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#### Overview

The Family Portal is a self-service tool that allows you to:

- View and pay your tuition and billing.
- View form requirements to fill out required forms.
- View up-to-date class rosters.

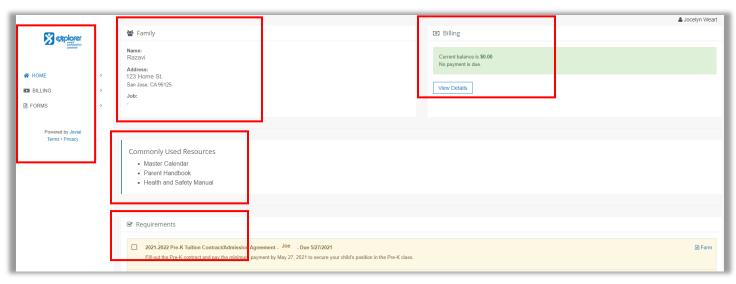
### Access the Family Portal

1. To access the Family Portal, go to <a href="https://www.jovial.org/explorer/family">https://www.jovial.org/explorer/family</a>



- 2. Enter your email address in the email field and select the **Next** button.
- 3. Check your email for the link from Jovial.Org (do not forget to check for spam).
- 4. Use the link in the email to access Jovial.
- 5. Please note: A password may be added to your account through account settings in the upper right-hand corner of the screen so you will not have to access Jovial through your personal email each time. If you forget your password, you must access the "forgot password" link sent to your personal email within 2 hours. The link will provide you with access to the Family Portal, and you will have to set a new password through the account settings (as you did to originally create your password). Explorer Preschool and the Jovial help desk cannot assist with resetting passwords.

6. Upon opening Jovial, you will be directed to the **Home** page.



- 7. The **Home page** of the family portal has several main areas helpful to families:
  - a. The left-hand panel is used to access billing, required forms, and return to the **Home** page.
  - b. The **Family** section located in the middle, at the top, contains your child's family name, home address, and family team assignments (i.e., jobs).
  - c. The **Billing** section can be used to view accounting details and make payments.
  - d. **Commonly Used Resources** contains links to the Master Calendar, the Parent Handbook, the Health and Safety Manual, and other Explorer Preschool resources.
  - e. **Requirements** for each student, working/volunteer individual, and families are located at the bottom of the screen. These requirements provide information to the family as to which forms (e.g., tuition contract, health and safety forms, etc.) need to be submitted.
- 8. Here is a link to a general video to walk you through accessing the licensing forms and features in Jovial: <u>General form submission</u>

### Requirements and Forms Overview

- 1. The following requirement/form submissions are due in May to secure a class position for the Together Time Program:
  - a. 20XX-20XX Tuition Contract Together Time
  - b. In-Class Volunteer Health and Safety Forms
  - c. In-Class Volunteer's TB Test Record
  - d. Annual In-Class Volunteer Health and Safety Requirements
  - e. Explorer Preschool Enrollment Form

- 2. The following requirement/form submissions are due in May to secure a class position in the Preschool Programs (MW2's, Fri2's, Multi-age, Pre-K):
  - a. 20XX-20XX Tuition Contract Preschool
  - b. In-Class Volunteer Health and Safety Forms
  - c. In-Class Volunteer's TB Test Record
  - d. Annual In-Class Volunteer Health and Safety Requirements
  - e. Student Health and Safety Forms Packet
  - f. Explorer Preschool Enrollment Form
- General forms in the Forms library (some may not be published until they are required/have a need to access):
  - Explorer Preschool Acknowledgements form submitted in August of the school year to acknowledge the information for the upcoming school year.
  - b. **Family and Individual Student Care Plan** submitted annually in August for each family's students enrolled in the preschool (MW2's, Fri2's, Multi-age, Pre-K).
  - c. **Notice of Withdrawal Form** form submitted only when withdrawing from Explorer after September 1st of the school year.

### Submitting a Tuition Contract

- 1. Log-in to Jovial and open the **Home** page.
- 2. At the bottom of the **Home** page, you will see the **Requirements** section at the bottom of the screen, which contains a list of outstanding forms and contracts.
- 3. Requirements in yellow are outstanding while the green items have been satisfied. If you see any requirements in red, they are overdue. **Any overdue requirements** may impact your child's start date if the school has not received the appropriate required forms prior to August 1st.
- 4. If any requirements are incorrect (e.g., Jovial lists a requirement for a form but it's not required for your family), please contact the Membership (<a href="mailto:membership@explorerpreschool.org">membership@explorerpreschool.org</a>) and Health and Safety (<a href="mailto:healthandsafety@explorerpreschool.org">healthandsafety@explorerpreschool.org</a>) Chairs.
- 5. Locate the **tuition contract requirement** for your enrolled student(s).



6. Click the **form button** on the righthand side of the requirement line. Selecting the button to the right of your due requirements is the easiest pathway to fill-out <u>all</u> your forms.



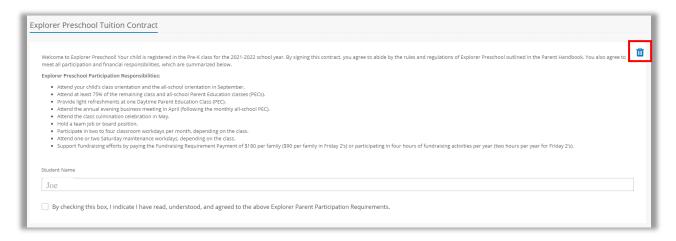
7. The form will open for you to review and fill-out.



- 8. Please note, the school has two tuition contracts:
  - a. One for the overall preschool programs which include: MW2's, Fri 2's, 3-5's (2-day), 3-5's (4-day), and pre-K.
  - b. One for our enrichment program: Together Time
- 9. If you have multiple students enrolled in the preschool, they may be submitted within the same contract (Example: Joe is in MW2's and Jane is in pre-K they may be submitted within the **Tuition Contract Preschool** together.
- 10. If you have one student enrolled in the preschool program and one student enrolled in our enrichment program, two separate contracts will need to be submitted for each student: One Tuition Contract Preschool and One Tuition Contract Together Time.
- 11. Select the "+" sign next to their name to expand the contract or form for your student (+ Joe).

  Please note: if you have more than one student enrolled at Explorer or alum students, their names will also appear within the contract. Please select the correct student for the program type.

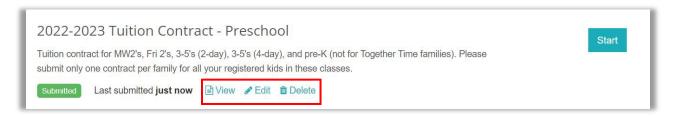
12. If you select the incorrect child, then click on the **trash can icon** to start over.



- 13. Once you have filled-in all the information within each form, select the **Submit** button at the bottom.
- 14. You may also submit the tuition contract by selecting **Forms** in the left-hand panel to take you to the **Forms Library**, but please make sure you are selecting the correct forms associated with the requirements due for your family (again, the easiest method is to select the forms button to the right of your requirement). You would select the **Start** button to open the form.
- 15. At any point, you may view, edit, or delete a submitted contract or form on your requirement by selecting one of the icons. Please note: you may only edit or delete a form that is still in a submitted or returned status versus in a processing status.



16. You may also perform one of these tasks within the forms library (select one of the icons).
Again, you may only edit or delete a form that is still in a submitted or returned status versus in a processing status.



17. A form may be returned to you for corrections. Please edit the form already submitted and resubmit a corrected version by selecting the **Edit** icon.

### Submitting Additional Forms (Health and Safety/Family Forms)

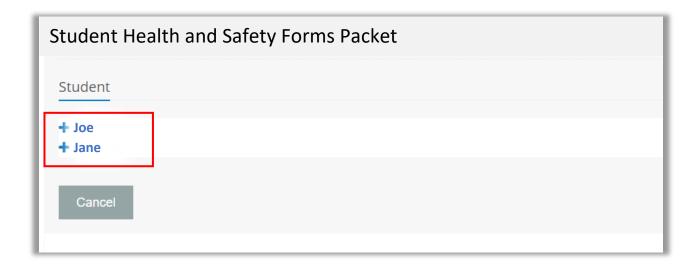
- The process to submit additional forms is like the process for submitting a tuition contract.
   Review what forms are required from your family by looking at the list of **Requirements** on the
   Home page.
- 2. Scroll down to the **Requirements** section on the **Home** page and look for the required forms for your enrolled students, family, and in-class working/volunteer caregivers. These can include health and safety form and other family forms (e.g. enrollment document).



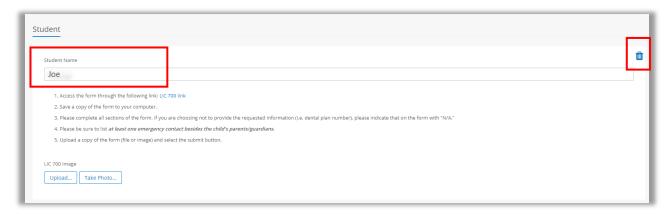
3. Select the **form button** to the right of the requirement.



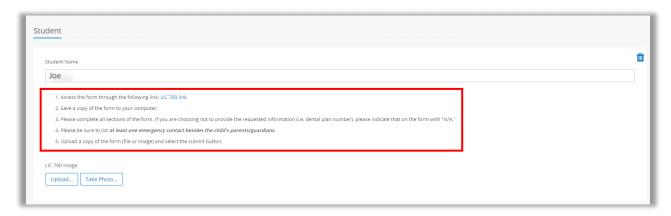
- 4. The form will open for you to fill-out.
- 5. Select the student(s) or caregiver(s) for which you want to submit the form by selecting the + sign next to their name to open the form. Please always review the information associated with each person who will be participating at Explorer for the upcoming year by clicking the plus sign to expand their information to ensure its correct. Please note: student names may include students who were enrolled at Explorer Preschool previously and have graduated. Please select the correct student when submitting the form.



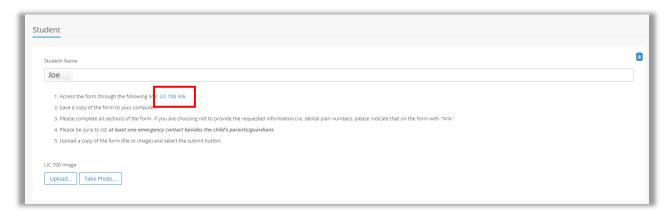
6. If you selected the wrong student, are not ready to submit, or are having a problem with uploading, click on the trashcan icon in the righthand corner to start over.



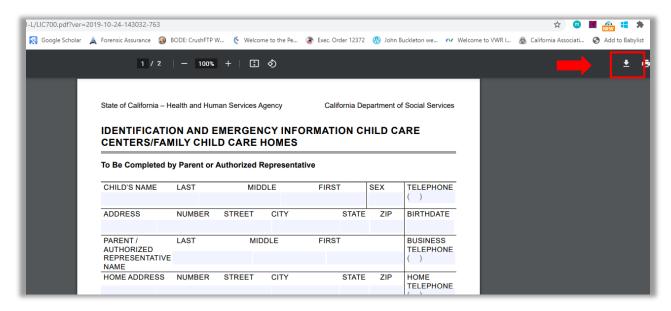
7. Directions specific to each form can be found in the field below the Student Name (also refer to the **Requirement** for information about the form and submission).



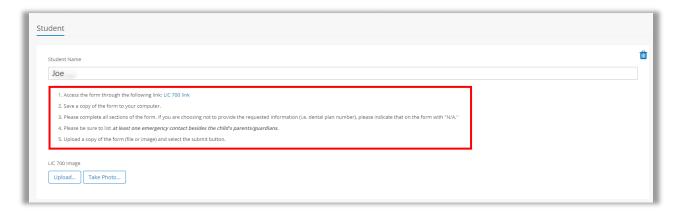
8. A link is provided for the health and safety forms. Access the forms by clicking on the link (Ex. **Student Health and Safety Forms Packet**).



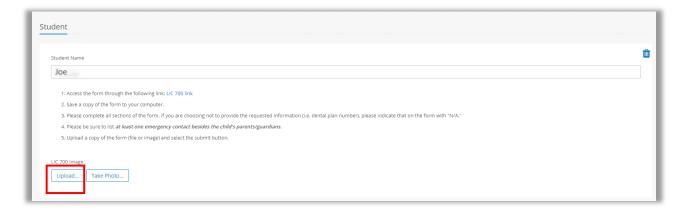
9. You will be directed to the from(s) location. **Download** a copy of the form and save it to your computer.



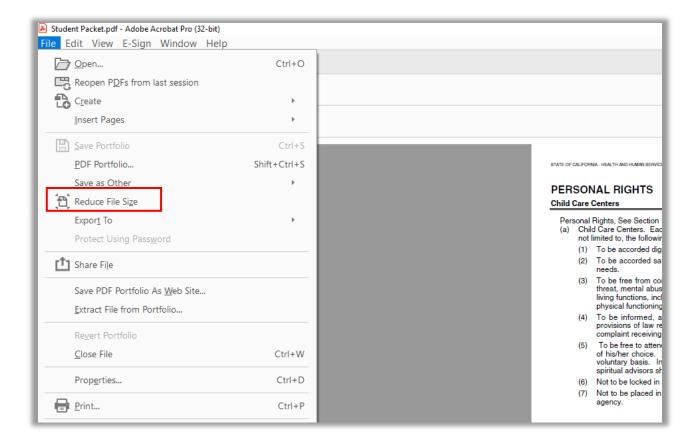
10. Fill-out the form according to the directions. If a licensing form requires a **physician's signature**, **fill-out the relevant portions** for your student/working parent and have your physician sign and fill-out the appropriate fields indicated on the licensing form.



11. Once the form is complete including a wet or digital signature, save the form as a PDF file or scan it to your computer. Upload the file and make sure the name of the individual is listed on the file (e.g. name is printed on immunization record or filled-in for a licensing form).



12. If there is an error uploading the form, try reducing the file size in Adobe by selecting **Reduce** File size under the File Menu and Save the file.



- 18. If you have separate files to upload, place all the files into one folder on your computer. Select **Upload** button and browse to open the computer folder with all the files for upload. Select one file and then select the control button before clicking on the second, third, and additional files. Click the **Open** button, and all the files should upload.
- 19. If there is a notification that the there is not enough storage space, contact the Membership (<a href="mailto:membership@explorerpreschool.org">membership@explorerpreschool.org</a>) and Health and Safety (healthandsafety@explorerpreschool.org) Chairs.
- 13. If you need to scan printouts of files, please download, and use the free application, Genius Scan, to convert your files into scanned PDF files. Email these files to yourself to save to your computer.
- 14. Once the file(s) is/are uploaded, select the **submit** button.
- 15. Please access this <u>troubleshooting video</u> to explain some of the processes previously described for file upload.
- 16. Repeat this process for the health and safety forms and immunization records related to each student, in-class working/volunteer individual, or family form.
- 17. You may also access any form by selecting Forms in the left-hand panel to take you to the Forms Library, but please make sure you are selecting the correct forms associated with the requirements due for your family (again, the easiest method is to select the forms button to the right of your requirement from the Home Page). You would select the Start button to open the form from the Forms Library.

### Accessing Forms Previously Submitted in Jovial

- 1. To access forms that were previously submitted in Jovial to resubmit for the 2023-2024 school year, please watch the following videos:
  - a. How to access forms in Jovial for your student
  - b. How to access and submit In-Class Volunteer H&S forms
- 2. Here is a quick reference for the names of each file/form that will now be submitted for each NEW requirement/form:
  - a. Student Health and Safety Forms Packet (2023-2024) will include all the previously submitted forms (you can find under your family's submission):
    - i. LIC 613A Personal Rights: Child Care Centers
    - ii. LIC 627 Consent for Emergency Medical Treatment
    - iii. LIC 700 Identification and Emergency Information

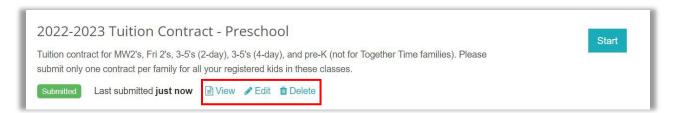
- iv. LIC 701 Physician's Report: Child Care Centers
- v. LIC 702 Child's Preadmission Health History
- vi. LIC 995 Child Care Center: Notification of Parent's Rights
- vii. Child's Immunization Record Preschool
- b. In-Class Volunteer Health and Safety Forms (2023-2024) will include the following previously submitted forms and the new form:
  - i. LIC 503 Health Screening Report Facility Personnel
  - ii. Class Working/Volunteer Individual's Immunizations (Measles & Pertussis)
  - iii. LIC 9108 \*NEW\* form for the 2023-2024 school year

#### Review, Edit, Delete Forms

1. At any point, you may **view**, **edit**, or **delete** a submitted contract or form on your requirement by selecting one of the **icons**. **Please note**: you may only edit or delete a form that is still in a **submitted** or **returned** status versus in a **processing** status.



- 2. Each year, you will be asked to review at a minimum, your LIC 627 and LIC 700 forms for any updates to your forms. If there are any updates, please resubmit these forms. If any allergies or additional conditions exist for your child, you will be able to alert us through the Explorer Enrollment form released in the Spring or with enrollment and the Family and Individual Student Care Plan released in the Fall when school starts.
- 3. You may also perform view, edit, or delete forms within the forms library by selecting one of the icons. Again, you may only edit or delete a form that is still in a submitted or returned status versus in a processing status.



4. A form may be returned to you for corrections. Please edit the form already submitted and resubmit a corrected version by selecting the **Edit** icon.

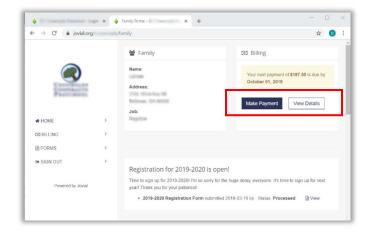
### Making a Payment in Jovial

#### Overview

At the top right of the home page, you will see your **Billing** Pane. It shows the minimum amount due and a due date. You can use the buttons in that pane to **make a payment** or **view** your billing details.

### <u>Please make your minimum contract</u> <u>payment as an E-Payment through Jovial</u>.

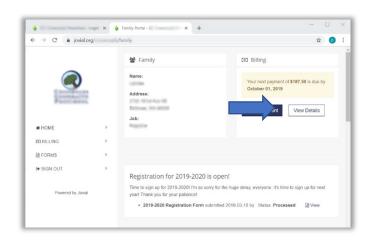
Monthly tuition payment can be made by check, or as an E-Payment. If you are unable to make an E-Payment, please contact <a href="mailto:controller@explorerpreschool.org">controller@explorerpreschool.org</a>.



The most convenient way to pay is to use the **View Details** and **Make Payment** links in the family portal to submit electronic payments. Jovial is set up to accept ACH payments.

#### New Payment Account Setup

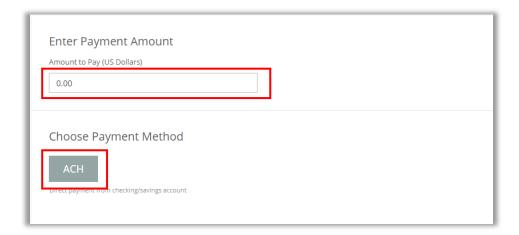
 Click View Details to review a summary of your family's billing statement.



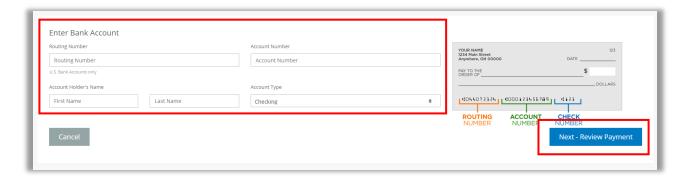
 Click the Make E-Payment button in the Billing Pane on the home page of your portal.



3. Enter **Payment Amount** (e.g., Total amount for minimum payment) and select the **ACH** button.



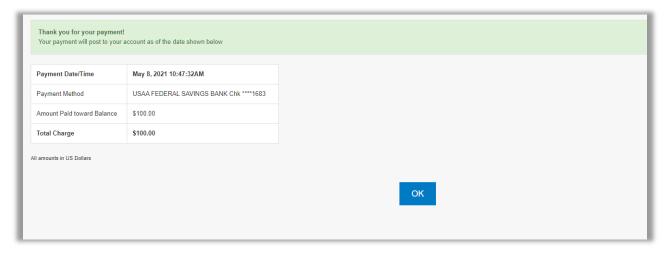
4. Fill-in the form with bank information and click the Next-Review Payment button.



5. The final screen will show a transaction summary and confirm the total amount to be charged. Any fees will also be reflected on that page for your information. Please **check the box** to acknowledge the fine print on the payment page.



6. Click the Agree & Submit Payment button and the screen below should appear. Select OK.



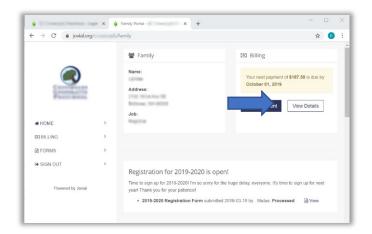
7. If this is your first time making a payment, you will have to complete an ACH verification. Please review the <u>E-Pay FAQ's</u> for details regarding ACH verification and any other questions related to making e-payments.



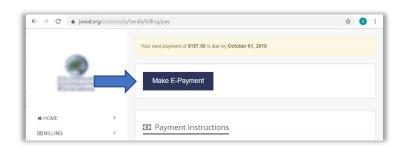
8. After your account is linked to your Family Portal, you may make class payments manually when they are due, enroll in autopay, or pay in advance.

#### **Returning User Payments**

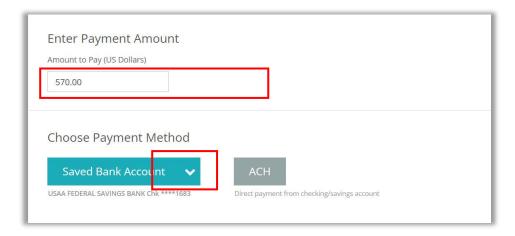
 Click View Details to review a summary of your family's billing statement.



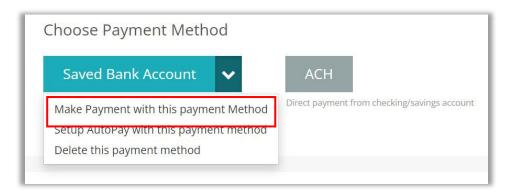
 Click the Make E-Payment button in the Billing Pane on the home page of your portal.



3. Enter **Payment Amount** (e.g., Total amount for minimum payment which may also auto populate) and select the **drop-down arrow** next to **Saved Bank Account**.



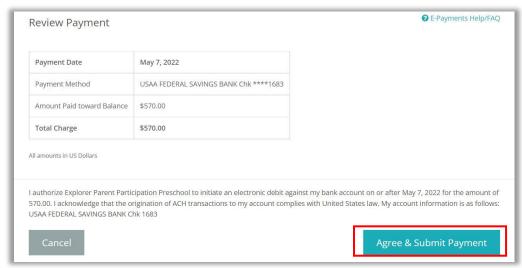
4. Select Make Payment with this payment Method.



5. Select the Next - Review Payment button.

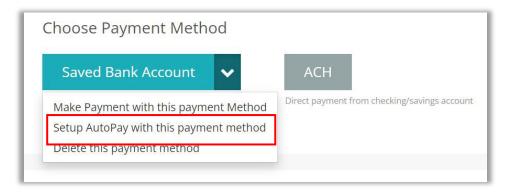


6. A new window will open to review your payment. Review your payment and select the **Agree & Submit Payment** button.

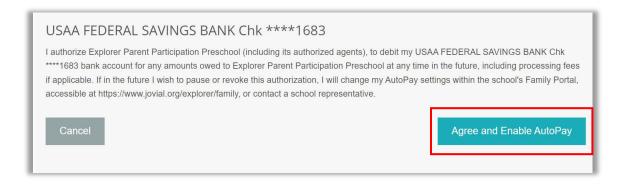


#### Set-Up AutoPay

1. Under Choose Payment Method, select Setup AutoPay with this payment method.



2. A new window will open, select the Agree and Enable AutoPay button to enable AutoPay.



3. You will have the following view through the **Make Payment** link under **Billing** if AutoPay is enabled for your family.

