Daily Reporting
 - Signature Capture Authorized pickup / online enrollment
7. CORE Dashboard
 - Alerts
 - Family Search
 - Today's Activity
 - Room Change
 - Updates
8. Setup Automatic Payments
9. Schedule Next Training

OB #2

1. Online Enrollment
 - Templates
 - Invitation
 - Data Update
2. Documents Store
 - Upload Logo
 - Upload Parent Handbook
3. Schedule Templates
 - Child
 - Staff
4. Room Setup
 - Child
 - Staff
 - Assign Alternate Staff
5. Program Setup
 - Holidays/ Closures
 - Inspections
 - Drills
 - COVID Exemptions/Vaccinations

6. Staff Set up
 - Manager
 - Staff/ Teacher
 - Teacher with Attendance
 - Accountant
7. LegUp Enrollment
8. Schedule Next Training

OB #3

1. Refresher
2. Online Enrollment
 - Review / Approve Process
 - Resend Applications
 - Parent Data Update Request
 - Send Sec. Code Reminder
 - Report – Pull Signed and dates application
3. Communications
 - Provider Events
 - Kiosk Messaging
 - Email Parents / Staff
 - 1. Send Security Code with Email
 - Text Parents / Staff
 - Go over Emergency Contacts / Mobile Number location (not a required field)
4. Create Kiosk Account(s)
 - Login to Desktop Version
 - Show App Version
5. Parent App
 - Showcase
 - Authorized Pick Up App
6. Provider Staff App
 - Showcase
7. Schedule Next Training

OB #4

1. Refresher
2. Child Attendance
 - Manual Entry
 - Approval
 - ROM
3. Child Support Functions / Management
 - Accident Reports
 - Immunizations
 - Parent Wait list
4. Child CCAP Maintenances
 - Link CORE to ATS
5. Quick Links
 - Parent Quick Link

- Child Quick Link
- 6. Staff Attendance Management
- 7. Staff Attendance Authorization
- 8. Staff Time Off
- 9. Staff Trainings
- 10. Staff Degrees
- 11. Staff Credentials
- 12. Documents Store
 - Provider Documents
 - Staff Documents
 - Parent Documents
 - Child Documents
 - View Documents
- 13. CACFP (If they are wanting to use it)
 - Food Items Exclusions
 - Meals
 - Weekly Menus
 - Weekly Menu Cycle Scheduler (This currently updates on Sundays)
- 14. Reports
 - Reporting
 - Favorite Reports
 - Schedule Reports
 - Dynamic Reports
- 15. Schedule Next Training

OB #5

1. Request Merchant Account
2. Turn on Billing
3. Billing Setup
 - Link Payroc Account
 - Setup Extended Hours
 - Go over all default email notifications
4. Setup Billing Cycles
 - Weekly
 - Biweekly
 - Monthly
5. Ledger Items Title Setup
6. Attendance Based Billing- Tuition Manager
 - Setup Rates Tables
 - Define Attendance Based Tuition
7. Setup Family Billing Cycles (only if there is more than one)
 - Disable Period Statement Email
 - Hold Auto Pay Charge until Due date
8. Family/Child Payment Instructions
9. Setup Discounts and Scholarships
10. Setup Recurring and One Time Charges
11. Setup Billing Ledger
12. Manage Billing Ledger
 - Add Payments



- Add Credits
 - Look up Voided / Declined Transactions
13. Billing Periods Review / Approve
 14. CCAP Ledger
 15. Deposit Log
 16. Enable QBO API
 17. Schedule CORE and Billing Q&A