

RoomRunner Checklist

Complete the tasks below before setting up RoomRunner. Each item links to a Procare support article for step-by-step guidance.

Confirm Access and Permissions

- Confirm you are on Procare Online (not Procare Desktop with Engagement Functionality)**

WHY THIS MATTERS

RoomRunner is exclusively available in Procare Online. Procare Desktop + Engagement customers must contact Customer Success if they are interested in exploring Procare Online.

- Ensure your staff account has Full Access or View Access to the RoomRunner permission**

→ [Learn more about Managing Staff Access](#)

WHY THIS MATTERS

RoomRunner is a permission-controlled feature. Staff without the correct role setting will not be able to navigate to My School > RoomRunner.

- Register for the RoomRunner live webinar for a guided walkthrough**

→ [Training Calendar](#)

WHY THIS MATTERS

Procare offers free live training on RoomRunner. Attending before your first setup session reduces errors and helps your team get the most out of AI suggestions.

Understand Your Room Setup

- Know what rooms your center has configured in Procare Online**

→ [Add, Edit or Deactivate Rooms](#)

WHY THIS MATTERS

RoomRunner's dashboard is built around your existing rooms. Later, you can decide which rooms to include or exclude from RoomRunner.

- Review the capacity of every room you want included in RoomRunner**

→ [Add, Edit or Deactivate Rooms](#)

WHY THIS MATTERS

Without an accurate capacity for each room, RoomRunner cannot correctly calculate openings or determine whether rooms are full. Capacity is set on each room's profile by navigating to My School > Rooms.

- Review the age range of every room you want included in RoomRunner**

→ [Add, Edit or Deactivate Rooms](#)

WHY THIS MATTERS

Accurate age ranges are required for RoomRunner to match waitlisted children to the right room and to surface age-up transition suggestions. Rooms can have overlapping age ranges.

Understand Student Profiles

- Know how to navigate student profiles

→ [Edit Student Profile](#)

WHY THIS MATTERS

RoomRunner pulls data directly from student profiles.

- Ensure every active student has an accurate date of birth on their profile

→ [Students and Family Reports](#)

→ [Edit Student Profile](#)

WHY THIS MATTERS

Birth dates power every age-based calculation in RoomRunner — room matching, 'Ready to Transition' signals, and AI suggestions all depend on accurate dates of birth.

- Ensure every active student is assigned to the correct primary room

→ [Assigning Default Room to Students](#)

→ [Edit Student Profile](#)

WHY THIS MATTERS

Primary room assignment determines which room card a student appears on. Misassigned students will make occupancy numbers inaccurate.

- Ensure every active student has an accurate schedule (full-time, part-time days AM/PM)

→ [Edit Student Profile](#)

WHY THIS MATTERS

RoomRunner uses FTE-based seat math. A part-time student mistakenly listed as full-time will show fewer available spots than you actually have.

- Learn what each enrollment status means: Active, On Hold, Inactive, and Graduate

→ [Student Enrollment Status](#)

→ [Edit Student Profile](#)

WHY THIS MATTERS

RoomRunner only surfaces Active students in the room cards. On Hold students appear in a separate window. Understanding statuses prevents confusion when students appear missing or misplaced.

Understand the Leads / Enrollment Pipeline

- Know what a lead is and how leads can be added to Procure Online

→ [Managing Lead Profiles](#)

→ [Creating an Online Registration Form](#)

WHY THIS MATTERS

RoomRunner's waitlist section draws from your leads pipeline, not your active student roster. Leads are prospective families managed in the Enrollment section.

- Understand what Lead Statuses are and how to customize them

→ [Lead Status for New Families](#)

WHY THIS MATTERS

During RoomRunner setup you select which Lead Statuses count as your RoomRunner Waitlist. Only families in those statuses appear in the RoomRunner Waitlist window and AI recommendations. In the Leads section, you can customize your Lead Statuses.

- Ensure lead students (waitlisted families) have a date of birth and a schedule assigned

→ [Edit Lead Details](#)

WHY THIS MATTERS

The AI Enrollment Agent evaluates age eligibility and schedule compatibility for waitlist matches. Missing Date of Birth (DOB) on a lead profile means they won't be suggested for placement.