Procare SOLUTIONS

PROCARE DESKTOP + ENGAGEMENT | CUSTOMER BEST PRACTICES

6 Best Practices for Running a Successful Child Care Center

Practical strategies and Procare Desktop + Engagement tools to strengthen operations, engage families, support learning and grow your center.

FOR OWNERS, DIRECTORS AND CENTER ADMINISTRATORS



Make your goals part of your routine

Successful center operations depend on consistent habits—not just software setup. Written for owners, directors and center administrators, this guide connects six common business goals to recommended practices and the Procare Desktop + Engagement features that can support them.

Start with the goal that matters most to your center. You do not need to complete the sections in order.

Your six goals

Goal		What success looks like
1	**Support your team**	Staff have clear schedules, coverage and communication.
2	**Stay safe and prepared**	Records, ratios, incidents and pickup practices are routinely reviewed.
3	**Connect with families**	Families receive useful updates and know how to reach your team.
4	**Show learning progress**	Observations inform instruction and make growth visible.
5	**Fill classrooms and retain families**	Openings, inquiries and returning families are managed proactively.
6	**Stay financially healthy**	Billing and collections are consistent, visible and timely.

HOW TO USE THIS GUIDE

For each goal, choose one or two practices to implement first. Assign an owner, establish a review cadence and use the measures of success to evaluate whether the practice is working. Each section ends with supporting Procare resources; check the Procare Desktop support site for the latest instructions.



1 Support your team

WHY THIS MATTERS

Clear staffing plans reduce last-minute coverage decisions and help staff spend more time with children.

Best practices and how Procare helps

BEST PRACTICE	WHERE TO FIND IT IN PROCARE
Plan coverage before the week begins. Compare classroom schedules with expected attendance, plan breaks and identify where float support may be needed.	Staff Management > Staff Scheduling; room assignments.
Verify actual coverage every day. Have staff clock into the room where they are working, then check live staff-to-child ratios at opening, during transitions and when coverage changes.	Sign In-Out > Student Staff Ratio; staff clock-in/out.
Make communication predictable. Agree on which updates belong in staff messages and who is responsible for communicating schedule changes.	Messaging > Staff Messaging; role-based permissions.

BEST PRACTICE IN ACTION

A director checks next week's schedule on Thursday, notices two overlapping breaks in one room and adjusts float coverage before the week starts.



Measure your success

ADOPTION: ARE YOU USING THE PRACTICE?

- ✓ Staff roles, permissions and room assignments are current.
- ✓ Schedules are reviewed weekly and ratio coverage is checked during the day.
- ✓ Staff know where to receive operational updates.

OUTCOME: IS IT WORKING?

- ✓ Track recurring coverage gaps and adjust the schedule.

Explore these resources: Managing Staff Access – Roles and Permissions • Assigning Rooms to Staff • Staff Scheduling • Analyze Student-Staff Ratios • Staff-to-Staff Messaging

2 Stay safe and prepared

WHY THIS MATTERS

An ongoing review process makes it easier to spot missing information and respond to issues before they become emergencies. Follow your state and local licensing requirements; software does not replace required supervision or safety procedures.

Best practices and how Procare helps

BEST PRACTICE	WHERE TO FIND IT IN PROCARE
Monitor ratios and capacity. Set room capacities and ratio alerts, choose who is notified and verify coverage in person when an alert occurs.	My School > Rooms; Student Sign-In > Ratio Monitoring; Live Room Status.
Audit child records regularly. Check contact details, health information, authorized pickups and required documentation. Review exceptions rather than assuming a completed profile remains current.	Student Profiles; Immunization report; Students and Family report; Emergency Cards.
Track staff qualifications. Maintain certification and training dates, and review upcoming expirations on a monthly schedule.	Staff Profiles; custom profile fields; Staff Detailed report.
Document and review incidents promptly. Train staff on timely, factual documentation, family communication and your reporting requirements.	Daily Activities > Incident Reports; signature settings where available.
Use a consistent pickup process. Keep authorized pickup lists current in the desktop application and require staff to verify identity before release, even with a PIN or signature.	Authorized pickups in Student Profiles; Attendance Options.

BEST PRACTICE IN ACTION

On the first business day of each month, an administrator reviews upcoming certification expirations and missing emergency contacts, then assigns follow-up tasks.

Measure your success

ADOPTION: ARE YOU USING THE PRACTICE?

- ✓ Ratio settings and alert recipients are reviewed when rooms or schedules change.
- ✓ Missing and expiring records are reviewed monthly.
- ✓ Incidents are documented and escalated according to policy.
- ✓ Authorized pickups and identity-verification procedures are current.

OUTCOME: IS IT WORKING?

- ✓ Track expiring certifications and missing records; the count should shrink monthly.

Explore these resources: Student-to-Staff Ratio Alerts & Monitoring • Immunization Tracking & Reports • Creating an Emergency Card Report • Incident Reports • Add Authorized Pickups and Carpools

3 Connect with families

WHY THIS MATTERS

Families build trust when communication is timely, consistent and relevant—not simply frequent.

Best practices and how Procare helps

BEST PRACTICE	WHERE TO FIND IT IN PROCARE
Set a realistic daily update standard. Decide which activities staff should record and when, while protecting time for direct care.	Daily Activity Feed; mobile app activities.
Make attendance simple and secure. Choose appropriate digital sign-in and sign-out options, communicate expectations to families and review exceptions.	Attendance Options, including QR code and kiosk workflows.
Choose the right channel. Use Classroom Chat for room-level conversations, Office Chat for administrative or sensitive matters and emergency messaging for urgent notifications. Establish response-time expectations.	Parent Messaging; Office Chat; Classroom Chat; Emergency SMS available.
Keep routine information easy to find. Use a predictable newsletter and calendar cadence, and share meal plans when relevant.	Parent Connection > Newsletters; Calendar Events; Meal Planning.

BEST PRACTICE IN ACTION

A center sends a brief weekly newsletter each Friday with next week's events and reminders, while staff continue sharing meaningful daily activities in the app.

Measure your success

ADOPTION: ARE YOU USING THE PRACTICE?

- ✓ Families know how to contact staff and administrators.
- ✓ Daily updates are consistent across classrooms.
- ✓ Family questions and feedback are reviewed for recurring themes.

OUTCOME: IS IT WORKING?

- ✓ Important messages receive timely responses.

Explore these resources: Activity Feed • Attendance Options • Parent Messaging via the Website • Creating Newsletters • Calendar Events (Web)

4 Show learning progress

WHY THIS MATTERS

Useful documentation connects what staff observe to what they plan next and helps families understand children's development.

Best practices and how Procare helps

BEST PRACTICE	WHERE TO FIND IT IN PROCARE
Plan learning experiences consistently. Create weekly lesson plans aligned to your curriculum and adapt them to the needs and interests of the group.	Learning > Lesson Plans; optional Procare Early Learning curriculum.
Capture meaningful observations. Record specific examples of learning, add photos when appropriate and connect observations to developmental milestones.	Mobile app > Activity > Observation.
Review progress—not just activity counts. Agree on age groups, milestones and progress labels. Periodically review whether documentation shows growth and where support is needed.	Learning > Assessments; Manage Age Groups; Student Assessment Tables.
Use portfolios in conversations. Review portfolios before conferences, share strengths and next steps and use observations to guide future activities.	Assessments > Portfolios; Student Portfolios report.

BEST PRACTICE IN ACTION

A staff member notices repeated interest in sorting objects, records an observation and uses it to plan additional counting and classification activities the following week.

Measure your success

ADOPTION: ARE YOU USING THE PRACTICE?

- ✓ Lesson plans are reviewed weekly.
- ✓ Observations reflect meaningful learning across children and domains.
- ✓ Assessment milestones and age groups are configured appropriately.
- ✓ Portfolios support family conferences and instructional planning.

OUTCOME: IS IT WORKING?

- ✓ Track the share of children with a recent observation, and whether that share is growing across age groups.
- ✓ Confirm that portfolios and assessment documentation are ready ahead of family conferences.

Explore these resources: Weekly Lesson Plans • Observation Activities • Assessments & Development Tracking • Student Portfolios report

5 Fill classrooms and retain families

WHY THIS MATTERS

Enrollment health depends on anticipating openings, responding to prospective families and giving current families reasons to stay.

Best practices and how Procare helps

BEST PRACTICE	WHERE TO FIND IT IN PROCARE
Forecast openings before seats become vacant. Review upcoming transitions, graduations and withdrawals regularly so you can plan outreach in advance.	Use Family Data reports for room capacities, age ranges and student dates of birth.
Follow up with every inquiry. Capture leads consistently, assign follow-up responsibility and review outstanding tasks each week.	MyProcare (prospective family inquiries and registration); Family Data for follow-up.
Make registration easy. Provide a clear application and registration process and monitor incomplete submissions.	MyProcare registration forms and fees.
Start re-registration early. Invite returning families to update information, communicate deadlines clearly and review likely departures before planning next term.	MyProcare registration for active families; re-registration fees.

BEST PRACTICE IN ACTION

A director sees several preschool openings projected in two months, contacts suitable waitlisted families early and tracks each conversation through enrollment.

Measure your success

ADOPTION: ARE YOU USING THE PRACTICE?

- ✓ Projected openings and waitlist matches are reviewed weekly or monthly.
- ✓ Every new inquiry has an owner and next step.
- ✓ Returning families receive clear re-registration communications.

OUTCOME: IS IT WORKING?

- ✓ Track inquiry-to-enrollment conversion and unfilled seats using your MyProcare and Family Data records. Use Family Data reports to review enrollment by age group.

Explore these resources: MyProcare • Family & Child Information • Training Overview

6 Stay financially healthy

WHY THIS MATTERS

Predictable billing and timely follow-up make it easier to plan for payroll and operating expenses.

Procare Desktop + Engagement note: Billing and payments are managed in Procare Desktop using Family Accounting.

Best practices and how Procare helps

BEST PRACTICE	WHERE TO FIND IT IN PROCARE
Configure once, bill with confidence. Set your billing cycle, charge and credit descriptions and standard amounts. Assign a tuition charge in each child's billing box, check new enrollments and changes, then run billing. Use the Standard Amount variance report to catch directly entered discounts; use discount credits.	Configuration > Accounting Management (billing cycle, charge/credit descriptions and standard amounts); each child's Billing Box; Automated Billing; Standard Amount variance report.
Make payment options clear. Give families payment setup instructions and explain autopay options and policies.	Family Accounting (payments and statements).
Review balances every week. Use aging information to find overdue accounts, follow up consistently and document payment arrangements per center policy.	Family Accounting Reports; filtered statements or merge letters for delinquent accounts.
Reconcile agency payments when applicable. Review subsidy invoices, amounts received and balances apart from family tuition. Check open items for payments posted to the wrong date of service or child.	Agency Accounting (agency payments and credits); Agency Aging; Account Activity Line Item/Open Item Summary.

BEST PRACTICE IN ACTION

Every Monday, an administrator reviews aging balances, follows up on overdue accounts and checks that recent tuition changes appear in each child's billing box.

Measure your success

ADOPTION: ARE YOU USING THE PRACTICE?

- ✓ Charges and tuition rates are reviewed after enrollment changes and scheduled changes, such as graduation.
- ✓ Families know their payment options and due dates.
- ✓ Overdue balances are reviewed weekly.
- ✓ Subsidy accounts are reconciled where applicable.

OUTCOME: IS IT WORKING?

- ✓ Track overdue balances using Family Accounting Reports or, with the Late Payment Calculator, the Charge/Credit Summary report.

Explore these resources: Family Accounting • Set Up Recurring Payments • Payment Options • Agency Accounting Overview • Family Accounting and Agency Reports

Your center operating rhythm

Use this as a starting point. Adjust the frequency to your size, staffing model and licensing obligations.

When	Director or administrator routine
Daily	Check room coverage and ratios; review urgent family messages; confirm attendance exceptions.
Weekly	Review staff schedules, new leads, forecasted openings, billing exceptions and overdue balances.
Monthly	Audit student and staff records; review learning documentation; compare enrollment and collections trends.
Each term	Plan transitions and re-registration; review family feedback; update center goals and training needs.

Put the guide into action

Choose one priority goal and write down the next action, owner, review date and success measure. Revisit it after 30 days. Once the routine is working, move to the next improvement.



Priority goal	Action to start	Owner and review date	How we will know it works

Resources and support

For detailed setup instructions, use the latest articles on the Procare Desktop support site.

Training Sessions

Procare training resources include free live and recorded training sessions covering attendance, family communication, MyProcare registration, family accounting, and more. Share parent training materials when introducing family-facing workflows.



IMPORTANT

Menu labels, permissions, features and optional services may change. Confirm current product behavior on the Procare Desktop support site. Follow applicable licensing, privacy, payment and safety requirements; this guide provides operational recommendations, not legal or regulatory advice.