



# Help Center

Just a click away!

## ChildPlus Desktop Setup

e-book



ChildPlus  
Software

**ChildPlus Software**

800-888-6674

childplus.com

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# Welcome to ChildPlus!

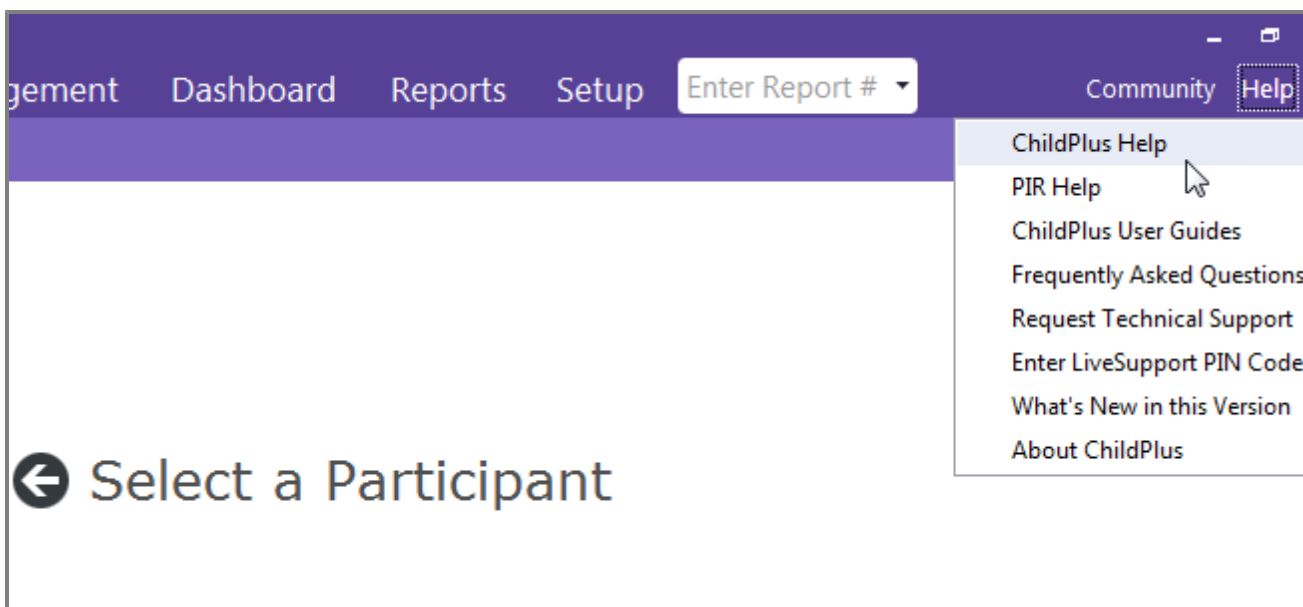
Welcome to ChildPlus! Whether you are a new user or a seasoned ChildPlus veteran, we've designed this guide to walk you through the process of setting up and configuring your ChildPlus system.

You'll find the majority of the tasks that you will be performing as you set up and configure ChildPlus in **Setup**. Think of it as a centralized location for performing all of your initial and on-going setup tasks, such as:

- adding your agency information
- setting up your sites and classrooms
- defining health requirements
- managing users and user security groups
- setting system preferences

## Additional Resources

In addition to this guide, you can also access this information through the **Help** menu in ChildPlus by clicking **Help > ChildPlus Help**:



## ChildPlus and the PIR

The fields that ChildPlus uses to calculate your PIR are easily identifiable in both this guide and within ChildPlus because they have a red **PIR** label next to them. Within ChildPlus, you can click on these red **PIR** labels to find out how ChildPlus uses the field to calculate the PIR.

# ChildPlus Setup Tasks

Before you can start working with ChildPlus, you will need to customize ChildPlus to reflect your specific agency and program information. This guide has been designed to walk you through the process of setting up and configuring ChildPlus and should be used along with the Initial Setup Menu.



## Additional Resources:

Go to **ChildPlus Desktop > Help > ChildPlus Help** to watch **System Setup** videos.

## Step 1 - Add each of your staff members to the Personnel module

You can use the **Personnel** module to add and maintain information about your staff members. Regardless of whether your agency uses ChildPlus to track employee information, completing some basic information in the **Personnel** module is necessary in order to use the system. Why is this? Because ChildPlus populates various drop-down lists in the system with the names of your staff members (**for example, the Case Worker list in Family Services**). If you do not complete this information in **Personnel**, then you will not be able to select a staff member from the list in **Family Services**.



To learn how to add staff members to the **Personnel** module, see page 11.



Many of the fields in the **Personnel** module contain sensitive and confidential information. Therefore, for initial set up purposes, ChildPlus Software recommends that you initially only complete the information on the **General** tab. You should also select the position that the employee holds from the **Position** list on the **Employment** tab.

Once proper user security settings are in place, you can return to this module to add information that is considered sensitive or confidential.

## Step 2 - Set up the funding sources for your program(s)

Funding sources are an important part of running your PIR because they link funding for programs to funding for individuals, staff members, and in-kind transactions. In order to effectively use ChildPlus, you should go ahead and set up each of your agency's funding source(s).



To learn how to set up funding sources for your agency, see page 18.

## Step 3 - Set up your Agency Information



Before you can start using ChildPlus, you will need to add information about your agency. To do this, go to **Setup > Agency Configuration > Agency Info**. On this screen, you will need to complete the following Steps:

1. **Complete the Agency Information tab by providing basic information about your agency- See *Setting up your Agency Information* on page 19**
2. **Add each of the agency's sites**
3. **Add classrooms to each site**

## Step 4 - Setting up Program Information

Before you can assign participants to programs in ChildPlus, you will need to **set up each program** that your agency offers. To do this, go to **Setup > Agency Configuration > Program Info**. Once you have opened **Program Information**, see page 1 for more information on adding your programs.



You will also need to associate the proper funding source(s) with each of your agency's programs, see page 24.

## Step 5 - Setting up Health and Events

In order to use the **Health** and **Education** modules, you will need to set up each of the health events that are associated with your program(s).



To learn how to set up health events, see Health and Education Events.

## Step 6 -Setting up Health and Education Requirements

You will need to set up Health and Education requirements so that you can compare a participant's health events against the actual requirements for a program. Once you have set up your health requirements, return to the **Program Info** screen and specify the health requirement set you want to associate with each program term.



To learn how to set up health requirements, see page 26.

## Step 7 - Setting up Immunizations

Setting up your immunizations schedule in ChildPlus so the system can automatically calculate when each participant's next immunization is due. It also lets you control the order in which immunizations display on the screen.



To learn how to set up an immunizations schedule, see page 30.

## **Step 8 - Setting up Disability**

Configure your ChildPlus Disability module by configuring how you track Concerns, IEPs and IFSPs.



To learn how to set up your Disability module, see **Disability Setup**.

## **Step 9 - Setting up Eligibility**

Configure your eligibility sets so ChildPlus can automatically calculate each participant's eligibility points when they apply to a program.



To learn how to set up an immunizations schedule, see page 33

## **Step 10 - Setting up Security Settings**

Through **Security Settings** you can manage security settings for different modules and features in ChildPlus. You can also use it to manage password enforcement options for users.



To learn how to set up security settings for ChildPlus, see page 38.

## **Step 11 - Set up your Security Groups**

Through **User Security Groups** you can create groups that allow you to assign full, view, or no security rights to different modules and screens throughout ChildPlus.



To learn how to set up user security groups for ChildPlus, see page 42.

## **Step 12 - Set up each of your ChildPlus Security Users**

You can set up each of your ChildPlus users on the **User Security Setup** screen. You will need to create a user name and password for each user. In addition, you can specify their site and classroom level security access and/or associate them with a specific **User Security Group**.



To learn how to set up users in ChildPlus, see page 43.

## **Step 13 - Optional Setup**

The following list reviews the additional setup Steps that you should complete at some point, depending on

your needs. Unlike the rest of the configuration steps, these do not have to be completed in any specific order and you can do so at your discretion.



To learn how to set up Agency-Specific fields in ChildPlus, see page 46.



To learn how to customize Dropdown Choices in ChildPlus, Customize Drop-down Choices.



To learn how to set up Data Entry Defaults in ChildPlus, see page 52.



To learn how to set up Family Services event in ChildPlus, see page 51.



To learn how to set up Family Outcome Instruments in ChildPlus, see page 162.



To learn how to set up Region Information in ChildPlus, see page 189.



To learn how to set up System Preferences in ChildPlus, see page 100.



To learn how to set up ZIP Codes in ChildPlus, see page 120.



To learn how to set up Online Applications in ChildPlus, see page 132.

## Adding Staff Members to Personnel

You can use the **Personnel** module to add and maintain information about your staff members. Regardless of whether your agency uses ChildPlus to track employee information, completing some basic information in the **Personnel** module is necessary in order to use the system. *Why is this? Because ChildPlus populates various drop-down lists in the system with the names of your staff members (**for example, the Case Worker list in Family Services**). If you do not complete this information in **Personnel**, then you will not be able to select a staff member from the drop-down lists found throughout the system.*

At the very minimum, you should complete the information in the **General** section for each of your staff members. You should also select the position that the employee holds from the **Position** list on the **Employment** tab.





Many of the fields in the **Personnel** module contain sensitive and confidential information. Therefore, for initial set up purposes, ChildPlus Software recommends that you only complete the basic information on the **General** tab and wait until your security settings are implemented before adding any sensitive or confidential information.

## Searching for staff members in the Personnel module

You can use the **Search for Personnel** box at the bottom of the **Participants List** to quickly search for personnel based on criteria such as their **First Name, Middle Name, Last Name, Preferred Name, SSN, Birthday, Phone Number** or **ChildPlus ID**.



You can use the  and  buttons to move through the different staff members in the list. These buttons work just like the **Previous** and **Next** buttons in previous versions of ChildPlus.

You can also use the **Alt+Up Arrow** and **Alt + Down Arrow** keys on your computer's keyboard to move through the different staff members in the list.

You can also use the **Change who appears in this list** link to filter the staff members that display in the **Participants List. Show me.**

## How do I set up staff members in the Personnel module?

1. Open the **Personnel** module. How do I do this? *Click on the **Management** tab and select **Personnel**.*
2. Click **Add New Personnel**.
3. Type the **Last Name, First Name, Birthday**, and/or **Social Security Number** of the staff member you want to add. Why do I have to enter this information?*ChildPlus uses this information to prevent you from inadvertently adding duplicate staff members to the system. You have to enter either a birthday or a social security number, however, both are not required.*What happens if I check **Search for existing person**?*If you suspect that the staff member has already been entered into ChildPlus (for example, they are a member of a family or have worked as a volunteer in the past), you can check the **Search for Existing Person** box to search for their record. Searching for an existing person can both save you time and prevent duplicate data entry efforts.*
4. Complete each of the remaining **fields** in the **General** section.


Item	Description
Last Name	Use this field to enter the last name of the staff member.
First	Use this field to enter the first name of the staff member. ChildPlus will automatically populate this field with the first name you provided when you added the staff member.
Middle	Use this field to enter the middle name of the staff member.
Suffix	If the staff member's name has a suffix, enter it here (for example: Jr, Sr, III).
Preferred	If the staff member goes by another name or nickname, enter it here.
Previous Name	If the staff member previously used another name (for example, if they had a different last name when they were married), enter it here.
Active	Check this box if you want the staff member's record to be active. If you

Item	Description
	uncheck this box, you won't be able to select the staff member from drop-down lists in the system. Click here to learn more.
SSN	Use this field to enter the social security number of the staff member.
Birthday	Enter the staff member's birth date.
Gender	Select the staff member's gender.
Marital Status	Select the staff member's current marital status.
<b>Hispanic/Latino</b> <sup>PIR</sup>	Select whether this participant is Hispanic/Latino or Non-Hispanic/Latino. ChildPlus uses this field to calculate question <b>B.12</b> on the <b>PIR</b> .
Agency	Select the agency where the staff member is employed.
Language <sup>PIR</sup>	Select each language that the staff member speaks.
Primary	Check the box next to the staff member's primary language.
Proficiency <sup>PIR</sup>	Select the staff member's level of proficiency in each language that he/she speaks.
Race <sup>PIR</sup>	Check the box that best describes the individual's race. If the staff member is multi-racial or biracial, you can check more than one race.
Hispanic/Latino	Choose <i>Yes</i> if the participant is of Hispanic/Latino or Latino descent or choose <i>No</i> if they are not.
View changes made by ChildPlus	If ChildPlus ever has to make any changes to your data during an update (for example, if a field is removed from the system), we'll preserve it here so you'll always have a historical record.

- Click on the **Employment** tab and select the staff member's position or job title from the **Position** list.
- Click **Save**.

## General Tab - Address and Contact and Agency-Specific Information

### Address and Contact

Item	Description
Living Address	Enter the staff member's living address. Tip: Click on the  button to generate a map of the address.
Address Line 2	If necessary, enter the second line of the staff member's living address (for example, an apartment number).
City	Enter the staff member's city.
State	Enter the staff member's state.
ZIP	Enter the staff member's ZIP code.
County	Enter the name of the county where the staff member lives.
Mailing address is the same as the living address	Check this box if the staff member's mailing address is the same as the physical address you entered. If the staff member's mailing address and physical address are different (for example, if the staff member uses a PO Box for their mailing

Item	Description
	address), then leave this box unchecked.
Work Email	Enter the staff member's work email address. This step is important if you want users to be able to use features such as the <b>Email Notification feature</b> in the <b>To-Do List</b> , the <b>Reset my password</b> feature or <b>LiveMessage</b> . If you add or edit a user's <b>Work Email</b> address in this field, ChildPlus will automatically update the <b>Email Address</b> field for the user stored in <b>Setup &gt; Security &gt; User Security</b> . Tip: Click on the <input type="checkbox"/> button to send a message to this email address.
Personal (Home) Email	Enter the staff member's home or personal email address. Tip: Click on the <input type="checkbox"/> button to send a message to this email address.
Phone Numbers	Click <b>Add Phone Number</b> to add a phone number for the staff member. If the staff member wants to opt in for text messages, make sure you select <i>Cell Phone</i> and set <b>Opt In for Text Messages</b> to Yes.  Tip: You can add as many phone numbers as you would like.
Emergency Contact Name	Enter the name of the staff member's emergency contact.
Relationship	Enter the contact's relationship to the staff member (for example: mother, husband, sister, friend).
Phone	Enter the emergency contact's phone number.
Extension	Enter the extension, if applicable, for the emergency contact.

### AGENCY-SPECIFIC INFORMATION

You can track data for Agency-Specific fields (custom fields that your agency can set up for data collection purposes) in the **Agency-Specific Information** section of the screen. See page 46 to learn more about agency-specific information.

### Employment

Item	Description
Employee ID	Enter the staff member's employee identification number.
Title	Enter the staff member's current title.
Effective	Enter the date that the staff member's employment became effective.
Full-Time or Part-Time	Select whether the staff member is employed full-time or part-time.
<b>Temporary or Permanent</b> <sup>PIR</sup>	Select whether the staff member is a temporary or permanent employee.
Job Class	Enter the code that represents the staff member's job class.
Position	Select the staff member's current position from the list.
This is a newly-created position	Check this box if the staff member holds a newly created position.
Date Created	If the staff members holds a newly created position, enter the date it was created.

Item	Description
Works directly with families	Select Yes or No to indicate whether the staff member works directly with families.
Vendor Payables Account Number	If applicable, enter the account number used by the staff member to pay for job-related expenses.
Primary Program	Select the program that the staff member is primarily involved with.
Primary Program Option	Select the program option that the staff member is primarily involved with.
Primary Service Area	Select the service area that the staff member is primarily involved with.
<b>Primary Age Group</b> * PIR  * <i>this field is only available if you have access to more than one agency in ChildPlus</i>	Choose the age group that the participant primarily works with.
Agency *  * <i>this field is only available if you have access to more than one agency in ChildPlus</i>	Select the agency where the staff member is employed.
Site	Select the site where the staff member is employed.
Supervisor	Type the first name of the staff member's supervisor.
Probation End Date	Enter the date that the staff member's probationary period is set to expire.
Days Inactive	If the staff member is currently <i>inactive</i> , enter the number of days.
<b>Terminated</b> PIR	Check this box if the staff member was terminated and is no longer employed at your agency.
<b>Termination Date</b> PIR	If the staff member was terminated, enter the date. * <i>This field is only available if you check the Terminated box.</i>
<b>Termination Code</b> PIR	If the staff member was terminated, enter the code that best matches the reason for their termination. * <i>This field is only available if you check the Terminated box.</i>
<b>PIR Position(s)</b> PIR	Check the box that represents the staff member's position at your agency. * <i>This field is only available if you check the Terminated box.</i>
Personnel Notes	Use this area to record comments about the staff member.

## Background

Item	Description
Initial Title	Enter the title of the staff member when hired.
<b>Initial Hire Date</b> PIR	Enter the date that the staff member was initially hired.
Rehire Title	If the staff member was rehired, enter the title given when rehired.
Rehire Date	If the staff member was rehired, enter their rehire date here.

Item	Description
<b>Parent Type</b> <sup>PIR</sup>	If the staff member is a parent/guardian of a participant that is or was formerly enrolled in a program at your agency, select the type of parent they are here.
Criminal Check	Enter the date the staff member's criminal background check was conducted.
Criminal Check Signature	Check this box if the staff member signed a criminal declaration.
Signature Date	If the staff member signed a criminal declaration, enter the date here.
Criminal Check Comments	Use this area to record any comments you have concerning the selected staff member's criminal background check.
Follow-up Needed	Check this box if you need follow-up information from this staff member.
Follow-up Date	If you had to follow-up on this staff member, enter the date here.
References Verified	Check this box after verifying the staff member's references.
Physical Date	Enter the date that the staff member received a physical examination.
Next Physical Due	Enter the date that the staff member's next physical examination is due.
TB Test Date	Enter the date of the staff member's last tuberculosis examination.
TB Test Results	Enter the results of the staff member's last tuberculosis examination.
Next TB Text Due	Enter the date that the staff member's next tuberculosis exam is due.

### Wages

Item	Description
Wage Classification	Select the staff member's wage classification.
Wage Frequency	Select the frequency at which the staff member is paid.
Hourly Rate	Enter the staff member's hourly rate.
Salary Grade	Enter the staff member's salary grade.
Last Increase Date	Enter the date that the staff member last received a salary increase.
Last Hourly Rate	If applicable, enter the staff member's most recent hourly rate.
Last Increase Percentage	Enter the percentage amount of the staff member's last salary increase.
Next Salary Increase Date	Enter the date that the staff member is due for their next salary increase.
Next Salary Increase Percent	Enter the projected percentage amount of the staff member's next salary increase.
Last Review Date	Enter the date of the staff member's last review.
Last Review Status	Enter the status of the staff member's last review.
Review Comments	Use this area to record comments about the staff member's review.



Item	Description
Next Review Date	Enter the date that the staff member is due for their next review.
<b>Wage Allocation</b> <sup>PIR</sup>	Click <b>Add Funding</b> to add a funding source for this staff member's salary. If the staff member is paid through more than one source, click <b>Add Funding</b> for each source you want to associate with the staff member's salary.

## Education Tab - Education & CDA

### Education

Item	Description
Education Level	Select the staff member's highest level of education.
Highest Degree	Enter the highest degree that this staff member holds.
Health Credential	Select <b>Yes</b> if the staff member has Health Services Competency Based Credentials.
Social Service Credential	Select <b>Yes</b> if the staff member has Social Service Competency Based Credentials.
<b>ECE or Related Degree</b> <sup>PIR</sup>	Select the staff member's highest degree from the list.
<b>Enrolled in an ECE or Related Degree Program</b> <sup>PIR</sup>	If the staff member is currently enrolled in an ECE or Related Program, , select the type of degree from the list.
<b>FCP or Related Degree</b> <sup>PIR</sup>	Check this box if the staff member has obtained an FCP or Related Degree. If they have, select the type of degree from the corresponding list.
<b>Enrolled in FCP or Related Program</b> <sup>PIR</sup>	Select <b>Yes</b> if the staff member is currently enrolled in an FCP or Related Program.
<b>FCC/Home-Based or Related Degree/Certification</b> <sup>PIR</sup>	Select the staff member's highest degree from the list.
<b>Enrolled in FCC/Home-Based or Related Degree</b> <sup>PIR</sup>	If the staff member is currently enrolled in an FCC/Home-Based or Related Program, select the type of degree from the list.
GED or High School Only	Check this box if the staff member's highest degree is a GED or High School diploma.
Notes	Use this <b>note box</b> to record additional information about the staff member's education.

### CDA

Item	Description
Preschool CDA	Select the staff member's Head Start Pre-School <b>CDA</b> <sup>1</sup> credential status.
Infant/Toddler CDA	Select the staff member's Head Start Infant/Toddler CDA credential status.
CDA is appropriate for staff member's Primary Program Option	Check this box for each staff member whose CDA is appropriate for their <b>Primary Program</b> and <b>Program Option</b> . Checking this box will ensure that staff members get counted towards questions B.5.d(1), B.5.e(3), B.8.d(1) & B.8.e(3) on the PIR.
CDA Advisor	Enter the name of the staff member's CDA Advisor
Waiver Expiration	Enter the expiration date for the staff member's waiver.
CDA Start	Enter the staff member's CDA start date.
CDA Obtained	Enter the date that the staff member obtained their CDA credential.
CDA Last Renewal	Enter the date that the staff member's CDA credential was last renewed.
CDA Next Renewal	Enter the date that the staff member's CDA credential is due for renewal.
CDA Resources File Began	Enter the date that the staff member's CDA Resource File was started.
CDA Resource File Completed	Enter the date that the staff member's CDA Resource File was completed.
Next CDA Action	Enter the next action that needs to take place regarding the staff member's CDA.
Next CDA Action Date	Enter the date that the next CDA action is scheduled to occur.
Total CDA Training Hours	Enter the total CDA training hours that the staff member has completed.
CDA Assessments	Use these fields to track the dates of up to 4 CDA Assessments.
CDA Observations	Use these fields to track the dates of up to 4 CDA Observations.
CDA Notes	Use this area to record comments about the staff member's CDA.

## Adding a New Funding Source

Funding sources are an important part of running your PIR because they link funding for programs to funding for individuals, program personnel, and in-kind transactions. Before you can assign a funding source to a specific program, individual or in-kind transaction, you must first set up each of the different funding sources that you want users to be able to choose from.

1. Click **Setup > Agency Configuration > Funding Source**.
2. Click **Add New Funding Source**.
3. Type the name that you want to assign to the funding source in the **Funding Source Name** box.
4. Click **Add Grant** to add a grant from the funding source you specified in step number 4.
5. Complete each of applicable **fields** about the grant.

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<sup>1</sup>Child Development Associate

Item	Description
Grant Name	Enter the name of the grant.
Active	Keep this box checked to indicate that the grant is active (and for it to display in drop-down lists). If you ever need to inactivate this grant, uncheck this box.
Grant Number or Funding ID	Enter the identification number assigned to the grant.
Award Amount	Enter the dollar amount of the grant.
Funded Enrollment	Number of enrolled children that the grant funds.
Begin Date	Date that the grant for the program takes effect.
End Date	Date that the grant for the program expires.

- Click **Save**.

## Setting up your Agency Information

Before you can start using the system, you will need to set up some basic information about your agency in ChildPlus.

### Adding basic information about your agency to ChildPlus

- Click **Setup > Agency Configuration > Agency Info**
- Click **Add New Agency**.
- Complete the **fields** on the **Agency Information** tab.

Item	Description
Agency Name	Type the name of your agency. ChildPlus uses this field to answer question 4 in the <i>General Program Information</i> section of the PIR.
Tax ID	Enter your agency's tax identification number.
Phone	Enter the main phone number for the agency. ChildPlus uses this field to answer question 10 in the <i>General Program Information</i> section of the PIR.
Fax	Enter the agency's fax number. ChildPlus uses this field to answer question 11 in the <i>General Program Information</i> section of the PIR.
Notes	You can use this field to enter an extension or other notes related to the agency's phone/fax number.
Active	Check this box if the agency is currently active. To deactivate an agency, leave this box

Item	Description
	blank.
Physical Address	Enter the agency's physical address.
Physical Address - Address 2	If the agency's physical address contains additional identifying information (such as a suite or building number), include it here.
Physical Address - City, State, ZIP	Enter the city, state, and ZIP code associated with the agency's physical address.
Mailing Address is the same as the Physical Address	Check this box if the agency's mailing address is the same as the physical address you entered. If the agency's mailing address and physical address are different (for example, if the agency uses a PO Box for their mailing address), then leave this box unchecked.
Mailing Address	Enter the agency's mailing address. ChildPlus uses this field to answer question 5 in the <i>General Program Information</i> section of the PIR.
Mailing Address - Address 2	If the agency's mailing address contains a additional identifying information (such as a suite or building number), include it here.
Mailing Address - City, State, ZIP	Enter the city, state, and ZIP code associated with the agency's mailing address.
Email	Enter the email address for the agency. ChildPlus uses this field to answer question 14 in the <i>General Program Information</i> section of the PIR.
Website	Enter the agency's web site address, if applicable. ChildPlus uses this field to answer question 15 in the <i>General Program Information</i> section of the PIR.
Notes	You can use this area to enter any notes or additional information about your agency's information.
Agency Logo	ChildPlus prints this logo at the top of every barcode ID you print using report <b>2340 - Attendance Scanning Bar Codes</b> . Click here to learn more about working with <b>Agency Logos</b> .

- Click **Save**. What if I have more than one agency to set up? *if you are setting up more than one agency in ChildPlus, click Add New Agency and repeat if you are setting up more than one agency in ChildPlus, click Add New Agency and repeat steps 4 and 5 for each agency you want to add.*

# Adding a New Site

Follow these steps to add a new site for an agency:

1. Click **Setup > Agency Configuration > Agency Info**.
2. Select the agency that you want to add a site to.
3. Click on the **Sites** tab.
4. Click **Add Site**.
5. Complete each of the applicable **general information** fields for the site.

Item	Description
Site Name	Enter the name of the site.
Short Name	Enter a short name for the site. ChildPlus uses this label to abbreviate the site's name on screens and reports.
Site Label	Enter a label for the site. ChildPlus uses this label to abbreviate the site's name on screens and reports.
License Number	Enter the license number for the site.
License Expiration	Enter the date that the site's license will expire.
Maximum Capacity	Enter the maximum capacity or number of people that the site can hold at one time.
Total Staff	Enter the total number of staff members (regardless of position or title) at the site.
Total Teachers	Enter the total number of teachers at the site.
Total Assistants	Enter the total number of assistants at the site.
This is a Contract Site	Check this box if this is a contract site.
Address	Enter the address for the site.
Region	Select the region that you want to associate the site with (if applicable).
Phone	Enter the main phone number for the site.
Fax	Enter the fax number for the site.
Note	Use this area to record any notes or additional information about the site's phone or fax number.

Item	Description
Responsible Staff	Enter the name of the staff member responsible for the site.
Responsible Staff Position	Enter the position or title of the responsible staff member.

6. Click **Save**.

## Adding a New Classroom

Follow these steps to add a new classroom to a site:

1. Click **Setup > Agency Configuration > Agency Info**.
2. Select the agency that you want to add a classroom to (you only need to perform this step if you have more than one agency set up).
3. Click on the **Sites** tab.
4. Select the site where the classroom is located.
5. Click on the **Classrooms** sub-tab.
6. Click where it says **Click here to add a new row**.
7. Complete each of the **fields** related to the new classroom.

Item	Description
Active	Keep this box checked to indicate that the classroom is active (and for it to display in drop-down lists). If you ever need to inactivate the classroom, you will need to uncheck this box.
Classroom Name	Enter the name that you want to assign to the classroom.
Classroom Label	Enter a one-character label for the classroom (for example, <i>a</i> or <i>1</i> ). ChildPlus uses this label to abbreviate the classroom's name on screens throughout the system.
Capacity	Enter the student capacity for each classroom.

8. Click **Save**.



**Tip:** Before you'll be able to enroll participants in your new classroom, you'll need to associate it with a program term.

### Adding a New Classroom to an Existing Program Term

Follow these steps if you already have your program term set up but need to add a new classroom to it. If you have not set up your program terms yet, see page 1.

1. Open the **Program Information** screen. How do I do this? *Click on **Setup** > **Agency Configuration** > **Program Info**.*
2. Select the program term that you want to add the classroom to.
3. Click **Add Classroom**.
4. Complete each of the **fields** related to the classroom.

Item	Description
<b>Program Option</b> <sup>PIR</sup>	Select the program option for the classroom.
Funded Enrollment	Check this box if the program option provides services for eight or more hours per day.
<b>Provides Services for Full Working Day (not less than 10 hours per day)</b> <sup>PIR</sup>	Check this box if the program option provides services for ten or more hours per day.
<b>Provides Services for Full Calendar Year (all days of the year other than Saturday, Sunday, and a legal public holiday)</b> <sup>PIR</sup>	Check this box if the program option provides services for the full calendar year.
Days the Classroom Operates	Check each day of the week that the classroom operates.  ChildPlus will use the information you provide here to determine the default days that are checked for each participant in the in the <b>Participation Days and Meals</b> section of the <b>Enrollment</b> screen.

5. Click **Save**.

### Adding Site Inspection Information

You can use the **Inspections** tab to record up to 50 of your site's inspections. If you track the dates of your inspections here, ChildPlus displays an asterisk next to the name of the next inspection due.

You have the choice of either using the default inspection items included with ChildPlus or setting up your own customized inspection items. To learn how to set up your own Agency-Specific inspections, see *Setting up Agency-Specific Customizable Fields* on page 46.

### How to track site inspections

1. Click **Setup** > **Agency Configuration** > **Agency Info**.
2. Select the agency that you want to add site inspection information for.
3. Click the **Sites** tab.
4. Click the **Inspections** sub-tab.
5. For each inspection item, you can enter the date of the last inspection, the date of the next inspection, as well as any comments you might have.
6. Click **Save**.

## Restricting Enrollment by ZIP Code

Does your agency only allow participants from certain ZIP codes to enroll or apply to your programs? If so, you can now restrict enrollment by ZIP code. This means that if a participant lives in a ZIP code that you've restricted, then the system won't allow you to enroll him.

### Restricting enrollment by ZIP Code

1. Click **Setup > Agency Configuration > Agency Info**.
2. Select the agency that you want to work with.
3. Click the **Enrollment Options** tab and go to the **ZIP Codes Served** section of the screen.
4. Select **Restrict enrollment in this agency by ZIP code**.
5. Type each ZIP Code that you want to restrict enrollment for in the **ZIP Code** list. Once you add a ZIP Code to this list, ChildPlus will not let you enroll an applicant who resides in it.

## Associating Funding Sources with Programs

Funding sources are an important part of running your PIR because they link funding for programs to funding for individuals, program personnel, and in-kind transactions.



You cannot assign funding for programs until you have set up each of your **funding sources** and **programs** in ChildPlus.

Follow these steps to assign a funding source:

1. Click **Setup > Agency Configuration > Agency Info**.
2. Select the agency that offers the program that you want to associate with a funding source.
3. Click on the **Funding** tab.
4. Click **Add Grant or Other Funding**.
5. Select the funding source that you want to associate with the program from the **Grant or Other Funding** list. *Do you need to add a funding source to the list? Click on **Agency Configuration** tab and select **Funding Source**. Then, click on **Add New Funding Source**.*
6. Complete each of the applicable **fields** on the screen.

Item	Description
Delegate ID	The identification number for the delegate.
Program	Select the program that this funding source is associated with.
Amount	Amount of the grant for the program.
Funded Enrollment	The number of enrolled participants that the grant funds.
Begin Date	Date that the grant for the program takes effect.
End Date	Date that the grant for the program expires.
Director	Name of the director for the program.

7. Click **Save**.





It is possible for a program to have multiple funding sources. To add an additional funding source for a program or to set up funding for additional programs, click on the **Add Grant or Other Funding** button and repeat step numbers 6-8.

## Setting up Health and Education Events

The **Health and Education Events** screen is where you set up each of your health and/or education events in ChildPlus. When you set up an event on this screen, it will be available as a choice in the **Event Type** list in the **Health** and **Education** modules.

As part of this set up process, you can also specify the **valid periods** for each of your events. These valid periods are used for determining the expiration date for each event that takes place. This is particularly useful when programs have different valid periods for the same event. For example, a Dental Exam may be valid for one year in your Head Start program but only for six months in another program.

### Setting up Health and Education Events

1. Click **Setup > Module Setup > Health and Education Events**.
2. Click **Add Event Type**.
3. Type the name you want to assign to the event in the **Event Type Name** field.
4. Select which module(s) this event should be available for in ChildPlus.
5. If this is a special event type (for example, a growth assessment or an event with sub-events like a Well Baby Check), select the type of event it is.
6. If you want to set up an optional valid period for the event, click **Add Program**.
7. Check each PIR question type that you want the event to count towards. *Hint: Click on the <sup>PIR</sup> link to view the full text of the PIR question.*
8. Select each field that you want to be available on the screen for the event type.
9. Select each status that you want to be available on the screen for the event type.
10. Click **Save**.

### Setting up Well Baby Checks

You can also set up well baby checks for Early Head Start programs on the **Health and Education Events** screen. If you perform Well Baby Checks at certain time intervals (for example, if you perform a well baby check at 3 months, 6 months, and 9 months), you will need to add a health event for each interval. Using the previous example, this means that you would need to set up an event for the 3 month well baby check, an event for the 6 month well baby check, and an event for the 9 month well baby check).

1. Click **Setup > Module Setup > Health Events**.
2. Click **Add Event Type**.
3. Type the name you want to assign to the well baby check in the **Event Type Name** field (for example, *Well Baby Check - 3 months*).
4. Select **This event type has sub-events** in the Special Event Types area
5. If you want to set up an optional **valid period** for the well baby check, click **Add Program**.
6. Check each PIR question type that you want the well baby check to count towards.

7. Click **Add Event Type** to add sub-events to the well baby check. Click **Add Event Type** for each sub-event you want to add (well baby check typically have more than one sub-event associated with them).
8. Select each field that you want to be available on the screen for the well baby check.
9. Select each status that you want to be available on the screen for the event type.
10. Click **Save**.

## Setting up Health and Education Requirements

You can use the **Health/Education Requirements** screen (available via **Setup > Module Setup > Health and Education Requirements**) to set up your **Health** and **Education** module requirements in ChildPlus. **Health and Education Requirements** allow you to define and track the specific enrollment and age requirements for participants at your agency. Once your requirements are set up, ChildPlus can automatically compare the Health and Education event records of participants against the program's requirements. You can use this comparison to check for compliance by viewing which requirements have been met and which have not.

- Click here to learn how to set up **Requirements based on Entry Date**.
- Click here to learn how to set up **Requirements based on Age**.



**Tip:** You can use **Health and Educations Events** to set up your system to automatically trigger health events as having met requirements.

## Entry Date Requirements

Entry Date Requirements are used track health events that are required each year or at enrollment. In general, Head Start requirements (for example, your 45 and 90 day requirements) are typically set up as entry date requirements while Early Head Start requirements (for example, well baby checks), are set up as **age** requirements. ChildPlus uses the entry date requirements that you set up to track program compliance requirements in the **Health** and **Education** modules.



Click **here** to view EPSDT information for your state.

## Configuring Entry Date Requirements

1. Click **Setup > Module Setup > Health and Education Requirements** to open the **Health/Educations Requirements Setup** screen.
2. Select the requirement set that you want to add requirements to or click **Add New Requirement Set** to add a new requirement set.



If you click **Add New Requirement Set**, you can either start with a blank requirement set or copy an existing requirement set

3. Click the **Requirements based on Entry Date** tab.
4. Click **Add Requirement**.
5. Select the **Event Type** that you want to add from the list.

6. Complete the rest of the fields on the screen using the following table as a guide:

Field	Description
Calculate this requirement using the ____ entry date	<p>Choose whether you want ChildPlus to base entry based health requirements on the participant's entry date into the <b>Program</b> or the <b>Program Term</b>. By default, ChildPlus will always calculate requirements using the <b>Program Term</b>.</p> <p>This feature gives you the flexibility of making some entry based requirements due only once when the participant enters the program and having other entry based requirements due each year when they enter the program term. For example, if you have participants who are enrolled in a program for multiple school years. They may have one requirement that needs to be met only when they start the program but others 45/90 requirements that have to be met annually at the beginning of the program term.</p> <p>In addition to the Program or Program Term Entry Date, you can also specify a unique date for ChildPlus to use when calculating requirements. <a href="#">Click here to learn more.</a></p>
This event is due within ____ days of entry date	<p>Choose the number of days after a participant enters a program that the event is due.</p> <p>For example, if you choose 7 then the event will be due within 7 days of the date you provide in the <b>Entry Date</b> field. This means that the requirement will be considered <i>Past Due</i> if the event is not completed within 7 days.</p>
Exclude events that occurred more than ____ months prior to entry date	<p>If you want to exclude health events that occurred before the participant's entry date, set the number of months here.</p> <p>For example, if you choose 6, then ChildPlus will not count an event as fulfilling a requirement if it occurred more than 6 months before to the participant's entry date.</p>

Field	Description
Count/Do Not Count this event for PIR Question C.8	Select whether you want to <i>Count</i> or <i>Not Count</i> this event towards question C.8 on the PIR.
This requirement applies to:	<p>Specify which participants you want health requirements to apply towards. For each requirement, you can choose whether you want it to apply towards:</p> <p><b>All Participants*</b> <i>in order to see this option, you need to make sure you have the Do you add adults as participants Preference set to Yes, All adult participants*</i> <i>in order to see this option, you need to make sure you have the Do you add adults as participants Preference set to Yes, All child participants, Child participants who will be at least ___ on their entry date, Child participants who will be less than ___ on their entry date, or Child participants who will be between ___ and ___ on their entry date.</i></p> <p>These options are particularly useful for agencies who enroll adults and participants in the same program (for example, Early Head Start and Migrant programs).</p>

7. Repeat steps 4-6 for each requirement you want to add.
8. Click **Save**.

## Age Requirements

Age Requirements are used to track health events that are administered at a specific age (for example, a required growth assessment at 6 months). In general, Early Head Start requirements (for example, well baby checks) are set up as age requirements while Head Start requirements (for example, your 45 and 90 day requirements) are typically set up as **entry date** requirements. ChildPlus uses the age health requirements that you set up to track program compliance requirements in the **Health** and **Education** modules.



Click **View State EPSDT Schedule** to view EPSDT information for your state.

## Configuring Age Requirements

1. Click **Setup > Module Setup > Health and Education Requirements** to open the **Health/Education Requirements Setup** screen.
2. Select the requirement set that you want to modify or click **Add New Requirement Set** to add a new requirement set.



If you click **Add New Requirement Set**, you can either start with a blank requirement set or copy an existing requirement set

3. Click on the **Requirements Based on Age** tab.
4. Select whether you want to calculate requirements using the participant's **Entry Date** into the **Program Term** or the **Program**.
5. Click **Add Requirement**.
6. Select the **Event Type** that you want to add from the list.
7. Complete the rest of the fields on the screen using the following table as a guide:

Field	Description
This event is required if a participant turns ___ after their entry date and while enrolled or if the participants entry date/re-enrollment date is within ___ days of turning...	Enter the age that the event is required for enrolled participants. You should also enter the number of days that, if the participant enters or re-enrolls in the program, this event is required.  For example, if you require a growth assessment at 12 months, this event will be due when an enrolled participant turns 12 months. This event will also be due for any participant who turns 12 months within 30 days of entering or being re-enrolled in the program.
Only events of this type that occur between the ages of ___ and ___ will be considered for meeting this requirement.	Enter the range of dates in which the event can occur and still be counted as meeting the requirement.  For example, if your growth assessment is due at 12 months, you can use these fields to set it up so that it will be valid if it occurs anytime between 10 months and 14 months.
Events of this type are considered late ___ days after the participant turns...	Enter the number of days after a participant's birthday that you have to complete this event before it is considered late.
Count/Do Not Count this event for PIR Question C.8.	Select whether you want to <i>Count</i> or <i>Not Count</i> this event towards question C.8 on the PIR.

8. Repeat steps 4-6 for each requirement you want to add.
9. Click **Save**.

## DeHealth Requirement Sets

Health Requirement Sets allow you to track which health requirements are associated with each program at your agency. Since health requirements differ by program, you can create a requirement set for each program. For example, you can create one requirement set for your Head Start program and another requirement set for your Early Head Start program. Requirement sets can be assigned to one or more programs. Therefore, if you have different programs that have the same health requirements, then you can set up one requirement set and assign it to each program that uses those health requirements. In general, Head Start

requirements are usually set up as **entry date requirements**; whereas, Early Head Start requirements are usually set up as **age requirements**.

Requirement sets also provide you with a means of tracking the history of the health requirements for your programs over time. For example, imagine you used one requirement set for the 2019-2020 school year but the requirements changed for the 2020-2021 school year. In this case, you would just create a new requirement set for the 2020-2021 school year and use it moving forward. However, your requirements for the 2019-2020 school year will remain intact and you'll always have the option of referring back to them.

## Adding a Health Requirement Set

1. Click **Setup > Module Setup > Health Requirements**.
2. Click **Add New Health Requirement Set** to add a new requirement set.
3. Decide whether you want to set up **entry date** or **age** requirements and click on the appropriate tab.
4. Click **Add Requirement**.
5. Select the **Event Type** you want to add from the list.
6. Complete the information on the screen about the event.
7. Click **Add Requirement** for each additional event you want to include in the requirement set.
8. Click **Save**.

## Setting up an Immunization Schedule

ChildPlus calculates the **Next Due** dates for immunizations based on the information you provide on the **Immunization Schedule Setup** screen. You can use this screen to choose which immunizations and **Next Due** dates you want ChildPlus to automatically calculate. In addition, you can also choose which immunizations and **Next Due** dates, if applicable, that you do *not* want ChildPlus to automatically calculate. You can also control the order in which immunizations display on this screen.



**Tip:** If you need assistance, you can **click here** to view national CDC guidelines at <http://www.cdc.gov/vaccines/recs/schedules/>.

## Setting up an Immunization Schedule in ChildPlus

1. Click **Setup > Module Setup > Immunizations**.
2. Complete the fields on the screen for each immunization.

Item	Description
Active	Check this <b>box</b> if you want to track the immunization in ChildPlus. If this box is not checked, it will be considered <i>inactive</i> and you will not be able to track or edit information for this immunization in ChildPlus.
Alternative Name	You can populate this field if you want to change the default name of the immunization (for example, so the name of the immunization matches your local requirements). If you specify an <b>Alternative Name</b> , ChildPlus will reference the <b>Alternative Name</b> on the <b>Immunization</b> screen and on reports.
First Due	Enter the number of days after the participant's birth date in which the first dose of the immunization is due (for example, if you enter <i>90</i> , then the first dose will be due exactly 90 days after the participant's birth date).  <b>Additional Options: M X 0</b>
Second Due	Enter the number of days after the participant's first dose of an immunization that the second dose in the series is due (for example, if you enter <i>90</i> in this field, then the second dose will be due exactly 90 days after the participant's first).  <b>Additional Options: M X 0</b>
Third Due	Enter the number of days after the participant's second dose of an immunization that their third dose in the series is due (for example, if you enter <i>90</i> , then the participant's third dose in the series will be due exactly 90 days after their second).  <b>Additional Options: M X 0</b>



Item	Description
Fourth Due	Enter the number of days after the participant's third dose of an immunization that their fourth dose in the series is due (for example, if you enter <i>90</i> , then the participant's fourth dose in the series will be due exactly 90 days after their third).  <b>Additional Options: M X 0</b>
Fifth Due	Enter the number of days after the participant's fourth dose of an immunization that their fifth dose in the series is due (for example, if you enter <i>90</i> , then the participant's fifth dose in the series will be due exactly 90 days after their fourth).  <b>Additional Options: M X 0</b>

3. Click **Save**.

## Customizing the Order of Immunizations for Data Entry

You can control the order in which immunizations actually display on the **Immunizations** screen. Organizing immunizations in a specific order can help make data entry more efficient if your staff members are used to recording data in a particular order. For example, you can order each immunization on the screen to display in the exact order of the current CDC Immunization Schedule.

To customize the order of immunizations:

1. Open the **Immunizations Setup** screen. *How do I do this?* Click on **Setup > Module Setup > Immunizations**.
2. Scroll down to the **Customize the Immunization Data Entry Screen** section.
3. Select an immunization.
4. Use the  and  arrow buttons to move it up and down in the list.
5. Repeat steps 3 and 4 for each immunization you want to organize.
6. Click **Save**.



**Immunizations**

Influenza     Other 1     Other 2     Other 3

	M	M
	X	X
	M	M
	M	M

Changing the data entry order will not damage existing immunizations associated with the proper immunization regardless of data

PCV
Polio
DTaP
Hib
MMR
Hepatitis B
Varicella
Hepatitis A
Influenza
Other 1
Other 2
Other 3

## Eligibility Criteria

You can configure eligibility sets in ChildPlus to use with each of your programs. Based on the information you provide when you create these eligibility sets, ChildPlus will automatically be able to calculate each participant's eligibility points when they apply to a program at your agency.

### Can I copy the information from an existing Eligibility Set?

Yes, you can copy the information from an existing eligibility set and base your new eligibility set's points and questions off the original one. Copying an existing eligibility set can save you a lot of time if the points and questions are similar. Here's how:

1. Click **Setup > Module Setup > Eligibility Criteria**.
2. Click **Add New Eligibility Set**.
3. Select **Start with a copy of...**
4. Select the eligibility set that you want to copy.
5. Click **OK**.
6. Type the name that you want to assign to the eligibility set in the **Eligibility Set Name** field.
7. Modify the eligibility set's criterion and **choices** as necessary.
8. Select the agency/program term(s) that you want the eligibility set to apply to.
9. Click **Save**.

### How do I create a new Eligibility Set?

If you do not have an existing eligibility set to base your new set on or if you would just rather start from scratch, you can create a new eligibility set by following these steps:

1. Click **Setup > Module Setup > Eligibility**.
2. Click **Add New Eligibility Set**.
3. Select **Start with a blank eligibility set**.
4. Click **OK**.
5. Type the name you want to assign to the eligibility set.
6. Complete the **Points based on Income** section of the screen using the following table as a guide:

<b>Points based on Income</b>	
<b>Option</b>	<b>Description</b>
Automatically assign points based on Income	Check this box if you want to automatically assign eligibility points based on the participant's income.
Foster	Enter the number of points you want to assign to participant's who are in foster care.
Homeless	Enter the number of points you want to assign to participant's who are homeless.
Public Assistance	Enter the number of points you want to assign to participant's who receive public assistance.
Percentage of Poverty Level	<p>This feature allows you to configure different poverty level ranges and associate point values with them. For example, a family from 0% to 50% of the poverty level would receive 90 points and a family from 51% to 75% would receive 40 points.</p> <p>To assign points based on poverty level percentage, you'll need to create a row for each poverty level range you have. Once you add the first row, you can add additional rows using the <b>Tab</b> key.</p>
Participant is not eligible if above ___ % of the Poverty Level	Check this box if you want to restrict participants from being enrolled if their % of poverty level is above the specified percentage.
Participant is not eligible based on annual income	Check this box if you want to restrict participants from being enrolled based on their annual income. Once you've checked this box, click <b>Set Income Levels</b> to configure income limits.
Set Income Levels	Click to set up maximum family incomes based on family size. ChildPlus will use this information to determine whether participants are eligible based on their annual income.

7. Complete the **Points based on Class Age** section of the screen using the following table as a guide:

Points based on Age	
Option	Description
Automatically assign points based on Class Age	Check this box if you want to automatically assign points based on the participant's Class Age.  To assign points based on Class Age, you'll need to create a row for each Class Age range you have. Once you add the first row, you can add additional age ranges using the <b>Tab</b> key.
Participant is not eligible if class age is less than ___ months	Check this box if you want to restrict participants from being enrolled if their Class Age is less than the specified number of months.
Participant is not eligible if class age is ___ months or greater	Check this box if you want to restrict participants from being enrolled if their Class Age is greater than the specified number of months.

8. Click **Add Criterion** in the **Other Eligibility Criteria** section to add additional eligibility items (for example, Teen Parent or Parental Status).
9. Add choices for each criterion item by clicking on **Add Choice** and completing the field using this table as a guide:

Other Eligibility Criteria	
Choice	Description
Choice	Type the name of the choice that you want users to be able to choose from when assigning eligibility points on the <b>Enrollment</b> screen. For example, if the criterion that you are setting up is titled <i>Teen Parent</i> , you would set up two choices: <i>Yes</i> and <i>No</i> .
Points	Specify the number of points that you want assigned to the choice. For example, if the answer is <i>Yes</i> , then the participant would be assigned <i>15</i> eligibility points; if the answer is <i>No</i> , then the participant would be assigned <i>0</i> eligibility points.
Not Eligible	If you check this box for the choice, then if a user selects this choice when filling out the participant's eligibility criteria, ChildPlus will automatically determine that the participant is <i>not eligible</i> .

12. Repeat steps 9 and 10 for each of the criterion that you want to add for the eligibility set.
13. Select the Agency/Program Term combinations that you want the eligibility set to apply to.
14. Click **Save**.

## Disability Setup

You can customize your **Disability** module in ChildPlus by configuring key system fields related to **Concerns**, **IEPs** and **IFSPs**.

## Concerns

### Adding a New Concern Activity Type

To add a new Concern Activity Type for the **Disability** module:

1. Open the **Disability Setup** screen. How do I do this? Click on **Setup > Module Setup > Disability**.
2. Click on the **Concerns** tab.
3. Click **Add Activity Type**.



**Tip:** The new **Concern Activity Type** will be available as a choice whenever you add a new activity for a concern.

4. Type the name you want to assign to the Activity Type in the **Description** box.
5. Select each of the status that you want to be available for the activity type.
6. Check the Enable Responsible Staff field
7. Make your changes to the activity.
8. Click **Save**.

### Editing a Concern Activity Type

To edit a Concern Activity Type for the **Disability** module:

1. Open the **Disability Setup** screen. How do I do this? Click on **Setup > Module Setup > Disability**.
2. Click on the **Concerns** tab.
3. Select the activity type you want to edit.



**Tip:** You can also use this screen to add new Activity Types or delete Activity Types.

4. Click **Edit**.
5. Make your changes to the activity.
6. Click Save.

Services To-Do List Entry Express Management Dashboard Reports Setup

Security Agency Configuration Module Setup System Setup Database Utilities Data Utilities Initial Setup

## Disability

### Disability Setup

Concerns IEP/IFSP

Concern Activity Types

Active	Description	This Activity is a Type of Referral	Referral Type	Enable Responsible Staff Field
<input checked="" type="checkbox"/>	Concern Identified			<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Diagnosis			<input type="checkbox"/>
<input checked="" type="checkbox"/>	Intervention / RTI			<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Referral - Internal	<input checked="" type="checkbox"/>	Internal	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Referral - External	<input checked="" type="checkbox"/>	External	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Evaluation			<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Observation			<input checked="" type="checkbox"/>
<input type="checkbox"/>	Status at Time of Conversion			<input checked="" type="checkbox"/>

[Add Activity Type](#) [Edit](#) [Delete](#)

Concern Activity Statuses

Active	Status	Complete*
<input checked="" type="checkbox"/>	Awaiting Feedback	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Awaiting Parent Consent	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Awaiting Staff	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Complete	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Diagnosed	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Diagnosed Prior to Program Year	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Evaluated - Eligible for Services (IEP/IFSP Pending)	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Evaluated - No Disability Found	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Evaluated - Not Eligible for Services	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Evaluation Not Needed	<input checked="" type="checkbox"/>

\*If this status is selected, its activity will be considered 'Complete' for purposes of report filtering and the To-Do List. [Add Status](#) [Edit](#) [Delete](#)

**Additional Setup Steps**

- Edit Concern Category choices by modifying the Concern Category (Disability) dropdown choice type at [Setup | System Setup | Customize Dropdown Choices](#)
- Add LEA and Part C Agencies by adding or modifying existing community resources and checking the "LEA" and/or "Part C Agency" box at [Management | Community Resources](#)
- Edit concern Closed Reason choices by modifying the Closed Reason (Disability Concerns) dropdown choice at [Setup | System Setup | Customize Dropdown Choices](#)

## IEP/IFSP

- Does your program track IEPs, IFSPs or both?
- IEP Types
- IFSP Types
- Activity Types

Services To-Do List Entry Express Management Dashboard Reports Setup

Security Agency Configuration Module Setup System Setup Database Utilities Data Utilities Initial Setup

## Disability

### Disability Setup

Concerns IEP/IFSP

Does your program track IEPs, IFSPs, or both?  IEPs  IFSPs

#### IEP Types

Active	Description
<input checked="" type="checkbox"/>	IEP - Annual Review
<input checked="" type="checkbox"/>	IEP - Initial
<input checked="" type="checkbox"/>	IEP - Triennial Evaluation
<input checked="" type="checkbox"/>	IEP - 6 Month Review
<input checked="" type="checkbox"/>	IEP - 30 Day Transition
<input checked="" type="checkbox"/>	IEP - Transition
<input checked="" type="checkbox"/>	IEP - Other

Add IEP Type Edit Delete

#### IFSP Types

Active	Description
<input checked="" type="checkbox"/>	IFSP - Annual Review
<input checked="" type="checkbox"/>	IFSP - Initial
<input checked="" type="checkbox"/>	IFSP - 6 Month Review
<input checked="" type="checkbox"/>	IFSP - 30 Day Transition
<input checked="" type="checkbox"/>	IFSP - Transition
<input checked="" type="checkbox"/>	IFSP - Other

Add IFSP Type Edit Delete

#### Activity Types

Active	Description	Applies to IEP	Applies to IFSP	Enable Responsible Staff Field
<input checked="" type="checkbox"/>	Follow-up	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Note	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Observation	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Parent Conference	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Add Activity Type Edit Delete

## Security Settings

Through **Security Settings** you can manage security settings for different modules and features in ChildPlus.

### General

The security setting on this tab lets you control whether users can access ChildPlus Mobile using a web browser. To turn on ChildPlus Mobile for your agency:

1. Click **Setup >> Security >> Security Settings**.
2. Select **Allow users to access ChildPlus using a web browser**.
3. Copy the URL and share it with any staff members that you want to have access to ChildPlus Mobile.



**Tip:** You can also manage access to ChildPlus Mobile through User Security Groups. To help make your transition to ChildPlus Mobile seamless, any **User Security Groups** that previously had access to **Family Services** in ChildPlus will automatically have access to **Family Services** in ChildPlus Mobile.

## Password Policy Enforcement

ChildPlus administrators can use the **Password Policy Enforcement** tab to:

- Set password strength
- Force the user to change their password after a certain number of days.
- Enable the **I Forgot My Password** feature

Both ChildPlus and ChildPlus Mobile require strong passwords that are, at a minimum, at least 8 characters long and contain at least 3 of the following character types:

- lower case letters
- upper case letters
- numbers
- symbols (~ ! @ # \$ % ^ \* ( ) \_ - + = { } [ ] \ | : ; " ` < > , . ? /)

## Restrict Access by Location

To restrict access by location:

1. Click **Setup > Security > Security Settings**.
2. Click on the **Restrict Access by Location** tab.
3. Set up your security settings for your locations using the following table as a guide:

Option	Description
In-Kind	Choose whether you want users to have access to all volunteers or only the volunteers who are associated with classrooms that users have access to in their <b>User Security</b> profile.
Entry Express - Enrollment	<p>Choose whether you want users to only be able to assign participants to sites and classrooms that they have access to in their <b>User Security</b> profile or if they should be able to assign participants to any site or classroom.</p> <p><b>Tip:</b> If you choose <b>Only allow users to assign sites and classrooms they have access to</b>, then the user will only be able to assign applicants to funding sources that are associated with agencies that the user has access to in their <b>User Security</b> profile.</p>
Location Preferences	Check this box if you want users to only be able to assign participants to a waitlist for sites and classrooms that they currently have access to.
Transportation	<p>Choose whether you want users to only be able to see bus routes for the sites that they have access to in their <b>User Security</b> profile or if they should be able to see all bus routes.</p> <p><b>Tip:</b> In order to take full advantage of this feature, you'll also need to visit the <b>Transportation Routes</b> screen and select an <b>Agency</b> and <b>Site</b> for each route.</p>
Professional Development *  <i>This feature is only available when you have multiple agencies set up in ChildPlus.</i>	Choose whether you want users to have access to all professional development records or only the professional development records that are associated with agencies that the user has access to in their <b>User Security</b> profile.
Case Workers *  <i>This feature is only available when you have multiple agencies set up in ChildPlus.</i>	Choose whether you want users to be able to choose any Case Worker from drop-down picklists in ChildPlus or if drop-down picklists should only include Case Workers that are associated with agencies that the user has access to in their <b>User Security</b> profile.



Option	Description
Community Resources *  <i>This feature is only available when you have multiple agencies set up in ChildPlus.</i>	Choose whether you want users to be able to choose any community resource from drop-down picklists in ChildPlus or if drop-down picklists should only include community resources that are associated with agencies that the user has access to in their <b>User Security</b> profile.
Personnel	These settings give you greater control over security access to <b>Personnel</b> and <b>User Security</b> records:  The first option lets you determine whether you want staff members to access all personnel records or only the personnel records that are associated with sites for which the user has security privileges to access.  The second option is only available if you have more than one agency set up in ChildPlus. It lets you determine if you want drop-down picklists in ChildPlus to display the name of all staff members or only the staff members associated with agencies for which the user has security access.

4. Click **Save**.

## Inactivity Timeout

To enhance the security of your information, you can configure how long users can be inactive before having to log back into the system.

To manage **Inactivity Timeouts** in ChildPlus:

1. Click **Setup > Security > Security Settings**.
2. Click on the **Inactivity Timeout** tab.
3. Click **Require users to reenter their password after a period of inactivity** to require users to type their password again after they've been inactive for more than 60 minutes. You can adjust this time to a different number of minutes if necessary.



Click **Log the user out completely after an additional \_\_\_ minutes of inactivity**, if you want to log users out of ChildPlus completely after a certain amount of time.

This feature can be very helpful if you want ChildPlus to log users out of the system completely instead of just requiring them to type their password again. This feature is also useful in situations where, for example, you are doing a global update and want ChildPlus to automatically log all of your users out of ChildPlus at the end of the day.

## User Security Groups

Through **User Security Groups** you can set up groups with designated access privileges to modules and screens in ChildPlus. Once you have set up user security groups in ChildPlus, you can **assign users to them**. Any users assigned to these groups will automatically be granted the same access privileges as their group assignment(s).

You can assign the following types of access privileges in ChildPlus:

- **Full Access** - A user security group that has been granted full access to a module in ChildPlus can add, change, or delete data within the module.
- **View Access** - A user security group that has been granted view access to a module in ChildPlus can view data within the module but cannot add, change or delete data.
- **No Access** - A user security group that has been denied access to a module in ChildPlus cannot view, add, change, or delete data within the module.

### Adding a New User Security Group

1. Click **Setup > Security > User Security Groups**.
2. Click **Add New Security Group**.
3. Choose **Start with a blank security group** to create a security group from scratch or choose **Start with a copy of** if you want to save time by copying an existing security group's settings.
4. Type the name you want to assign to the group in the **Security Group Name** field.
5. Use the **Security Group Description** field to provide a brief description of the security group.
6. Click on the **+** next to the name of each tab to expand the different modules, screens, and functions that you can assign access privileges to. You can assign access privileges to entire tabs, modules available through those tabs, and individual functions available in these modules.



**Time Saving Tip:** You can use the **Expand All** button to expand all the options in the list. Use **Collapse All** to collapse all the options in a list that has already been expanded. **Click Copy to Clipboard** to copy and paste the user security group's information into another application (such as Microsoft Word or Notepad).

7. Right click on the item you want to assign security privileges to and select either **Full Access** A user security group that has been granted full access to a module in ChildPlus can add, change, or delete data in within the module, **View Access** A user security group that has been granted view access to a module in ChildPlus can view data within the module but cannot add, change or delete data, or **No Access** A user security group that has been denied access to a module in ChildPlus cannot view, add, change, or delete data within the module.
8. Click **Save**.



Many of the screens and reports in ChildPlus contain sensitive and confidential information. Therefore, when setting up your security groups, ChildPlus Software recommends that only system administrators have full access to everything in ChildPlus. Security is especially a concern for features accessible through **Management** and **Setup**.

### Setting Required and Recommended Fields

Administrators can now configure which fields are required or recommended in the **Application module**. This feature was developed to give administrators the ability to force or encourage users to fill in certain fields

To set required fields in the **Family Application**:

1. Open the **Security Group Setup** screen (click **Setup** > **Security** > **User Security Groups**).
2. Choose the security group you want to set up required fields for.
3. Drill down to the **Family Application** fields.
4. Right click on each field you want set requirements for.



If you mark a field as required, users cannot save without completing the field. If it is marked as recommended, the user will be warned upon saving that a recommended field was not completed.

## Setting up Security for the Dashboard and To-Do List

You can modify the **Dashboard** and **To-Do List** security settings for ChildPlus users through **User Security Groups**.

To grant users access to the Dashboard and To-Do List:

1. Open the **Security Group Setup** screen (click **Setup** > **Security** > **User Security Groups**).
2. Choose the security group you want to set up Dashboard and To-Do List security for.
3. Drill down to the **Dashboard** and **To-Do List** fields.
4. Right click on each field you do want the user to be able to access and choose *Full Access*.



Make sure that each field you want users to have access to has the  *Full Access* symbol next to it.

To restrict users from accessing the Dashboard and To-Do List:

1. Open the **Security Group Setup** screen (click **Setup** > **Security** > **User Security Groups**).
2. Choose the security group you want to set up Dashboard and To-Do List security for.
3. Drill down to the **Dashboard** and **To-Do List** fields.
4. Right click on each field you do want the user to be able to access and choose *No Access*.

## User Security Setup

Set up the User Security profile for each of your users by completing the following tasks:



All users must be added to **Personnel** before you can set up security for them.

### Set up User Name and Password

1. Click **Setup > Security > User Security**.
2. Select the name of the user that you want to set up a user name and password for. Click here to learn more about searching for users.
3. Make sure the **Login** tab is selected.
4. Type the **User Name** you want to assign to the user (this is the name that the user will use when logging into ChildPlus).
5. Click **Assign New Password**.
6. Type the **Password** you want to assign to the user. Click **Generate a Password** if you want ChildPlus to automatically create a password for you.
7. Type the user's **Email Address**. This step is important if you want users to be able to use the **Email Notification feature** in the **To-Do List**. If you add or edit a user's Email Address in this field, ChildPlus will automatically update the **Work Email** field for the user in **Personnel**.
8. Click **Save**.



Check **Force User to change password at next login** if you want ChildPlus to prompt the user to change their password the next time they log in. If you want to disable the user's access to ChildPlus, click **Lock this user out of ChildPlus**.

## Locking Users out of ChildPlus

1. Click **Setup > Security > User Security**.
2. Select the name of the user that you want to lock out of ChildPlus.
3. Click on the **Login** tab.
4. Check **Lock this user out of ChildPlus**.
5. Click **Save**.



The User will not be locked out until the next time the attempt to log on to ChildPlus.

## Set up Agency, Site, and Classroom Level Security for Users

1. Open the **User Security Setup** screen. How do I do this? Click **Setup > Security > User Security**.
2. Select the name of the user that you want to set up Agency, Site, and Classroom security for.
3. Click on the **Restrict Access by Location** tab.
4. Choose one of the following options:
  - *This user may access all sites, and classrooms*
  - *Restrict access to selected sites and classrooms*
5. If you are restricting the user's access to select locations, check each agency\*,\* *this field is only available if you have access to more than one agency in ChildPlus*, site, and classroom that you want the user to be able to access.
6. Click **Save**.



### **Time Saving Tip:**

If you want the user to have access to all agencies sites and/or classrooms, check the **All** box(es).

## Assign Users to Security Groups

1. Open the **User Security Setup** screen. *How do I do this? Click **Setup** > **Security** > **User Security**.*
2. Select the name of the user that you want to assign to a **user security group**.
3. Click on the **User Security Groups** tab.
4. Check each security group that you want the user to be a member of. Do you want to assign this user access to all of your security groups? *If so, check **All Security Groups**.*
5. Click **Save**.

## Assign Security for Calendars

1. Open the **User Security Setup** screen. *How do I do this? Click **Setup** > **Security** > **User Security**.*
2. Select the name of the user whose calendar security you want to modify.
3. Click on the **Calendars** tab.
4. Choose the level of access you want to assign to each calendar in the list. For example, if you do not want the user to have access to a calendar, you should assign them *No Access*. If you want the user to be able to view, but not make changes to a calendar, assign them *View Access*. If you want the user to be able to view and make changes to a calendar, assign them *Full Access*.
5. Click **Save**.

## Assign Security for Personnel Records

You can use the **Personnel** tab to control which **Personnel** records each staff member can access. This tab lets you specify the staff member's supervisor and then choose whether you want them to have access to:

- All personnel records
- Only their own record and the personnel records of their subordinates
- Only their own personnel record
- Access to the personnel records of their subordinates
- No access to personnel records

# Additional Configuration Options for ChildPlus

The following list reviews the additional setup tasks that you should complete at some point, depending on your needs. Unlike the rest of the configuration tasks, these do not have to be completed in any specific order and doing so is at your discretion.

## Module Setup

You can set up the following features under the **Module Setup** menu in ChildPlus:

**Age Range Sets** (see page 161)

**Assessment Setup** (see page 158)

**Calendars** (see page 161)

**Eligibility Criteria** (see page 33)

**Setting up Family Outcomes in ChildPlus** (see page 162)

**Setting up Health and Education Events** (see page 25)

**Setting up Health and Education Requirements** (see page 26)

**Setting up an Immunization Schedule** (see page 30)

**Adding New Monitoring Checklists** (see page 175)

Building LiveMessages in ChildPlus

Building LiveReports in ChildPlus

**Module Designer** (see page 53)

**Transportation Routes** (see page 185)

## **System Setup**

You can set up the following features under the **System Setup** menu in ChildPlus:

**Setting up Agency-Specific Customizable Fields** (see page 46)

**Customize Dropdown Choices**

**Data Entry Defaults** (see page 52)

Participant Groups & Flags

**System Preferences Setup** (see page 100)

**ZIP Code** (see page 120)

## **System Utilities**

**Database Utilities Menu** (see page 189)

**Data Utilities Menu** (see page 192)

# **Setting up Agency-Specific Customizable Fields**

**Agency-Specific Customizable Fields** allow you to create custom fields that let you track information that is not already tracked in ChildPlus. You can set up custom fields for the following areas of the system:

## **Family Members**

The **Family Member** tab allows you to set up custom fields in the **Application module**. You can use these fields to capture additional family member information not listed in ChildPlus. You can track up to 220 Agency-Specific Customizable fields for your family members. ChildPlus gives you various types of fields to choose from. For example, you can choose between text, numeric, pick list, check box or unlimited note box fields.

ChildPlus also lets you control which agency-specific fields display for each family member and type. For example, this feature is useful if you only want to track certain information for the children, but not the adults, in a family or vice versa. The following table lists each of the field numbers along with the applicable types you can assign to them:

These fields...	Are this type....
Data Type: Text(15)	Text fields that can hold up to 15 characters
Text(64)	Text fields that can hold up to 64 characters
Numeric	Numeric fields (up to 2 decimal places)
Date	Date fields
Pick List	Pick list configurable choices. <i>Once you set up the field name on this screen, you can configure each of the choices that display in the pick list through <b>Dropdown Choices</b>. To configure lists, make a note of the name of the pick list you want to configure the choices for and click <b>Setup &gt; System Setup &gt; Customize Dropdown Choices</b> to open the <b>Customize Validation Codes</b> screen. You can then choose the <b>Family Application - Agency-Specific</b> field that you want to configure (don't forget to choose the correct field name). You can click <b>Add a Choice</b> for each item you want included in the pick list you created.</i>
Checkbox	Check boxes
Yes/No Pick List	Pick lists where users can choose either <i>Yes</i> or <i>No</i>
Notes	Note boxes that hold an unlimited number of characters
Section Label	Use this data type to create a label for a group of Agency-Specific fields).

### TO SET UP AGENCY-SPECIFIC FIELDS FOR YOUR FAMILY MEMBERS:

1. Click **Setup > System Setup > Agency-Specific Customizable Fields**.
2. Find an **Agency-Specific** field that matches the data type you want to use. For example, if the field is going to be a date field, use one of the **Data Type: Date** fields.
3. Select the **Active** box to activate the field.
4. Type the name that you want to assign to the field in the **Field Name** column.
5. If you want the **Agency-Specific** fields to display in a specific order on the screen, use the **Row Number** and **Item Number** columns.
6. Choose each participant type that you want the field to display for. For example, you can set up agency-specific fields to only display for the children, but not the adults, in a family. You can also choose if you want the field to display on the screen, on printed applications or both.
7. Click **Save**.

### WORKING WITH SECTION LABELS

You can use **Section Labels, Row Numbers, and Item Numbers** to control how, and in what order, your **Agency-Specific** Fields display in the **Family Application** and **Personnel** modules.

## Personnel

The **Personnel** tab allows you to set up custom fields in the **Personnel** module. You can use these fields to capture additional information not listed in ChildPlus and can track up to 210 Agency-Specific fields for **Per-**

**sonnel.** The following table lists each of the field numbers along with the applicable types you can assign to them:

These fields...	Are this type....
Data Type: Text(15)	Text fields that can hold up to 15 characters
Text(64)	Text fields that can hold up to 64 characters
Numeric	Numeric fields (up to 2 decimal places)
Date	Date fields
Pick List	Pick list configurable choices. <i>Once you set up the field name on this screen, you can configure each of the choices that display in the pick list through <b>Dropdown Choices</b>. To configure lists, make a note of the field number you want to configure (111 - 140) open the <b>Customize Validation Codes</b> screen, choose the <b>Personnel- Agency-Specific field</b> you want to configure (don't forget to choose the correct field number). You can then click <b>Add a Choice</b> for each item you want included in the pick list.</i>
Check box	Check Boxes
Yes/No Pick List	Pick lists where users can choose either Yes or No
Notes	Note boxes that hold an unlimited number of characters
Section Label	Use this data type to create a label for a group of Agency-Specific fields.

#### TO SET-UP AGENCY-SPECIFIC FIELDS FOR YOUR STAFF MEMBERS IN PERSONNEL:

1. Click **Setup > System Setup > Agency-Specific Customizable Fields**.
2. Click on the **Personnel** tab.
3. Select the **Active** box to activate the field.
4. Type the name that you want to assign to each custom field in the **Your Agency's Name for this Field** column.
5. If you want the **Agency-Specific** fields to display in a specific order on the screen, use the Row Number and Item Number columns.
6. Click **Save**.

#### WORKING WITH SECTION LABELS

You can use **Section Labels, Row Numbers, and Item Numbers** to control how, and in what order, your **Agency-Specific** fields display in the **Family Application** and **Personnel** modules.

## Education



The **Education** tab allows you to set up two custom columns in the **Education** module that can be used to track assessments and screenings.

To set up **Agency-Specific** fields for the **Education** module:

1. Click **Setup > System Setup > Agency-Specific Customizable Fields**.
2. Click on the **Education** tab.
3. Select the **Active** box to activate the field.
4. Type the name you want to assign to the assessment or screening in the **Header** field.
5. Type the name that you want to assign to each custom field in the **Your Agency's Name for this Field** column.
6. Click **Save**.

## Site Inspections

The **Site Inspections** tab allows you to customize the inspection items that display on the **Inspections** tab for each site. You can use these fields to track the different inspections that occur at your sites.




1. Click **Setup > System Setup > Agency-Specific Customizable Fields**.
2. Click on the **Site Inspections** tab.
3. Type the name you want to assign to each inspection item **Your Agency's Name for this Field** column.
4. Click **Save**.

## Customize Dropdown Choices

Through **Customize Dropdown Choices** you can add or delete codes that are available in drop-down lists throughout the system. For example, **Application Status** is a drop-down list in the **Enrollment** module. You can modify the codes that are available in this list through the **Customize Dropdown Choices Setup** screen. This screen allows you add additional validation codes to the **Application Status** list or you can delete or inactivate codes so that they are no longer available for users to select. You can also use **Dropdown Choices** to **set up your system to automatically trigger health events has having met requirements**.

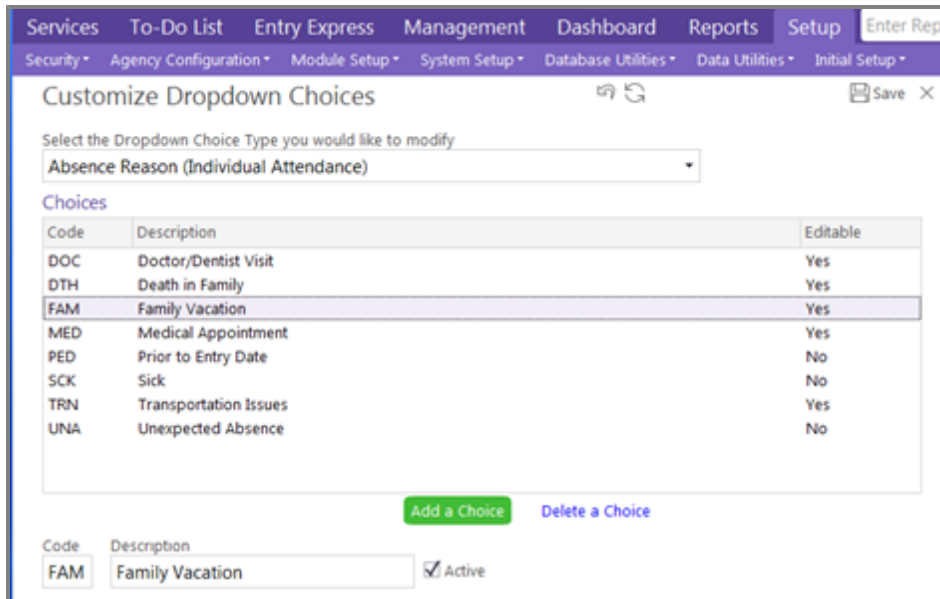
### Accessing the Customize Dropdown Choices Screen

1. Click **Setup > System Setup > Customize Dropdown Choices**.
2. Choose the dropdown list that you want to edit from the list.

Tips and Tricks	
	You can edit any code in the list as long as it has a <b>Yes</b> in the <b>Editable</b> column.
	You can add new codes by clicking <b>Add a Choice</b> and delete existing codes by clicking <b>Delete a Choice</b> .
	To inactivate a code, uncheck the <b>Active</b> box. If you deactivate a code, it will no longer display as a choice for users to choose from. To help you quickly identify which codes have been inactivated, the word ( <i>Inactive</i> ) displays next to each inactive code on the <b>Drop-</b>

## Tips and Tricks

**down Choices Setup** screen.



## Customizing Family Services Issues

1. Click **Setup > System Setup > Customize Dropdown Choices**.
2. Choose **Service Area (Family Services)** as the **Dropdown Choice Type** you want to modify.
3. Select the **Service Area** that you want to want to customize.
4. Select each of the issues that you want ChildPlus to display as choices for selected **Service Area**. In the following example, *Child Care*, *Health* and *Medical Care* will be available as choices for the **Issues** field for the **Immunizations** .

## Customize Dropdown Choices

Select the Dropdown Choice Type you would like to modify

Service Area (Family Services)

### Choices

Code	Description	Editable
AD	Administration	No
DN	Dental	No
ED	Education	No
FM	Family	No
HC	Disability	No
HL	Health	No
IM	Immunizations	No
MD	Medical (Inactive)	No
MH	Mental Health	No
NU	Nutrition	No

**Add a Choice**    Delete a Choice

Code: IM    Description: Immunizations     Active

Issues associated with service area 'Immunizations'

Issues	Selected Issues
Budget	Child Care
Child Abuse	Health
Clothing	Medical Care
Community Affairs	
Counseling/Treatment	
Child Support	
Child Sexual Abuse	
Domestic Violence	

Double-click Issues in the left panel to associate them with this Service Area

## Configuring Family Service Events

You can associate your **Family Services** events with either an entire family or just family members who are participants. ChildPlus Administrators can configure which events are associated with individual participants and which events must be associated with the entire family via **Setup > Module Setup > Family Service Events**.

Follow these steps to configure your **Family Services** events in ChildPlus:

1. Click **Setup > Module Setup > Family Service Events**.
2. Select the *Event Type (Family Services)* that you want to configure.
3. Select each of the fields that you want to be available for the event type in ChildPlus.
4. Use the **This type of event is associated with** field to specify whether the vent is associated with: the family only, the family by default, participants only, or the participant by default.
5. Click **Save**.

## Customize Dropdown Choices - Health and Education Events

ChildPlus Administrators can configure, for each status, whether Health and Education events should be considered when ChildPlus evaluates requirements. Once each status for Health and Education events has been configured, ChildPlus will automatically know whether or not the event should count towards satisfying one of the individual's requirements on the **PIR**.

To configure which Health and Education event statuses should be considered when evaluating requirements:

1. Click **Setup > System Setup > Customize Dropdown Choices**.
2. Select the *Status (Health Events)* dropdown choice type from the list.
3. Select a status.
4. Check the **Consider health events with this status when evaluating health requirements** box for each status that you want ChildPlus to consider when evaluating health requirements.
5. Click **Save**.



If you do not want ChildPlus to consider a particular status when evaluating requirements (for example, *Absent on Screening Date*), simply leave the **Consider health events with this status when evaluating health requirements** box unchecked.

## Data Entry Defaults

By setting up data entry defaults in ChildPlus, you can eliminate repetitive data entry keystrokes and let ChildPlus auto-populate information for you. For example, if most of your families share the same area code, then you can set up that area code as a data entry default. Whenever you add a new family to the system, ChildPlus will automatically populate the family's area code with the data entry default. Data entry defaults can be set up for the following modules: **Family Application & Enrollment**.

### Setting up Your Data Entry Defaults

1. Click **Setup > System Setup > Data Entry Defaults**.
2. Uncheck the **Use Admin Defaults** box.
3. Complete each of the data entry fields that you want ChildPlus to auto-populate for you. The fields that are available are organized by module. Use **Family Information** to set data entry defaults for the **Family Information** section of the **Family Application**; **Family Members** allows you to set data entry defaults for each individual **family member** added to the **Family Application**; and **Enrollment**

allows you to set data entry defaults for the **Enrollment** module.

4. Click **Save**.

## Setting up Data Entry Defaults for All ChildPlus Users

The data entry defaults that you set up under the *Admin* account can be accessed by all of your ChildPlus users. Setting up defaults under this account can be beneficial because you can create a set of defaults that are the same for all of your users. If users want to create their own unique defaults, they will still have that option as long as they have been granted proper security access.



If users want to use the defaults you set up under the *Admin* account, then they will need to check **Use Admin Defaults** box on the **Data Entry Defaults** screen.

1. Log into ChildPlus using your *Admin* user name and password.
2. Click **Setup > System Setup > Data Entry Defaults**.
3. Complete each of the data entry fields that you want ChildPlus to auto-populate for you. The fields that are available are organized by module. Use **Family Information** to set data entry defaults for the **Family Information** section of the **Family Application**; **Family Members** allows you to set data entry defaults for each individual **family member** added to the **Family Application**; and **Enrollment** allows you to set data entry defaults for the **Enrollment** module.
4. Click **Save**.

## Module Designer

You can use the **Module Designer** to create your own custom modules, forms and reports in ChildPlus. You can use these modules to track information that you currently track externally (for example, in a spreadsheet, on paper, etc.) directly in ChildPlus.

Using the **Module Designer** in ChildPlus, you can create modules and custom forms to track all kinds of information in ChildPlus. To make getting started easier, we've created a gallery of ready-to-use modules. You can either use them as-is or modify them to meet your agency's specific needs. See page 53 to learn more about the ready-to-use modules in ChildPlus.

If you don't see a premade module that fits your needs, you'll also have the ability to **create a new module** from scratch. Don't worry, we've made it super easy to do! See page 83 for some examples of custom modules or forms you can create using the **Module Designer** in ChildPlus.

### Module Designer Gallery

Click on one of the ready-to-go modules to learn more about it. You can access and install these modules by clicking **Setup > Module Setup > Module Designer > Install premade modules from the gallery**.

## Allergy Plan

The **Allergy Plan** module enables tracking of detailed information about each child's allergies, as well as related emergency plans in the **Health** module. This module can be edited to reflect your agency's policies and procedures.

## DEFAULT SETUP DETAILS

General Info	Description
Module Name - Allergy Plan	You can edit this name if you want to change it.
This module relates to - Participants	This module collects data related to <i>Participants</i> and will be available to users via the <b>Services</b> menu.  You can change this selection before you start collecting information in this module. Once you add data record, you will no longer be able to modify the data type that this module relates to in ChildPlus.
Service Area - Health	This module will be available to users via the Health module.
Tab Name - Allergy Plan	ChildPlus will display <i>Allergy Plan</i> as the tab name for this module.
Each unique record is called a(n) - Allergy Plan	In addition to the record name, ChildPlus also uses this term for the name of the button in the module.

## REPORTS

Default reports that we've included with the **Allergy Plan** module include:

- Allergy Plans
- Children with Allergies
- Children with Emergency Allergy Plans

## EXAMPLE

This is what the **Allergy Plan** module looks like when activated in the ChildPlus's **Health** module:

The screenshot shows the software interface for Harriet Michaels. At the top, there's a header with the patient's name, gender (Female), date of birth (4/30/10), age (5y 9m), and CPID (236635). Below this is a navigation menu with tabs for Application, Enrollment, Family Services, Health (selected), Immunizations, Disability, Mental Health, Birth, Transportation, Education, Fees, Attendance, and PIR. Under the Health tab, there are sub-tabs for Events, Requirements, Health Information, Attachments (0), and Allergy Plan (selected). The Allergy Plan section shows a table with one record:

Plan Date	Has Food Allergies	Notes	Has Other Allergies?	Notes	Emergency Plan Needed
2/9/2015	No				Yes

There is an "Add Allergy Plan" button in the top right corner of the table area.

Here's an example of the fields you'll see when you click **Add Allergy Plan**:

### Allergy Plan

Save
Cancel Add

Plan Date

---

**Food Allergies**

Does the child have food allergies?

Dairy
  Eggs
  Fish
  Shellfish
  Peanuts
  Tree Nuts
  Wheat/Gluten
  Soy
  Other

Describe

Severity  What can trigger a reaction?

Notes

[Other Allergies](#)

## Daily Health Check

This module allows agencies to log daily health checks, their results, and any associated follow-ups in the **Health** module.

### DEFAULT SETUP DETAILS

General Info	Description
Module Name - Daily Health Check	You can edit this name if you want to change it.
This module relates to - Participants	<p>This module collects data related to <i>Participants</i> and will be available to users via the <b>Services</b> menu.</p> <p>You can change this selection before you start collecting information in this module. Once you add data record, you will no longer be able to modify the data type that this module relates to in ChildPlus.</p>
Service Area - Health	This module will be available to users in the <b>Health</b> module.
Tab Name - Daily Health Check	ChildPlus will display <i>Daily Health Check</i> as the tab name for this module.
Each unique record is called a(n) - Health Check	In addition to the record name, ChildPlus also uses this term for the name of the button in the module.

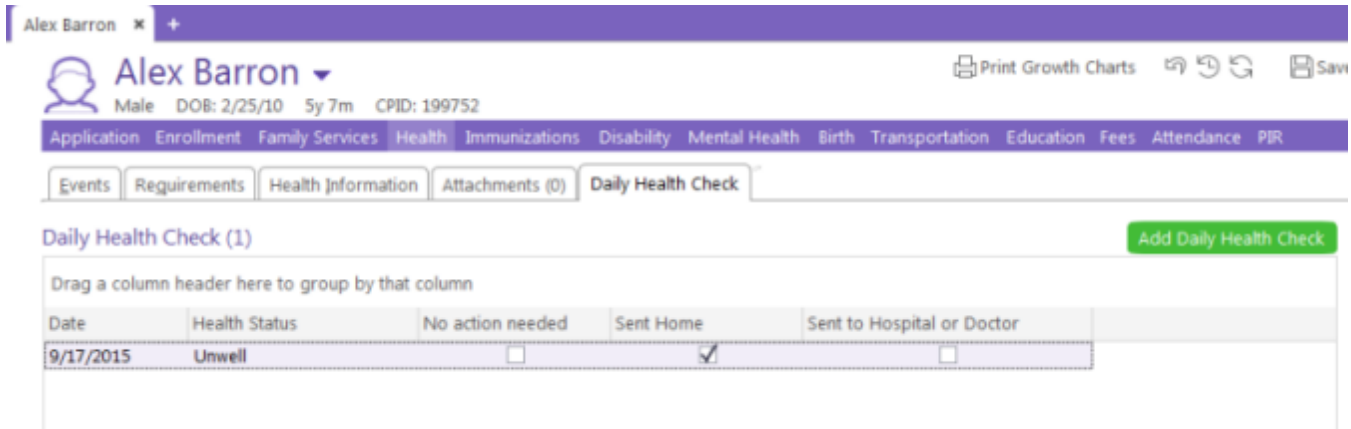
### REPORTS

Default reports that we've included with the **Daily Health Check** module include:

- Daily Health Checks

**EXAMPLE**

This is what the **Daily Health Check** module looks like when activated in the ChildPlus's **Health** module:



Here's an example of the fields you'll see when you click **Add Daily Health Check**:

**Daily Health Check** [Save](#) [Cancel Add](#)

Date:  Health Status:

---

**Symptoms**

Asthma Attack or Wheezing  
  Bruises or Swelling  
  Cough  
  Cuts or Sores  
  Diarrhea  
  Fever  
  Temperature (Farenheit)  
  Headache  
  Lice

Mouth Sores / Drooling  
  Pink Eye/Drainage  
  Rash  
  Runny Nose  
  Sneezing  
  Sore Throat  
  Stomach Ache

Unusual Mood or Behavior (e.g. excessively tired, etc.)  
  Unusual Skin Color (pale, etc.)  
  Vomiting

Other

Symptom Notes 🕒 ⌨️ 🖨️ 📄 ↶ ↷

**ENTERING DATA FROM WITHIN THE DAILY HEALTH CHECKS REPORT**

To make data entry faster and easier, you can follow these steps to enter data directly from within a report:

1. Once you **install the Daily Health Check module**, open the **Module Designer**. How do I do this? Click **Setup > Module Setup > Module Designer > Design or edit your own custom modules > Daily Health Check**.
2. Click on the **Reports** tab.



3. Click on the existing **Daily Health Checks** report to modify it. This report is included with the module when you install it.
4. Change the **Report Type** from **Matching Records Only** to **Standard Report**.
5. Click **Reports > Health** and choose the **Daily Health Checks** report.
6. Filter the report by the date that you want to enter records for.
7. Click **View in Grid**.
8. Click a child's row in the report.
9. Click **Yes** to add a **Daily Health Check** record.
10. Record the health check information for the child.
11. Repeat steps 8-10 for each child.

## Definitions and Policies

The **Definitions and Policies** module helps you to track and define terms utilized by your agency, policies and procedures.

## Employment Requirements

The **Employment Requirements** module allows you track a variety of items that may be required for each of your employees to have and/or to keep current (for example, CPR, First Aid, CDL, Immunizations, TB, Child Abuse and Neglect Training, etc).

### DEFAULT SETUP DETAILS

General Info	Description
Module Name - Employment Requirements	You can edit this name if you want to change it.
This module relates to - Personnel	This module collects data related to <i>Personnel</i> and will be available to users via the <b>Personnel</b> module.  You can change this selection before you start collecting information in this module. Once you add data record, you will no longer be able to modify the data type that this module relates to in ChildPlus.
Tab Name - Employment Requirements	ChildPlus will display <i>Employment Requirements</i> as the tab name for this module.
Each unique record is called a(n) - Employment Requirements	In addition to the record name, ChildPlus also uses this term for the name of the button in the module.

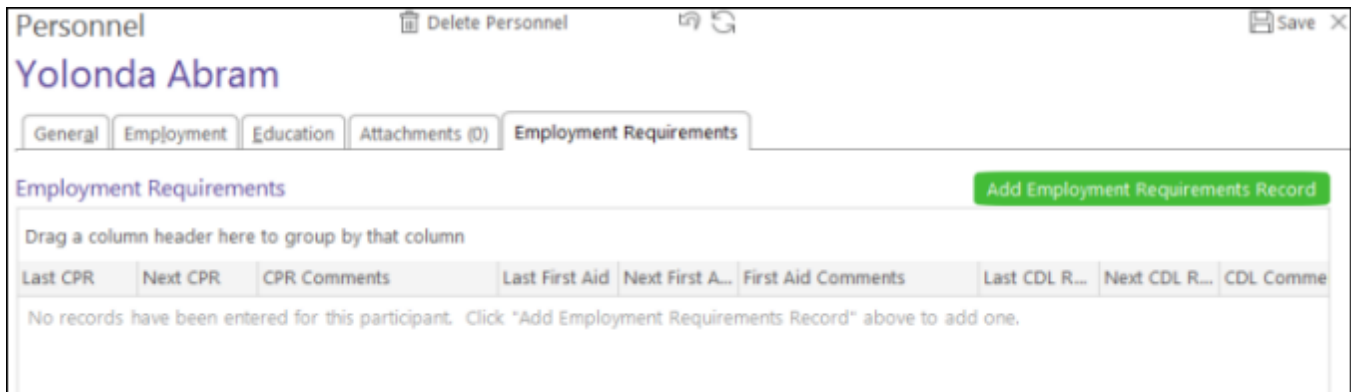
### REPORTS

Default reports that we've included with the **Employment Requirements** module include:

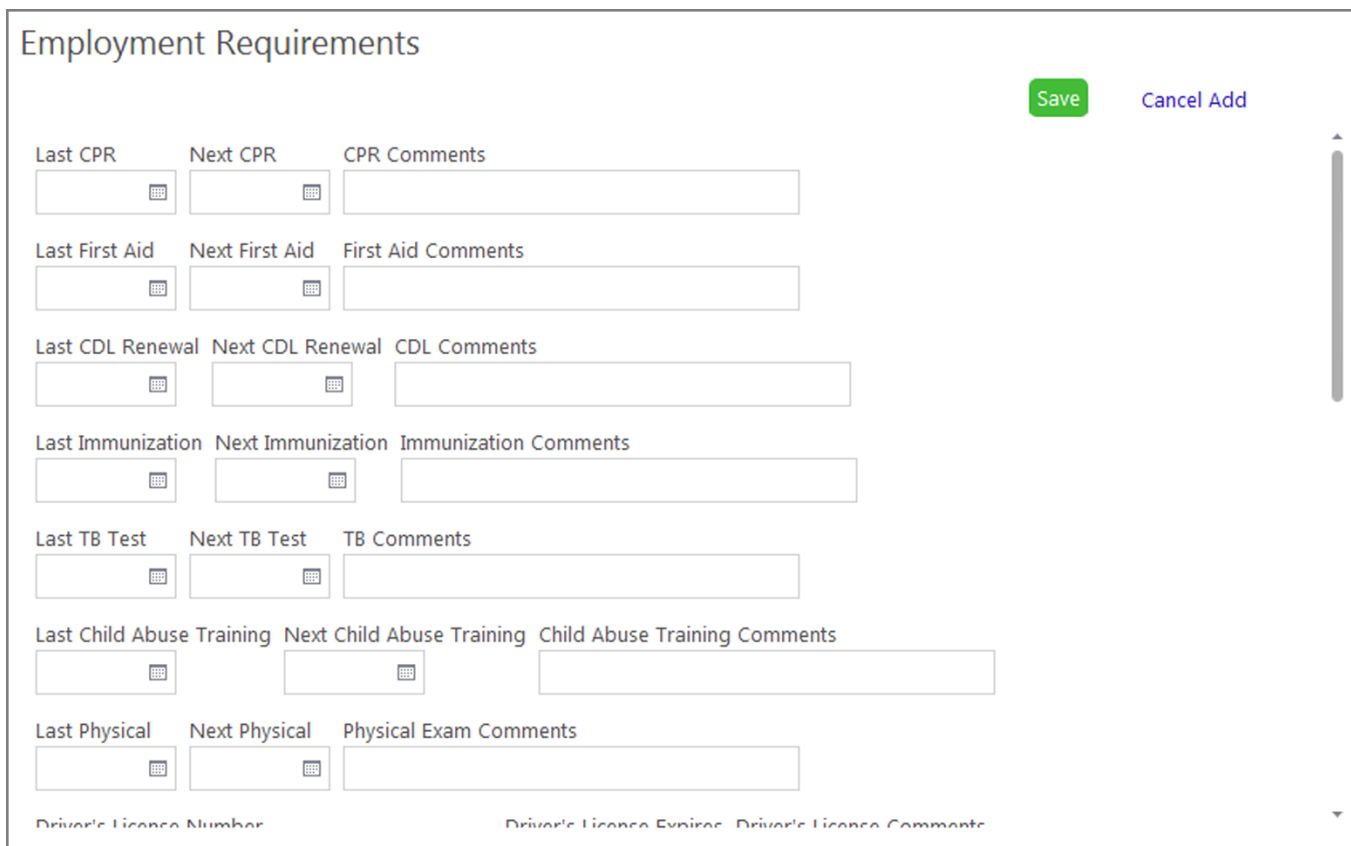
- Employment Requirements
- Employment Requirements - Due < 30 Days
- Employment Requirements - Expired

**EXAMPLE**

This is what the **Employment Requirements** module looks like when activated in the ChildPlus's **Personnel** module:



Here's an example of the fields you'll see when you click **Add Employment Requirements Record**:



## Enrollment Change Requests

The **Enrollment Change Request** module is an example of what you can create when if you use the **Module Designer** to create a tool for communicating between two groups of staff. If your agency uses a centralized data entry team for processing enrollment changes, this module allows the family workers in the field to request enrollment changes by adding a request into ChildPlus, rather than submitting a paper form or

sending an email. For example, when a Family Worker finds out that a child has dropped from the program, he/she can enter a drop request into the system. The enrollment team, who monitors the enrollment change requests report daily, would be able to see the request and process it.

## DEFAULT SETUP DETAILS

General Info	Description
Module Name - Enrollment Change Requests	You can edit this name if you want to change it.
This module relates to - Management	This module collects data related to <i>Management</i> and will be available to users via the <b>Management</b> menu. You can change this selection before you start collecting information in this module. Once you add data record, you will no longer be able to modify the data type that this module relates to in ChildPlus.
Tab Name - Enrollment Change Requests	ChildPlus will display <i>Enrollment Change Requests</i> as the tab name for this module.
Each unique record is called a(n) - Enrollment Change Request	In addition to the record name, ChildPlus also uses this term for the name of the button in the module.

## REPORTS

Default reports that we've included with the **Enrollment Change Requests** module include:

- Enrollment Change Requests
- Enrollment Change Requests to be Processed

## EXAMPLE

This is what the **Enrollment Change Requests** module looks like when activated in ChildPlus:

Here's an example of the fields you'll see when you click **Add Enrollment Change Request**:

### Enrollment Change Request

Save
Cancel Add

---

Participant Information

First Name

Last Name

ChildPlus ID

---

Requested Change

Requested Change

Last Day in Current Status

Requested By

Notes 🕒 ABC 🖨️ ✎️ 📄 ↗️

---

Enrollment Team Use Only

Request Assigned To

Vacancy needs to be filled

## Fixed Assets

The **Fixed Asset** module lets you track what assets your agency owns, where each asset is located, who has it, when it was checked out, when it is due for return, when it is scheduled for maintenance, and the cost and depreciation of each asset.

### DEFAULT SETUP DETAILS

General Info	Description
Module Name - Fixed Assets	You can edit this name if you want to change it.
This module relates to - Management	This module collects data related to <i>Management</i> and will be available to users via the <b>Management</b> menu.  You can change this selection before you start collecting information in this module. Once you add data record, you will no longer be able to modify the data type that this module relates to in ChildPlus.
Tab Name - Fixed Assets	ChildPlus will display <i>Fixed Assets</i> as the tab name for this module.
Each unique record is called a(n) - Asset	In addition to the record name, ChildPlus also uses this term for the name of the button in the module.

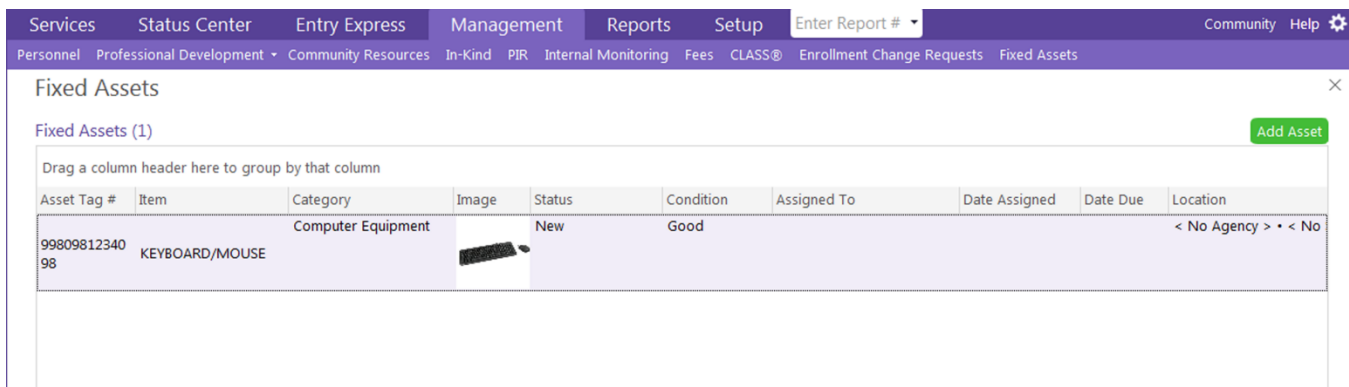
### REPORTS

Default reports that we've included with the **Fixed Asset** module include:

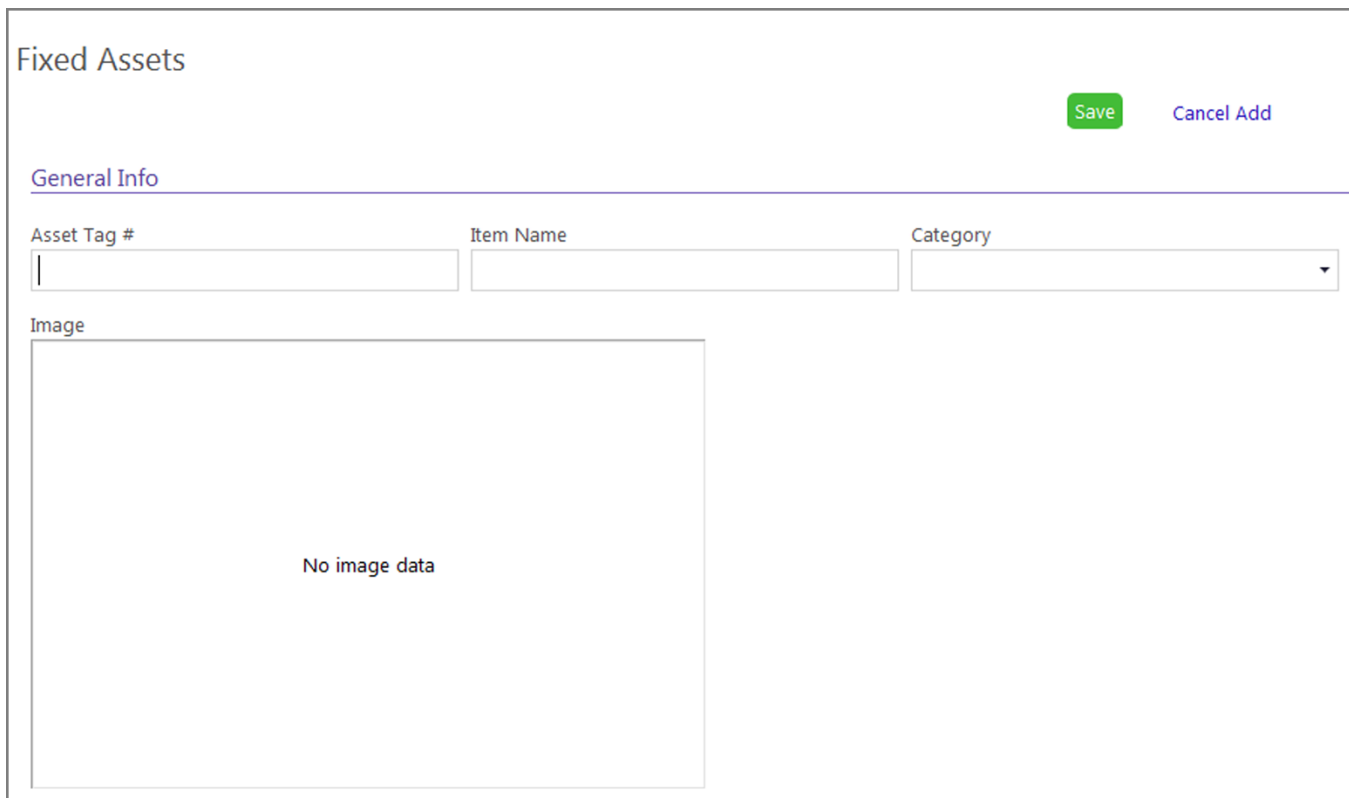
- Asset List
- Assets by Category
- Assets by Location
- Missing Assets
- Past Due Assets
- Additions
- Disposals
- Upcoming Maintenance
- Net Book Value of Assets

**EXAMPLE**

This is what the **Fixed Asset** module looks like when activated in the ChildPlus's Health module:



Here's an example of the fields you'll see when you click **Add Asset**:



## Incident Report

The **Incident Report** module lets you track incidents such as accidents, behavior issues, etc. It allows you to record what happened, who was notified, and what response was enacted.

### DEFAULT SETUP DETAILS

General Info	Description
Module Name - Incident Report	You can edit this name if you want to change it.
This module relates to - Participants	This module collects data related to <i>Participants</i> and will be available to users via the <b>Services</b> menu.  You can change this selection before you start collecting information in this module. Once you add data record, you will no longer be able to modify the data type that this module relates to in ChildPlus.
Service Area - Application	This module will be available to users in the Application module.
Tab Name - Incident Reports	ChildPlus will display <i>Incident Reports</i> as the tab name for this module.
Each unique record is called a(n) - Incident Reports	In addition to the record name, ChildPlus also uses this term for the name of the button in the module.

### REPORTS

Default reports that we've included with the **Incident Report** module include:

- Accidents
- Exposure Incidents
- Incident Reports

### EXAMPLE

This is what the **Incident Report** module looks like when activated in ChildPlus:

Alex Barron

Male DOB: 2/25/10 5y 7m CPID: 199752

Application Enrollment Family Services Health Immunizations Disability Mental Health Birth Transportation Education Fees Attendance PIR

**Family Members**

Family Information	FamilyID	70299
Megan E Barron Primary Adult Female DOB 7/31/78 CPID 199750 More In-Kind		
Jules Barron 19y Child Male DOB 12/17/95 CPID 199751 More		
Alex Barron 5y 7m Child Male DOB 2/25/10 CPID 199752 More		

Buttons: Add an Adult, Add a Child

Incident Reports

Incident Report

Drag a column header here to group by that column

Incident Type	Date	Time	Description of the Incident	Action Taken	Exposure Incident	Medical Attention
No Incident Reports have been entered for this participant. Click "Add Incident Report" above to add one.						

Here's an example of the fields you'll see when you click **Add Incident Report**:

Incident Report

Save Cancel Add

Incident Type: [Dropdown] Date of Incident: 10/5/15 Time: [Text] Staff Reporting the Incident: [Dropdown]

Location of Incident: Agency: < No Agency > Site: < No Site > Classroom: < No Classroom >

If Other Location, Specify Here: [Text]

Description of the Incident: [Text Area]

Action Taken: [Text Area]

Did the incident involve exposure to bloodborne pathogens or bodily fluids? Was the child seen by a physician or emergency room personnel? [Dropdown] [Dropdown]

Parent/Guardian Notified

## Internal Help Desk

The **Internal Help Desk** module allows you to track requests for technology-related help that can be fielded by one or more of your agency's employees (for example, IT Professionals or Support).

### DEFAULT SETUP DETAILS

General Info	Description
Module Name - Internal Help Desk	You can edit this name if you want to change it.
This module relates to - Management	This module collects data related to <i>Management</i> and will be available to users via the <b>Management</b> menu.  You can change this selection before you start collecting information in this module. Once you add data record, you will no longer be able to modify the data type that this module relates to in ChildPlus.
Tab Name - Internal Help Desk	ChildPlus will display <i>Internal Help Desk</i> as the tab name for this module.
Each unique record is called a(n) - Ticket	In addition to the record name, ChildPlus also uses this term for the name of the button in the module.

## REPORTS

Default reports that we've included with the Internal Help Desk module include:

- All Help Desk Tickets
- Help Desk Tickets Closed in the Last 7 Days
- Open Help Desk Tickets

## EXAMPLE

This is what the **Internal Help Desk** module looks like when activated in ChildPlus:

Ticket #	Request Date	Request Time	Priority	Category	Status	Status Date	Assigned To
2	8/26/2015	11pm	3 - Low	Computer	Completed	9/27/2015	Abram, Yolonda
1	9/25/2015	10:06 AM	2 - Normal	Software	Needs Follow-up	9/27/2015	Iglesias, Karina

Here's an example of the fields you'll see when you click **Add Ticket**:



**Internal Help Desk**

Save Cancel Add

---

**Requested By**

Name  Phone  Email

Location

---

**Request Info**

Request Date  Request Time  Priority  Category

Problem Description

---

**Help Desk Use Only**

Status  Status Date  Assigned To

## Lesson Plans

The **Lesson Plans** module lets you:

- Create and print weekly lesson plans
- Associate activities with the HS ELOF, state standards and DRDP measures
- Track supervisor approval

To add your state's standards to the module, go to **Setup > System Setup > Customize Dropdown Choices > State Regulation (Module Designer)**.

### EXAMPLE

This is what the **Lesson Plans** module looks like when activated in ChildPlus:

Week Beginning	Teacher	Classroom	Curriculum	Theme/Area of Focus	Date Submitted	Supervisor	Supervisor Approval	Date
8/3/2020	Abner, Jina	Little Beginnings Childcare - Happy Hearts Center - Classroom A	Healthy Body	washing hands	7/23/2020	Crews, Vanessa	Ready for Review	
8/3/2020	Abner, Jina	Little Beginnings Childcare - Happy Hearts Center - Classroom A	Language Skills	story time	6/23/2020	Crews, Vanessa	Approved	7/1/20

Here's an example of the fields you'll see when you click **Add Lesson Plan**:

## Medication Log

The **Medication Log** module provides a method for recording a child's medication log electronically. You can store information about each medication a child is taking, as well as keep a record of each time the medication is administered.

### DEFAULT SETUP DETAILS

General Info	Description
Module Name - Medication Log	You can edit this name if you want to change it.
This module relates to - Participants	This module collects data related to <i>Participants</i> and will be available to users via the <b>Services</b> menu.  You can change this selection before you start collecting information in this module. Once you add data record, you will no longer be able to modify the data type that this module relates to in ChildPlus.
Service Area - Health	This module will be available to users in the Health module.
Tab Name - Medication Log	ChildPlus will display <i>Medication Log</i> as the tab name for this module.
Each unique record is called a(n) - Medication Log	In addition to the record name, ChildPlus also uses this term for the name of the button in the module.

### EXAMPLE

This is what the **Medication Log** module looks like when activated in ChildPlus:

Alex Barron

Male DOB: 2/25/10 5y 7m CPID: 199752

Application Enrollment Family Services Health Immunizations Disability Mental Health Birth Transportation Education Fees Attendance PIR

Events Requirements Health Information Attachments (0) Daily Health Check Medication Log

Medication Log (1) Add Medication Log

Drag a column header here to group by that column

School Year	Medication	Dosage	Route	Frequency	Time	Start Date	End Date	Physician
2015-2016	Albuterol	4 puffs	spacer/inhaler	every 4-6 hours	as needed			Setia, Magnolia ...

Here's an example of the fields you'll see when you click **Add Medication Log**:

Medication Log Save Cancel Add

School Year

Medication Details

Medication Name Dosage Route

Frequency Time Start Date End Date

Physician

Special Instructions

Administration Log

Add an entry below each time the medication is administered. Also describe any errors, incidents, or side effects and whether or not the parent/guardian was notified, if applicable. If an expected dose was not given, add an entry below to document that the dose was missed and explain why.

Log

## Nutrition Assessment

The **Nutrition Assessment** module enables tracking of the process a Nutritionist or Registered Dietician goes through to determine whether each child needs nutrition-related assistance, as well as the results of that process. Reports include Missing Nutrition Assessment, Nutrition Concerns, and Nutrition Follow-up.

### DEFAULT SETUP DETAILS

General Info	Description
Module Name - Nutrition Assessment	You can edit this name if you want to change it.
This module relates to - Participants	This module collects data related to <i>Participants</i> and will be available to users via the <b>Services</b> menu.  You can change this selection before you start collecting information in this module. Once you add data record, you will no longer be able to modify the data type that this module relates to in ChildPlus.
Service Area - Health	This module will be available to users in the Health module.
Tab Name - Nutrition Assessment	ChildPlus will display <i>Nutrition Assessment</i> as the tab name for this module.
Each unique record is called a(n) - Assessment	In addition to the record name, ChildPlus also uses this term for the name of the button in the module.

## REPORTS

Default reports that we've included with the **Nutrition Assessment** module include:

- Missing Nutrition Assessment
- Nutrition Assessments
- Nutrition Concerns
- Nutrition Follow-up

## EXAMPLE

This is what the **Nutrition Assessment** module looks like when activated in ChildPlus:

The screenshot shows the user interface for Alex Barron's record. At the top, there's a navigation bar with tabs for Application, Enrollment, Family Services, Health, Immunizations, Disability, Mental Health, Birth, Transportation, Education, Fees, Attendance, and PIR. Below this, there are sub-tabs for Events, Requirements, Health Information, Attachments (0), Daily Health Check, Medication Log, and Nutrition Assessments. The Nutrition Assessments tab is active, showing a table with one record. A green 'Add Assessment' button is visible in the top right of the table area.

Date	Assessment Status	Assessment Results	Follow-up Required	Follow-up Due	Follow-up Completed
9/5/2015	Completed	No Concerns	<input checked="" type="checkbox"/>	10/5/2015	

Here's an example of the fields you'll see when you click **Add Assessment**:

### Nutrition Assessment

Save
Cancel Add

Assessment Date  Assessed By

Assessment Status  If incomplete, explain why:

---

#### Assessment Results

Assessment Results

Areas of Concern (check all that apply):

Hemoglobin/Hematocrit
  Growth Assessment
  Blood Lead
  Nutrition Survey/History
  Parent Concerns
  Staff or Physician Concerns

Notes

---

#### Follow-up

Follow-up Required
 Follow-up Staff 
Follow-up Due 
Follow-up Completed

## Performance Evaluation

The **Performance Evaluation** module allows you to record and report on employee performance evaluations.

### DEFAULT SETUP DETAILS

General Info	Description
Module Name - Performance Evaluation	You can edit this name if you want to change it.
This module relates to - Personnel	<p>This module collects data related to <i>Personnel</i> and will be available to users via the <b>Personnel</b> module.</p> <p>You can change this selection before you start collecting information in this module. Once you add data record, you will no longer be able to modify the data type that this module relates to in ChildPlus.</p>
Tab Name - Performance Evaluation	ChildPlus will display <i>Performance Evaluation</i> as the tab name for this module.
Each unique record is called a(n) - Performance Evaluation	In addition to the record name, ChildPlus also uses this term for the name of the button in the module.

General Info	Description

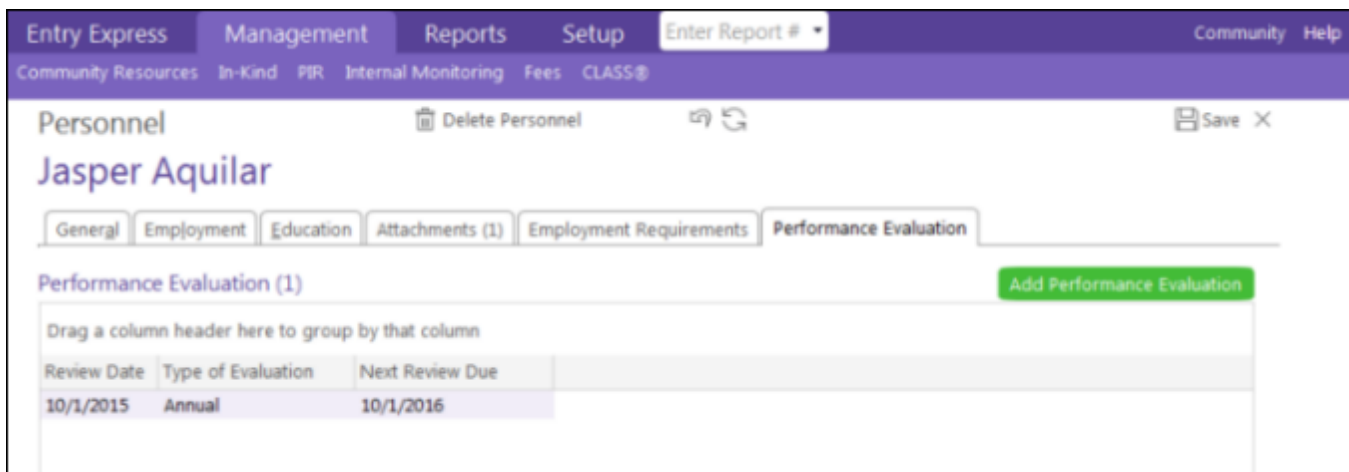
## REPORTS

Default reports that we've included with the **Performance Evaluation Records** module include:

- Missing Performance Evaluation
- Performance Evaluation Due < 30 Days
- Performance Evaluations

## EXAMPLE

This is what the **Performance Evaluation** module looks like when activated in ChildPlus:



Here's an example of the fields you'll see when you click **Add Performance Evaluation**:

### Performance Evaluation

Save
Cancel Add

Review Date  Type  Supervisor

Job Description (attachment)  Add Attachment View Delete

Next Review Due

If performance goals were set at the last performance evaluation, list them below and comment on the employee's progress.

---

**Performance Definitions**

Exceptional - Performance is consistently superior and significantly exceeds position requirements.

Highly Effective - Performance frequently exceeds position requirements

Proficient - Performance consistently meets position requirements.

Inconsistent - Performance meets some, but not all requirements, or does not meet requirements consistently.

Unsatisfactory - Performance consistently fails to meet minimum position requirements; employee lacks or fails to utilize necessary skills.

N/A - Not applicable, or the employee has not been in the position long enough to be reviewed in this area.

---

**Performance Competencies**

Maintains accurate records

## Policy Council

The **Policy Council** module enables tracking of membership in policy council and parent committees as well as attendance at policy council meetings.

### DEFAULT SETUP DETAILS

General Info	Description
Module Name - Policy Council	You can edit this name if you want to change it.
This module relates to - Management	<p>This module collects data related to <i>Management</i> and will be available to users via the <b>Management</b> menu.</p> <p>You can change this selection before you start collecting information in this module. Once you add data record, you will no longer be able to modify the data type that this module relates to in ChildPlus.</p>
Tab Name - Policy Council	ChildPlus will display <i>Policy Council</i> as the tab name for this module.
Each unique record is called a(n) - Member	In addition to the record name, ChildPlus also uses this term for the name of the button in the module.

## REPORTS

Default reports that we've included with the **Policy Council** module include:

- Policy Council Attendance
- Policy Council Membership

## EXAMPLE

This is what the **Policy Council** module looks like when activated in ChildPlus:

First Name	Last Name	Member Type	Membership	Date Voted In	Inactive
John	Abner	Parent	PC Member	8/10/2014	<input type="checkbox"/>
Sariah	Santana	Community Representative	PC Member	8/3/2013	<input type="checkbox"/>

Here's an example of the fields you'll see when you click **Add Member**:



## Policy Council

Save
Cancel Add

---

### General Information

First Name

Last Name

Member Type

Membership

Date Voted In   This member is no longer active

Location (Applies to Parents)  
< No Agency >

< No Site >

Child's Name (Applies to Parents)

Staff Contact

Community Organization (Applies to Community Reps)

---

### Contact Information

Address

City

State

Zip

Home Phone

Mobile Phone

Work Phone

Email Address

Language   Translation Required

---

### Committees

Education
  Family Services
  Nutrition
  Personnel
  Executive Committee

Executive Committee Position

---

### Attendance

Sep 28
  Oct 15
  Nov 16
  Dec 17
  Jan 18
  Feb 11
  Mar 18
  Apr 15
  May 20
  Jun 17
  Jul 15

## Policy Council & Committee (1301.3, 1301.4)

The **Policy Council & Committee (1301.3 and 1301.4)** module lets you track membership in policy council and parent committees to comply with Head Start regulations 1301.3 and 1301.4.

### DEFAULT SETUP DETAILS

General Info	Description
Module Name - Policy Council & Committee (1301.3, 1301.4)	You can edit this name if you want to change it.
This module relates to - Management	This module collects data related to <i>Management</i> and will be available to users via the <b>Management</b> menu.  You can change this selection before you start collecting information in this module. Once you add data record, you will no longer be able to modify the data type that this module relates to in ChildPlus.
Tab Name - Policy Council/Committee	ChildPlus will display <i>Policy Council/Committee</i> as the tab name for this module.
Each unique record is called a(n) - Member	In addition to the record name, ChildPlus also uses this term for the name of the button in the module.

## REPORTS

Default reports that we've included with the **Policy Council & Committee (1301.3 and 1301.4)** module include:

- Policy Council Attendance
- Policy Council Membership

## EXAMPLE

This is what the **Policy Council & Committee (1301.3 and 1301.4)** module looks like when activated in ChildPlus:

The screenshot shows the ChildPlus software interface. At the top, there is a navigation bar with several menu items: Services, To-Do List, Entry Express, Management (which is highlighted), Dashboard, Reports, Setup, and Enter Rep. Below this, there is a secondary navigation bar with more options: Personnel, Professional Development (with a dropdown arrow), Community Resources, In-Kind, PIR, Internal Monitoring, Fees, CLASS®, and Inspection. The main content area displays the title 'Policy Council\Committee' and a sub-header 'Policy Council Committee (1301.3, 1301.4) (1)'. To the right of the sub-header is a link 'Print All Records'. Below the sub-header, there is a table with a header row: 'First Name', 'Last Name', 'Active', 'Member Type', 'Membership', and 'D'. The first data row contains: 'Susan', 'Smith', a checked checkbox, 'Parent', 'Committee Member Only', and '5'. Above the table, there is a text prompt: 'Drag a column header here to group by that column'.

## Pre-Enrollment Checklist

The **Pre-Enrollment Checklist** module let you track the steps and documents that are required in your pre-enrollment process.

### DEFAULT SETUP DETAILS

General Info	Description
Module Name - Pre-Enrollment Checklist	You can edit this name if you want to change it.
This module relates to - Participants	This module collects data related to <i>Participants</i> and will be available to users via the <b>Services</b> menu. You can change this selection before you start collecting information in this module. Once you add data record, you will no longer be able to modify the data type that this module relates to in ChildPlus.
Service Area - Enrollment	This module will be available to users in the <b>Enrollment</b> module.
Tab Name - Pre-Enrollment Checklist	ChildPlus will display <b>Pre-Enrollment Checklist</b> as the tab name for this module.
Each unique record is called a(n) - Pre-Enrollment Checklist	In addition to the record name, ChildPlus also uses this term for the name of the button in the module.

### REPORTS

Default reports that we've included with the **Pre-Enrollment Checklist** module include:

- Incomplete
- Missing Pre-Enrollment Checklist
- Pre-Enrollment Checklists
- Ready for Review

### EXAMPLE

This is what the **Pre-Enrollment Checklist** module looks like when activated in ChildPlus:

Jason Beltran

Male DOB: 3/19/10 5y 6m CPID: 115412

Application Enrollment Family Services Health Immunizations Disability Mental Health Birth Transportation Education Fees Attendance PIR

Enrollment Attachments (0) Pre-Enrollment Checklist

Pre-Enrollment Checklist (1) Add Pre-Enrollment Checklist

Drag a column header here to group by that column

School Year	Status	Status Date	App	Age	TB	Income	Foster	SSI	Homeless	IEP/IFSP	Full Day
2015-2016	Ready for Review	10/1/2015	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	N/A	Needed	N/A	N/A	Needed

Here's an example of the fields you'll see when you click **Add Pre-Enrollment Checklist**:

Pre-Enrollment Checklist

Save Cancel Add

School Year Applying For:  Pre-Enrollment Status:  Status Date:

Documents Required for All Participants

Application Form  Age Verification  Immunization Record  TB Assessment and/or TB Test  Income Verification

Other Documents that may be Required

Proof of Legal Custody (if child in foster care):  Proof of Supplemental Security Income (SSI):  Homelessness Verification (if applicable):

Current IEP or IFSP (if applicable):  Full Time Employment of School Verification (if requesting full day services):

Notes / Follow-up

Pre-Enrollment Notes:

## Program Goals (1302.102)

The **Program Goals (1302.102)** module lets you track program goals to comply with Performance Standard 1302.102.

### DEFAULT SETUP DETAILS

General Info	Description
Module Name - Program Goals (1302.102)	You can edit this name if you want to change it.
This module relates to - Management	This module collects data related to <i>Management</i> and will be available to users via the <b>Management</b> menu.  You can change this selection before you start collecting information in this module. Once you add data record, you will no longer be able to modify the data type that this module relates to in ChildPlus.
Tab Name - Policy Council/Committee	ChildPlus will display Program Goals as the tab name for this module.
Each unique record is called a(n) - Goal	In addition to the record name, ChildPlus also uses this term for the name of the button in the module.

## REPORTS

Default reports that we've included with the **Program Goals (1302.102)** module include:

- Goal Worksheet
- Program Goals

## EXAMPLE

This is what the **Program Goals (1302.102)** module looks like when activated in ChildPlus:

Services	To-Do List	Entry Express	Management	Dashboard	Reports	Setup	Enter Rep												
Personnel	Professional Development ▾	Community Resources	In-Kind	PIR	Internal Monitoring	Fees	CLASS®	Inspection											
<h3>Program Goals</h3> <p>Program Goals (1302.102) (1) <span style="float: right;">Pri</span></p> <p>Drag a column header here to group by that column</p> <table border="1"> <thead> <tr> <th>Goal</th> <th>School Year</th> <th>Description</th> <th>Service Area</th> <th>Started</th> <th>Status</th> </tr> </thead> <tbody> <tr> <td>School Readiness Goal</td> <td>2016 - 2017</td> <td>Community School Readiness</td> <td>Education</td> <td>4/10/2017</td> <td>In Progress</td> </tr> </tbody> </table>								Goal	School Year	Description	Service Area	Started	Status	School Readiness Goal	2016 - 2017	Community School Readiness	Education	4/10/2017	In Progress
Goal	School Year	Description	Service Area	Started	Status														
School Readiness Goal	2016 - 2017	Community School Readiness	Education	4/10/2017	In Progress														

## Work Orders

The **Work Orders** module lets you track the creation, approval, assignment and completion of work order requests.

### DEFAULT SETUP DETAILS

General Info	Description
Module Name - Work Orders	You can edit this name if you want to change it.
This module relates to - Management	This module collects data related to <i>Management</i> and will be available to users via the <b>Management</b> menu.  You can change this selection before you start collecting information in this module. Once you add data record, you will no longer be able to modify the data type that this module relates to in ChildPlus.
Tab Name - Work Orders	ChildPlus will display <b>Work Orders</b> as the tab name for this module.
Each unique record is called a(n) - Work Order	In addition to the record name, ChildPlus also uses this term for the name of the button in the module.

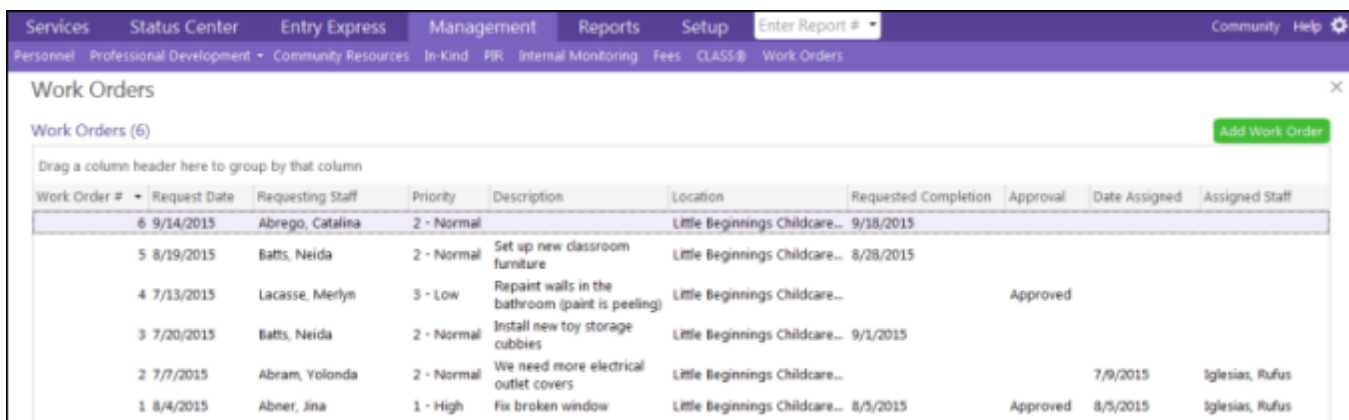
### REPORTS

Default reports that we've included with the **Work Orders** module include:

- Approved Work Orders Needing Assignment
- Open Work Orders
- Work Order Requests
- Work Orders

### EXAMPLE

This is what the **Work Orders** module looks like when activated in ChildPlus:



Here's an example of the fields you'll see when you click **Add Work Order**:

## Work Orders

Save
Cancel Add

---

### Work Order Request

Request Date
Requesting Staff
Priority

Description of the work requested 🕒 🗑️ 🖨️ 📄 ↶ ↷

The location where the issue exists:

Requested Completion Date

Requestor's Supervisor
Supervisor Approval
Approval Date

---

### Maintenance Use Only

Date Assigned
Assigned Staff
Status
Completion Date

## Work Samples

The **Work Samples** module allows you to store samples of each child's work in the system.

### DEFAULT SETUP DETAILS

General Info	Description
Module Name - Work Samples	You can edit this name if you want to change it.
This module relates to - Participants	This module collects data related to <i>Participants</i> and will be available to users via the <b>Services</b> menu.  You can change this selection before you start collecting information in this module. Once you add data record, you will no longer be able to modify the data type that this module relates to in ChildPlus.
Service Area - Education	This module will be available to users in the <b>Education</b> module.
Tab Name - Work Samples	ChildPlus will display <b>Work Samples</b> as the tab name for this module.
Each unique record is called a(n) - Work Samples	In addition to the record name, ChildPlus also uses this term for the name of the button in the module.

## REPORTS


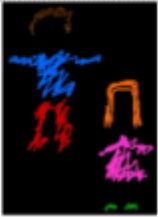
Default reports that we've included with the **Work Samples** module include:

- Work Samples
- Work Samples - Children Without a Work Sample

## EXAMPLE

This is what the **Work Samples** module looks like when activated in ChildPlus:

The screenshot shows the ChildPlus interface for a user named Jason Beltran. The top navigation bar includes tabs for Application, Enrollment, Family Services, Health, Immunizations, Disability, Mental Health, Birth, Transportation, Education, Fees, Attendance, and PIR. The 'Work Samples' tab is active. Below the navigation, there are buttons for 'Education', 'Attachments (0)', and 'Work Samples'. A green 'Add Work Sample' button is located in the top right corner of the main content area. The main content area displays a table with the following columns: Date, School Year, Time of Year, Work Sample, Activity, Approache..., Social and ..., Language ..., Cognition, and Perceptual, ... The table contains two rows of data, each representing a work sample. The first row shows a work sample from 9/1/2015, 2014-2015, in the Fall, with a drawing of a face and the text 'K1 + PDD'. The second row shows a work sample from 9/1/2015, 2014-2015, in the Winter, with a drawing of a person and a house. Both rows have 'Coloring' as the activity and a checked box in the 'Perceptual, ...' column.

Date	School Year	Time of Year	Work Sample	Activity	Approache...	Social and ...	Language ...	Cognition	Perceptual, ...
9/1/2015	2014-2015	Fall		Coloring	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
9/1/2015	2014-2015	Winter		Coloring	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Here's an example of the fields you'll see when you click **Add Work Sample**:



### Work Orders

Save
Cancel Add

---

#### Work Order Request

Request Date
Requesting Staff
Priority

Description of the work requested 🕒 🗑️ 🖨️ 📄 ↶ ↷

The location where the issue exists:

Requested Completion Date

Requestor's Supervisor
Supervisor Approval
Approval Date

---

#### Maintenance Use Only

Date Assigned
Assigned Staff
Status
Completion Date

## Workshop Evaluations

The **Workshop Evaluations** module allows you to store and summarize the results of workshop evaluation surveys.

### DEFAULT SETUP DETAILS

General Info	Description
Module Name - Workshop Evaluations	You can edit this name if you want to change it.
This module relates to - Management	This module collects data related to <i>Management</i> and will be available to users via the <b>Management</b> menu.  You can change this selection before you start collecting information in this module. Once you add data record, you will no longer be able to modify the data type that this module relates to in ChildPlus.
Tab Name - Workshop Evaluations	ChildPlus will display <b>Workshop Evaluations</b> as the tab name for this module.
Each unique record is called a(n) - Workshop Evaluations	In addition to the record name, ChildPlus also uses this term for the name of the button in the module.

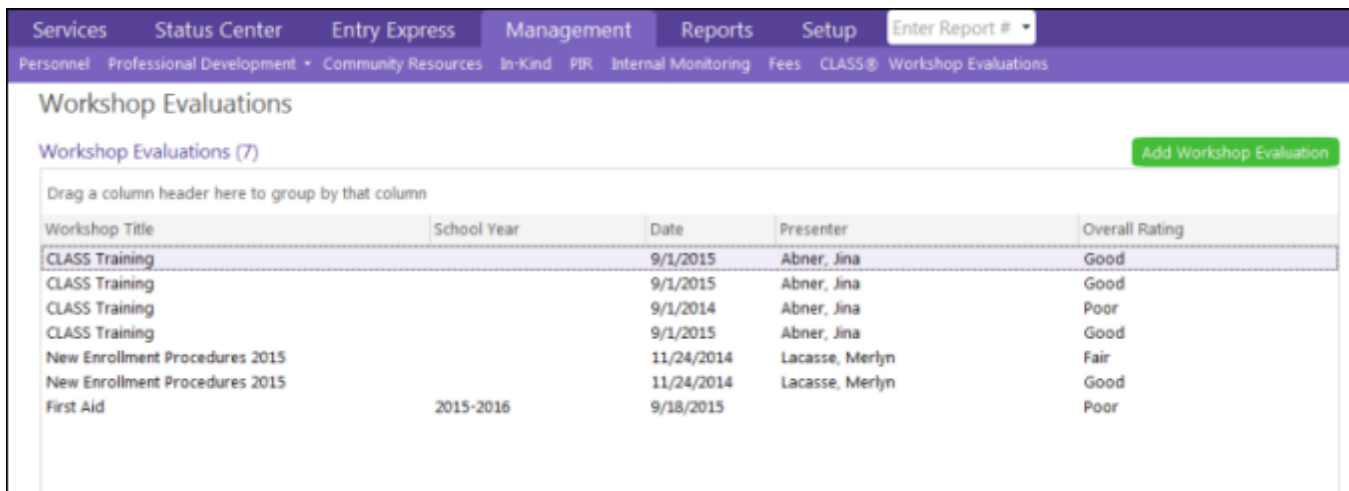
## REPORTS

Default reports that we've included with the **Workshop Evaluations** module include:

- Evaluations with a Fair or Poor Overall Rating
- Workshop Evaluations

## EXAMPLE

This is what the **Workshop Evaluations** module looks like when activated in ChildPlus:



Workshop Title	School Year	Date	Presenter	Overall Rating
CLASS Training		9/1/2015	Abner, Jina	Good
CLASS Training		9/1/2015	Abner, Jina	Good
CLASS Training		9/1/2014	Abner, Jina	Poor
CLASS Training		9/1/2015	Abner, Jina	Good
New Enrollment Procedures 2015		11/24/2014	Lacasse, Merlyn	Fair
New Enrollment Procedures 2015		11/24/2014	Lacasse, Merlyn	Good
First Aid	2015-2016	9/18/2015		Poor

Here's an example of the fields you'll see when you click **Add Workshop Evaluation**:

## Workshop Evaluations

Save
Cancel Add

Workshop Title

School Year

Date

Presenter

---

**Ratings**

Organization and Format

Usefulness of Material

Applicability to My Job

Pacing/Speed

Length/Duration

Level/Difficulty

Presenter's Knowledge on the Subject

Presenter's Communication Style

Opportunity for Participation

Visual Aids

Handouts

Acoustics/Volume

Meeting Space

What did you like, appreciate, or enjoy about the workshop?

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## Module Designer Examples

Here are some examples of custom modules or forms you can create using the **Module Designer** to track:

### Examples of Participant Modules

Here are some examples of participant-related modules that you can create using the **Module Designer**:

- Case notes
- Consent forms
- Allergy records
- Medication administration
- Authorizations for medication
- Food substitution
- Oral Health Form for Children
- Oral Health Form for Pregnant Women
- Waiver form
- Kindergarten entrance screening
- Child file review
- Nutrition assessment
- Health history
- Pre-enrollment checklist
- Prenatal checklist

- Purchase order request to pay for child's health needs
- Transition checklist
- Change of enrollment status request
- Daily health check
- Health plan
- Case Management / MDT Meeting
- Parent Conference / Home Visit
- Individualized Learning Plan
- Developmental/Behavioral Screenings
- Enhanced Prenatal Tracking
- Portfolio/Work Samples
- Incident reports

## **Examples of Family Modules**

Here are some examples of family-related modules that you can create using the **Module Designer**:

- CAA/CAP/CSBG information (for example, ROMA, LIHEAP, Weatherization, Food pantry, Senior meals, Teen parents, Homeless services)
- Family Partnership Agreement / Goals

## **Examples of Personnel Module**

Here are some examples of personnel-related modules that you can create using the **Module Designer**:

- Staff reviews/evaluations
- New hire checklists
- Personnel Activity Reports (PAR)
- Staff training request
- Supervisor monthly report
- Travel Request
- Improved Professional Development Tracking

## **Examples of Management Modules**

Here are some examples of management-related modules that you can create using the **Module Designer**:

- Bus maintenance
- Work orders
- Inspections
- Lesson plans
- Help Desk Tickets
- Workshop Evaluation
- Inventory / Asset Tracking
- Bus driver daily log
- Parent Committee Agenda
- Policy Council Agenda
- Fire Drill log
- Policy Council Membership
- Parent Interest Survey
- Refrigerator / Freezer daily log

- Real Property Status Report SF-429
- School Readiness Goals

## Installing a Module from the Module Gallery

To make getting started easier, we've created a gallery of ready-to-use modules. You can either use our premade modules as-is or modify them to meet your agency's specific needs. To access premade modules in ChildPlus, click **Setup > Module Setup > Module Designer > Install premade modules from the gallery**.

Follow these steps to install a premade module:

1. Click **Setup > Module Setup > Module Designer > Install premade modules from the gallery**.
2. Select the module you want to install and click **Install**.



There is no limit to the number of premade modules you can install. Before you install it, you can learn more about the module by clicking **More Info**. To learn more, you can also see page 53.

3. Click **OK** to confirm that you want to install the premade module. Once the module is installed, you can access it via **Setup > Module Setup > Module Designer > Design or edit your own custom modules**.

## Adding and Organizing Module Designer Fields

Once you've **created a new module** with the **Module Designer**, you'll need to add and organize the fields that you want include on it. Click on one of the following topics to learn more:

### Choosing Fields

When you are ready to define the fields for your new module:

1. If you haven't already done so, open the **Module Designer**. How do I do this? Click **Setup > Module Setup > Module Designer > Design or edit your own custom modules**.
2. Select the module you want to work with.
3. Click on the **Fields** tab.
4. Click **Add Field** to add a field to the module.
5. Complete each of the following fields:

Field Details	Description
Field Type	<p>Select the type of field you are adding to the module. Some of your choices are standard fields that you would add to a form (for example, checkbox, dates, text, date, number). You can also select fields that are unique to ChildPlus (for example, Agency, Community Resource, Personnel, PIR). If you select a ChildPlus specific field, it will display a drop-down list in your module with choices based on the field you select. For example, if you choose <i>PIR</i> then ChildPlus will include a field in the module that is a drop-down list with a list of PIR's that you can choose from.</p> <p>Click here to learn more about working with <b>Formula Fields</b> in ChildPlus.</p> <p>Once you've associated data with a module, you can't make changes to this field.</p>
Field Name (for grids)	<p>Type the name of the field that you want ChildPlus to display in the data grid for the module. Since this name will be displayed in a grid format, we recommend you make it as short as possible.</p>
Field Label (for data entry)	<p>Type the name of the field that you want ChildPlus to display when a user is entering data for the module. We recommend that you make the field label as descriptive as possible.</p>
Only allow users to access records in this module if they security access to the location stored in this field	<p>This option is only available for <b>Agency</b>, <b>Agency-Site</b> and <b>Agency-Site-Classroom</b> fields for <b>Module Designer</b> modules related to <b>Management</b>. If selected, users will only have access to records in the module if they also have security privileges for the location.</p>
This field is required	<p>Check this box if you want to make this field required. If it is required, your users will not be able to leave it blank when entering data for the module.</p>
Show this field in the grid from which users select records	<p>Check this box if you want the field to be visible in the module's data grid. This is the grid where users select which record</p>

Field Details	Description
	they want to view.
Column Width in Characters (when displayed in a grid)	Type the width (in pixels) that you want ChildPlus to use when displaying the field in the data grid. You can make the width any size you want (there is no minimum or maximum). If you leave this field blank, ChildPlus will automatically size the column based on the default system width of the field. See page 93 to learn more.
Show this field on a new line	Check this box if you want ChildPlus to display this field on a new line. If you don't check this box, ChildPlus will display the field to the right of the previous field instead of on a line below it.

6. Do one of the following:
- Click **Save and Add Another Field** (or press **Ctrl+ Enter** on your keyboard) to add another field to the module.
  - Click **Save and Close** to return to the **Module Designer** screen.



If you want to make a copy of the field you just added, click **Save and Close** to return to the **Module Designer** screen and click **Duplicate**.

Module Designer 
[Tips](#) [Delete Module](#) [Delete Data](#) [View Deleted Records](#)

[General](#) [Fields](#) [Reports](#) [Security](#)

Define fields for the module [Preview Layout](#) [Add Field](#) [Move Up 10](#) [Up 1](#) [Down 1](#) [Down 10](#) [Move To...](#) [Edit](#) [Duplicate](#)

Field	Name	Label	Field Type	Required	Show in Grid	New Line
1	Date	Date	Date	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2	Medical Background	Medical Background	Section Label	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3	Asthma	Has your child been diagnosed with a...	Yes/No/Blank	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
4	Allergies	Does your child have any allergies	Yes/No/Blank	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
5	Notes	If yes, explain	Notes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6	Conditions	Does your child have , or has had in th...	Label	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
7	Chickenpox	Chickenpox	Checkbox	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
8	Seizures	Seizures	Checkbox	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
9	Anemia	Anemia	Checkbox	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
10	Eye Problems	Eye Problems	Checkbox	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
11	Diabetes	Diabetes	Checkbox	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
12	Parents Signature	Parents Signature	Electronic Signatu...	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>



Did you know that we have Module Designer hotkeys to make designing your Module Designer modules easier? Click here to learn more about the hotkeys in shortcuts in Module Designer.

## Editing Module Fields

To edit a field that you've associated with a **Module Designer** module:

1. If you haven't already done so, open the **Module Designer**. How do I do this? Click **Setup > Module Setup > Module Designer > Design or edit your own custom modules** and select the module you want to work with.
2. Click on the **Fields** tab.
3. Click **Edit**.
4. Make your changes to the field.
5. Click **Save and Close**.

## Organizing Module Fields

You can make changes to the order in which fields display on the screen using the **Move Up 10, Up 1, Down 1, Down 10** and **P...** buttons.

The screenshot shows the 'Module Designer' interface with the 'Fields' tab selected. The toolbar contains the following buttons: 'Add Field', 'Move Up 10', 'Up 1', 'Down 1', 'Down 10', 'Move To...', 'Edit', 'Duplicate', and 'Delete'. Below the toolbar is a table of fields.

Field	Name	Label	Field Type	Required	Show in Grid	New Line	Column Width
1	Date	Date	Date	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	9
2	Medical Background	Medical Background	Section Label	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	24
3	Asthma	Has your child been diagnosed with a...	Yes/No/Blank	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	9
4	Allergies	Does your child have any allergies	Yes/No/Blank	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	9
5	Notes	If yes, explain	Notes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	33
6	Conditions	Does your child have , or has had in th...	Label	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	24
7	Chickenpox	Chickenpox	Checkbox	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	9
8	Seizures	Seizures	Checkbox	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	9
9	Anemia	Anemia	Checkbox	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	9
10	Eye Problems	Eye Problems	Checkbox	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	9
11	Diabetes	Diabetes	Checkbox	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	9
12	Parents Signature	Parents Signature	Electronic Signatu...	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	40

## Previewing Your New Module

Once you've defined the fields for your new module, you can preview what they'll look like on the module screen:

1. If you haven't already done so, open the **Module Designer**. How do I do this? Click **Setup > Module Setup > Module Designer > Design or edit your own custom modules** and select the module



- you want to preview..
2. Click on the **Fields** tab.
  3. Click **Preview Layout**.

Module Designer Tips Delete Module Refresh Delete Data View Deleted Records Save Close

General **Fields** Reports Security

Define fields for the module **Preview Layout** Add Field Move Up 10 Up 1 Down 1 Down 10 Move To... Edit Duplicate Delete

Field	Name	Label	Field Type	Required	Show in Grid	New Line	Column Width
1	Date	Date	Date	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	9
2	Medical Background	Medical Background	Section Label	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	24
3	Asthma	Has your child been diagnosed with a...	Yes/No/Blank	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	9
4	Allergies	Does your child have any allergies	Yes/No/Blank	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	9
5	Notes	If yes, explain	Notes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	33
6	Conditions	Does your child have , or has had in th...	Label	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	24
7	Chickenpox	Chickenpox	Checkbox	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	9
8	Seizures	Seizures	Checkbox	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	9
9	Anemia	Anemia	Checkbox	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	9
10	Eye Problems	Eye Problems	Checkbox	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	9
11	Diabetes	Diabetes	Checkbox	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	9
12	Parents Signature	Parents Signature	Electronic Signatu...	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	40



Once you've defined the fields for your new module, you can also create your own reports for it. See page 94 to learn how.

You can also set security privileges for it. See page 98 to learn how.

## Adding and Organizing Module Designer Fields

Once you've **created a new module** with the **Module Designer**, you'll need to add and organize the fields that you want include on it. Click on one of the following topics to learn more:

### Choosing Fields

When you are ready to define the fields for your new module:

1. If you haven't already done so, open the **Module Designer**. How do I do this? Click **Setup > Module Setup > Module Designer > Design or edit your own custom modules**.
2. Select the module you want to work with.
3. Click on the **Fields** tab.
4. Click **Add Field** to add a field to the module.
5. Complete each of the following fields:

Field Details	Description
Field Type	<p>Select the type of field you are adding to the module. Some of your choices are standard fields that you would add to a form (for example, checkbox, dates, text, date, number). You can also select fields that are unique to ChildPlus (for example, Agency, Community Resource, Personnel, PIR). If you select a ChildPlus specific field, it will display a drop-down list in your module with choices based on the field you select. For example, if you choose <i>PIR</i> then ChildPlus will include a field in the module that is a drop-down list with a list of PIR's that you can choose from.</p> <p>Click here to learn more about working with <b>Formula Fields</b> in ChildPlus.</p> <p>Once you've associated data with a module, you can't make changes to this field.</p>
Field Name (for grids)	<p>Type the name of the field that you want ChildPlus to display in the data grid for the module. Since this name will be displayed in a grid format, we recommend you make it as short as possible.</p>
Field Label (for data entry)	<p>Type the name of the field that you want ChildPlus to display when a user is entering data for the module. We recommend that you make the field label as descriptive as possible.</p>
Only allow users to access records in this module if they security access to the location stored in this field	<p>This option is only available for <b>Agency</b>, <b>Agency-Site</b> and <b>Agency-Site-Classroom</b> fields for <b>Module Designer</b> modules related to <b>Management</b>. If selected, users will only have access to records in the module if they also have security privileges for the location.</p>
This field is required	<p>Check this box if you want to make this field required. If it is required, your users will not be able to leave it blank when entering data for the module.</p>
Show this field in the grid from which users select records	<p>Check this box if you want the field to be visible in the module's data grid. This is the grid where users select which record</p>

Field Details	Description
	they want to view.
Column Width in Characters (when displayed in a grid)	Type the width (in pixels) that you want ChildPlus to use when displaying the field in the data grid. You can make the width any size you want (there is no minimum or maximum). If you leave this field blank, ChildPlus will automatically size the column based on the default system width of the field. See page 93 to learn more.
Show this field on a new line	Check this box if you want ChildPlus to display this field on a new line. If you don't check this box, ChildPlus will display the field to the right of the previous field instead of on a line below it.

6. Do one of the following:
- Click **Save and Add Another Field** (or press **Ctrl+ Enter** on your keyboard) to add another field to the module.
  - Click **Save and Close** to return to the **Module Designer** screen.



If you want to make a copy of the field you just added, click **Save and Close** to return to the **Module Designer** screen and click **Duplicate**.

Module Designer 
[Tips](#) [Delete Module](#) [Delete Data](#) [View Deleted Records](#)

[General](#) [Fields](#) [Reports](#) [Security](#)

Define fields for the module [Preview Layout](#) [Add Field](#) [Move Up 10](#) [Up 1](#) [Down 1](#) [Down 10](#) [Move To...](#) [Edit](#) [Duplicate](#)

Field	Name	Label	Field Type	Required	Show in Grid	New Line
1	Date	Date	Date	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2	Medical Background	Medical Background	Section Label	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3	Asthma	Has your child been diagnosed with a...	Yes/No/Blank	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
4	Allergies	Does your child have any allergies	Yes/No/Blank	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
5	Notes	If yes, explain	Notes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6	Conditions	Does your child have , or has had in th...	Label	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
7	Chickenpox	Chickenpox	Checkbox	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
8	Seizures	Seizures	Checkbox	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
9	Anemia	Anemia	Checkbox	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
10	Eye Problems	Eye Problems	Checkbox	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
11	Diabetes	Diabetes	Checkbox	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
12	Parents Signature	Parents Signature	Electronic Signatu...	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>



Did you know that we have Module Designer hotkeys to make designing your Module Designer modules easier? Click here to learn more about the hotkeys in shortcuts in Module Designer.

## Editing Module Fields

To edit a field that you've associated with a **Module Designer** module:

1. If you haven't already done so, open the **Module Designer**. How do I do this? Click **Setup > Module Setup > Module Designer > Design or edit your own custom modules** and select the module you want to work with.
2. Click on the **Fields** tab.
3. Click **Edit**.
4. Make your changes to the field.
5. Click **Save and Close**.

## Organizing Module Fields

You can make changes to the order in which fields display on the screen using the **Move Up 10, Up 1, Down 1, Down 10** and **P...** buttons.

The screenshot shows the 'Module Designer' interface with the 'Fields' tab selected. The toolbar contains the following buttons: 'Add Field', 'Move Up 10', 'Up 1', 'Down 1', 'Down 10', 'Move To...', 'Edit', 'Duplicate', and 'Delete'. Below the toolbar is a table of fields.

Field	Name	Label	Field Type	Required	Show in Grid	New Line	Column Width
1	Date	Date	Date	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	9
2	Medical Background	Medical Background	Section Label	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	24
3	Asthma	Has your child been diagnosed with a...	Yes/No/Blank	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	9
4	Allergies	Does your child have any allergies	Yes/No/Blank	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	9
5	Notes	If yes, explain	Notes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	33
6	Conditions	Does your child have , or has had in th...	Label	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	24
7	Chickenpox	Chickenpox	Checkbox	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	9
8	Seizures	Seizures	Checkbox	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	9
9	Anemia	Anemia	Checkbox	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	9
10	Eye Problems	Eye Problems	Checkbox	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	9
11	Diabetes	Diabetes	Checkbox	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	9
12	Parents Signature	Parents Signature	Electronic Signatu...	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	40

## Previewing Your New Module

Once you've defined the fields for your new module, you can preview what they'll look like on the module screen:

1. If you haven't already done so, open the **Module Designer**. How do I do this? Click **Setup > Module Setup > Module Designer > Design or edit your own custom modules** and select the module

- you want to preview..
2. Click on the **Fields** tab.
  3. Click **Preview Layout**.

Module Designer Tips Delete Module Refresh Delete Data View Deleted Records Save X

General **Fields** Reports Security

Define fields for the module **Preview Layout** Add Field Move Up 10 Up 1 Down 1 Down 10 Move To... Edit Duplicate Delete

Field	Name	Label	Field Type	Required	Show in Grid	New Line	Column Width
1	Date	Date	Date	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	9
2	Medical Background	Medical Background	Section Label	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	24
3	Asthma	Has your child been diagnosed with a...	Yes/No/Blank	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	9
4	Allergies	Does your child have any allergies	Yes/No/Blank	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	9
5	Notes	If yes, explain	Notes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	33
6	Conditions	Does your child have , or has had in th...	Label	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	24
7	Chickenpox	Chickenpox	Checkbox	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	9
8	Seizures	Seizures	Checkbox	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	9
9	Anemia	Anemia	Checkbox	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	9
10	Eye Problems	Eye Problems	Checkbox	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	9
11	Diabetes	Diabetes	Checkbox	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	9
12	Parents Signature	Parents Signature	Electronic Signatu...	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	40



Once you've defined the fields for your new module, you can also create your own reports for it. See page 94 to learn how.

You can also set security privileges for it. See page 98 to learn how.

### Default Column Width for Fields

ChildPlus uses the following default column widths when displaying **Module Designer fields** in a data grid on screen:

Field Type	Default Column Width (Pixels)
Attachment	170
Checkbox	66
Community Resource	170
Custom Pick List	125
Date	66
Image	228
Notes	228
Number	66
Personnel	170
Text	170

Field Type	Default Column Width (Pixels)
Time	66
Validation Code	170
Yes/No	66
Yes/No/Blank	66
Agency	170
Agency-Site	279
Agency-Site-Classroom	364
Funding Source / Grant	170
Participant Group	170
Program	170
Program Term	170
Region	170
School Year	81

### Creating Module Designer Reports

Once you've added fields to your new module, you can create your own custom reports to go along with it.

To add a new report:

1. If you haven't already done so, open the **Module Designer**. How do I do this? Click **Setup > Module Setup > Module Designer > Design or edit your own custom modules** and select the module you want to work with.
2. Click on the **Reports** tab.
3. Click **Add New Report**.
4. Choose the type of report you want to create. Use the following table to learn about the different types of **Module Designer** reports that are available in ChildPlus:

Report Type	This options lets you create a....
Basic List	Basic list report with an easy to use design tool.
Advanced List	List report (with multiple records per page) from scratch using the Advanced Report Designer.
Advanced Form	Form report (with one record per page) from scratch using the Advanced Report Designer.
Worksheet	Report that looks like a blank data entry screen.

5. Type the **Report Number** you want to use for the report.
6. Type the **Report Name** that you want to assign to the report.
7. Select the **Report Menu** where you want to make this report available in ChildPlus.

8. Select the **Report Type** that you want to associate with the report. Use the following table to learn about the different **Report Types** available in ChildPlus:

Report Type	Description
Standard Report	Standard reports include all participants even if they don't have a record that meets the report's filter criteria. If you have a participant with no matching records, ChildPlus will display them on the report with a dimmed or gray background.
Matching Records Only	Matching Records Only reports only include participants that have a record that meets the report's filter criteria. ChildPlus will not display participants who do not have matching records anywhere on the report.
Exception Report	Exception reports are the opposite of Matching Records Only reports. They only include participants who do not have a records that meet the report's filter criteria.

9. Click **Add Fields** to add each of the fields that you want to include on the report. In addition to the fields, you can also select additional fields with related information.

## Add Fields to this Report

Include the following fields from this module  All

- Date
- Health Status
- Asthma/Wheezing
- Bruises or Swelling
- Cough
- Cuts or Sores
- Diarrhea
- Fever
- Temp (F)
- Headache
- Lice
- Mouth Sores / Drooling
- Pink Eye/Drainage
- Rash
- Sneezing
- Sore Throat
- Stomach Ache
- Mood/Behavior
- Skin Color
- Vomiting
- Other
- Description
- Symptom Notes
- No action needed
- Sent Home
- Sent to Hospital or Doctor
- Follow-up Notes

Include the following additional information  All

- Added By
- Age (in Days)
- Age (in Months)
- Age (in Weeks)
- Age (in Years)
- Application Date
- Application Status
- Birthday
- ChildPlus ID
- Class Age
- Date Added
- Date Last Updated
- Enrollment Date
- Entry Date
- Gender
- Last Updated By
- Location (Agency)
- Location (Classroom)
- Location (Site)
- Location (Site-Classroom)
- Name (First Last)
- Name (First)
- Name (Last)
- Name (Last, First)
- Name (Middle)
- Name (Preferred)
- Name (Previous)
- Name (Suffix)
- Status Date

Fields will be added to the report in the order in which they are selected.

10. Click **OK**.
11. If you want to adjust the order in which these fields display on the report, use the **Move Up** and **Move Down** buttons. Tip: Click **Remove Field** if you want to delete a field from a report.
12. Double click **Allow Users to Filter** and check the **Allows Users to Filter** box for each field that you want users to be able to filter information for. You can use the **Previous** and **Next** buttons if you want to check this box or edit details for other report fields.
13. Click **Add Built-in Filter** if you want one of the fields you checked in step # 11 to be available as a built-in filter on the report. Select the field you want to include and click **OK**.



Some reports allow you to create two different Built-in Filters (one that filters records on the report and another that filters filtering the participants, families or personnel on the report. If you want to delete a built-in filter from a report, select the **Built-in Filter** > click **Edit** > click **Delete Filter**.



14. Use the **Report Sorting and Grouping** section of the screen to specify how you want data on this report sorted and grouped. For example, if you want this report grouped by classroom and results sorted alphabetically by the participant's name then you'd select the following:

▼ Report Sorting and Grouping

Sort and group from low to high by ▼	Location (Classroom) ▼
Sort from low to high by ▼	Name (Last, First) ▼
▼	▼
▼	▼

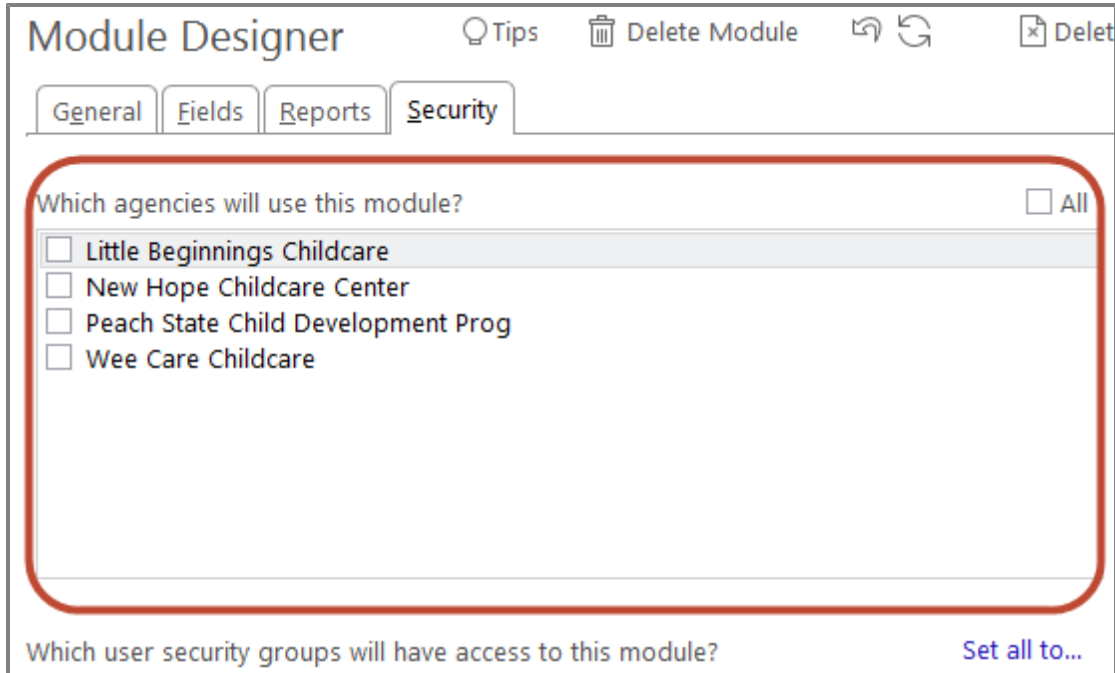
15. Use the **Page Setup and Other Options** section of the screen to fine-tune your report before you print it:

Page Option	Description
Header and Footer	Use this option to control the headers and/or footers that you want ChildPlus to display on each page of the report. You can control the font, alignment and position of header/footer text. We've provided you with built-in controls that let you quickly add the following information to your headers and footers: page number, pages #, page # of page #, date printed, time printed, and/or user name.
Scale	If you aren't happy with the default way that ChildPlus scales the report, you can use this option to customize the report's scaling. You can adjust the scale to a percent of the normal size or you can fix the report to a certain number of pages.
Margins	Use this option to adjust the report's Top, Right, Bottom and Left margins.
Orientation	This option lets you control whether the report displays in Portrait or Landscape mode.
Size	Use this option to specify the paper size.
Allow users to ADD records directly from the report	Use this option to give users the ability to add records directly from Module Designer reports.
Allow users to EDIT records directly from the report	Use this option to give users the ability to edit records directly in Module Designer reports.
Freeze the leftmost ____ columns	Type the number of columns that you want to freeze. ChildPlus will freeze the number of columns you specify and the column names will remain visible even if the user scrolls all the way to the right side of the screen.

## Module Designer Security

### Agency Level Security

You can use the **Security** tab to configure security for your module. Choose which agencies (if you have more than one set up in your system) that will have access to the module.



The screenshot shows the 'Module Designer' interface with the 'Security' tab selected. The main content area is titled 'Which agencies will use this module?' and contains a list of four agencies, each with an unchecked checkbox: 'Little Beginnings Childcare', 'New Hope Childcare Center', 'Peach State Child Development Prog', and 'Wee Care Childcare'. There is an 'All' checkbox in the top right corner of the list area. Below the list, there is a label 'Which user security groups will have access to this module?' and a link 'Set all to...'. The interface also features a top navigation bar with 'Tips', 'Delete Module', and 'Delete' icons, and a tabbed menu with 'General', 'Fields', 'Reports', and 'Security'.

### User Security Groups

You can also set the security privileges for each of your user security groups on this screen.

## Module Designer



Delete Module



Delete

General

Fields

Reports

Security

Which agencies will use this module?

 All

- Little Beginnings Childcare
- New Hope Childcare Center
- Peach State Child Development Prog
- Wee Care Childcare

Which user security groups will have access to this module?

Set all to...

Security Level	Security Group
Full Access	Admin
View Access	Append Only Notes
Full Access	Application & Enrollment
View Access	Attendance
View Access	Disability/Mental Health
No Access	Education
No Access	FCP
No Access	Health/Nutrition
View Access	Home Visitors
No Access	Maintenance
Full Access	Migrant
No Access	No Edit Append Only Notes
View Access	No Module Designer Mods



By default, none of your security user groups will initially have security privileges to the new module. However, if a user creates a new module in ChildPlus using the **Module Designer**, they will automatically have user security access to it.



Keep in mind that if a user has full access to the module, they'll have access to and the ability to view *all* of the records in the module.

## Region Information

Regions provide you with an additional way to group and manage your sites. Setting up regions is optional but can be extremely helpful for tracking, reporting, and security purposes.



Did you know that you can assign user security by region?

## System Preferences Setup

### General Preferences

You can set the following preferences on the **General** tab of the **Preferences Setup** screen (accessible via **Setup > System Setup > Preferences > General**):

#### General

### Family Application - Minimum length of filter criteria required to search for a family

This preference sets the number of characters that users must enter when **searching for a family member** in the **Application module**. For example, if you set this preference to 5 and are searching for a family with the last name of *Appleton*, users will be required to enter *Apple* (the first 5 characters of the name) before you can search for matches.

NOTE: This preference only applies to users who *do not* have **security access** to all sites and classrooms in ChildPlus. Users who have access to ALL sites and classrooms will be unaffected by this preference setting.

### Tools - Poverty Calculator

To configure default values for the **Poverty Calculator**, enter the amount you want to use as the poverty level for a one person family and then enter the amount that you want ChildPlus to add for each additional person in the family. Visit <https://aspe.hhs.gov/poverty-guidelines> to view the current HHS poverty guidelines.

The **Poverty Calculator** is available on the **Tools** menu in ChildPlus and allows you to quickly calculate a family's poverty level based on their income and the number of people in the family.

### ChildPlus Community on the Main Menu

You can use these preferences to decide which features are available to users on the ChildPlus Community.

Preference	Description
Show the Forums Section	Check this box if you want users to be able to access the different Forums available for ChildPlus. Forums include the ChildPlus Feature Request Forum and the Head Start Community Question & Answer Forum.
Show the Social Media Section	Check this box if you want users to be able to access ChildPlus Software's multimedia sites (for example, ChildPlus Software Facebook, Twitter and YouTube page).

## Attachments

You can use these preferences to control what happens once a file is attached to a record in ChildPlus. You can choose from the following 3 options:

Preference	When you add a file as an attachment in ChildPlus...
Leave the file in its current folder	This option will leave the file in its current folder on your computer.
Move the file to a sub-folder named <i>Attached</i>	<p>This option will automatically move the file to a folder on your computer named <i>Attached</i>. If it doesn't already exist, ChildPlus will automatically create the <i>Attached</i> folder for you and will add it as a sub-folder under the file's original folder. For example, if the file was stored in <i>C:\My Documents</i>, ChildPlus will create the sub-folder and you'll find the file in <i>C:\My Documents\Attachments</i>.</p> <p>Note: If a user does not have permission to create a folder on their computer, ChildPlus will not move the file and will leave it in its current location.</p>
Delete the file	If you choose this option, the file will automatically be deleted from its location on your computer.

## Does agency operate an American Indian/Alaska Native program?

You can use this preference to indicate if your agency operates an American Indian/Alaska Native program. ChildPlus uses this information for the **Eligibility Verification** page of the printed family application as follows:

- If this preference is set to **No** then ChildPlus will check **Counted as part of 10% of maximum for non-AI/AN programs** sub-option on the Eligibility Verification page.
- If this preference is set to **Yes** then the report will check **Counted as part of the 49% of maximum for AI/AN programs Over Income** sub-option on the Eligibility Verification page.
- If this preference is not set then ChildPlus won't check either of the Over Income sub-options on the **Eligibility Verification** page.

## Duplicate Social Security Numbers

This preference allows administrators to restrict or allow duplicate social security numbers in ChildPlus.

### PIR

#### PIR - Default value for question on the PIR screen

This preference sets the default value (either *Yes* or *No*) that you want ChildPlus to assign to items on the **PIR** screen.

#### Show red PIR links above fields that impact the PIR

Check this preference if you want ChildPlus to display a red PIR link above any PIR-related field in ChildPlus.  
**Show me.**

### Enrollment Preferences

You can set the following preferences related to the **Enrollment** module via **Setup > System Setup > System Preferences > Enrollment**):

### Applications

#### When adding a new family, the first member should default as

This preference lets you choose which family member type you want ChildPlus to automatically add first whenever you add a new family to the system. Your choices are:


Preference	Description
No Default	Lets the user choose which type of family member they want to add to the family.
Child Applicant	ChildPlus will always add a participant applicant as the first member of any new family you add to the system.
Primary (Adult)	ChildPlus will always add the primary adult as the first member of any new family you add to the system.



#### When adding a new family, should Other Adults be included in the Number in Family?

This preference lets you specify whether ChildPlus should count family members marked as an **Other Adult** in the **Number in Family** field. By default, this preference will be set to *Yes* in ChildPlus.

### ADULT STATUS FIELD

Joey Abner x +




**Joey Abner** ▼   Fla






Male DOB: 4/23/14 3y 5m CPID: 222330

New 10/12/17 • Year 2 (+3) HS 17-18 • Little

Application Enrollment Family Services Health Immunizations Disability Mental Health Bi

### Family Members

 Family Information

 Sena Whyte	Primary	Adult	Female	DOB	6/02/86
 Molly Abner	Other Adult	Adult		DOB	4/19/81
 Kimberly M Abner	7y 10m	Child	Female	DOB	12/06/09
 Felton Addison	5y 5m	Child	Male	DOB	4/30/12
 Joey Abner	3y 5m	Child	Male	DOB	4/23/14

Molly Abner Attachments (0)

### General Information

Adult or Child <sup>PIR</sup>	Adult ▼	ChildPlus ID
Adult Status <sup>PIR</sup>	Other Adult ←	Birthday
First Name	Molly	Gender

**NUMBER IN FAMILY FIELD**

Joey Abner \* +

Male DOB: 4/23/14 3y 6m CPID: 222330

New 10/12/17 • Year 2 (+3) HS 17-18 • Little Beginnings Childcare • < No Site

Application Enrollment Family Services Health Immunizations Disability Mental Health Birth Transportation Education

### Family Members

Family Information							FamilyID	30584
	Sena Whyte	Primary	Adult	Female	DOB	6/02/86	CPID	84270 <a href="#">More</a>
	Molly Abner	Other Adult	Adult		DOB	4/19/81	CPID	236780 <a href="#">More</a>
	Kimberly M Abner	7y 10m	Child	Female	DOB	12/06/09	CPID	94808 <a href="#">More</a>
	Felton Addison	5y 5m	Child	Male	DOB	4/30/12	CPID	162239 <a href="#">More</a>
	Joey Abner	3y 6m	Child	Male	DOB	4/23/14	CPID	222330 <a href="#">More</a>

Family Information Attachments (0) Fam Health History

### General Information

Parental Status <sup>PIR</sup> One Parent Family

Primary Language <sup>PIR</sup> At Home English

Number in Household 4

Number in Family 5


## When adding a new family, should family members that do not live with the family be included in the Number in Family?



This preference lets you specify whether ChildPlus should count family members that do not live with the family in the **Number in Family** field. By default, this preference will be set to Yes in ChildPlus.

Lives with Family Field



Joey Abner x +



**Joey Abner** ▼  

Male DOB: 4/23/14 3y 6m CPID: 222330

New 10/12/17 • Year 2 (+3) HS 17-18 • Little Beginnings Childcare •

Application Enrollment Family Services Health Immunizations Disability Mental Health Birth Transportation E

### Family Members

Family Information	FamilyID	30584
Sena Whyte Primary Adult Female DOB 6/02/86 CPID 84270		
Molly Abner Other Adult Adult DOB 4/19/81 CPID 236780		
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Felton Addison 5y 5m Child Male DOB 4/30/12 CPID 162239		
Joey Abner 3y 6m Child Male DOB 4/23/14 CPID 222330		

Molly Abner Attachments (0)

### Additional Information

Lives with Family <input checked="" type="checkbox"/> Yes ▼	Teen Parent <input type="checkbox"/> No ▼
Provides Financial Support <input checked="" type="checkbox"/> Yes ▼	Subsidized <input checked="" type="checkbox"/> Yes ▼

**NUMBER IN FAMILY FIELD**

Joey Abner

Male DOB: 4/23/14 3y 6m CPID: 222330

New 10/12/17 • Year 2 (+3) HS 17-18 • Little Beginnings Childcare • < No Site

Application Enrollment Family Services Health Immunizations Disability Mental Health Birth Transportation Education

**Family Members**

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	Kimberly M Abner	7y 10m	Child	Female	DOB	12/06/09	CPID	94808 <a href="#">More</a>
	Felton Addison	5y 5m	Child	Male	DOB	4/30/12	CPID	162239 <a href="#">More</a>
	Joey Abner	3y 6m	Child	Male	DOB	4/23/14	CPID	222330 <a href="#">More</a>

Family Information Attachments (0) Fam Health History

**General Information**

Parental Status <sup>PIR</sup> One Parent Family

Primary Language <sup>PIR</sup> English

At Home

Number in Household 4

Number in Family 5

## Do you add adults as participants?

This **Application** preference allows you to specify whether you want adults to be added as applicants in your system (for example, if you are an Early Head Start program that serves pregnant women then you would want to make it possible for adults to be applicants).

## Track specific races for multi-racial individuals

This preference let you control whether you want users to have the ability to select multiple races for individuals in ChildPlus. If you choose *no*, users will be able to set an individual's race as **Multi-Racial/Biracial** but won't be able to specify the different races.

## Track descriptions when Other is selected

This preference gives users the option of manually typing in a person's race if **Other** is selected for an individual's **Race**.

## Application Signatures

This preference gives you control over whether ChildPlus displays a **Verifying Staff** signature and date line at the bottom of the **Application Eligibility & Enrollment Information** page of paper applications printed using report **2135- Printed Applications**.

## Enrolling

### When enrolling a participant, should the Enrollment Date be used as the default Entry Date?

Choose **Yes** if you want ChildPlus to automatically use the participant's **Enrollment Date** as their default **Entry Date**. Users will still have the option of changing the **Entry Date** before enrolling a participant,

ChildPlus will just automatically prefill the **Entry Date** field with the participant's **Enrollment Date**. If you choose **No**, users will always have to manually type a date into the **Entry Date** field.

## Restrict enrollment by classroom's funding

This preference allows administrators to restrict the number of participants who can be enrolled in a classroom based on the classroom's funded enrollment. This option prevents users from enrolling participants in a classroom once the classroom's funded slots have been filled.

### Eligibility

## Also show the CACFP Status on the Poverty Level Calculator

Check this box if you want each participant's **CACFP Status** to display on the **Poverty Calculator**.

### Data History Log

You can set the following preferences for the **Data History Log** via **Setup > System Setup > System Preferences > Data History Log**). Users with access to the **Data History Log** can use this tab to turn the **Data History Log** off and on; decrease or extend the amount of time ChildPlus saves your information; and choose which modules you want to track changes for.

## Track change to made to records?

Check this box if you want to track any changes made to records with the **Data History Log**.

## Data History Log transactions should be kept for \_\_\_\_ days

Choose the number of days that you want ChildPlus to save changes in the **Data History Log**.

## Track changes for selected modules

Check each module in which you want ChildPlus to track changes.

### Attendance Preferences

You can set the following preferences related to the **Attendance** module via **Setup > System Setup > System Preferences > Attendance**:

### Entry Express

When a classroom is set to **Open**, configure the status that you want ChildPlus to automatically assign to participants:

Preference	Use this option to...
Participants who normally participate	<p>Choose the attendance code that you want ChildPlus to automatically assign to participants who normally participate. ChildPlus determines normal participation based on the <b>Participation Days and Meals</b> information stored for each participant in the <b>Enrollment</b> module.</p> <p><b>Tip:</b> You can choose <i>blank</i> if you don't want ChildPlus to automatically assign a status. If you choose the <i>blank</i> option, your users will have to manually set the status of each participant.</p>
Participants who normally do not participate	<p>Choose the attendance code that you want ChildPlus to automatically assign to participants who <i>do not</i> normally participate.</p>
Prior to participant's Entry Date (or if blank)	<p>Choose the attendance code that you want ChildPlus to automatically assign to participants if you take attendance prior to their actual <b>Entry Date</b>.</p>
Default the classroom status to Open	<p>Check this option if you want ChildPlus to always default the <b>Classroom Status</b> to <b>Open</b>.</p>
Default the scheduled meals when child is marked <i>Present</i>	<p>Check this option if you still want ChildPlus to automatically count each participant as having been served a meal or snack (if one is normally served in the classroom). If you want your data entry staff to manually check each meal that is served, leave this box blank.</p>

## Attendance Scanning

Preference	Use this option to...
Attendance Scanning: If a child is not checked in, default his attendance as	Choose the attendance code that you want ChildPlus to automatically assign to participants who <i>are not</i> checked in via <b>Attendance Scanning</b> . For example, if you have a classroom with 10 participant in it and 9 of those participants were checked in using <b>Attendance Scanning</b> on a specific date. This status would apply to the 1 participant who was not checked in that day.
When participants are checked in, mark all of their scheduled meals as served	Automatically mark the participant's meals for the day as being served. You should only choose this option if your agency is <i>not</i> going to use the scanning feature to track meals. If you check this box, the <b>Meals</b> button will not even be available in the <b>Attendance Scanning</b> module.  <b>Tip:</b> If a participant arrived late/left early and was not served a meal, you will need to pull up their attendance record for the day (via <b>Entry Express &gt; Attendance</b> ) and manually remove the meal.
Mark a participant as Tardy if they check in ___ minutes or more after the classroom begin time	Automatically mark a participant as <i>Tardy</i> if they check in ___ minutes after the classroom's <b>Begin Time</b> . If you want to use this option, you'll need to specify the number of minutes you want to wait until a child is marked as <i>Tardy</i> .  The classroom's <b>Begin Time</b> is configurable in ChildPlus via <i>Setup &gt; Agency Configuration &gt; Program Info</i> . <b>Show me.</b>
Mark a participant as Left Early (or Tardy/Left Early if they were also Tardy) if they check out ___ minutes or more before the classroom end time	Automatically mark a participant as <i>Left Early</i> if they check out ___ minutes before the classroom's <b>End Time</b> . If you want to use this option, you'll need to specify the number of minutes before the classroom <b>End Time</b> that you want someone to be marked as <i>Left Early</i> .  The classroom's <b>End Time</b> is configurable in ChildPlus via <i>Setup &gt; Agency Configuration &gt; Program Info</i> . <b>Show me.</b>

## Staff Time Clock

These setting are for the **Staff Time Clock**.

Preference	Use this option to...
Enable Staff Time Clock	Turn on/off access to the <b>Staff Time Clock</b> . Once enabled, your employees will be able to check in and out of ChildPlus either through the Gear menu or by scanning their ID badge via <i>Entry Express &gt; Attendance Scanning</i> .
Employees will...	Specify how you'd like hours for your staff members recorded. They can either: <ul style="list-style-type: none"> <li>• Check in/out through Attendance Scanning or the Gear menu.</li> <li>• Manually enter the number of hour they worked using My Timesheet on the Gear menu.</li> </ul>
Lock time clock records prior to....	If you want to lock time clock record prior to a certain date, enter it here.

## Attendance App

These settings are for the **Attendance App**.

Preference	Use this option to...
Enable Access to Attendance App	Turn on/off access to the <b>Attendance App</b> . In order for the <b>Attendance App</b> to work, you'll need to make sure this box is checked. In addition, who will be accessing the app have access to the ChildPlus Mobile App through <b>User Security Groups</b> ( <i>Setup &gt; Security &gt; User Security Groups</i> ).
Enable the "Parent Check In" feature	If you want to enable the Parent Sign-in mode in the <b>Attendance App</b> . Using Parent Sign-in, parents can check their children in and out daily.
Record the parent's signature when a participant is checked in or checked out	Record the signatures of parents when they drop off/pick up their child.
Mark a participant as Tardy if they check in ___ minutes or more after the classroom begin time	Automatically mark a participant as <i>Tardy</i> if they check in ___ minutes after the classroom's <b>Begin Time</b> . If you want to use this option, you'll need to specify the number of minutes you want to wait until a child is marked as <i>Tardy</i> .  The classroom's <b>Begin Time</b> is configurable in ChildPlus via <i>Setup &gt; Agency Configuration &gt; Program Info</i> . <b>Show me.</b>
Mark a participant as Left Early (or Tardy/Left Early if they were also Tardy) if they check out ___ minutes or more before the	Automatically mark a participant as <i>Left Early</i> if they check out ___ minutes before the classroom's <b>End Time</b> . If you want to use this option, you'll need to specify the number of minutes before the classroom <b>End</b>

Preference	Use this option to...
classroom end time	<b>Time</b> that you want someone to be marked as <i>Left Early</i> .  The classroom's <b>End Time</b> is configurable in ChildPlus via <i>Setup &gt; Agency Configuration &gt; Program Info</i> . <b>Show me.</b>
Only allow meals to be recorded for a participant that is checked in at the time the meal is recorded	Require that children be checked in on the app before you can record a meal for them. If you leave this option unchecked, meals can be recorded on the app for children who are not checked in but who have an Attendance status of <i>Present, Tardy, Left Early</i> or <i>Tardy/Left Early</i> .
When participants are checked in, mark all of their scheduled meals as served	Automatically check all meals for participants when they are checked in. If you check this option, you'll just have to remember to manually uncheck each meal that was not eaten.
Require meals to be counted at the point of service. Do not allow meals to be records more than ___ minutes before the meal begin time or more than ___minutes after the meal end time	Require that meals be counted at the point of service. For example, you can set this option up so that meals are not counted if you attempt to record them 5 minutes before or 5 minutes after the meal's regularly scheduled Begin/End Time.  The classroom's meal <b>Begin/End Time</b> are configurable in ChildPlus via <i>Setup &gt; Agency Configuration &gt; Program Info</i> . <b>Show me.</b>

## ADA

Indicate how the following attendance codes should count regarding ADA and attendance percentages

Preference	Use this option to...
No Class	Choose how you want attendance counts on <i>No Class</i> days to count towards your ADA and attendance percentages.
Not Scheduled	Choose how you want attendance counts on <i>Not Scheduled</i> days to count towards your ADA and attendance percentages.
Best Interest Date	Choose how you want attendance counts on <i>Best Interest Days</i> days to count towards your ADA and attendance percentages.

By default, ChildPlus will count the following attendance codes as either *Present* or *Absent* when calculating ADA and attendance percentages on this report:

<b>Codes that Count as Present</b>
Present
Tardy
Left Early
Tardy/Left Early

<b>Codes that Count as Absent</b>
Absent
Excused
Unexcused

## Locking

The **Lock Attendance Records** preference provides administrators with the ability automatically lock attendance records on a certain day of the week or month, after a certain number of days or prior to a specific date. This preference was designed to prevent attendance records from being modified AFTER you've already submitted your CACFP reimbursement counts. To use this preference, check **Lock Attendance Records** and choose one of the following options:

### **AUTOMATICALLY ON EVERY \_\_\_\_\_, LOCK THE PREVIOUS WEEK'S ATTENDANCE RECORDS**

Use this option if you close out your attendance on a specific day each week. For example, if you choose Tuesday, then on Tuesday of each week the previous week's records will be locked.

### **AUTOMATICALLY ON THIS DAY OF EVERY MONTH: \_\_\_\_\_ LOCK THE PREVIOUS MONTH'S ATTENDANCE RECORDS**

Use this option if you close out your attendance on a specific day of each month. If you set this option to 10, then on the 10th day of each month, ChildPlus will lock your previous month's attendance records. For example, on November 10th, ChildPlus will lock all of the attendance records for October.

### **AUTOMATICALLY LOCK ATTENDANCE RECORDS THAT ARE MORE THAN \_\_\_\_\_ DAYS OLD**

Use this option if you want to lock attendance records that are more than a certain number of days old. For example, if you lock records that are more than 30 days old then users will only be able to add and edit records for dates within the last 30 days.

### **PRIOR TO A SPECIFIC DATE: \_\_\_\_\_**

Use this option if you want to lock attendance records prior to a specific date. For example, if you choose April 30, 2020 then users will not be able to add or edit attendance for any date prior to April 30, 2020.

## Migrant Preferences

You can set the following preferences specifically designed for migrant and seasonal programs via **Setup > System Setup > System Preferences > Migrant**).

## Track Agricultural Income

This option lets users indicate whether a source of income is from agricultural work. If you activate it, ChildPlus will add an **Ag** income choice to the **Family Income** section of the **Application module**. Users can



then choose whether a source of income is agricultural. If it is, ChildPlus will count it in the Agricultural income totals. This field will also be available when you add a new family to ChildPlus.

**Family Income**

Income Verified By: Abram, Yolonda [View Head Start Program Definition of Income](#)

Verification Date: 7/28/14

TANF Status <sup>PIR</sup>: No

SSI <sup>PIR</sup>: No

Income Sources

Family Member	Amount	Per	Annual Amt.	Description	Verification	Note	Ag	Agricultural Activity
Haywood M B...	\$11,628.00	Yearly	\$11,628.00	Eligibility income	SSI Document...	2013 income		
Charolette E B...	\$8,692.00	Yearly	\$8,692.00	broken down into Agricultural and Non-Agricultural categories.	Income Tax F...	2013 income	Yes	Appl...
	\$0.00		\$0.00					
	\$0.00		\$0.00					
	\$0.00		\$0.00					
Total Eligibility Income:			\$20,320.00	Agricultural: \$8,692.00 (43%)	Non-Agricultural: \$11,628.00 (57%)			

*Callouts:*  
 - "Choose Yes if the income is from agricultural work."  
 - "If you are tracking agricultural activities, choose the activity associated with the income source."  
 - "Eligibility income broken down into Agricultural and Non-Agricultural categories."  
 - "Add another income verification" (link)

In addition, ChildPlus will also display the family's **Agricultural Income** in the **Eligibility** section of the **Enrollment** module.

**Eligibility**

Application Date: 9/25/14

Application Status: Complete & Verified

Application Number: 92928GA

Participation Year <sup>PIR</sup>: 1

Eligibility Date: 6/3/14

Number in Family: 6

Eligibility Income: \$8,503.00 (27% of Poverty Level)

Income Status <sup>PIR</sup>: Income below 100%

**Ag Income: \$5,732.00 (67% of Eligibility Income)**

Initial M/S Status: Newly Enrolled

M/S Eligibility: Migrant



**Attention ChildPlus Administrators:** If you have users who only work with non-migrant programs (for example, Head Start or Early Head Start), you can either have your non-migrant users leave the **AG** income choice blank or you can disable their security privileges to this field through **User Security Groups**.

## Track Agricultural Activities

Check this **option** if you want to track the primary crop and activity performed along with the each income source for a family. When this option is checked, ChildPlus adds an **Agricultural Activity** column to the **Family Income** section of the **Family Application**.

ram, Yolonda

8/14

[View Head Start Program Definition of Income](#)

Choose the crop and activity associated with this income source.

Amount	Per	Annual Amt.	Description	Verification	Note	Ag	Agricultural Activity
11,628.00	Yearly	\$11,628.00	SSI Document...	2013 income			
8,692.00	Yearly	\$8,692.00	Income Tax F...	2013 income		Yes	Appl...
0.00		\$0.00					
0.00		\$0.00					
0.00		\$0.00					

20.00 Agricultural: \$8,692.00 (43%) Non-Agricultural: \$11,628.00 (57%) [Add another income verification](#) [Help](#)

## Track Migrant and Seasonal Eligibility

This option lets users indicate whether a participant's eligibility is migrant or seasonal. If you activate it, ChildPlus will add a M/S Eligibility field to the **Eligibility** section of the **Enrollment** module. This field will also be available when you add a new family to ChildPlus.

▼ Eligibility

Application Date	9/25/14	Eligibility Date	6/3/14
Application Status	Complete & Verified	Number in Family	6
Application Number	92928GA	Eligibility Income	\$8,503.00
Participation Year <sup>PIR</sup>	1	Income Status <sup>PIR</sup>	27% of Poverty Level
Ag Income	\$5,732.00		Income below 100%
Initial M/S Status	Newly Enrolled		
M/S Eligibility	Migrant		

## Track Migrant and Seasonal Initial Enrollment Status

This option lets users indicate whether a participant's initial enrollment status was newly enrolled or re-enrolled. ChildPlus uses this information so it knows how to report this participant for the first month of their enrollment. If you activate it, ChildPlus will add an **Initial M/S Enrollment Status** field to the **Eligibility** section of the **Enrollment** module. This field will also be available when you add a new family to ChildPlus.

▼ Eligibility

Application Date	9/25/14	Eligibility Date	6/3/14
Application Status	Complete & Verified	Number in Family	6
Application Number	92928GA	Eligibility Income	\$8,503.00 27% of Poverty Level
Participation Year <sup>PIR</sup>	1	Income Status <sup>PIR</sup>	Income below 100%
Ag Income	\$5,732.00	67% of Eligibility Income	
Initial M/S Status	Newly Enrolled		
M/S Eligibility	Migrant		

## Record previous addresses at the time the application is added

This option lets users record previous addresses where the family lived while adding an application.

Started Living At	Living Address	Address Line 2	Zip	City	State
8/1/14	394 W Oaks Trail		30188	Woodstock	GA

Living Address Notes

Previous Addresses

Living / M...	Begin	End	Address	City
Click here to add a previous address				
Both	8/2/13	8/1/14	293 Lake Forest Dr	Acworth
Both	12/31/12	8/1/13	501 Granville	Atlanta

When adding a new application for a family, you can record their previous addresses here.

## Show the Migrant and Seasonal Enrollment Report

Check this preference if you want users to be able to access the **2280 - Migrant and Seasonal Enrollment Report** in ChildPlus. The **Migrant and Seasonal Enrollment Report** lets you track your migrant and seasonal enrollment. You can use this report to submit your monthly enrollment information to the HSES.

## Calculation Options for the Migrant and Seasonal Enrollment Report

Choose one of the following options so ChildPlus knows how to you want calculate this report:

Preference	Check this option if you want ChildPlus to...
Only count participants who were enrolled on the last day that services were provided for the reporting month	Choose this option if you want ChildPlus to include participants who were enrolled for at least 1 day during the month for which the report is being run. For example, if the <b>Last Day of Services Provided</b> is 10/25/20, then the report will count any participant who was enrolled for at least one day between 10/1/20 and 10/25/20.
Count participants who were enrolled for at least one day during the reporting month	Check this option if you want ChildPlus to count any participant who was enrolled for one day during the reporting month. If you choose this option, 2280 will count every participant who was enrolled on the date you enter in the <b>Last day of services provided</b> field, regardless of whether the participant is still enrolled.

## Examples of the Migrant and Seasonal Enrollment Report

Migrant and Seasonal Enrollment Report			
First Month of Budget:		July	
Last day of services provided:		7/31/2014 12:00:	
	Current M/S Enrollment Status	Migrant	Seasonal
Newly Enrolled:	6	4	2
Re-Enrolled:	0	0	0
Continued Enrollment	0	0	0
<b>Total:</b>	6	4	2

In addition to totals, you can also use the detailed version of this report to verify your enrollment counts. This report lets you view each of your participants, their **Current M/S Enrollment Status**, **Initial M/S Enrollment Status** and whether they are **Migrant or Seasonal**.

11/3/2014 2:59 PM		<b>2280 - Migrant and Seasonal Enrollment Report</b> Program Term: Migrant Head Start 2014		Page 2 of 2 admin	
<b>Faith House Center</b>					
Name		Current M/S Enrollment Status	Initial M/S Enrollment Status	Migrant or Seasonal	
<a href="#">Benito, Eduardo</a>		Newly Enrolled	Re-Enrolled	Seasonal	
<a href="#">Benito, Enrico</a>		Newly Enrolled	Re-Enrolled	Seasonal	
<a href="#">Evan, Ben</a>		Newly Enrolled	Newly Enrolled	Migrant	
<a href="#">Goodnight, Alex</a>		Newly Enrolled	Newly Enrolled	Migrant	
<a href="#">Spitler, Lila</a>		Newly Enrolled	Newly Enrolled	Migrant	
<a href="#">Stoltz, Gaylord</a>		Newly Enrolled	Newly Enrolled	Migrant	
Faith House Center	(6 Participants)	Newly: 6	Newly: 4	Migrant: 4	
		Re-Enrolled: 0	Re-Enrolled: 2	Seasonal: 2	
		Continued: 0	<blank>: 0	<blank>: 0	
		Cannot be Determined: 0			
Little Beginnings Childca	(6 Participants)	Newly: 6	Newly: 4	Migrant: 4	
		Re-Enrolled: 0	Re-Enrolled: 2	Seasonal: 2	
		Continued: 0	<blank>: 0	<blank>: 0	
		Cannot be Determined: 0			

### In-Kind Preferences

The **Lock in-kind transactions** preference helps prevent your in-kind totals from changing after you've already submitted them. Check this preference if you want to automatically lock in-kind records on a certain day of the week or month, after a certain number of days or prior to a specific date. You can learn about all of the different locking options below:

Preference	Choose this option if you want ChildPlus to...
Automatically on this date of every month	Close out your in-kind transactions by a specific day of each month. If you choose the <i>10th</i> , then on the 10th of each month ChildPlus will automatically lock the previous month's transactions. For example, on April 10th ChildPlus will lock March's in-kind transactions.
Automatically lock in-kind transactions that are more than ___ days old.	Automatically lock in-kind transactions that are more than a certain number of days old. For example, if you choose <i>30</i> days then your users will only be able to edit transactions that have a date within the last 30 days.
Prior to a specific date	Automatically lock in-kind transactions that occur before a certain date. For example, if you choose <i>June 1st</i> , then transactions prior to June 1st will not be editable. In addition, you'll only be able to add new transactions that have a transaction date that is on or after June 1st.




You can set preferences related to the **In-Kind** module via **Setup > System Setup > System Preferences > In-Kind**).

### Notes Preferences

You can set the following preferences for note fields via **Setup > System Setup > System Preferences > Notes**).

You can use this tab to configure preferences for **Custom Date/Time/User Stamps** and **Quick Notes**.

### Note Fields - Date/Time/User Stamp Options

Check each stamp option that you want included when a user with **append-only access** clicks on the  button to add a time stamp in a **Notes** box. For example, if you check Date, Time, User's Initials then the stamp will look like: *11/10/20 12:06 JFK*. If you choose Date, Time, User's Name (First Last), and User's Title then the stamp will look like *11/10/20 12:07 Jane Doe Head Start Director*.

### Note Fields- Quick Notes Setup

This feature allows you to quickly enter notes by creating your own shorthand for the words and phrases you type most often. **Quick Notes** will automatically convert your shorthand into the full words or phrases. For example, if you frequently type *My next home visit is scheduled for...* you can make its Shorthand Note abbreviation *NHV*. Then, whenever you type *NHV* in a **Notes** box, ChildPlus will instantly convert it to *My next home visit is scheduled for...*

1. Click on the **Notes** tab.
2. Click in the **When I type...** column and type a shorthand abbreviation.
3. Press the **Tab** key on your keyboard.
4. Type the text that you want ChildPlus to convert your shorthand to in the **Change it to...** column.
5. Repeat steps 4 - 6 for each shorthand note you want to create.
6. Click **Save**.

## State Specific System Preferences

Users located in the state of **California** can use this tab to configure preferences that specific to their state.

### CD- , 7617, 801A, 9400, 9600

## Enabling Fee Tracking in ChildPlus

There are two things that you must do before you can begin using the **Fees** module in ChildPlus. First, you'll need to enable fee tracking for your entire ChildPlus system. Once you've enabled global fee tracking in ChildPlus, you will also need to enable fee tracking for each program term that you want to use with the **Fees** module.

### ENABLE FEE TRACKING IN CHILDPLUS

Follow these steps to **Enable Fee Tracking** in ChildPlus:

1. Click on **Setup > System Setup > System Preferences**.
2. Click on the **Fees** tab.
3. Click **Enable Fee Tracking**.



**Tip:** Once you **Enable Fee Tracking** in ChildPlus, you'll also need to set up each program term that you want to use with the **Fees** module.

### ENABLE FEE TRACKING FOR PROGRAM TERMS

Follow these steps to **Enable Fee Tracking** for your program terms in ChildPlus:

1. Click **Setup > Agency Configuration > Program Info**.
2. Select the program term that you want to enable.
3. Click on the **Fees** tab.
4. Click **Enable Fee Tracking**.
5. Click **Automatically set up billing for children added to this program term** if you want ChildPlus to automatically activate billing for any participant who has a participation record added for this program term.
6. Choose which participants are billed by selecting one of the following:

Option	Description
Charge participants a normal amount each billing period, regardless of attendance	Choose this option if you want to charge your participant a set amount each billing period. If you choose this option, all participants will be charged the same amount, regardless of how many days they actually attended the program.
Charge participant a daily rate based on their attendance	<p>Choose this option if you want to charge your participant a daily rate that is based on how many days they actually attended your program. For example, if you charge a participant \$8.00 per day and they attended for 10 days during a billing period, then they would be billed \$180.00.</p> <p>If you choose this option you can also choose to <b>Only charge participants for each day their attendance code is</b> set to a specific status. If you choose to charge based on attendance code, select each attendance code that participants should be billed for. Participants will be charged the daily rate for each day during the billing period that their attendance code is equal to one you select here.</p>

7. Click **Save**.



**Tip:** Click **Set all existing participants to these values** only if you want ChildPlus to automatically populate the **Participant is billed** and the **Normal Fee Amount/Amount to Charge Per Day** fields on the **Services > Fees** screen with the default values that you set up for the program term.



**Caution:** Proceed with caution if you have already populated the **Participant is Billed** and the **Normal Fee Amount/Amount to Charge Per Day** fields for participants in this program term. Once you set all existing participants to the defaults for the program term, ChildPlus will overwrite any existing data .

## ZIP Code

The **ZIP Code Lookup** feature can help make your data entry more efficient and accurate. **ZIP Code Lookup** lets administrators configure the city, state, and county associated with each ZIP code in your area. Then, during data entry, whenever someone enters a ZIP code, ChildPlus will automatically fill in the city, state and county for them.



## Setting Up the ZIP Code Configuration in ChildPlus

Before you can start using this feature, your agency's ChildPlus Administrator will need to set up a master list of ZIP codes. To do this:

1. Click **Setup > System Setup > ZIP Code Configuration**.
2. Add a new row by choosing **Click here to add a new row**.
3. Type a ZIP Code.
4. Type the city, state, and/or county you want to associate with the ZIP code.



If the same ZIP code covers two different cities or counties, be sure to create an entry for both. For example, if ZIP code 30080 is for either Atlanta, GA or Smyrna, GA then you will need to add 30080 on two separate rows. During data entry, if a user enters a ZIP code with more than one city or county associated with it, ChildPlus will display a popup with a list of choices so they can easily select the correct ZIP.

## Using the ZIP Code Lookup While Entering Data

Once your ChildPlus Administrator has performed your **Zip Code Configuration**, you can instantly begin using it the **ZIP Code Lookup** with data entry. In fact, you don't even have to do anything special to start using it. Just type a ZIP code in a ZIP field just like you normally would. Once you type a ZIP code, ChildPlus will automatically enter the city, state, and county that is associated with the ZIP code you entered. Does your area have more than one ZIP code? If you enter a ZIP code that is associated with more than one city or county in your area, ChildPlus will display a pop up that lets you quickly select the correct ZIP from a list. If you enter a ZIP that has not been set up to use with the **ZIP Code Lookup**, you can still manually type the information.

## Turning off the ZIP Code Lookup

Don't want to use the Zip Code Lookup? To turn it off:

1. Click **Setup > System Setup > ZIP Code Configuration**.

- Uncheck the **Turn on Zip Code Lookup** box.

### Zip Code Configuration

Turn on ZIP Code Lookup

ZIP code lookup allows ChildPlus.net to automatically fill in the city, state and ZIP code. This screen allows you to maintain the listing of ZIP codes and the Add all the ZIP codes in your area to make it quick and easy for data entry. If a ZIP code is in more than one city and/or county, create a separate row below for a ZIP code that has more than one city or county associated with it, they will be the correct city or county. If the user enters a ZIP code that is not in the list, they will have to enter the city or county manually.

[Click here for the United States Postal Service ZIP code lookup](#)

ZIP Code ▲	City	State	County
<a href="#">Click here to add a new row</a>			
30005	Alpharetta	GA	Ful
30009	Alpharetta	GA	Ful
30030	Decatur	GA	DEK
30038	Lithonia	GA	Dek
30041	Cumming	GA	
30044	Lawrenceville	GA	Gwi
30075	Roswell	GA	Ful

[Delete Selected Row](#)

Editing or deleting a ZIP Code record in the table above will not affect existing

## Online Applications

**Online Applications** give parents the flexibility of applying from anywhere! All they'll need is a tablet or computer with Internet access. Included for free with your ChildPlus subscription, Online Applications will help you increase recruitment and save valuable data entry time. With Online Applications:

- Parents can apply for your programs from any Internet connected computer or tablet, making your recruitment process easier.
- Parents can apply in either English or Spanish.
- Just add a simple link (that we provide you) to your agency's website or social media outlets and ChildPlus handles the rest.
- Online applications entered by parents are instantly saved directly in your ChildPlus database, eliminating the data entry burden.
- Easily customize your online application by selecting data elements, colors and logos to appear on your

application website.

- We've set up a complete process for handling online applications within ChildPlus.



Online Applications are just another way to add applications to your system. Nothing will change about the way that you currently enter applications in ChildPlus. You'll still be able to add applications by clicking **Add New Family**. You'll also be able to disable Online Applications until you are ready to implement them.

*\* this feature is only available to ChildPlus Hosted Users.*

## Online Applications from Parent's Perspective

Parents will not be filling out applications in ChildPlus. Instead, they will be filling out applications on a web page that you can completely customize for your agency. When parents fill out an Online Application, we'll automatically save the data they enter into ChildPlus for you. Here's an example of what the Online Application will look like to parents:

The screenshot shows a web browser window with the following content:

- Browser address bar: <https://www.childplus.net/en-us/12345789101112131415161718192021>
- Browser title: Online Application
- Page header: **ABC Head Start**
- Text: Welcome to ABC Head Start. Please complete our application. Someone from our agency will contact you soon.
- Section title: **Address**
- Form fields:
  - Living Address:
  - Address Line 2:
  - City:
  - State:

## Deploying Online Applications

Once you complete the **Online Application Setup**, parents can start applying to your programs online. In order for parents to access your Online Application though, you'll need to provide them with a link to the unique Website Address for your **Online Application**. You can find this Website Address on the **General** tab of the **Online Application Setup** screen.

Online Application Setup

Agency: Online App Enabled

Little Beginnings Childcare	<input checked="" type="checkbox"/>
New Hope Childcare Center	<input type="checkbox"/>
Peach State Child Development Prog	<input type="checkbox"/>
Wee Care Childcare	<input type="checkbox"/>

General | Program Terms & Locations | Child (Applicant) | Address | Primary Adult | Secondary Adult | Family | Email Confirmation

▼ Little Beginnings Childcare

Enable online application for this agency

Website Address: (Call this URL from your existing website)

<https://www.childplus.net/en-us/123456789101112131415161718192021222324252627282930>

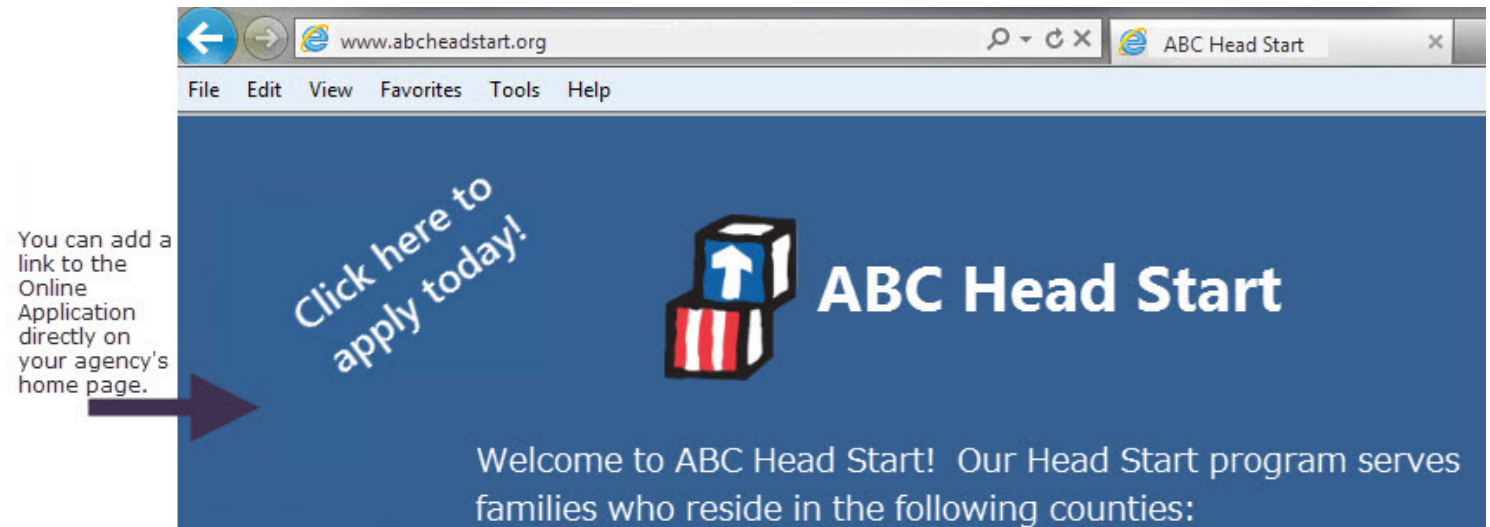
This is a sample URL. Your actual URL will be unique to your agency. If you have more than one agency set up in ChildPlus, we'll provide you with a separate URL for each agency.

Copy

### Linking Parents to Your Online Application

It's up to you how you link parents to your **Online Application**. You can either add the link your website or distribute it to parents via email. Whichever method you choose, this unique Website Address belongs to you. It will never change and always be available exclusively to your organization.

Your agency's home page is a great place to make sure parents see the link. For example:



### Spanish Applications

You'll have the option of making the **Online Application** available in Spanish as well as English. If you decide to allow parents to input applications in Spanish, we'll provide you with a separate Website Address that you can use to **deploy** your **Spanish Online Application**.

Agency	Online App Enabled
Little Beginnings Childcare	Yes
New Hope Childcare Center	
Peach State Child Development Prog	
Wee Care Childcare	Yes

General	Program Terms & Locations	Primary Adult	Address	Secondary Adult	Family	Child (Applicant)	Email Confirmation
---------	---------------------------	---------------	---------	-----------------	--------	-------------------	--------------------

Spanish

Enable Spanish version of online application

Website Address - Spanish:  
<http://ds1.childplus.local/ChildPlus.net/apply/es/64E24815E698A7088A2795D8802F768A/78DB83829FFEDB38302DEA5A6A8...> Copy

Introductory Instructions - Spanish - Optional Tip – You can type either plain text or HTML code in the boxes below.

You can use this field to enter general instructions for the parent on how to fill out the online application. These instructions will appear at the top of the application.

Final Instructions - Spanish - Optional

You can use this field to enter final instructions and a thank you message for the parent that will appear at the bottom of the application. For example, "Gracias por su interés en el programa de Head Start. Por favor haz Click en 'Submit' para entregar su aplicación. Le contactaremos para hacer una cita de entrega."

Display the following message if a user visits the above link when the Spanish application is not enabled

La solicitud en línea no está disponible.

## Custom Dropdown Choices

We've already translated all of the fields and **Dropdown Choices** (formerly known as **Validation Codes**) that come with ChildPlus into Spanish for you. If you decide to allow parents to complete applications in Spanish, however, you'll need to make sure that you've translated all of the custom **Dropdown Choices** that you've added to your system.

You can modify **Dropdown Choices** in ChildPlus via **Setup > System Setup > Customize Dropdown Choices**. Use the **Description - Spanish** field to translate each of your custom **Dropdown Choices**. Check the back of this guide for a list of all the possible fields that you may need to translate.

Services   Status Center   Entry Express   Management   Reports

Security ▾ Agency Configuration ▾ Module Setup ▾ System Setup ▾ Database Utilities ▾ Data Utili

## Customize Dropdown Choices (Validation Codes)

Select the Dropdown Choices (Validation Code) Type you would like to modify

Income Source (Family Application) ▾

### Choices

Code	Description	Editable
PEN	Pension	No
SS	Social Security	No
SSI	SSI	No
CS	Child Support	Yes
GF	Gift	Yes
INH	Inheritance	Yes
FAM	Extended	Yes

**You'll be able to add Spanish translations here.**

[Add a Choice](#)   [Delete a Choice](#)

Code: GF   Description: Gift    Active

Description - Spanish: Regalo

### Previewing Online Applications

As you are designing your **Online Application**, you can preview what it looks like at any time by saving your changes and then clicking the website address on the **Online Application Setup** screen:

## Online Application Setup

🗨️ Tips
↶ ↷

Agency	Online App Enabled
Little Beginnings Childcare	Yes
New Hope Childcare Center	
Peach State Child Development Prog	
Wee Care Childcare	Yes

General | Program Terms & Locations | Primary Adult | Address | Secondary Adult | Family | Child (Applicant) | Email Confirmation


### Little Beginnings Childcare

Enable online application for this agency

Website Address: (Call this URL from your existing website)

<https://www.childplus.net/en-us/123456789101112131415161718192021222324252627282930> Copy

Show a logo at the top of the online application:


ABC Head Start

[Pick a different Logo](#)
[Delete Logo](#)

Website Section Header Font Color ■ Use these color settings to make the online application match your existing website.

Click on the website address to preview your Online Application at any time.

## Finding Online Applications in ChildPlus

Once a parent submits an Online Application, we'll automatically assign its application status to *New Online Application*. Prior to deploying Online Applications, you may want to establish a process for how your agency will handle applications with this new status. One idea is to have one staff member at your agency checking for new applications using the **My Participants List**. To make this easy to do, we've added the ability for you to filter **My Participant List** results based on application status:

### Select Which Participants to Include

General Custom Filters (0)

Program Term  All

- < No Program Term >
- Migrant Head Start 2016
- Head Start 2015-2016
- After School 2015-2016
- Early Head Start 2015-2016
- GA State Pre-K 2015-2016

Agencies  All

- < No Agency >
- Little Beginnings Childcare
- New Hope Childcare
- Peach State Child Dev
- Wee Care Childcare

Sites  All

- Little Beginnings Childcare
- < No Site >
- Administration Office
- Faith House Center
- Happy Hearts Center
- Moving Up Center
- North Springs Center

Classrooms  All

- Little Beginnings Childcare
- Little Beginnings Childcare - < No Site >
- < No Classroom >
- Administration Office
- < No Classroom >
- Faith House Center
- < No Classroom >
- After School
- Classroom D

Status  All

- New
- Waitlisted
- Accepted
- Enrolled
- Dropped
- Drop/Wait
- Drop/Accept
- Completed
- Abandoned

Filter by Application Status

- < None >
- Complete & Verified
- Incomplete
- Incomplete, Info. not returned
- New Online Application
- Other - Specify in Comments

Filter by Group

- Active Military
- Athabaskan
- Parent Committee
- Policy Council
- Pregnant Mothers

Clear All Find Cancel

Another idea is to designate either one or more staff members for ChildPlus to email whenever a new Online Application is submitted (this setting is available on the **Email Confirmation** tab. There is also a setting on the **Program Terms and Locations** tab that emails you whenever an application is submitted for a specific site.



Services To-Do List Entry Express Management Dashboard Reports Setup Enter Report #

Security Agency Configuration Module Setup System Setup Database Utilities Data Utilities Initial Setup

## Online Application Setup

Agency Online App Enabled

Little Beginnings Childcare Yes

New Hope Childcare Center

Peach State Child Development Prog

Wee Care Childcare

General Program Terms & Locations Primary Adult Address Secondary Adult Family Child (Applicant) Email Confirmation

Send a confirmation email to the primary adult after they submit the application

Subject - English Your application has been submitted

Subject - Spanish

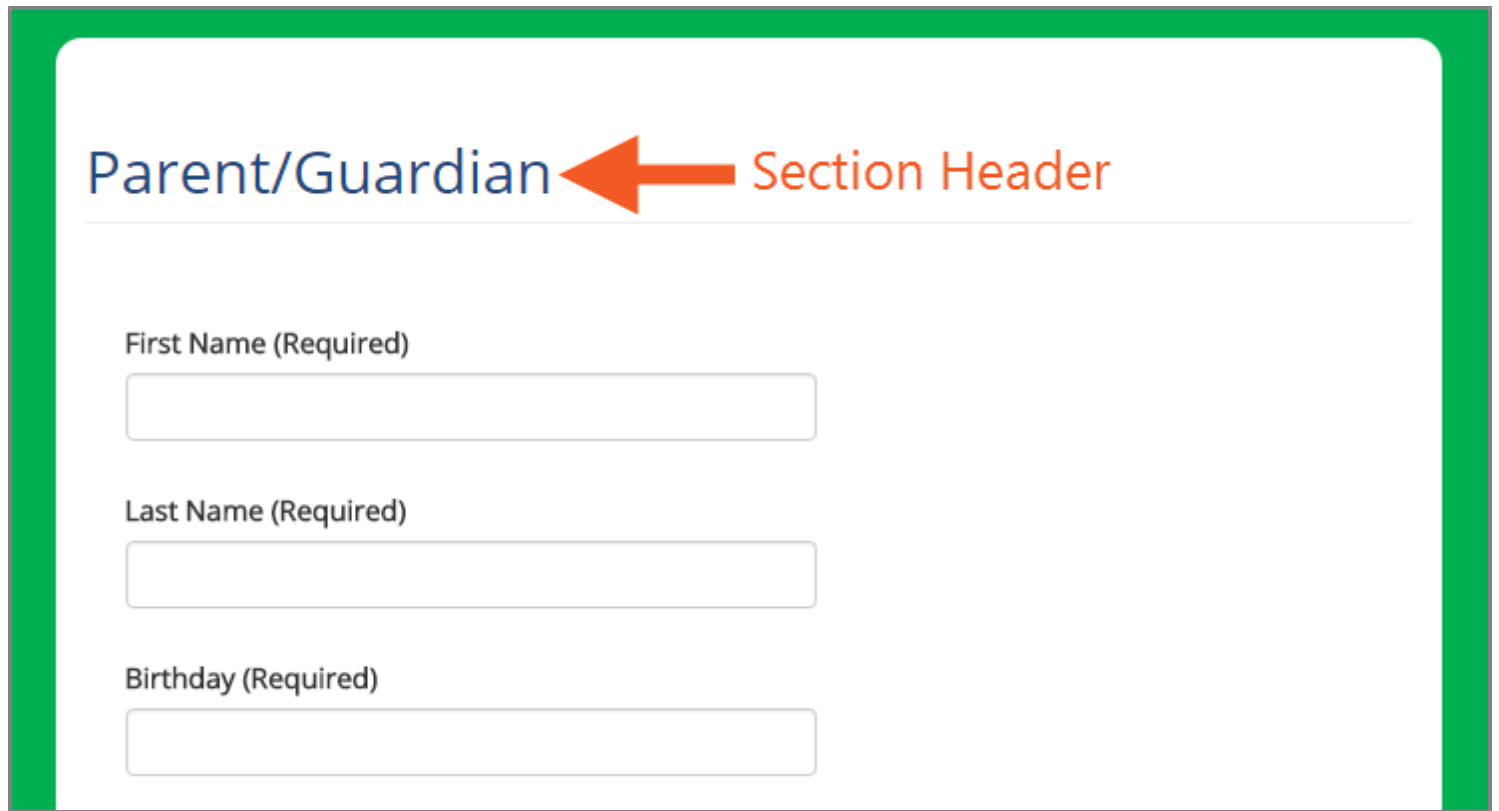
Body - English Thank you for submitting your application. Someone will contact you in the next 5 business days.

Body - Spanish

### Online Application Color Settings

You can use the following color settings to match your Online Application to your existing website. You can access these settings via **Setup > Module Setup > Online Application**.

Website Section Header Font Color



Parent/Guardian ← Section Header

---

First Name (Required)

Last Name (Required)

Birthday (Required)

## Website Background Color

Parent/Guardian

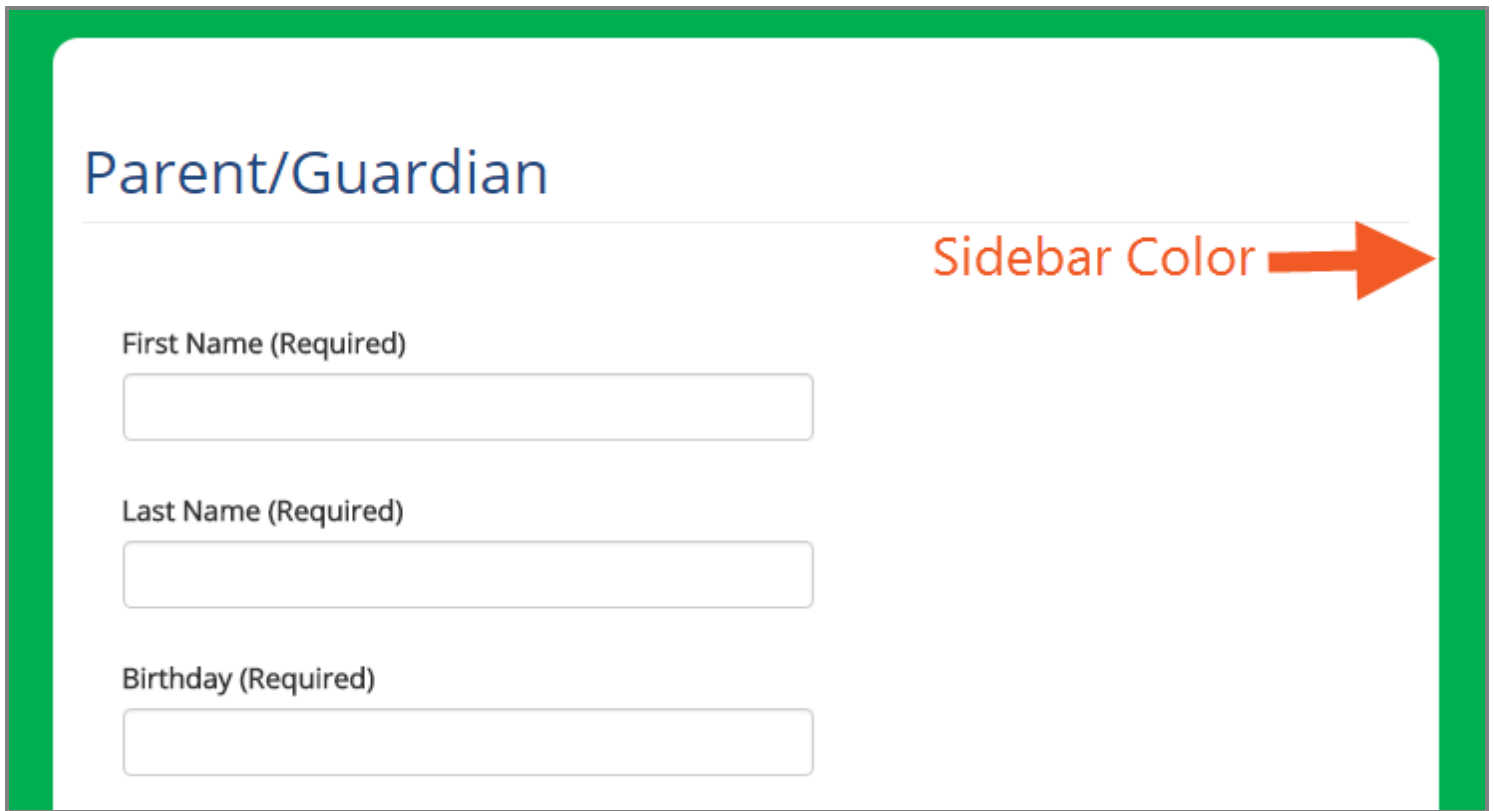
First Name (Required)

Last Name (Required)

Birthday (Required)

This Online Application has a Grey Background Color

## Website Sidebar Color




The image shows a screenshot of a web application interface. On the left, there is a vertical green sidebar. The main content area has a white background with rounded corners. At the top of the main area, the text "Parent/Guardian" is displayed in a blue font. Below this text, there are three input fields, each with a label above it: "First Name (Required)", "Last Name (Required)", and "Birthday (Required)". To the right of the input fields, the text "Sidebar Color" is written in orange, with a large orange arrow pointing from the text towards the green sidebar.

## Online Application Setup

Ready to start using Online Applications? First you'll need to set up Online Applications in your ChildPlus system. To access the **Online Application Setup**:

1. Click **Setup > Module Setup > Online Application**.

2. Select the agency whose **Online Application** you want to set up (this step is only necessary if you have more than one agency set up in ChildPlus).

Online Application Setup Tips 

Agency	Online App Enabled
Little Beginnings Childcare	Yes
New Hope Childcare Center	
Peach State Child Development Program	
Wee Care Childcare	

**Select the agency you want to set up.**

General | Program Terms & Locations | Primary Adult | Address | Secondary Address

**Little Beginnings Childcare**

Enable online application for this agency


3. Complete the **Online Application Setup** using the following information as a guide:

### General Options for the Online Application

Use the following table to set up the options available on the **General** tab of your Online Application. These options include what the Online Application will look like to parents and whether it's available in English, Spanish or both.



If you have more than one agency set up in ChildPlus, make sure that you've selected the agency that you want to work with before proceeding.

Online Application Setup Tips 

Agency	Online App Enabled
Little Beginnings Childcare	Yes
New Hope Childcare Center	
Peach State Child Development Program	
Wee Care Childcare	

**Select the agency you want to set up.**

General | Program Terms & Locations | Primary Adult | Address | Secondary Address

**Little Beginnings Childcare**

Enable online application for this agency

Option	Description
Enable online application for this agency	Check this box if you want the Online Application to be available for the selected agency. If the Online Application is not enabled, you can specify what message you'd like parents to see when they try to access it in the <b>Display the following message if a user visits the above link when online application is not enabled</b> field.
Website Address	This is the URL or web address that you'll use to link parents to your Online Application. This URL is unique for your agency. To make it easy to access the complete the URL, we've added the ability for you to copy it directly on the screen. Once you copy it, you can paste it into an email or use it to link parents from your website or social media.
Show a logo at the top of the online application	Check this box if you want to display your agency's logo or a picture at the top of the Online Application.  <b>Add a Logo</b> adds the logo you want to display at the top of your Online Application.  <b>Pick a Different Logo</b> lets you change the logo that displays.
Website Section Header Font Color	Choose the color that you want to use for the <b>section headings</b> in your Online Application. You can click the <b>Preview</b> button at anytime to see what the section header looks like in your Online Application. See (see page 129) for more information.
Website Background Color	Choose the background color that you want to display in the <b>background</b> of your Online Application. You can click the <b>Preview</b> button at anytime to see what the background color looks like in your Online Application. See page 129 for more information.
Website Sidebar Color	Choose the color that you want use for the <b>sidebar</b> in your Online Application. You can click the <b>Preview</b> button at anytime to see what the website sidebar color looks like in your Online Application. See page 129 for more information.
Take the user to this URL after they submit their application	You can use this field to specify the <b>webpage</b>

Option	Description
	that will display once a parent submits an application. For example, you could send them to your agency's home page or a specific page on your website. By default, we provide you with a URL that points to a <b>webpage</b> that confirms the online application has been submitted.
Introductory Instructions * <i>* this field is optional</i>	Use this field to enter general instructions for the parent that explain how to complete an Online Application. Any text that you enter into this field will display at the top of the Online Application. You can either enter plain text or HTML code in this field.
Final Instructions * <i>* this field is optional</i>	Use this field to enter final instructions and/or a thank you message for parents. Any text that you enter into this field will display at the bottom of the Online Application. You can either enter plain text or HTML code in this field.
Display the following message if a user visits the above link when the online application is not enabled	Use this field to specify the message that you want to display on the screen if a parent visits the Online Application and it's not enabled.

## SPANISH ONLINE APPLICATION OPTIONS

Complete the following options if you'd like to make the Online Application available in Spanish as well. These options are all available on the **General** tab.

Option	Description
Enable Spanish version of online application	Check this box if you want the Online Application to be available in Spanish for the selected agency.
Website Address - Spanish	This is the URL that you'll use to link parents to your Online Application. This URL is unique for your agency. To make it easy to access the complete the URL, we've added the ability for you to copy it directly on the screen. Once you copy it, you can paste it into an email or link to it from a webpage.
Introductory Instructions - Spanish* <i>* this field is optional</i>	Use this field to enter general instructions in Spanish that explain how to complete the Online Application. Any text that you enter into this field will display at the top of the Online Application. You can either enter plain text or HTML code in this field.

Option	Description
Final Instructions - Spanish* <i>* this field is optional</i>	Use this field to enter final instructions and/or a thank you message for parents in Spanish. Any text that you enter into this field will display at the bottom of the Online Application. You can either enter plain text or HTML code in this field.
Display the following message if a user visits the above link when the Spanish online application is not enabled	Use this field to enter the message in Spanish that you want to display on the screen if a parent visits the Online Application and it's not enabled.

### Setting up Program Terms & Locations

Use the following table to set up the **Program Terms & Locations** options for your Online Application. These options, available on the **Program Terms & Locations** tab, include which program terms parents can add applications for, the dates that you accept applications, location and site information.

Security ▾ Agency Configuration ▾ Module Setup ▾ System Setup ▾ Database Utilities ▾ Data Utilities ▾ In

Agency	Online App Enabled
Little Beginnings Childcare	Yes
New Hope Childcare Center	
Peach State Child Development Prog	
Wee Care Childcare	Yes

General	Program Terms & Locations	Primary Adult	Address	Secondary Adult	Family	Child (A
Program Term	Families Can Apply Online	Application Period		Par		
Migrant Head Start 2016	Yes	2/2/2016 - 10/31/2016				
Head Start 2015-2016	Yes	2/2/2015 - 7/31/2016				
After School 2015-2016		2/2/2016 - 7/31/2016				
Early Head Start 2015-2016		2/2/2016 - 7/31/2016				
GA State Pre-K 2015-2016		2/2/2016 - 7/31/2016				
Migrant Head Start 2015						

**Migrant Head Start 2016 Options**

Allow families to apply online for this program term

Accept applications between  and  Program Term begins o





Before proceeding, make sure you have selected the program term that you want to work with.

## Online Application Setup

Tips



Agency	▲ Online App Enabled
Little Beginnings Childcare	Yes
New Hope Childcare Center	
Peach State Child Development Prog	
Wee Care Childcare	

General	Program Terms & Locations	Print	Secondary Adult	Family
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Program Term	Families Can Apply Online	Application Period
Migrant Head Start 2016		2/2/2016 - 10/31/2016
Head Start 2015-2016	Yes	2/2/2015 - 7/31/2016
After School 2015-2016		2/2/2016 - 7/31/2016
Early Head Start 2015-2016		2/2/2016 - 7/31/2016

Make sure you select the program term you want to work with.

Option	Description
Allow families to apply online for this program term	Check this box if you want families to be able to apply online for the selected program term.
Accept applications between	Specify the date range when parents can apply online.
Parent Friendly Name for this Program Term	Type in a Parent Friendly name for the Program Term. For example, <i>Head Start Program</i> .
Parent Friendly Description	Type in a Parent Friendly description for the Program Term. For example, <i>Free Preschool for Children Ages 3-5</i> .
Allow families to specify location preferences	Check this box if you'd like to give families the choice of which site location they want to apply for. Locations will be listed on a map so parents can see their proximity to their actual location. Before you deploy your Online Application for this program term, you should <b>preview</b> your Online Application to verify that each site displays accurately on the map. If it does not, make sure you are using a proper post office deliver address. You can modify the site's address via <b>Setup &gt; Agency Configuration &gt; Agency Info &gt; Sites</b> .
Specify which sites families can select and describe program options offered to help parents choose	If there are multiple sites in this list, please select the site that you want to work with before proceeding.

Option	Description
Allow families to select this site in the list of location preferences	Check this box if you want the selected site to be available as a location preference choice for parents on the Online Application.
Parent Friendly Description of Program Options	Type an English and Spanish (if applicable) Parent Friendly description of the Program Option available at the selected site. For example, <i>Part Day Preschool</i> or <i>Full Day Preschool</i> .
Send a notification to the following email address when an online application is submitted with the selected Site as the location preference	<p>Check this box if you want ChildPlus to automatically email staff at your agency when a parent submits an application for the selected site. You can enter one or multiple email addresses in this field. Multiple email addresses should be separated with a comma (for example: <i>jane.doe@headstart.com, john.doe@headstart.com</i>).</p> <p>There are additional email notification options available on the <b>Email Confirmations</b> tab.</p>

### Choosing Primary Adult Fields

You can use the **Primary Adult** tab to specify what information you'd like to collect for the family's **Primary Adult** on the **Online Application**. In addition to the fields that you can include on the Online Application, you can also specify instructions that will display above the **Primary Adults** section of the Online Application screen.

Agency	Online App Enabled
Little Beginnings Childcare	Yes
New Hope Childcare Center	
Peach State Child Development Prog	
Wee Care Childcare	Yes

Instructions - English (Optional) Tip – You can type either plain text or HTML code in the b  
**Parent Instructions**

Instructions - Spanish (Optional)  
 You can use this field to give the parent instructions on how to fill out this section of the o

**INSTRUCTIONS**

Option	Description
Instructions - English (Optional)	Type any instructions that you'd like ChildPlus to display above the Primary Adult fields on the Online Application. You can either type plain text or HTML code into this box. If you don't want to include any instructions for parents, just leave this field blank.
Instructions - Spanish (Optional)	Type any instructions that you'd like ChildPlus to display above the Primary Adult fields on your Spanish Online Application. You can either type plain text or HTML code into this box. If you don't want to include any instructions for parents, just leave this field blank.

**PRIMARY ADULT FIELDS**

Check each of the **Primary Adult** fields that you'd like to include on your Online Application:

Field Name	Special Notes
First Name	You must include this field on your Online Application. Parents filling out your Online Application will also be required to complete this field.
Middle Name	N/A
Last Name	You must include this field on your Online Application. Parents filling out your Online Application will also be required to complete this field.
Suffix	N/A
Nickname	N/A
Birthday	You must include this field on your Online Application. Parents filling out your Online Application will also be required to complete this field.
Gender	N/A
Email Address	You must include this field on your Online Application. Parents will be required to provide their email address when they fill out an Online Application. ChildPlus will then check to ensure that their email address isn't already associated with another application in your system.
Phone Numbers (Mobile, Home and Work)	N/A
SSN	N/A
Race	N/A
Hispanic/Latino	N/A
English Proficiency	N/A
Other Language	If you are using the Spanish Online Application, you may need to translate the custom Dropdown Choice codes associated with this field. You can customize Dropdown Choices in ChildPlus via <b>Setup &gt; System Setup &gt; Customize Dropdown Choices</b> .
Other Language Proficiency	N/A
Highest Grade Completed	If you are using the Spanish Online Application, you may need to translate the custom Dropdown Choice codes associated with this field. You can customize Dropdown Choices in ChildPlus via <b>Setup &gt; System Setup &gt; Customize Dropdown Choices</b> .
Employment Status	If you are using the Spanish Online Applic-

Field Name	Special Notes
	ation, you may need to translate the custom Dropdown Choice codes associated with this field. You can customize Dropdown Choices in ChildPlus via <b>Setup &gt; System Setup &gt; Customize Dropdown Choices</b> .
Child's Relationship	If you are using the Spanish Online Application, you may need to translate the custom Dropdown Choice codes associated with this field. You can customize Dropdown Choices in ChildPlus via <b>Setup &gt; System Setup &gt; Customize Dropdown Choices</b> .
Custody	N/A
Lives with Family	N/A
Provides Financial Support	N/A
Teen Parent	N/A
If Teen Parent, Subsidized?	N/A

### Choosing Address Fields

You can use the **Address** tab to specify what type of address information you'd like to collect for the family on the Online Application. In addition to the fields that you can include on the **Online Application**, you can also specify instructions that will display in the **Address** section of the **Online Application** screen.

Agency	Online App Enabled
Little Beginnings Childcare	Yes
New Hope Childcare Center	
Peach State Child Development Prog	
Wee Care Childcare	Yes

General	Program Terms & Locations	Primary Adult	<b>Address</b>	Secondary Adult	Family
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Instructions - English (Optional) Tip – You can type either plain text or HTML code in

You can use this field to give the parent instructions on how to fill out this section of t

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Instructions - Spanish (Optional)

You can use this field to give the parent instructions on how to fill out this section of t

### INSTRUCTIONS & ZIP CODE SCREENING

Option	Description
Instructions - English (Optional)	Type any instructions that you'd like ChildPlus to display above the Address fields on the Online Application. You can either type plain text or HTML code into this box. If you don't want to include any instructions for parents, just leave this field blank.
Instructions - Spanish (Optional)	Type any instructions that you'd like ChildPlus to display above the Address fields on your Spanish Online Application. You can either type plain text or HTML code into this box. If you don't want to include any instructions for parents, just leave this field blank.
Automatically screen applicants by ZIP code	If you check this option, ChildPlus will not let parents submit applications for ZIP codes outside of your service area. You can configure ZIP codes for your service area via <b>Setup &gt; Agency Configuration &gt; Agency Info &gt; Enrollment Options</b> .

## ADDRESS FIELDS

Check each of the **Address** fields that you'd like to include on your Online Application:

Field Name	Special Notes
Is your family experiencing homelessness?	You must include this field on your Online Application. Parents filling out your Online Application will also be required to complete this field.
Living Address	You must include this field on your Online Application. Parents filling out your Online Application will also be required to complete this field.
Mailing Address same as Living Address	N/A
Mailing Address	N/A

## Choosing Secondary Adult Fields

You can use the **Secondary Adult** tab to specify what information, if any, you'd like to collect for the family's **Secondary Adult** on the **Online Application**. In addition to the fields that you can include on the Online Application, you can also specify instructions that will display above the **Secondary Adult** section of the **Online Application** screen.

Security ▾ Agency Configuration ▾ Module Setup ▾ System Setup ▾ Database Utilities ▾ Data Utilities ▾ Initial

Agency	Online App Enabled
Little Beginnings Childcare	Yes
New Hope Childcare Center	
Peach State Child Development Prog	
Wee Care Childcare	Yes

Include a section for an additional parent/guardian (secondary adult)

Instructions - English (Optional) Tip – You can type either plain text or HTML code in the boxes b

Instructions - Spanish (Optional)

### TRACKING INFORMATION FOR SECONDARY ADULTS

Check **Include a section for an additional parent/guardian (secondary adult)** if you want to collect information about secondary adults on your **Online Application**.

### INSTRUCTIONS

Option	Description
Instructions - English (Optional)	Type any instructions that you'd like ChildPlus to display above the Secondary Adult fields on the Online Application. You can either type plain text or HTML code into this box. If you don't want to include any instructions for parents, just leave this field blank.
Instructions - Spanish (Optional)	Type any instructions that you'd like ChildPlus to display above the Secondary Adult fields on your Spanish Online Application. You can either type plain text or HTML code into this box. If you don't want to include any instructions for parents, just leave this field blank.

### SECONDARY ADULT FIELDS



Check each of the **Secondary Adult** fields that you'd like to include on your Online Application:

Field Name	Special Notes
First Name	You must include this field on your Online Application. Parents filling out your Online Application will also be required to complete this field.
Middle Name	N/A
Last Name	You must include this field on your Online Application. Parents filling out your Online Application will also be required to complete this field.
Suffix	N/A
Nickname	N/A
Birthday	You must include this field on your Online Application. Parents filling out your Online Application will also be required to complete this field.
Gender	N/A
Email Address	N/A
Phone Numbers (Mobile, Home and Work)	N/A
SSN	N/A
Race	N/A
Hispanic/Latino	N/A
English Proficiency	N/A
Other Language	If you are using the Spanish Online Application, you may need to translate the custom Dropdown Choice codes associated with this field. You can customize Dropdown Choices in ChildPlus via <b>Setup &gt; System Setup &gt; Customize Dropdown Choices</b> .
Other Language Proficiency	N/A
Highest Grade Completed	If you are using the Spanish Online Application, you may need to translate the custom Dropdown Choice codes associated with this field. You can customize Dropdown Choices in ChildPlus via <b>Setup &gt; System Setup &gt; Customize Dropdown Choices</b> .
Employment Status	If you are using the Spanish Online Application, you may need to translate the custom Dropdown Choice codes associated with this field. You can customize Dropdown Choices in

Field Name	Special Notes
	ChildPlus via <b>Setup &gt; System Setup &gt; Customize Dropdown Choices</b> .
Child's Relationship	If you are using the Spanish Online Application, you may need to translate the custom Dropdown Choice codes associated with this field. You can customize Dropdown Choices in ChildPlus via <b>Setup &gt; System Setup &gt; Customize Dropdown Choices</b> .
Custody	N/A
Lives with Family	N/A
Provides Financial Support	N/A
Teen Parent	N/A
If Teen Parent, Subsidized?	N/A

### Choosing Other Adult Fields

You can use the **Other Adults** tab to specify what information, if any, you'd like to collect for the family's **Other Adults** (for example, grandparents, aunts, uncles) on the **Online Application**. In addition to the fields that you can include on the Online Application, you can also specify instructions that will display above the **Other Adults** section of the **Online Application** screen.

## Online Application Setup

 Tips


Agency	Online App Enabled
Little Beginnings Childcare	Yes
New Hope Childcare Center	
Peach State Child Development Prog	
Wee Care Childcare	

General	Program Terms & Locations	Primary Adult	Address	Secondary Adult	Other Adults	Family	Ch
<input checked="" type="checkbox"/> Include a section for other adults							
Instructions - English (Optional)				Tip – You can type either plain text or HTML code in the boxes below.			
You can use this field to give the parent instructions on how to fill out this section of the online applica							
<hr/>							
Instructions - Spanish (Optional)							
You can use this field to give the parent instructions on how to fill out this section of the online applica							
<hr/>							

**TRACKING INFORMATION FOR OTHER ADULTS**

Check **Include a section for other adults** if you want to collect information about other adults on your **Online Application**.

**INSTRUCTIONS**

Option	Description
Instructions - English (Optional)	Type any instructions that you'd like ChildPlus to display above the Other Adult fields on the Online Application. You can either type plain text or HTML code into this box. If you don't want to include any instructions for parents, just leave this field blank.
Instructions - Spanish (Optional)	Type any instructions that you'd like ChildPlus to display above the Other Adult fields on your Spanish Online Application. You can either type plain text or HTML code into this box. If you don't want to include any instructions for parents, just leave this field blank.

### OTHER ADULT FIELDS

Check each of the **Other Adults** fields that you'd like to include on your Online Application:

Field Name	Special Notes
First Name	You must include this field on your Online Application. Parents filling out your Online Application will also be required to complete this field.
Middle Name	N/A
Last Name	You must include this field on your Online Application. Parents filling out your Online Application will also be required to complete this field.
Suffix	N/A
Nickname	N/A
Birthday	You must include this field on your Online Application. Parents filling out your Online Application will also be required to complete this field.
Gender	N/A
Email Address	N/A
Phone Numbers (Mobile, Home and Work)	N/A
SSN	N/A
Race	N/A
Hispanic/Latino	N/A
English Proficiency	N/A
Other Language	If you are using the Spanish Online Applic-

Field Name	Special Notes
	ation, you may need to translate the custom Dropdown Choice codes associated with this field. You can customize Dropdown Choices in ChildPlus via <b>Setup &gt; System Setup &gt; Customize Dropdown Choices</b> .
Other Language Proficiency	N/A
Highest Grade Completed	If you are using the Spanish Online Application, you may need to translate the custom Dropdown Choice codes associated with this field. You can customize Dropdown Choices in ChildPlus via <b>Setup &gt; System Setup &gt; Customize Dropdown Choices</b> .
Employment Status	If you are using the Spanish Online Application, you may need to translate the custom Dropdown Choice codes associated with this field. You can customize Dropdown Choices in ChildPlus via <b>Setup &gt; System Setup &gt; Customize Dropdown Choices</b> .
Child's Relationship	If you are using the Spanish Online Application, you may need to translate the custom Dropdown Choice codes associated with this field. You can customize Dropdown Choices in ChildPlus via <b>Setup &gt; System Setup &gt; Customize Dropdown Choices</b> .
Custody	N/A
Lives with Family	N/A
Provides Financial Support	N/A
Teen Parent	N/A
If Teen Parent, Subsidized?	N/A

## Choosing Family Fields

You can use the **Family** tab to specify whether you want to collect information about the family and, if so, what type of family information you'd like to collect on the Online Application. In addition to information about the family, you can also collect emergency contact information and also specify instructions that will display in the **Family** section on the **Online Application** screen.

Agency	▲ Online App Enabled	
Little Beginnings Childcare	Yes	
New Hope Childcare Center		
Peach State Child Development Prog		
Wee Care Childcare	Yes	

General	Program Terms & Locations	Primary Adult	Address	Secondary Adult	<b>Family</b>	Child (Applicant)
---------	---------------------------	---------------	---------	-----------------	---------------	-------------------

Include a section for Family Information

Instructions - English (Optional) Tip – You can type either plain text or HTML code in the boxes below.

Instructions - Spanish (Optional)

### TRACKING FAMILY INFORMATION

Check **Include a section for Family Information** if you want to collect information about family information on your **Online Application**.

### INSTRUCTIONS

Option	Description
Instructions - English (Optional)	Type any instructions that you'd like ChildPlus to display above the Family fields on the Online Application. You can either type plain text or HTML code into this box. If you don't want to include any instructions for parents, just leave this field blank.
Instructions - Spanish (Optional)	Type any instructions that you'd like ChildPlus to display above the Family fields on your Spanish Online Application. You can either type plain text or HTML code into this box. If you don't want to include any instructions for parents, just leave this field blank.

## FAMILY FIELDS

Check each of the **Family** fields that you'd like to include on your Online Application:

Field Name	Special Notes
Parental Status	N/A
Primary Language at Home	If you are using the Spanish Online Application, you may need to translate the custom Dropdown Choice codes associated with this field. You can customize Dropdown Choices in ChildPlus via <b>Setup &gt; System Setup &gt; Customize Dropdown Choices</b> .
Number in Household	N/A
Number in Family	N/A
Gross Annual Income	N/A
Is your family receiving cash benefits or other services under the Temporary Assistance for Needs Families (TANF) programs?	N/A
Is your family receiving Supplemental Security Income (SSI)?	N/A
Is your family receiving services from WIC?	N/A
WIC ID	N/A
Is your family receiving services under the Supplemental Nutrition Assistance Program (SNAP), formerly referred to as Food Stamps?	N/A
Is at least one parent/guardian an active duty member of the United States military?	N/A
Is at least one parent/guardian a veteran of the United States military?	N/A
Include a section for Emergency Contact	<p>If you check this option, families will be able to add emergency contacts information along with their application. You'll need to check each of the emergency contact fields you want them to be able to add:</p> <ul style="list-style-type: none"> <li>Name (required)</li> <li>Relationship</li> <li>Contact</li> <li>Release To</li> <li>Address</li> <li>Phone Numbers (Mobile, Home and Work)</li> </ul>

## Choosing Child (Applicant) Fields

You can use the **Child (Applicant)** tab to specify what type of information you'd like to collect for the applicant on the Online Application. In addition to the fields that you can include on the Online Application, you can also specify instructions that will display in the **Child (Applicant)** section of the Online Application screen.

Security ▾ Agency Configuration ▾ Module Setup ▾ System Setup ▾ Database Utilities ▾ Data Utilities ▾ Initial Setup ▾

Agency	Online App Enabled
Little Beginnings Childcare	Yes
New Hope Childcare Center	
Peach State Child Development Prog	
Wee Care Childcare	Yes

General | Program Terms & Locations | Primary Adult | Address | Secondary Adult | Family | **Child (Applicant)** | Email Confirmation

Instructions - English (Optional) Tip – You can type either plain text or HTML code in the boxes below. ⌚ ⌨️ 🖨️

Please complete all these fields for the child who is applying:

Instructions - Spanish (Optional) ⌚ ⌨️ 🖨️

You can use this field to give the parent instructions on how to fill out this section of the online application.

## INSTRUCTIONS

Option	Description
Instructions - English (Optional)	Type any instructions that you'd like ChildPlus to display above the Child (Applicant) fields on the Online Application. You can either type plain text or HTML code into this box. If you don't want to include any instructions for parents, just leave this field blank.
Instructions - Spanish (Optional)	Type any instructions that you'd like ChildPlus to display above the Child (Applicant) fields on your Spanish Online Application. You can either type plain text or HTML code into this box. If you don't want to include any instructions for parents, just leave this field blank.

## CHILD (APPLICANT) FIELDS

Check each of the **Child (Applicant)** fields that you'd like to include on your Online Application:



Field Name	Special Notes
First Name	You must include this field on your Online Application. Parents filling out your Online Application will also be required to complete this field.
Middle Name	N/A
Last Name	You must include this field on your Online Application. Parents filling out your Online Application will also be required to complete this field.
Suffix	N/A
Nickname	N/A
Birthday	You must include this field on your Online Application. Parents filling out your Online Application will also be required to complete this field.
Gender	N/A
SSN	N/A
Race	N/A
Hispanic/Latino	N/A
English Proficiency	N/A
Other Language	If you are using the Spanish Online Application, you may need to translate the custom Dropdown Choice codes associated with this field. You can customize Dropdown Choices in ChildPlus via <b>Setup &gt; System Setup &gt; Customize Dropdown Choices</b> .
Other Language Proficiency	N/A
Primary Health Coverage	N/A
Other Coverage	N/A
Insurance Number	N/A
Medicaid Eligibility	N/A
Medicaid Number	N/A
Doctor/Medical Home	N/A
Dental Coverage	N/A
Dental Coverage Number	N/A
Dentist/Dental Home	N/A

Field Name	Special Notes
Does your child have a disability?	N/A
Is there anything else you want to tell us about your child? (Application Notes)	ChildPlus will record this information in the Notes box on the <b>Services &gt; Application</b> screen for the participant in ChildPlus.

### Choosing Siblings Fields

You can use the **Siblings** tab to specify what information, if any, you'd like to collect for the family's **Siblings** on the **Online Application**. In addition to the fields that you can include on the Online Application, you can also specify instructions that will display above the **Siblings** section of the **Online Application** screen.

The screenshot shows the 'Online Application Setup' screen with the 'Siblings' tab highlighted in orange. The 'Online App Enabled' checkbox is checked. Below the agency list, there are tabs for 'General', 'Program Terms & Locations', 'Primary Adult', 'Address', 'Secondary Adult', 'Other Adults', 'Family', 'Child (Applicant)', 'Siblings', and 'Email'. The 'Siblings' tab is active, showing a checked box for 'Include a section for siblings'. Below this, there are two text areas for instructions: 'Instructions - English (Optional)' and 'Instructions - Spanish (Optional)'. Both contain the text: 'You can use this field to give the parent instructions on how to fill out this section of the online application.'

### TRACKING INFORMATION FOR SIBLINGS

Check **Include a section for siblings** if you want to collect information about siblings on your **Online Application**.

### INSTRUCTIONS

Option	Description
Instructions - English (Optional)	Type any instructions that you'd like ChildPlus to display above the Siblings fields on the Online Application. You can either type plain text or HTML code into this box. If you don't want to include any instructions for parents, just leave this field blank.
Instructions - Spanish (Optional)	Type any instructions that you'd like ChildPlus to display above the Siblings fields on your Spanish Online Application. You can either type plain text or HTML code into this box. If you don't want to include any instructions for parents, just leave this field blank.

## SIBLINGS FIELDS

Check each of the **Siblings** fields that you'd like to include on your Online Application:

Field Name	Special Notes
First Name	You must include this field on your Online Application. Parents filling out your Online Application will also be required to complete this field.
Middle Name	N/A
Last Name	You must include this field on your Online Application. Parents filling out your Online Application will also be required to complete this field.
Suffix	N/A
Nickname	N/A
Birthday	You must include this field on your Online Application. Parents filling out your Online Application will also be required to complete this field.
Gender	N/A
SSN	N/A
Race	N/A
Hispanic/Latino	N/A
English Proficiency	N/A
Other Language	If you are using the Spanish Online Application, you may need to translate the custom Dropdown Choice codes associated with this field. You can customize Dropdown Choices in

Field Name	Special Notes
	ChildPlus via <b>Setup &gt; System Setup &gt; Customize Dropdown Choices</b> .
Other Language Proficiency	N/A

## Setting up Email Confirmations

Using the **Email Confirmation** tab, you can configure automatic emails for parents and staff members.

The screenshot shows a configuration page for 'Email Confirmation'. At the top, there is a table with columns 'Agency' and 'Online App Enabled'. Below this, there are several tabs: 'General', 'Program Terms & Locations', 'Primary Adult', 'Address', 'Secondary Adult', 'Family', 'Child (Applicant)', and 'Email Confirmation'. The 'Email Confirmation' tab is highlighted with an orange circle. Underneath the tabs, there is a checkbox labeled 'Send a confirmation email to the primary adult after they submit the application'. Below the checkbox, there are three text input fields: 'Subject - English' (containing 'Your application has been submitted'), 'Subject - Spanish', and 'Body - English' (containing 'Thank you for submitted your application. Someone will contact you within the next 5 business days.').

## PRIMARY ADULTS

Check **Send a confirmation email to the primary adult after they submit the application** if you want ChildPlus to automatically email parents a confirmation after they submit an application. You can customize the email's Subject and message (in English as well as Spanish) here as well.

## ONLINE APPLICATION SUBMITTED

Check **When an online application is submitted, send a notification to the following email address** to automatically email staff members whenever an application is submitted. If you want the email to go to multiple staff members, separate each email address with a comma. For example, john.-doe@headstart.com, jane.doe@headstart.com, ann.doe@headstart.com.

## ONLINE APPLICATION SUBMITTED WITHOUT PREFERRED SITE

Check **When an online application that does not have a preferred site is submitted, send a notification to the following email address** to automatically email staff members whenever an application is submitted without a preferred site or location preference. If you want the email to go to multiple staff members, separate each email address with a comma. For example, john.doe@headstart.com, jane.-doe@headstart.com, ann.doe@headstart.com.

This option can help prevent you from missing an application when you've also checked the option on the **Program Terms & Locations** tab that emails you whenever an Online Application is submitted for a specific site.

## Online Application Fields

You will have complete control over the fields that ChildPlus includes on your agency's Online Application. Based on the fields you choose, you can make your agency's Online Application as brief or as comprehensive as you'd like. Here's a complete list of all of the fields that you'll be able to include on your Online Application. If the field has an asterisk next to it, the parent will be required to complete it in order to submit their child's application. Two asterisks means that you may need to customize **Dropdown Choices** for this field if you are using Spanish Applications.

### Fields Related to Children:

First Name\*  
 Middle Name  
 Last Name\*  
 Suffix  
 Nickname  
 Birthday\*  
 Gender  
 SSN  
 Race  
 Hispanic/Latino  
 English Proficiency  
 Other Language\*\*  
 Other Language Proficiency  
 Primary Health Coverage  
 Other Coverage  
 Insurance Number  
 Medicaid Eligibility  
 Medicaid Number  
 Doctor/Medical Home  
 Dental Coverage  
 Dental Coverage Number  
 Dentist/Dental Home  
 Does your child have a disability?  
 Application Notes

### Fields Related to the Family's Address:

Is your family experiencing homelessness?\*  
 Living Address\*  
 Mailing Address same as Living Address  
 Mailing Address

### Fields Related to Primary and/or Secondary Adults:

First Name\*  
 Middle Name

Last Name\*  
Suffix  
Nickname  
Birthday\*  
Gender  
SSN  
Race  
Hispanic/Latino  
English Proficiency  
Other Language\*\*  
Other Language Proficiency  
Highest Grade Completed\*\*  
Employment Status\*\*  
Child's Relationship\*\*  
Custody  
Lives with Family  
Provides Financial Support  
Teen Parent  
If Teen Parent, Subsidized?  
Email Address

**Fields Related to the Family:**

Parental Status  
Primary Language at Home \*\*  
Number in Household  
Number in Family  
Gross Annual Income  
Phone Numbers  
Is your family receiving cash benefits or other services under the Temporary Assistance for Needy Families (TANF) program?  
Is your family receiving Supplemental Security Income (SSI)?  
Is your family receiving services from WIC?  
WIC ID  
Is your family receiving services under the Supplemental Nutrition Assistance Program (SNAP), formerly referred to as Food Stamps?  
Is at least one parent/guardian an active duty member of the United States military?  
Is at least one parent/guardian a veteran of the United States military?

## Assessment Setup

Before you can track assessment scores in ChildPlus, you will need to set up each of your assessment instruments in the system. When you set up an assessment instrument in ChildPlus, you start by providing some basic information about the instrument, such as whether it is a checklist or a scored instrument. Then, you can type in each item on your instrument and define assessment periods for the instrument.

If your instrument is being used to document compliance with Head Start outcome measures, you can create links between the items on your instrument and the federal framework. Prior to setting up an instrument in ChildPlus, however, you may find it helpful to complete the **Assessment Instrument Setup** worksheet at

the end of this guide. This worksheet will help you collect the information that ChildPlus needs to know about your instrument prior to actually setting it up as part of the system.

## Setting up an Assessment Instrument in ChildPlus

1. Click **Setup > Module Setup > Assessment Instruments**.
2. Click **Add New Assessment Instrument**.
3. Complete the information on the **General** tab. If you need help, refer to the following table for a complete list of the fields that are available (the question numbers in parentheses refer to your responses on the **Assessment Instrument Setup** worksheet).

Item	Description
Instrument Name	Type the name you want to assign to the assessment instrument. (Question 1)
Assessment Instrument Type	Select either Checklist or Scored. (Question 2)
Data Entry Depth	Select the number of levels appropriate for your instrument. (Question 3)
Active	Check this box if the instrument is currently active.
Use Item Classifications	Check this box if the instrument uses Item Classifications. This box is available only for checklists. (Question 4)
Use Local Standard of Mastery	Check this box if the instrument has a standard of mastery. This box is available only for checklists. (Question 5)

4. Click **Save**. Next, you will set up your rating labels for the assessment instrument.

## Setting up Rating Labels

Use the table in question 6 (for checklists) or question 7 (for scored instruments) on the **Assessment Instrument Setup** worksheet to complete the fields on this tab

1. Open the **Assessment Instrument Setup** screen if you haven't already. How do I do this? Click **Setup > Module Setup > Assessments**.
2. Click on the **Rating Labels** tab.
3. Enter the name you want to assign to the label (for example, *Developing*).
4. Enter the character you want to use to abbreviate this label on reports (for example, *D*).
5. Enter the character you want to assign to this label for data entry purposes (for example, *D* or *1*).
6. Click **Save**. Next, you will set up your instrument items.

## Adding Instrument Items

1. Open the **Assessment Instrument Setup** screen if you haven't already. How do I do this? Click **Setup > Module Setup > Assessments**.
2. Click on the **Instrument Items** tab.

3. Click **Add Item** to add the first instrument item.
4. In the **Description** box, type the item text.
5. Select the level (for example: 1, 2 or 3) at which this item appears in the instrument.



Does the instrument use item classifications? *If so, 3 Classification boxes will be displayed in the lower left corner of the screen. If the item you are entering is at the lowest (data entry) level, enter the codes for the item in the Classification boxes. (See Question 4 on the **Assessment Instrument Setup** worksheet.)*



Does the instrument use a local standard of mastery? *If so, there will be a box at the bottom of the screen labeled Mastery of this topic requires mastery of how many sub-items? If the item you are entering is not at the lowest (data entry) level, enter the appropriate number of sub-items in the box.*



Is this a scored instrument? *There will a Scores box is displayed in the lower right corner of the screen. If this items sub-scale ranges differ from those set for the entire instrument on the Rating Labels tab, make the necessary changes in this box.*

6. Repeat steps 3-6 for each of the instrument items you want to enter.
7. Click **Save**. Next, you will set up your assessment periods.

## Adding Assessment Periods

1. Open the **Assessment Instrument Setup** screen if you haven't already. How do I do this? Click **Setup** > **Module Setup** > **Assessments**.
2. Click on the **Assessment Periods** tab.
3. Click **Add Assessment Period**.
4. Complete the information for the assessment period using the answer to Question 8 on the **Assessment Instrument Setup** worksheet.
5. Click **Save**. Next, you will link your instrument items to the federal framework.

## Linking to the Federal Framework

1. Open the **Assessment Instrument Setup** screen if you haven't already. How do I do this? Click **Setup** > **Module Setup** > **Assessments**.
2. Click on the **Link to Federal** tab.



- The top portion of this screen lists all Domains, Domain Elements, and Indicators in the federal framework. You can scroll to view the entire framework.
- The middle section of this screen lists all items in your selected instrument.
- The bottom section displays all assessment instrument items that are linked to the selected federal framework item.

3. Click the item in the federal framework item that you want to link to your instrument. You can link to any level of the federal framework: Domain, Domain Element, or Indicator.
4. Select the instrument item you want to link to the federal framework item you selected. In this step, you can only link to the lowest (data entry) level of your instrument.



5. Click **Link Items**.
6. Click **Save**.

## Age Range Sets

Age Range Sets allow you to set up different age ranges to use for evaluation purposes on report **2003 - Management Report - Enrollment Demographics**. Because there is no limit to the number of age range sets you can create, you can have one or more age range sets for each program that your agency operates.

### Configuring Age Range Sets

1. Click **Setup > Module Setup > Age Range Sets**.
2. Click **Add an Age Range Set**.
3. Type the name you want to assign to the age range set in the **Age Range Set Name** field.
4. Select a time unit (either years or months) for the age range set from the **Time Frame** list.
5. Type the age values you want to assign to the set in the **Age 1 – Age 5** boxes.
6. Click **Save**.

## Calendars

Calendars are used in conjunction with the **To-Do List** module. Once you create calendars, you can add appointments and reminders to them. There is no limit to the number of calendars you can create in ChildPlus. Users will be able to decide which calendars they want to view, however, you can also control whether a particular user has access to view or modify the calendar they have been assigned.

### Adding a New Calendar

1. Click **Setup > Module Setup > Calendars**.
2. Click on **Add New Calendar**.
3. Type the name you want to assign to the calendar in the **Calendar Name** box.
4. If you have more than one agency set up in ChildPlus, choose the agency that you want to apply the calendar to or choose *All Agencies* to make the calendar available to all of your agencies. This option is only available if you have more than one agency set up in the system.
5. For each user in the list, select the level of calendar access you want to assign. For example, if you do not want a user to have access to the new calendar, you should assign them *No Access*. If you want the user to be able to view, but not make changes to the calendar, assign them *View Access*. If you want the user to be able to view and make changes to the calendar, assign them *Full Access*. **Show me how**.



#### **Did you know?**

You can also assign security for calendars directly from the **User Security Setup** screen.

6. Click **Save**.

# Family Engagement Outcomes

You can use the **Family Engagement Outcomes** module in ChildPlus to:

- Set up and configure your own family assessment instruments or choose from the **examples** that we've built into ChildPlus.
- Ensure families are being assessed in a timely fashion.
- Easily identify areas where your agency can assist each family.
- Use reports and graphs to see each family's assessment results and gains during the school year (you can record up to 3 assessments per school year).
- Determine your program's impact on each family.



to watch a video about **Family Engagement Outcomes**. Watch a video about Family Engagement Outcomes at <http://youtu.be/hyFiVtiTyOM?hd=1>.

How do I?	See...
<b>Set up Family Engagement Outcomes in ChildPlus</b>	page 162
<b>Add a New Family Outcomes Instrument</b>	page 163
<b>Set up School Years</b>	page 167
<b>Associate a School Year with a Program Term</b>	Associating a with a Program Term with a School Year
<b>Associate an Instrument with a School Year</b>	page 170
<b>Record Assessment Results for a Family</b>	page 172
<b>Add an Attachment</b>	Working with Attachments
<b>View Family Outcomes Reports</b>	page 174

## Setting up Family Outcomes in ChildPlus

There is a specific order in which you'll need to set up **Family Engagement Outcomes** in ChildPlus. To get you started using this module as quickly as possible, we recommend that you perform these tasks in this order:

**Setup Task 1 - Adding a New Family Outcomes Instrument**- See page 163 to learn more.

**Setup Task 2 - Adding a School Year** - See page 163 to learn more.

**Setup Task 3 - Associating a School Year with a Program Term** - Click here to learn more.

**Setup Task 4 - Associating a School Year with a Family Outcomes Instrument** - See page 170 to learn more.

## Adding a New Family Outcomes Instrument

Ready to set up a new **Family Outcome Instrument** in ChildPlus? Follow these steps to learn how:

### Setting up a New Instrument

Follow these steps to set up a new **Family Outcomes Instrument** in ChildPlus:

1. Click **Setup > Module Setup > Family Outcome Instruments**.
2. Click **Add New Instrument**.
3. Choose whether you want to **Start with a blank instrument** or **Start with a copy of** an existing assessment. If you choose **Start with a copy of** then you will also need to choose the instrument you want to copy.



To help get you started, we've built several different **example instruments** into the system. Before you can use an example instrument, you'll first need to make a copy of it. Once you make a copy of an instrument, you can either use it *as is* or customize it to suit your agency's needs. Click here to learn more.

4. Click **OK**.
5. Type the name you want to assign to the new **Family Outcomes Instrument**.
6. Select how many times each family will be assessed per year. For example, if you assess families three times per year then select 3.
7. Type the name you want to assign to the first assessment of the school year.
8. Type the name you want to assign to the second assessment of the school year (if applicable).
9. Type the name you want to assign to the third assessment of the school year (if applicable).
10. Choose whether you want printed **Assessment Worksheets** to print each assessment during the school year on the same worksheet or whether you would rather each assessment print on a different worksheet. For example, choose **Multiple Assessments Per Worksheet** if you want to use the same piece of paper to record each assessment throughout the school year. Choose **Single Assessment Per Worksheet** if you want to complete each assessment on a separate piece of paper.
11. Use the **Default Notes** section of the screen if you want to track family interview questions that are not scored or additional information for each family. ChildPlus will display any text you add to this section whenever you are entering results for an assessment or printing an **Assessment Worksheet**.



Continue to the **next section** to learn how to set up scoring for your new **Family Outcomes Instrument**.

### Scoring Setup

1. Go to the **Scoring Setup** section of the **Family Outcomes Instrument Setup** screen.

▼ Scoring Setup

Lower Score Means Greater Ne... ▼

Score	Description
3	Strength
2	Making Progress
1	Needs Assistance

Add Edit Delete

2. Choose type of score that indicates a greater need: **Lower** or **Higher**. For example, if a score of 5 out of 5 indicates a higher need, choose **Higher Score Means Greater Need**. If a score of 1 out of 5 indicates a higher need then choose **Lower Score Means Greater Need**.
3. Click **Add**.
4. Type a score value into the **Family Outcome Score** field. Score values can be either integers (5) or decimals (5.0).
5. Type a score description into the **Family Outcome Score Description** field. For example, a description could be something like *family needs immediate support*.
6. Click **OK**.
7. Click **Add** for each score choice you want to add to the instrument.



Continue to the **next section** to learn how to set up categories for your new **Family Outcomes Instrument**.

## Adding Categories & Family Outcome Items

1. Go to the **Category Setup** section of the **Family Outcomes Instrument Setup** screen.

▼ **Category Setup**

**Family Outcomes Categories**  
Add the categories for your instrument (e.g. Family Well-Being, Positive Parent-Child Relationships, etc.)

Family Well-Being
Positive Parent-Child Relationships
Families as Lifelong Educators
Families as Learners
Family Engagement in Transitions
Family Connections to Peers and Community
Families as Advocates and Leaders

Add Outcome Category Edit Move Up Move Down Delete

**Family Outcome Items for Family Well-Being**  
Add the specific items that belong to this category (e.g. Budget, Housing, Employment, etc.)

Description	Scoring Guidance
Housing Status	3. Family has adequate, permanent housing...
Safety	3. Family feels safe in their current home and neighborhood...
Health	3. Family has medical/dental home, affordable and adequate...
Mental Health	3. Family has no known mental health issues or family member(s)...
Employment Status	3. Family is employed or not seeking employment...
Education	3. Family is satisfied with their current level of education....
Budget and Finances	3. Family has a budget and/or has financial security....
Transportation	3. Family has own means/access to transportation and/or has...

2. Click **Add Outcome Category**.
3. Type the **Family Outcome Category Name** in the box.
4. Click **OK**.

 Click **Move Up** or **Move Down** to adjust the category's location in the list.

 Click **Edit** if you need to edit a **Family Outcome Category** or click **Delete** to delete it.

5. Click **Add Outcome Item** to add each of the outcome items that you want to associate with the selected **Category**.
6. Type an **Item Description** in the box. Typically, the **Item Description** will be the actual assessment question.
7. Type any **Scoring Guidance** that you'd like ChildPlus to display whenever you are entering results for an assessment or print an **Assessment Worksheet**. Depending on your instrument, **Scoring Guidance** may be helpful, however, it is optional.
8. Click **OK**.

 Click **Move Up** or **Move Down** to adjust the item's location in the list.

 Click **Edit** if you need to edit a **Family Outcome Item** or click **Delete** to delete it.

9. If you want to set up more than one **Family Outcome Category**, repeat Steps 2-4 for each **Family Outcome Category** you want to add. Depending on your instrument you may only need one **Family Outcome Category**.

### **Outcome Category.**

10. Repeat Steps 5-8 for each **Family Outcome Item** you want to add.
11. Click **Save**.



Once you've set up your instrument in ChildPlus, you can click **Print** to print a copy of the **Family Outcomes - Assessment Worksheet**. We recommend that you print a copy to review and double check it for any data entry errors.

## **Associate the Family Outcomes Instrument with a School Year**

Once you set up a **Family Outcomes Instrument** in your system, you will need to associate it with a School Year. Click here to learn how.

### **Editing a New Family Outcomes Instrument**

Need to make changes to a **Family Outcomes Instrument**? Follow these steps to learn how:

### **Editing an Existing Instrument**

Follow these steps to set up a new **Family Outcomes Instrument** in ChildPlus:

1. Click **Setup > Module Setup > Family Outcome Instruments**.
2. Select the **Family Outcomes Instrument** you want to modify.
3. Go to the section you want to modify (for example, Scoring Setup, Category Setup, Family Outcome Items).
4. Click **Edit**.
5. Make your changes to the text.
6. Click **OK**.
7. Click **Save**.

## **Finding Out Which Participants Have Assessments for an Instrument**

You can quickly find out which participants already have assessments associated with a specific instrument by following these steps:

1. Click **Setup > Module Setup > Family Outcome Instruments**.
2. Select the **Family Outcomes Instrument** you want to work with.
3. Click **Show Families that have an Assessment for this Instrument**.

▼ Instrument Setup

Instrument Name   Active Show Families that have an Assessment for this Instrument

Assessments Per Year  ▼

Assessment 1 Name

Assessment 2 Name

Assessment 3 Name

4. Click **Print** to print the list or **OK** to close it.

## Inactivating an Instrument

Do you want to inactivate an instrument so that it's no longer available as a choice in system drop-down lists? Here's how:

1. Click **Setup > Module Setup > Family Outcome Instruments**.
2. Select the **Family Outcomes Instrument** you want to inactivate.
3. Uncheck the **Active** box.
4. Click **Save**.

## Setting up School Years

### Adding a New School Year

1. Click **Setup > Agency Configuration > School Year**.
2. Click **Add New School Year**.
3. Type the value of your **Begin Year** (for example, if this is for the 2019-2020 school year then type *2019*).
4. Type the value of your **End Year** (for example, if this is for the 2019-2020 school year then type *2020*).
5. Type a **School Year Name** description. Your description can contain up to 20 characters.
6. Click **Save**.



Now that your school year is set up, you'll need to associate it with a Program Term(s). Click [here](#) to learn how.

## Associating a Family Outcomes Instrument with a NEW Program Term or School Year

Did you just start a new school year or program term or did you just begin using ChildPlus? If so, you'll need to set up a **School Year** and/or **Program Term** to associate with your **Family Outcomes Instrument**.

### Step 1 - Adding a New School Year

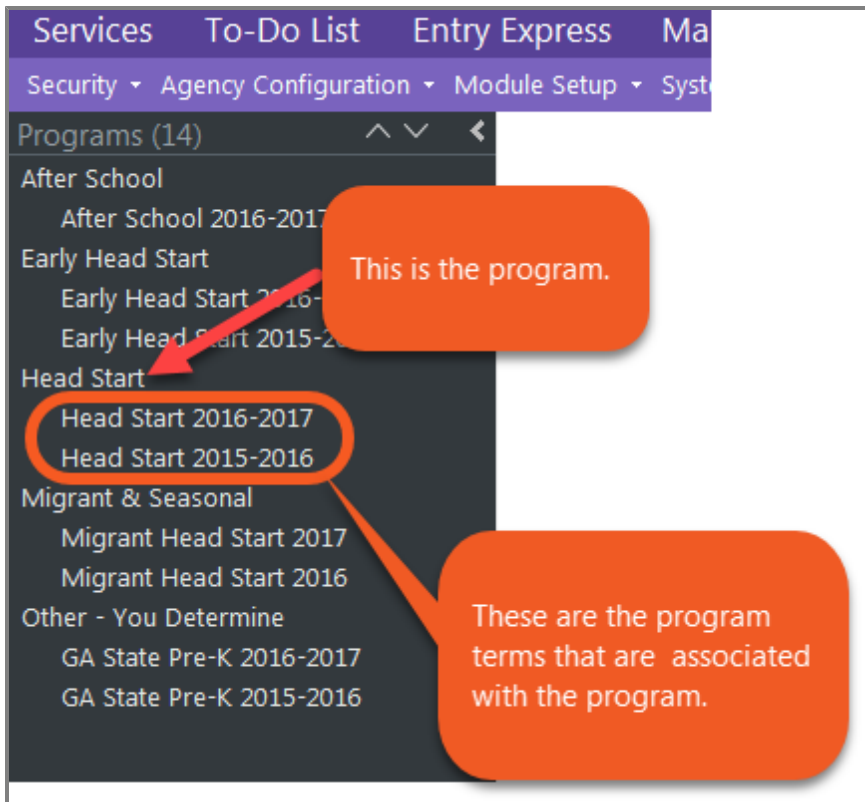
1. Click **Setup > Agency Configuration > School Year**.
2. Click **Add New School Year**.

3. Type the value of your **Begin Year** (for example, if this is for the 2019-2020 school year then type 2019).
4. Type the value of your **End Year** (for example, if this is for the 2019-2020 school year then type 2020).
5. Type a **School Year Name** description. Your description can contain up to 20 characters.
6. Click **Save**.

## Step 2 - Adding a New Program Term

If you haven't already done so, you'll also need to add a new Program Term.

1. Open the **Program Information** screen. *How do I do this? Click **Setup** > **Agency Configuration** > **Program Info**.*
2. Select the program that you want to add a program term to. You can choose from the list of programs on the left side of the screen.





3. Click **Add Another Program Term**.



**Tip:**

Click [here](#) to learn more about setting up a new program term.

**Step 3 - Associating Your Family Outcomes Instrument with a School Year**

1. Click **Setup > Agency Configuration > School Year**.
2. Choose the **School Year** you want to work with.

3. Click on the **Family Outcome Assessments** tab.
4. If you have more than one agency set up in the system, select your **Agency** from the list.
5. Choose the **Family Outcomes Instrument** that your agency will use during the school year.

## School Year 2014-2015

General **Family Outcome Assessments**

### Family Outcomes Assessments for the 2014-2015 School Year

Agency	Family...	Days to...	2nd...	2nd...	3rd...
< No Agency >				0	
Little Beginnings Childcare			12/12/2014	30	1/24/2015 30
New Hope Childcare Center				0	0
Wee Care Childcare				0	0

Which family outcomes instrument does this agency use during this school year? **Family Self-Assessment**

To configure family outcomes instruments go to [Setup | Module Setup | Family Outcomes](#)

A family's first assessment is due no less than  days after enrollment

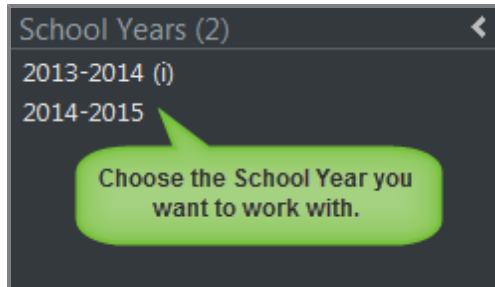
6. Enter the number of days that the family's first assessment will be due after a family member enrolls.
7. Enter the date that the family's second assessment must be completed by (if applicable). *Don't see this option? You won't see this option unless you have **configured 2 or 3 assessments per year** for the **Family Outcomes Instrument**.*
8. Enter the date that the family's third assessment must be completed by (if applicable). *Don't see this option? You won't see this option unless you have **configured 3 assessments per year** for the **Family Outcomes Instrument**.*
9. Click **Save**.

## Associating a Family Outcomes Instrument with a School Year

Once you've **set up a school year** and **associated it with a program term**, you'll need to associate a **Family Outcome Instrument** with the school year. After you complete this step, you'll be able to start tracking family outcomes in ChildPlus.

### Associating a Family Outcomes Instrument with a School Year

1. Click **Setup > Agency Configuration > School Year**.
2. Choose the **School Year** you want to work with.



3. Click on the **Family Outcome Assessments** tab.
4. If you have more than one agency set up in the system, select your **Agency** from the list.
5. Choose the **Family Outcomes Instrument** that your agency will use during the school year.

School Year  
2014-2015

General Family Outcome Assessments

Family Outcomes Assessments for the 2014-2015 School Year

Agency	Family...	Days to...	2nd...	2nd...	...
< No Agency >				0	
Little Beginnings Childcare			12/12/2014	30	3/24/2015 30
New Hope Childcare Center				0	0
Wee Care Childcare				0	0

Which family outcomes instrument does this agency use during this school year? Family Self-Assessment

To configure family outcomes instruments go to [Setup](#) | [Module Setup](#) | [Family Outcoments](#)

A family's first assessment is due no less than  days after enrollment

6. Enter the number of days that the family's first assessment will be due after a family member enrolls.
7. Enter the date that the family's second assessment must be completed by (if applicable). *Don't see this option? You won't see this option unless you have **configured 2 or 3 assessments per year** for the **Family Outcomes Instrument**.*
8. Enter the date that the family's third assessment must be completed by (if applicable). *Don't see this option? You won't see this option unless you have **configured 3 assessments per year** for the **Family Outcomes Instrument**.*
9. Click **Save**.



If you have more than one agency set up in the system, repeat steps 5 - 10 for each of your agencies.

## Recording a Family's Assessment Results

Once you've **set up the Family Engagement Outcomes** module in ChildPlus, you'll be ready to start recording assessment results for your families. Here's how:

1. Use the **Participants List** to select the participant whose family you want to record an assessment for.
2. Access the **Family Services** module. *How do I do this? Click **Services** > **Family Services**.*
3. Click on the **Family Outcomes** tab.
4. Select the **School Year** that you want to add assessment results for. You can click **Participants** (or use the *Alt+P* hotkey) to view a list of all of the participants in the family for the selected **School Year**.

Felton Addison's Family ▾  
Male DOB: 4/30/11 3y 5m CPID: 162239

Application Enrollment Family Services Health Immunizations Disability Mental Health Birth Transportation Education

Events Family Outcomes Family Services Information

2014-2015 School Year • Little Beginnings Childcare ▾ 1 School Year Record Participants (1)

Family Self-Assessment  
Lower Score Means Greater Need

First	Second	Third
 Incomplete Due 11/03/14 Edit	 Enter Results	 Enter Results

5. Click **Enter Results** to enter results for your assessment. Depending on the way you **set up your Family Outcomes Instrument**, there will be between 1 and 3 assessments available for you to choose from.

**Felton Addison's Family** ▾  
 Male DOB: 4/30/11 3y 5m CPID: 162239

Application Enrollment Family Services Health Immunizations Disability Mental Health Birth Transportation Education

Events Family Outcomes Family Services Information

2014-2015 School Year • Little Beginnings Childcare ▾ 1 School Year Record Participants (1)

Family Self-Assessment  
 Lower Score Means Greater Need

First Second Third

Due 11/03/14

Enter Results Enter Results Enter Results

Safety

Our house is safe  
 Our children are safe when leaving home

Physical Health and Social/Emotional Well-being

Click Enter Results to record scores for this assessment period.

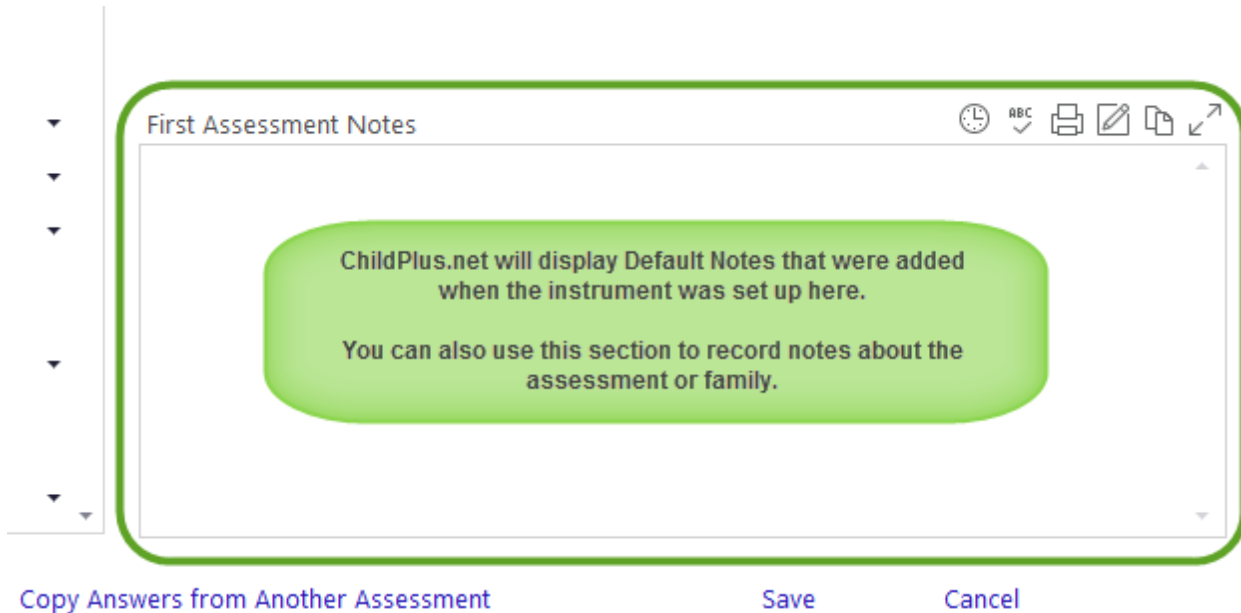
Click Enter Results to record scores for this assessment period.

6. Type the date that the assessment was completed.



What happens if a family refuses or can't be assessed? If you are unable to assess a family, check the **Not Assessed** box and select the reason why from the list.

7. Choose the **Case Worker** who completed the assessment.
8. Record an answer for each assessment question. You can either use the pick list to choose your answer or, for faster data entry, use your keyboard's number pad and Up/Down Arrow keys to quickly move through the list.
9. Need to record notes about the assessment? Use the **Notes** area. ChildPlus will also use this area to display any **Default Notes** that were added when the assessment instrument was initially set up in the system. See page 163 to learn more.



10. Click **Save**.



**Time Saving Tips:**

Has this family already been assessed? Click **Copy Answers from Another Assessment** if you want to copy the answers from a previous assessment and then modify them.

Make a mistake? Click **Clear Answers** to quickly delete all of your previous answers and start again.

Use the *Alt+S* hotkey to save your changes or use *Alt+C* if you want to stop entering results.

## Family Outcomes Reports

You can use the following reports in conjunction with the **Family Engagement Outcomes** module:

### 4110 - Family Service History

This report lets you filter Family Service events by Family Outcome.

### 4210 - Family Outcomes - Assessment Worksheet

This report lets you print a paper worksheet that you can use to record the results of a family's assessment.

### 4220 - Family Outcomes - Assessment Completion Status

You can use this report to determine if families are being assessed on time and which participants still need to be assessed.

### 4230 - Family Outcomes - Family Profile

This report prints each family's assessment results, as well as gains/losses, during the school year. Because there is a page break after each participant, you can use this report to store a hard copy of the family's results.

### **4240 - Family Outcomes - Analysis**

This report lets you view each family's assessment scores, as well as totals and gains/losses during the school year. You can also use it to efficiently analyze classroom, site and agency averages.

## **Adding New Monitoring Checklists**

With Internal Monitoring, you can use the built-in OHS Monitoring Protocols or create your own monitoring checklists.

We've built the following OHS Monitoring Protocols into ChildPlus:

### **2020 OHS PROTOCOL**

- 2020 Focus Area One Monitoring Protocol
- 2020 Focus Area Two Monitoring Protocol

### **2019 OHS PROTOCOL**

- 2019 Focus Area One Monitoring Protocol
- 2019 Focus Area Two Monitoring Protocol

### **2018 OHS PROTOCOL**

- 2018 Focus Area One Monitoring Protocol
- 2018 Focus Area Two Monitoring Protocol

### **2017 OHS PROTOCOL**

- 2017 OHS Protocol - ERSEA

### **2016 OHS PROTOCOL**

- 2016 OHS Protocol
- 2016 OHS Protocol - Environmental Health & Safety
- 2016 OHS Protocol - ERSEA
- 2016 OHS Protocol - Fiscal Integrity
- 2016 OHS Protocol - Head Start Key Indicator - Compliant
- 2016 OHS Protocol - Comprehensive Services & School Readiness Early Head Start
- 2016 OHS Protocol - Comprehensive Services & School Readiness Family Child Care
- 2016 OHS Protocol - Comprehensive Services & School Head Start

### **2015 OHS PROTOCOL**

- 2015 OHS Protocol
- 2015 OHS Protocol - Environmental Health & Safety

- 2015 OHS Protocol - ERSEA
- 2015 OHS Protocol - Fiscal Integrity
- 2015 OHS Protocol - Head Start Key Indicator - Compliant

## 2014 OHS PROTOCOL

- 2014 OHS Protocol
- 2014 OHS Protocol - Child Development and Education
- 2014 OHS Protocol - Child Health and Safety
- 2014 OHS Protocol - ERSEA
- 2014 OHS Protocol - Family and Community Engagement
- 2014 OHS Protocol - Fiscal Integrity
- 2014 OHS Protocol - Management Systems
- 2014 OHS Protocol - Program Governance

## 2013 OHS PROTOCOL

- 2013 OHS Protocol
- 2013 OHS Protocol - Child Development and Education
- 2013 OHS Protocol - Child Health and Safety
- 2013 OHS Protocol - ERSEA
- 2013 OHS Protocol - Family and Community Engagement
- 2013 OHS Protocol - Fiscal Integrity
- 2013 OHS Protocol - Management Systems
- 2013 OHS Protocol - Program Governance

## 2012 OHS PROTOCOL

- 2012 OHS Protocol
- 2012 OHS Protocol - Child Development and Education
- 2012 OHS Protocol - Child Health and Safety
- 2012 OHS Protocol - ERSEA
- 2012 OHS Protocol - Family and Community Engagement
- 2012 OHS Protocol - Fiscal Integrity
- 2012 OHS Protocol - Management Systems
- 2012 OHS Protocol - Program Governance



You can only modify checklist results and security settings for the built-in OHS protocols. If you want to modify the design of one of the built-in protocols, you'll need to make a copy of it first. To make a copy of one of the OHS protocols, go to **Setup > Module Setup > Internal Monitoring Checklists**. You can then click **Add New Monitoring Checklist** and select **Start with a copy of....** to make a copy of the OHS protocol.

## OTHER BUILT-IN CHECKLISTS

We've also built the following checklists into ChildPlus:

- **Governance Readiness Tool**
- **Health and Safety Screener (versions released in 10/2013 and 11/2017)**



## Copying a Checklist

If you want to modify the design of one of the built-in OHS protocols, you will need make a copy of it first. To make a copy of a checklist:

1. Go to **Setup > Module Setup > Internal Monitoring Checklists**.
2. Click **Add New Monitoring Checklist** and select **Start with a copy of.....**
3. Choose the OHS protocol you want to copy.
4. Click **OK**.
5. Modify the checklist.
6. Click **Save**.

## Adding New Monitoring Checklists

If you don't monitor from the OHS monitoring protocol, you can create your own monitoring checklists. Here's how:

1. Go to **Setup > Module Setup > Internal Monitoring Checklists**.
2. Click **Add New Monitoring Checklist**.
3. Select **Start with a blank checklist**.
4. Click **OK**.
5. Complete the **General** section of the **Monitoring Checklist Setup** screen.

Field	Description
Checklist Name	Type the name you want to assign to the checklist.
Service Area	Select the service area that the monitoring applies to.
For Monitoring	Choose whether this is a monitoring checklist is for the Agency, Site or Classroom level.
Active	Uncheck this box if you want to inactivate the checklist. Users will not be able to record monitoring results for inactive checklists.
Link this checklist to the OHS Monitoring Protocol for fiscal year	Check this box if you want to link the checklist to the OHS Monitoring Protocol for the fiscal year.
Track which regulations are associated with each checklist item	Check this box if you want to track which regulations are associated with each monitoring item in the checklist.
Add a Record ID field to the data entry screen	Check this box if you want to include a <b>Record ID</b> with your <b>Internal Monitoring</b> checklist. You can use this field to track information like <b>ChildPlus ID, Child ID, Equipment ID</b> or any identifier that you need to track.
Add a help link for the user entering monitoring results	Check this box if you want to add a help link to the <b>Internal Monitoring</b> module. If you add a help link, the link will be available on the screen when users are entering checklist data in the <b>Internal Monitoring</b> module.

Field	Description
Add a second help link for the user entering monitoring results	Check this box if you want to add a another help link to the <b>Internal Monitoring</b> module. If you add a help link, the link will be available on the screen when users are entering checklist data in the <b>Internal Monitoring</b> module.
Checklist Name	Type the name you want to assign to the checklist.
Service Area	Select the service area that the monitoring applies to.
For Monitoring	Choose whether this is a monitoring checklist is for the Agency, Site or Classroom level.

6. Complete the **Setup Results** section of the screen.

Field	Description
Select which results will be available for this monitoring checklist	<p>Check each result that you want users to be able to choose from when they are entering monitoring results.</p> <p>If you want don't use the default terminology for results (for example, if you use <i>Satisfactory</i> and <i>Needs Improvement</i> instead of <i>Compliant</i> and <i>Non-Compliant</i>), you can modify the text of each result in the <b>Description</b> field.</p> <p>Click <b>Use Default</b> if you've modified the description but want to switch back to the default description.</p>
When results are entered, default all values to	<p>Choose the default result that you want to display when users are entering monitoring results.</p> <p><b>Tip:</b> This option can save you valuable data entry time.</p>
Default days to create a corrective action plan	Enter the default number of days that users will have to create a corrective action plan.
Defaults days to resolve <i>Non-Compliant</i> items	Enter the default number of days that users will have to resolve <i>Non-Compliant</i> checklist items.
Default days to resolve <i>Non-Compliant-Urgent</i> items	Enter the default number of days that users will have to resolve <i>Non-Compliant-Urgent</i> checklist items.

7. Choose the type of checklist you want to set up in the **Checklist Setup** section of the screen. You can choose from:

- **Simple list (1,2,3...)**
- **List with sections (1, 1A, 1B, 1C...)**
- **List with sections and sub-sections (1, 1A, 1Ai, 1Aii...)**

6. Create the monitoring checklist.



You can use the *Tab* and *Enter* to add additional indicator items within a section. If you want to add a new section, click outside of the indicator item.

8. Complete the **Access to this Monitoring Checklist** section of the screen.

Field	Role	Description
Which users will have administrator access to this checklist?	Administrator	Choose the user security group(s) that you want to have administrator access to the monitoring. Users with administrator access will have full access to the monitoring (including all functions in the <b>Internal Monitoring</b> module) and can also modify settings on the <b>Monitoring Checklist Setup</b> screen.
Which users will have full access to this checklist in the Internal Monitoring Module?	Compliance Officer	Choose the user security group(s) that you want to have full access to the monitoring checklist. Users with this level of security access will have full access to the monitoring (including setting due dates and all other functions in the <b>Internal Monitoring</b> module).  Typically, only Compliance Officers are granted this level of security access.
Which users will use this checklist to perform monitoring?	Monitor	Choose the user security group(s) that will perform monitoring using this checklist. Users with this level of security access will have access to most of the monitoring functions (excluding setting due dates) in the <b>Internal Monitoring</b> module).  Typically, Service Area Managers, Compliance Monitors and/or staff members who perform monitoring are gran-

Field	Role	Description
		ted this level of security access.
Which users will enter corrective action plans?	Party responsible for corrective action	Choose the user security group(s) that will enter corrective action plans using this checklist. Users with this level of security access will only have access to monitoring functions on the <b>Corrective Action</b> tab in the <b>Internal Monitoring</b> module).  Typically, Site Managers and/or staff members who are responsible for correction action are granted this level of security access.

9. Complete the **Monitoring Worksheet** section of the screen.

Field	Description
Cover Sheet	Use this section to create a cover sheet that will print along with the monitoring worksheet (report 8020). Typically, you would use the cover sheet to provide information that you want the monitor to read prior to conducting a monitoring.
Header	Use this section to add any text that you'd like to display at the top of the monitoring worksheet ( <b>report 8020</b> ).
Footer	Use this section to add any text that you'd like to display if you print at the end of the monitoring worksheet ( <b>report 8020</b> ).

10. Choose which agencies will use this checklist. If you have more than one agency set up in ChildPlus you can choose from the following options (otherwise, you can skip this step):
  - This checklist is used by all agencies
  - This checklist is only used by the selected agencies.
11. Click **Save**.
12. Choose which agencies will use the checklist. If you have more than one agency set up in ChildPlus you can choose from the following options (otherwise, you can skip this step):
  - This checklist is used by all agencies
  - This checklist is only used by the selected agencies
13. Click **Save**.

## Internal Monitoring Security Privileges

Your ChildPlus Administrator will need to determine which user security groups should have access to Internal Monitoring. In addition, your ChildPlus Administrator will need to set up security access for each monitoring checklist available in ChildPlus.

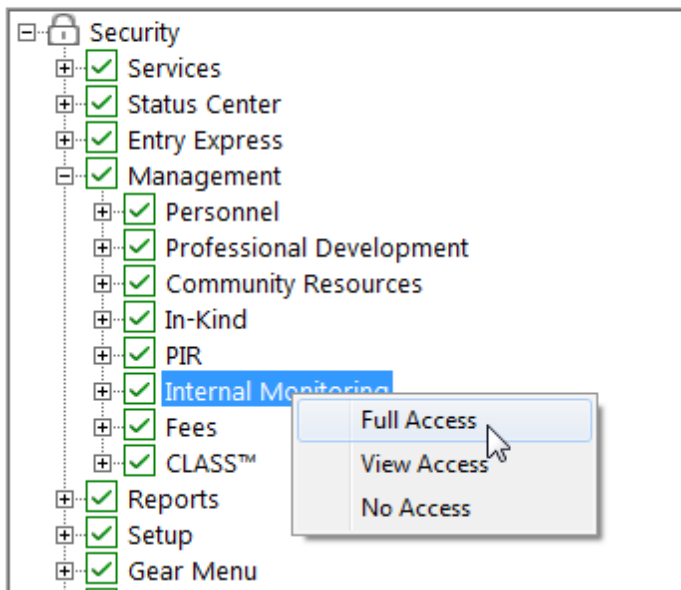
## Granting Users Access to Internal Monitoring

1. Click **Setup > Security > User Security Groups**.
2. Choose the **Security Group** that you want to work with.
3. Click **Management** in the list and drill-down to **Internal Monitoring**.
4. Right-click **Internal Monitoring** and choose the level of security access that you want to assign to the group (choose from either *Full Access* a user security group that has been granted full access to a module in ChildPlus can add, change, or delete data within the module, *View Access* a user security group that has been granted view access to a module in ChildPlus can view data within the module but cannot add, change or delete data or *No Access* a user security group that has been denied access to a module in ChildPlus cannot view, add, change, or delete data within the module).

### User Security Groups Delete User Security

Security Group Name	Security Group Descriptive
Admin	Administrators User G

Access Privileges for Members of this Security Group. Right-click



The screenshot shows a tree view of modules under the 'Security' category. The 'Internal Monitoring' module is selected, and a context menu is open with 'Full Access' highlighted. The tree view includes the following modules: Services, Status Center, Entry Express, Management, Personnel, Professional Development, Community Resources, In-Kind, PIR, Internal Monitoring, Fees, CLASS™, Reports, Setup, and Gear Menu. Each module has a checkmark icon next to it.



You can also grant security access based on each monitoring checklist you have set up in ChildPlus.

## Assigning Security Access for Each Monitoring Checklist

In addition to overall access to the Internal Monitoring module, you can also set up security access for each monitoring checklist. To do so:

1. Go to **Setup > Module Setup > Internal Monitoring Checklists**.
2. Do one of the following:
  - Select the checklist that you want to modify the security settings for.
  - Click **Add New Monitoring Checklist** to add a new monitoring checklist.
3. Complete the **Access to this Monitoring Checklist** section of the screen using the following table as a guide:

Field	Role	Description
Which users will have administrator access to this checklist?	Administrator	Choose the user security group(s) that you want to have administrator access to the monitoring. Users with administrator access will have full access to the monitoring (including all functions in the <b>Internal Monitoring</b> module) and can also modify settings on the <b>Monitoring Checklist Setup</b> screen.
Which users will have full access to this checklist in the Internal Monitoring Module?	Compliance Officer	Choose the user security group(s) that you want to have full access to the monitoring checklist. Users with this level of security access will have full access to the monitoring (including setting due dates and all other functions in the <b>Internal Monitoring</b> module).  Typically, only Compliance Officers are granted this level of security access.
Which users will use this checklist to perform monitoring?	Monitor	Choose the user security group(s) that will perform monitoring using this checklist. Users with this level of security access will have access to most of the monitoring functions (excluding setting due dates) in the <b>Internal Monitoring</b> module).

Field	Role	Description
		Typically, Service Area Managers, Compliance Monitors and/or staff members who perform monitoring are granted this level of security access.
Which users will enter corrective action plans?	Party responsible for corrective action	Choose the user security group(s) that will enter corrective action plans using this checklist. Users with this level of security access will only have access to monitoring functions on the <b>Corrective Action</b> tab in the <b>Internal Monitoring</b> module).  Typically, Site Managers and/or staff members who are responsible for correction action are granted this level of security access.

- Click **Save**.

## LiveReport and LiveMessage

### LiveReport

LiveReport is a powerful ad-hoc report designer that gives you the power to build your own reports in ChildPlus. Using LiveReport, you can create and build reports and form letters that address your agency's specific reporting needs.

### LiveMessage

LiveMessage combines the power of LiveReport's mail merge/letter generator with the practicality of a word processor. With LiveMessage, you can create custom letters and mail merge documents in ChildPlus. You can also use it to send text and email messages.



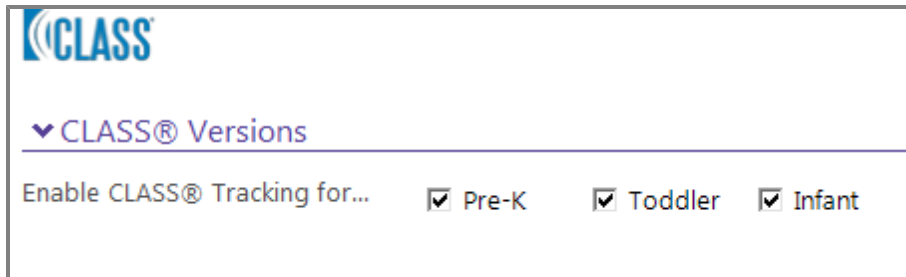
Please refer to the *ChildPlus Reports Guide* for more information on setting up and creating LiveReports and LiveMessages in ChildPlus.

## Configuring CLASS® Thresholds and Observation Periods in ChildPlus

If you choose to, you can set up optional **Thresholds** and **Observation Periods** to use with your CLASS® reports. You can access these setup options by clicking **Setup > Module Setup > CLASS Observations**.

### CLASS Versions

Select each version of CLASS® that you want your users to have access to in ChildPlus.



Enable CLASS® Tracking for...  Pre-K  Toddler  Infant

### Configuring Observation Periods

Observation periods allows you to compare your CLASS® results over time in reports. For example, you might enter an observation period to encompass CLASS® observations performed during your self assessment or during a particular time of year (for example, Fall 2020).

### Configuring Observation Periods

Observation periods allows you to compare your CLASS® results over time in reports. For example, you might enter an observation period to encompass CLASS® observations performed during your self assessment or during a particular time of year (for example, Fall 2020).

### Configuring Thresholds for Comparison

Thresholds allow you to compare your CLASS® results against established standards in reports. For example, you might create thresholds to represent the CLASS® results from your triennial Federal Review, the average CLASS® scores from your Region or your own program goals. ChildPlus includes the following thresholds that we've already set up for you:

- Re-competition Level
- 2018 National Average
- 2018 Lowest 10% Nationally
- 2017 National Average
- 2017 Lowest 10% Nationally
- 2016 National Average
- 2016 Lowest 10% Nationally
- 2015 National Average
- 2015 Lowest 10% Nationally
- 2014 National Average



- 2014 Lowest 10% Nationally
- 2013 Lowest 10% Nationally
- 2013 National Average
- 2012 National 10% Nationally
- 2012 National Average



To add a new threshold, select **Click here to add a new row**.

## Transportation Routes

You can use **Transportation Routes** to add and manage bus routes in ChildPlus. You can track the days that a bus route operates, add riders to the bus route, manage the order in which participants are picked up and dropped off, and track additional information such as arrival and departure locations and times.

### Adding a New Bus Route

1. Click **Setup > Module Setup > Transportation Routes**.
2. Click **Add New Bus Route**.
3. Complete each of the **fields** on the screen.

Field	Description
Route Name	Enter the name you want to assign to the bus route.
Origin	Enter the location that this bus route will originate from.
Destination	Enter the bus route's destination.
Driver	Enter the name of the bus driver for this route.
Bus Number	Enter the number of the bus used on this route.
Departs	Enter the time that the bus departs its point of origin.
Arrives	Enter the time that the bus arrives at its destination.
Pick-up/Drop-off	Select the option that describes the route (is it a pick-up route, a drop-off route, or neither?).
Runs	Check each of the days that this bus route is scheduled to run.

4. Click **Add Rider** to add riders to the bus route.

- Use the **Select Which Participants to Include** dialog to customize the list of riders to choose from.

### Select Which Participants to Include

The screenshot shows the 'Select Which Participants to Include' dialog box. It has two tabs: 'General' and 'Custom Filters (0)'. The 'General' tab is active. It contains several sections:

- Program Term:** A list of program terms with checkboxes. 'Head Start 2014-2015' is checked. Other terms include '< No Program Term >', 'Migrant Head Start 2015', 'After School 2014-2015', 'Early Head Start 2014-2015', and 'GA State Pre-K 2014-2015'.
- Agencies:** A list of agencies with checkboxes. All are checked: '< No Agency >', 'Little Beginnings Childcare', 'New Hope Childcare', 'Peach State Child Development Center', and 'Wee Care Childcare'.
- Sites:** A list of sites with checkboxes. All are checked: '< No Agency >', '< No Site >', 'Little Beginnings Childcare', '< No Site >', 'Administration Office', 'Faith House Center', 'Happy Hearts Center', 'Moving Up Center', 'North Springs Center', 'New Hope Childcare Center', '< No Site >', and 'Arlington Center'.
- Classrooms:** A list of classrooms with checkboxes. All are checked: '< No Agency >', '< No Agency > - < No Site >', '< No Classroom >', 'Little Beginnings Childcare', 'Little Beginnings Childcare - < No Site >', '< No Classroom >', 'Administration Office', '< No Classroom >', 'Faith House Center', '< No Classroom >', 'After School', and 'Classroom A'.
- Status:** A list of statuses with checkboxes. 'New' is checked. Other statuses include 'Accepted', 'Waitlisted', 'Enrolled', 'Dropped', 'Drop/Wait', 'Completed', 'Abandoned', and 'Drop/Accept'.
- Filter by Group:** A list of groups with checkboxes. None are checked: 'Active Military', 'Athabascan', 'Parent Committee', 'Policy Council', and 'Pregnant Mothers'.

At the bottom of the dialog, there are three buttons: 'Clear All', 'Find', and 'Cancel'.

- Click **Find**.
- Check each participant that you want to add to the route.
- Complete the default values you want to assign to each of the riders you selected in step number 7.
- Click **Next**.
- Optional:* Select any rider whose default values (assigned in step 8) you want to change. Once you've selected a rider, you can modify his/her information as necessary. You can also use the notes box to add notes (for example, directions or special instructions) for each rider.
- Use the arrows on the next to the **Pick-up/Drop-off Order** list to set the order in which the riders are picked up and dropped off on this route.
- Click **Finish**.

## Adding Riders to an Existing Route

- Click on **Setup**.
- Click on **Module Setup** and select **Transportation Routes**.
- Select the route you want to add riders to from the **Bus Routes** list.

- Click **Add Riders**.
- Use the **Select Which Participants to Include** dialog to customize the list of riders to choose from.

### Select Which Participants to Include

**General** Custom Filters (0)

Program Term  All

- < No Program Term >
- Migrant Head Start 2015
- After School 2014-2015
- Early Head Start 2014-2015
- GA State Pre-K 2014-2015
- Head Start 2014-2015

Agencies  All

- < No Agency >
- Little Beginnings Child
- New Hope Childcare
- Peach State Child De
- Wee Care Childcare

Sites  All

- < No Agency >
- < No Site >
- Little Beginnings Childcare
- < No Site >
- Administration Office
- Faith House Center
- Happy Hearts Center
- Moving Up Center
- North Springs Center
- New Hope Childcare Center
- < No Site >
- Arlington Center

Classrooms  All

- < No Agency >
- < No Agency > - < No Site >
- < No Classroom >
- Little Beginnings Childcare
- Little Beginnings Childcare - < No Site >
- < No Classroom >
- Administration Office
- < No Classroom >
- Faith House Center
- < No Classroom >
- After School
- Classroom A

Status  All  Filter by Group

- New
- Accepted
- Waitlisted
- Enrolled
- Dropped
- Drop/Wait
- Completed
- Abandoned
- Drop/Accept

- Active Military
- Athabaskan
- Parent Committee
- Policy Council
- Pregnant Mothers

Clear All Find Cancel

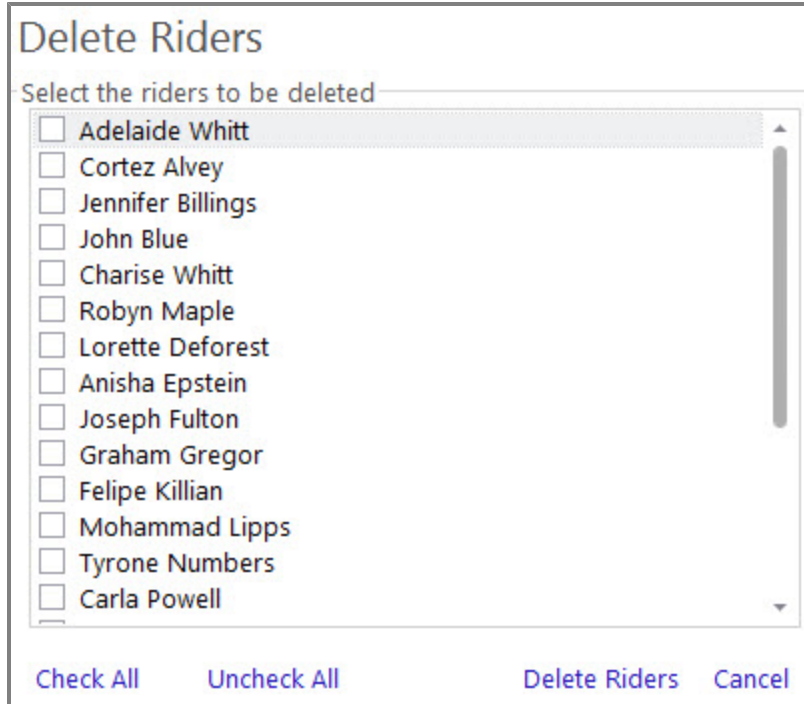
- Click **Find**.
- Check each participant that you want to add to the route.
- Complete the default values you want to assign to each of the riders you selected in step number 7.
- Click **Next**.
- Optional:* Select any rider whose default values (assigned in step 8) you want to change. Once you've selected a rider, you can modify his/her information as necessary. You can also use the notes box to add notes (for example, directions or special instructions) for each rider.
- Use the arrows on the next to the **PickUp/Drop-off Order** list to set the order in which the riders are picked up and dropped off on this route.
- Click **Finish**.



You can add individual riders to bus routes from the **Transportation** module in ChildPlus.

## Deleting Riders from an Existing Route

1. Click on **Setup**.
2. Click on **Module Setup** and select **Transportation Routes**.
3. Select the route that you want to delete riders from.
4. Click **Delete Riders**.
5. Select each rider that you want to delete from the list:



**Delete Riders**

Select the riders to be deleted

- Adelaide Whitt
- Cortez Alvey
- Jennifer Billings
- John Blue
- Charise Whitt
- Robyn Maple
- Lorette Deforest
- Anisha Epstein
- Joseph Fulton
- Graham Gregor
- Felipe Killian
- Mohammad Lipps
- Tyrone Numbers
- Carla Powell

Check All    Uncheck All    Delete Riders    Cancel

6. Click **Delete Riders**.

## Mapping a Route

1. Click **Setup > Module Setup > Transportation Routes**.
2. Select the route you want to map from the **Bus Routes** list.
3. Click **Show on a map**.



You can also generate maps using report **6001 - Participant Mapping**.

## Copying a Route

You can save time by copying existing transportation routes. This feature is especially useful if a route you want to create is similar to a route you have already created (for example, if you have already established a morning route and want to create an afternoon route with the same riders and stops).

1. Click **Setup > Module Setup > Transportation Routes**.
2. Select the route you want to copy from the **Bus Routes** list.
3. Click **Copy this Route** and ChildPlus will create a new route with the exact same information as the route you copied in step 3.

## Region Information

Regions provide you with an additional way to group and manage your sites. Setting up regions is optional but can be extremely helpful for tracking, reporting, and security purposes.



Did you know that you can assign user security by region?

## Adding Regions

Regions provide you with an additional way to group and manage your sites. Setting up regions is optional but can be extremely helpful for tracking and reporting purposes.

### Adding regions in ChildPlus

1. Click **Setup > Agency Configuration > Region Info**.
2. Click **Add Region**.
3. Type the name you want to assign to the region in the **Region Name** box.
4. Repeat steps 3 and 4 for each region you want to add.
5. Click **Save**.

## Database Utilities Menu

You can access the following utilities and applications through the **Database Utilities** menu:

**Create Archive/Training**

**Connect to Archive**

**Connect to Training**

### Create Archive/Training

If you want to quickly view what your data looked like a few months ago, you should connect to an archive. You can also use archives for training purposes. When you create a training archive, users that are new to ChildPlus can add, change, and delete data as they are learning to use the system. However, since they are connected to an archive copy of your data, you do not need to worry about your live data being compromised.

Think of an archive as a snapshot of your database at a certain moment in time. Like a detailed picture, this snapshot is an exact replica of your data. And like a digital picture, you can open it on your computer and view it in ChildPlus.

The benefit of an archive is that you can pull it up from directly within ChildPlus and view this historical data on your computer without impacting the data that other users are looking at. Just remember, although you can make and save changes in an archive, these changes will only be saved in the archive, not your current data.



ChildPlus recommends that you create regular archives of your database. Each time you create an archive, ChildPlus makes a copy of your database. Keep this in mind because each archive you create takes up memory on your computer or server.

## Creating an Archive

1. Click on the **System** tab and select **Database Utilities**.
2. Click **Manage Archive and Databases**.
3. Click **Create Archive/Training**.
4. Choose **Archive** from the **Type** list.
5. Type the **Database Name** you want to assign to your archive.



Archive names can only contain numbers, letters, and underscores. ChildPlus will not accept names with punctuation or spacing in them. The first character of the archive name must start with a letter, rather than a number.

6. Click **OK** to create your archive.



Once created, you can connect to your archive via **Setup > Database Utilities > Connect to Archive**.

## Creating a Training Database

1. Click on the **System** tab and select **Database Utilities**.
2. Click **Manage Archive and Databases**.
3. Click **Create Archive/Training**.
4. Choose **Training** from the **Type** list.
5. Type the **Database Name** you want to assign to your training database.



Training database names can only contain numbers, letters, and underscores. ChildPlus will not accept names with punctuation or spacing in them. The first character of the training database name must start with a letter, rather than a number.

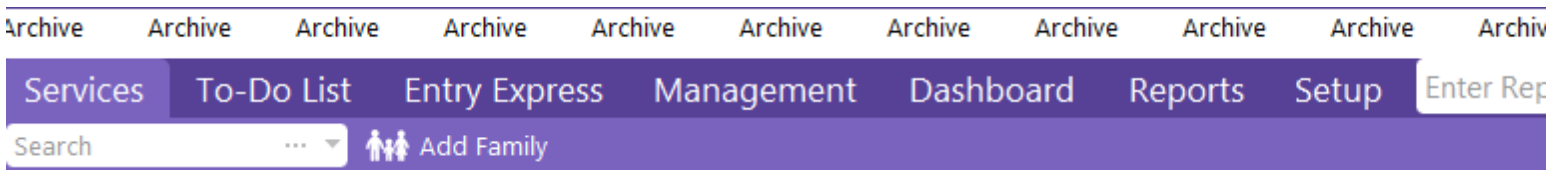
6. Click **OK** to create your training database.



Once created, you can connect to your training database via **Setup > Database Utilities > Connect to Training**.

## Archive Mode

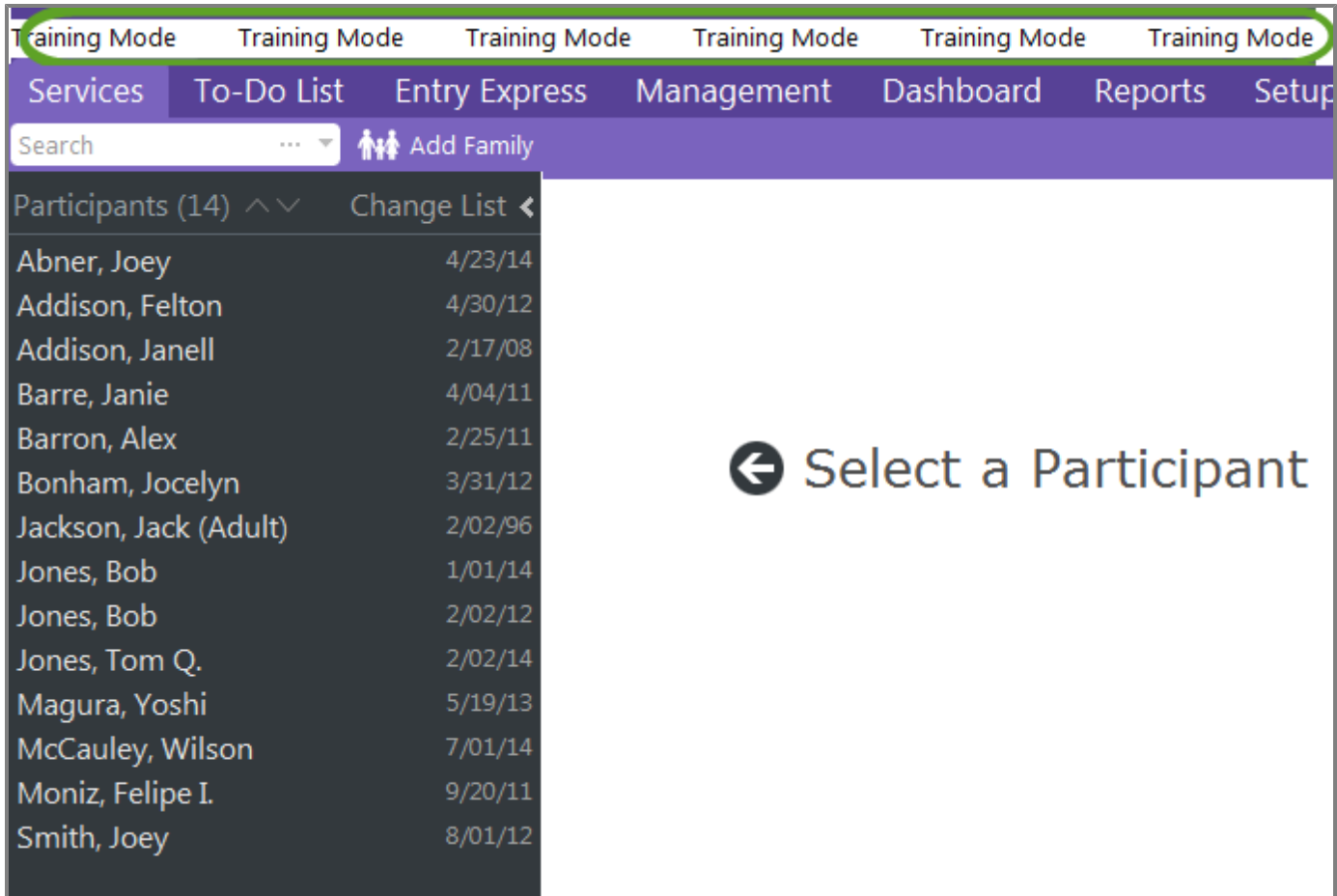
To help you easily distinguish between modes, the top portion of the ChildPlus screen looks different when you are in archive mode. The following screen illustrates what ChildPlus looks like in archive mode (note the word *Archive* that displays across the top of the screen).




See page 192 to learn how to exit Archive Mode.

## Training Mode

To help you easily distinguish between modes, the top portion of the ChildPlus screen looks different when you are in training mode. The following screen illustrates what ChildPlus looks like in training mode (notice that the words *Training Mode* display across the top of the screen).




 See page 192 to learn how to exit Training Mode.

## Connect to Archive

Once you have **created an archive database**, you can connect to it in ChildPlus using the following steps:

1. Click **Setup > Database Utilities > Connect to Archive.**
2. Select the archive database that you want to connect to from the list.
3. Click **Connect.**

 Once you click **Connect**, ChildPlus will automatically re-start your system. As soon as you log in to the system again, you will be connected to the archive you selected in step 3.

## Connect to Training

Once you have **created an training database**, you can connect to it in ChildPlus using the following steps:

1. Click **Setup > Database Utilities > Connect to Training**.
2. Select the training database that you want to connect to from the list.
3. Click **Connect**.



Once you click **Connect**, ChildPlus will automatically re-start your system. As soon as you log in to the system again, you will be connected to the training database you selected in step 3.

## Exiting Archive/Training Mode

When you have finished working in archive or training mode and are ready to return to your live data, simply exit out of ChildPlus. When you log back into the system, you will automatically be reconnected to your live data.

## Data Utilities Menu

You can access the following utilities and applications through the **Data Utilities** menu:

### License Information

### In-Kind Defaults Utility

### Prepare for Next Program Term

### Merge Utilities

History: **Sign-In/Sign-Out History**, **Data History Log (Participant Information)**, **Data History Log (Personnel Changes)**, **Data History Log (System Configuration Changes)**

## Licensing Information

Do you want to check your ChildPlus license information? Go to **Help >> About ChildPlus** to view your agency's current license status, license expiration date and license count.

## In-Kind Defaults Utility

You'll be able to use the **In-Kind Defaults Utility** to quickly update the default In-Kind transaction values for specific types of in-kind volunteers. For example, you'll be able to update defaults for only your volunteers



who are parents/guardians.

You can access the **In-Kind Defaults Utility** via **Setup > Data Utilities > In-Kind Defaults Utility**.

## In-Kind Defaults Utility ✕

This utility allows you to update the Defaults for In-Kind Transactions for a specific type of in-kind volunteer. These changes will apply only to the transaction defaults of each volunteer, no existing in-kind transactions will be affected. These changes apply to all volunteers with the selected Volunteer Description and cannot be undone.

To update defaults, select the Volunteer Description, enter a new value for any of the transaction fields, and click the Update button.

1. Update In-Kind volunteers who meet the following criteria:

Volunteer Description	Parent/Guardian ▼
Program	Head Start ▼
Agency	Little Beginnings Childcare ▼
Site	< All Sites > ▼
Classroom	< All Classrooms > ▼

2. Select the fields you would like to update (unchecked fields will keep their current value)

<input type="checkbox"/> Quantity	
<input checked="" type="checkbox"/> Rate	10
<input type="checkbox"/> Units	
<input checked="" type="checkbox"/> Type	Time (In Hours) ▼
<input checked="" type="checkbox"/> Service Area	Social Services ▼

Update

## Prepare for Next Program Term

Once you submit your PIR, you can use the following suite of utilities in ChildPlus to help prepare your system for another program term. You can access these utilities via **Setup > Data Utilities > Prepare for Next Program Term**.

### Rollover Utility

**Closeout Program Term Utility**

**Fees Rollover Utility**

**Clear PIR Addendum**

**Purge Data**

**Purge In-Kind**

**Rollover Utility**

You can use the **Rollover Utility** to:

- Determine which participants are eligible to return to the program they are currently in and which participants will need to transition to another program.
- Create new participation records for both returning and transitioning participants.
- Update new participation records with the correct application status, enrollment status, participation year, site and classroom assignment, etc.

**Before you Begin**

Before you use the **Rollover Utility**, you should:

- **Create new program terms** for the upcoming program term or school year. Why do I have to do this? *Because in order to mark participants as either returning to the same program or transition them into to another program, you are going to have to tell ChildPlus which program term they are going to be returning or transitioning to. Since you cannot create new program terms in the Rollover Utility, you will have to perform this step before you can begin using this utility.*
- Run report **2030 - PNPT Rollover**. This report allows you to generate lists of participants who are either transitioning to another program or eligible to return to the same program. This report can help you as you are performing the rollover process.

**Step 1 - Select the participants you want to roll over**

The first thing you need to do when using the **Rollover Utility** is tell ChildPlus which participants you actually want to roll over to the next program term. New participation records will be created for each of participant who is eligible.

1. Open the **Rollover Utility** by clicking **Setup > Data Utilities > Prepare for Next Program Term > Rollover Utility**.
2. Click **OK** to continue.
3. Select the **Current Program Term** that the participants you want to roll over are associated with. *For example, if you want to mark participants who are currently enrolled in the 2020-2021 Head Start pro-*

gram term as returning to your Head Start program for another term, then you would select the 2020-2021 Head Start program term here.

4. Select **returning to** if you want to mark participants as returning to the same program OR select **transitioning to** if you want to mark participants as transitioning to another program.
5. Select the program term that the participants will be returning/transitioning to as their **New Program Term**.
6. Enter the cut-off age and **School Year Cut-off Date** that you want to use to determine age eligibility. Participants who are younger than this age on or before the school year cut-off date will be eligible to return for the next program term. If participants are transitioning, they will need to be older than this age on the **School Year Cut-off Date**.
7. Check the **Agency, Site, and Classroom** that the participants you want to mark as *returning* are currently associated with. You can also filter participants by their current status and/or group.



When using the **Rollover Utility**, it is usually easier to work with smaller groups of participants. With this in mind, ChildPlus Software recommends that you run this utility for only one site at a time until you are familiar with the process.

## Step 2 - How would you like the records for these participants to roll over?

In Step 1, you specified which participants you wanted to roll over and create new participation records for. In this step, you will tell ChildPlus the information that you want each of the new records to contain.

1. Complete the following fields for each **Current Status** listed (ChildPlus groups the records of the participants you are rolling over by their **Current Enrollment Status**):

Field	Description
New Status	Select the enrollment status that you want to assign to the participants you are rolling over.
New Status Date	Select the enrollment status date that you want to assign to the participants you are rolling over. This will be each participant's enrollment status date in their new participation record.
New Application Status	Select the application status that you want to assign to the participants you are rolling over. This will be each participant's application status in their new participation record.
Select Fields to be Copied	<p>Check the field(s) that you want ChildPlus to copy from the participant's current participation record into their new one. You can choose from the following ChildPlus fields:</p> <ul style="list-style-type: none"> <li>• Application Date</li> <li>• CACFP (Date, Income, Per, Status)</li> <li>• California Information</li> <li>• Education Assessments (Dates and Scores)</li> <li>• Education Dates (Home Visits, Individualized Curriculum, Parent Conferences)</li> <li>• Eligibility Criteria</li> <li>• Eligibility Income</li> <li>• Eligibility Notes</li> </ul>

Field	Description
	<ul style="list-style-type: none"> <li>• Enrollment Notes</li> <li>• Funding</li> <li>• Location Preferences</li> <li>• Needs Assessment and Family Partnership Information</li> <li>• <b>PIR Information</b></li> </ul>
Increment Participation Year	Check this box if you want ChildPlus to automatically increment the participation year for the participant you are rolling over. For example, if the child's participation year is currently set to 1, then ChildPlus will increment their participation year to 2 in the new record.
Returning Points	Enter the number of eligibility points you want to carry over from the participant's current participation record. The points value you enter here will automatically be copied into the new participation record.

2. Select whether you want assign the participants to the same Agency, Site, and Classroom that they are currently assigned to. If you select **Yes**, ChildPlus will automatically assign each participant to their current **Agency, Site, and Classroom**. If you select **No**, choose their new **Agency, Site, and Classroom** assignments.
3. Enter the number of calendar days that you want ChildPlus to use as the cut off when determining whether or not to increment the participation year. This field must be populated and should contain a value greater than 1.
4. Choose **Yes** if you want ChildPlus to automatically copy the PIR data from the participant's record that you are rolling over and apply the answers to their new participation record as well.
5. Choose **Yes** if you want ChildPlus to automatically copy each participant's current **Needs Assessment and Family Partnership** information to their new participation record as well.
6. Click **Next Step**.

### Step 3 - Select Participants to Create New Records

In this step, you have to review and select all of the participants that you want to create a new participation record for.

1. Review the names of each participant included in the grid. ChildPlus will create a new participation record for each child whose name is checked. If there is a child that you do not want to create a participation record for, uncheck the box next to his/her name.
2. If you want to print a list of the participants who will be rolled over, click **Preview** or **Print**.



If you need to make any changes to the participant's new record, you can do so in the next step.

3. Click **Next Step**.
4. Click **Confirm** to create a new participation record for each participant in the grid.

### Step 4 - Modify Individual Records

In Step 3, you created new participation records for the participants you are rolling over. In Step 4, you'll have the opportunity to modify this information for each participant.

1. Review the names of each participant included in the grid.
2. If you need to modify their new participation record, select the name of the participant whose record you want to adjust and make your changes on the lower half of the screen.



Make sure you have the name of the child whose record you want to modify highlighted before you make any changes.

3. Repeat step 2 for each participant whose record you need to modify.
4. Click **Finish Editing Records**.
5. Do one of the following:
  - Click **Roll over more individuals** to use the **Rollover Utility** with additional participants.
  - Click **Exit the Rollover Utility** to return to the main ChildPlus screen.

TSG

### Closeout Program Term Utility



#### Teaching Strategies GOLD Users

If you are a Teaching Strategies GOLD user, please make sure that all of your data and reporting for the year has been completed in Teaching Strategies GOLD before running this utility.

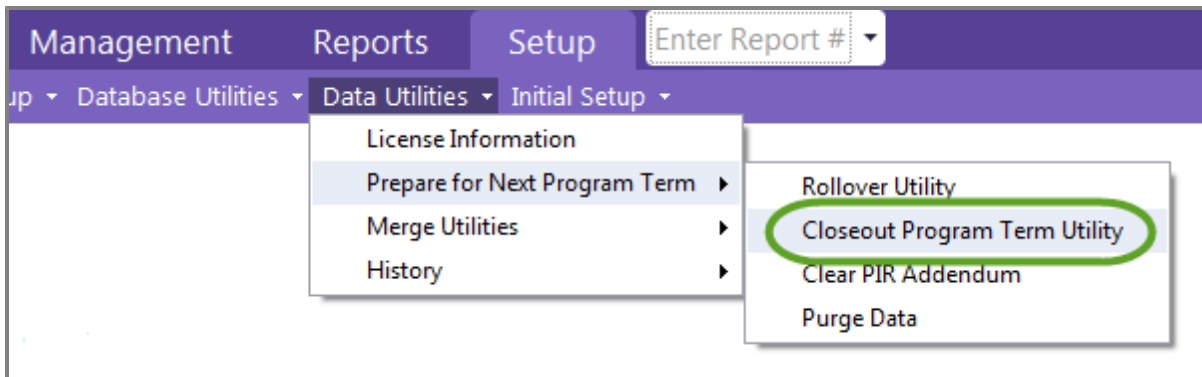
You can use the **Closeout Program Term Utility** in ChildPlus to close out your program terms when the program term or school year ends. Closing out your program terms is important because doing so allows you to free up the licenses of the participants who have been dropped so you can use them for the next program term. Using this utility, you can:

- Quickly mark all the participants who were enrolled in a program term as *complete*.
- Assign a **Drop Date** and **Drop Reason** to the records of participants who you are terminating.
- Add **Transition Notes** (if applicable) to the records of participants who are transitioning to another program.

The **Closeout Program Term Utility** gives you the flexibility of working with either **Returning** or **Transitioning** participants. You can also work with both types of participants at the same time, which is especially helpful if you want to close out returning participants differently than transitioning participants. What is the difference between the **Closeout Program Term Utility** and the **Rollover Utility**? *The **Closeout Program Term Utility** is typically used to after a program term or school year ends to mark large groups of participants as having completed the program term. You typically use the **Rollover Utility** when you are getting ready for enrollment to create new participation records for both your returning and transitioning participants.*

### Opening the Closeout Program Term Utility

1. Click **Setup > Data Utilities > Prepare for Next Program Term**.
2. Click on **Closeout Program Term Utility**.



## Closing out a program term in ChildPlus

1. Select the program term you want to closeout from the **Program Term** list.
2. Select the locations you want to closeout by checking each applicable agency, site, classroom, and group.
3. Select the participants you want to closeout by checking **those who are returning** and/or **those who are transitioning**.
4. Enter the age that participants must be younger than in order to return to the program.
5. Enter the birthday cut off for returning participants.
6. Click **Go to Next Step**.
7. Verify that ChildPlus assigned each of the participants listed with the correct status (either *Returning* or *Transitioning*). If you want to change a participant's status, you can use the drop down arrow next to the status to change it.



If you do not want to include a participant in the closeout, uncheck the box next to their name.

8. At the bottom of the screen you will see two areas. The first is for the returning participants and the second is for transitioning participants. Complete each of the following **fields** for each group of **Returning** and/or **Transitioning** participants. **Show me**.

Field	Description
Drop Date	Select how you want ChildPlus to calculate the participant's drop date. You can either: <ul style="list-style-type: none"> <li>• Use each participant's classroom end date</li> <li>• Use selected date for all participants (if you choose this open, make sure you enter the date you want to use)</li> </ul>
Drop Reason	Select the <b>Drop Reason</b> that you want to assign to each participant in the group. ChildPlus uses this field to calculate question A.19 on the PIR.
Completed Program Term	Select this option to mark each participant in the group as having completed the program term.
Completed Program	Select this option to mark each participant in the

Field	Description
	group as having completed the program.

- Click **Add transition comments for multiple individuals** to write up comments that will apply to each of the transitioning participants (if applicable).



To add comments for each participant individually, click on the **Comments** link in the **Transition** column for each participant you want to add a comment for.

- Click **Closeout Records**.
- Confirm that you want to mark the selected records complete by clicking **Mark as complete**.

## Clearing PIR Values

Clearing the values for **PIR** fields is helpful if you've used ChildPlus during previous PIR years and now want to remove data that is no longer valid for returning participants.



**Warning:** Keep in mind that once you clear values in these fields, ChildPlus will delete any and all existing PIR module data values that are stored in your system. Therefore, you should only clear PIR module data values after you have completed and submitted your PIR for the selected program term.

Follow these steps to clear values for the **PIR** screen:

- Click **Setup > Data Utilities > Prepare for Next Program Term > Clear PIR Addendum**.
- Select the **Program Term, Agency, Site, and/or Classroom** that you want to clear PIR data for. If you do not want to specify a specific **Agency, Site** and/or **Classroom**, you can select **<All>** to delete all values.
- Click **Clear PIR Addendum**.
- Click **Yes** button to confirm that you want to clear the PIR data.

## Purge Data

The **Purge Data Utility** permanently deletes records that you no longer need from ChildPlus. This utility lets you purge records by program term. The way it works is that any family or participant who only has a participation record for the program term you are purging will be removed from ChildPlus. If a family or participant has participation records for multiple terms, however, will not be removed from ChildPlus and you'll still be able to view the program term that was purged (although it will be *grayed out* and *view only*) in the **Enrollment** module. Once the program term has been purged, you can print a list of the family members who were purged.



### Proceed with caution!

Before purging any data it is strongly recommended that you create an archive and run the **Prepare for Next Program Term Utility**. Once you purge records, they will be permanently deleted from ChildPlus.

## How to Purge Data Records in ChildPlus:



### **Before you begin:**

Make sure that all of your users have exited out of ChildPlus before you use the **Purge Data Utility**.

1. Click **Setup > Data Utilities > Prepare for Next Program Term > Purge Data**.
2. Click **OK** to confirm you want to purge data.
3. Check the box next to each program term that you want to purge.
4. Click the
5. Click **Print Purge Report** to print a list with the *Name, ChildPlus ID, Age, and Birthday* of each participant and family member that will be purged.
5. Review the report to verify that you want to purge all everyone listed on it.
6. Click on the **Purge** button when you are ready to purge the selected program term(s).
7. Type **Purge** to confirm that you want to purge the records.
8. Click **Purge**.

## **Merge Utilities**

You can use the following suite of utilities in ChildPlus to help you streamline your data. You can access these utilities via **Setup > Data Utilities > Merge Utilities**.

### **Merge Community Resources**

### **Merge Families**

### **Merge Dropdown Choices**

### **Merge Health Event Types**

### **Merge In-Kind Volunteers**

## **Merge Community Resources**

The **Merge Community Resources Utility** allows you to quickly clean up duplicate community resources. Rather than having multiple community resource records, you can use this utility to merge duplicate community resources into one record. Doing so prevents errors and extra data entry efforts that can occur when users choose the wrong community resource. For example, say you have one community resource that is named "Stephens, Patrick M.D." and another named "Patrick Stephens M.D.". After verifying, if you determine that both records are for the same resource, you can eliminate future confusion by merging the two records into one.

## How to Merge Community Resources

1. Open the **Merge Community Resources** utility by clicking **Setup > Data Utilities > Merge Utilities > Merge Community Resources**.



2. Select the name of the resource that you want to use as the main community resource. All duplicate resources will be merged into the resource you select here.
3. Check the box next to the name of each community resource that you want to merge in the **Check one or more Community Resources to merge away** box. ChildPlus will merge these resources with the community resource you selected in step number 2.
4. Click **Merge**.
5. Type **Merge** to confirm that you want to merge the community resources.
6. Click **Merge** to merge the community resources.

dups

### Merge Families Utility

Did someone add a family to your database twice? No problem! You can use the **Merge Families Utility** to merge duplicate families together.



This utility is designed to move all of your family members to a different family. Click here if you just need to move one family member to a different family.

## Merging Families

1. Open the **Merge Families** utility by clicking **Setup > Data Utilities > Merge Utilities > Merge Families**.
2. Select the family that you want to keep.
3. Select the family that you want to remove from the system. ChildPlus will merge the participants of this family with the family selected as the **Family to Keep**.
4. Select either **Yes** or **No** to tell ChildPlus whether you want to merge the **Family Service Events** of the family you are removing with the new combined family that you are creating.
5. Click **Merge**.
6. Type **Merge** to confirm that you want to merge the families.
7. Click **Merge**.

### Merge Health Event Types

You can use the **Merge Health Event Types** utility to merge duplicate or unnecessary **health events** in ChildPlus.

## Merging Health Event Types

1. Open the **Merge Health Event Types** utility by clicking **Setup > Data Utilities > Merge Utilities > Merge Health Event Types**.
2. Select an event type from the list on the left.
3. Select the event types that you want to merge with the event.
4. Click **Merge**.
5. Type **Merge** to confirm that you want to merge the families.
6. Click **Merge**.

## Merge Dropdown Choices

You can use the **Merge Validation Codes** utility to merge duplicate or unnecessary **validation codes** in ChildPlus.

## Merging Dropdown Choices

1. Open the **Merge Dropdown Choices** utility by clicking **Setup > Data Utilities > Merge Utilities > Merge Dropdown Choices**.
2. Select the **Drop-down Choice (Validation Code) Type** that you want to modify.
3. Select the drop-down choice that you want to keep.
4. Select the code(s) that you want to merge with the code you selected in Step 3 (the code(s) you select will be deleted after the merge).
5. Click **Merge**.
6. Type **Merge** to confirm that you want to merge the families.
7. Click **Merge** merge the drop-down choices.

## Sign-In/Sign-Out Worksheet

Along with the **Data History Log**, you can use the **Sign-In/Sign-Out History** report to view a history of what time users logged in to and out of ChildPlus, the IP Address that was used to access ChildPlus, and the name of the computer that they were using when they logged in.

## Using the Sign-In/Sign-Out Worksheet

1. Click **Setup > Data Utilities > History > Sign-In/Sign-Out History**.
2. Choose whether you want to run the report for users who:
  - Signed-in within the last \_\_\_ days.
  - Signed-in between two specific dates.
  - Are signed-in at the moment.
3. Check the users that you want to see on the report.
4. Click **Find**.

## Data History Log

The **Data History Log** lets you see a complete history of any changes made to your ChildPlus data. With this feature, you can run reports that lists all of data that has been added or changed in participant records, personnel records, and your system configuration. In addition to what was changes, you'll also be able to see the name of the user who made the changes. Depending on the type of information you want to view changes for, you can pick from the:

## Data History Log (Participant Information)

You can use the **Data History Log (Participant Information)** to track changes for all of the modules that are part of the **Services** tab. The **Services** modules in ChildPlus include: **Family Application, Enrollment, Family Services, Health, Immunizations, Disability, Mental Health, Birth, Pregnancy, Transportation, and Education**. In addition, you can also track changes to **Entry Express - Family Service**

**Entry Express - Health.** You can track changes for these areas via: **Setup > Data Utilities > History > Data History Log (Participant Information).**

## Data History Log (Personnel Changes)

You can use the **Data History Log (Personnel Changes)** to track changes made in the **Personnel** module. You can track changes for **Personnel** via: **Setup > Data Utilities > History > Data History Log (System Personnel Changes).**

## Data History Log (System Configuration Changes)

You can use the **Data History Log (System Configuration Changes)** to track changes for the following areas: **User Security, User Security Groups, Security Settings, Program Info, System Preferences.** You can track changes for these areas via: **Setup > Data Utilities > History > Data History Log (System Configuration Changes).**

### Configuring the Data History Log

Through **System Preferences**, you can turn the Data History Log off and on; decrease or extend the amount of time ChildPlus saves your data; and choose which Services modules you want to track changes for. Click here to learn how to configure the **Data History Log**.

### Viewing the Data History Log for Participant Information

1. Click **Setup > Data Utilities > History > Data History Log (Participant Information).**
2. Specify the time period that you want to view the history for.
3. Specify if you want to view:
  - all transactions for families or family members
  - transactions for a specific families (filter by FamilyID or Family Name)
  - transactions for specific family members (filter by name or ChildPlusID)
4. Check each module that you want to view the history for.
5. Check the type of data history you want to view. Choose **Add** to see a history of records that have been added, **Edit** to see a history of records that have been changed, and/or **Delete** to see a history of records that have been deleted).
6. Check the name of each user you want included in the history. For example, if you choose *Jane Doe* then any records that Jane Doe modified will be included in the history.
7. Click on the **Find** button.



You can view the **Data History Log** by clicking the **Data History Log** button located at the top of each module under the **Services** tab. **Show me.**

When you view the **Data History Log** from within a Services area module, you are viewing the data history for the participant selected in **Participants List**. If you want to view the complete **Data History Log**, go to **Setup > Data Utilities > History > Data History Log (Participant Inform-**


ation).

## Viewing the Data History Log for Personnel and System Configuration

1. Click **Setup > Data Utilities > History** and choose either the **Data History Log (Personnel Changes)** or **Data History Log (System Configuration Changes)**.
2. Specify the time period that you want to view the history for.
3. Click **OK**.
4. Double click the transaction you want to view.

## Viewing Changes Made by ChildPlus

We occasionally modify or remove fields to improve ChildPlus during an update. Follow these steps to view any changes we've made to a participant's record:

1. Open a **Service Area** module for the participant whose changes you want to view. *How do I do this?* Click **Services > select the participant's name in the Participants List > select the Service Area module you want to open.**
2. Open the **Data History Log** by clicking  or by typing the *Alt+Y* hotkey.
3. Click **View changes made by ChildPlus**.
4. Select the date that you want to view changes for.
5. Review the changes and click **OK**.

### View changes made by ChildPlus

#### Data History Log

The **Data History Log** lets you see a complete history of any changes made to your ChildPlus data. With this feature, you can run reports that lists all of data that has been added or changed in participant records, personnel records, and your system configuration. In addition to what was changes, you'll also be able to see the name of the user who made the changes. Depending on the type of information you want to view changes for, you can pick from the:

## Data History Log (Participant Information)

You can use the **Data History Log (Participant Information)** to track changes for all of the modules that are part of the **Services** tab. The **Services** modules in ChildPlus include: **Family Application, Enrollment, Family Services, Health, Immunizations, Disability, Mental Health, Birth, Pregnancy, Transportation, and Education**. In addition, you can also track changes to **Entry Express - Family Service Events, Entry Express - Health** and the **Mobile Attendance App**. You can track changes for these areas via: **Setup > Data Utilities > History > Data History Log (Participant Information)**.

## Data History Log (Personnel Changes)

You can use the **Data History Log (Personnel Changes)** to track changes made in the **Personnel** module. You can track changes for **Personnel** via: **Setup > Data Utilities > History > Data History Log (System Personnel Changes)**.

## Data History Log (System Configuration Changes)

You can use the **Data History Log (System Configuration Changes)** to track changes for the following areas: **User Security, User Security Groups, Security Settings, Program Info, System Preferences**. You can track changes for these areas via: **Setup > Data Utilities > History > Data History Log (System Configuration Changes)**.

### Configuring the Data History Log

Through **System Preferences**, you can turn the Data History Log off and on; decrease or extend the amount of time ChildPlus saves your data; and choose which Services modules you want to track changes for. Click [here](#) to learn how to configure the **Data History Log**.

### Viewing the Data History Log for Participant Information

1. Click **Setup > Data Utilities > History > Data History Log (Participant Information)**.
2. Specify the time period that you want to view the history for.
3. Specify if you want to view:
  - all transactions for families or family members
  - transactions for a specific families (filter by FamilyID or Family Name)
  - transactions for specific family members (filter by name or ChildPlusID)
4. Check each module that you want to view the history for.
5. Check the type of data history you want to view. Choose **Add** to see a history of records that have been added, **Edit** to see a history of records that have been changed, and/or **Delete** to see a history of records that have been deleted).
6. Check the name of each user you want included in the history. For example, if you choose *Jane Doe* then any records that Jane Doe modified will be included in the history.
7. Click on the **Find** button.



You can view the **Data History Log** by clicking the **Data History Log** button located at the top of each module under the **Services** tab. **Show me**.

When you view the **Data History Log** from within a Services area module, you are viewing the data history for the participant selected in **Participants List**. If you want to view the complete **Data History Log**, go to **Setup > Data Utilities > History > Data History Log (Participant Information)**.

## Viewing the Data History Log for Personnel and System Configuration

1. Click **Setup > Data Utilities > History** and choose either the **Data History Log (Personnel Changes)** or **Data History Log (System Configuration Changes)**.
2. Specify the time period that you want to view the history for.
3. Click **OK**.
4. Double click the transaction you want to view.

### Data History Log Transaction History

ChildPlus creates a new transaction record each time a user adds, changes, or deletes data in your system. In order to help you understand common transaction records, we have put together this topic which includes examples of how common actions in the system translate in the **Data Entry History Log**.



You can configure the amount of time that transactions are stored in the **Data History Log** through **System Preferences**.

### Changing Data Stored in a Field

When you change data stored in a field, both the **Old Value** (what it was) and the **New Value** (what you changed it to) will be displayed in the transaction record. In the following example, we've highlighted the record that was changed. Jason Aiken's birthday was changed from 12/28/2009 to 12/08/2009.

Application History for the Aiken family						
Drag a column header here to group by that column						
Transaction Date	User Name	Update Type	Record Description	Field Name	Old Value	New Value
2/3/2015 11:29:09 ...	<admin>	Edited Person	Aiken, Jason (236642)	LanguageEnglishPrim...	True	False
2/3/2015 11:25:15 ...	<admin>	Edited Person	Aiken, Jason (236642)	PreferredName	Jay	
2/3/2015 11:25:11 ...	<admin>	Edited Person	Aiken, Jason (236642)	PreferredName		Jay
2/3/2015 11:23:53 ...	<admin>	Edited Person	Aiken, Jason (236642)	MiddleName		Alexander
2/3/2015 11:23:17 ...	<admin>	Edited Person	Aiken, Jason (236642)	Birthday	12/28/2009	12/8/2009

Data History Log transactions are kept for 120 days

View changes made by ChildPlus.net

Export Print Close

[Learn About Transactions](#)

In this example, we've added a middle name for a participant. The **Old Value** column is blank because the **Middle Name** field was previously empty. The **New Value** column shows that her middle name is now listed as *Alexander*.

Application History for the Aiken family

Drag a column header here to group by that column

Transaction Date	User Name	Update Type	Record Description	Field Name	Old Value	New Value
2/3/2015 11:29:09 ...	<admin>	Edited Person	Aiken, Jason (236642)	LanguageEnglishPrim...	True	False
2/3/2015 11:25:15 ...	<admin>	Edited Person	Aiken, Jason (236642)	PreferredName	Jay	
2/3/2015 11:25:11 ...	<admin>	Edited Person	Aiken, Jason (236642)	PreferredName		Jay
2/3/2015 11:23:53 ...	<admin>	Edited Person	Aiken, Jason (236642)	MiddleName		Alexander
2/3/2015 11:25:17 ...	<admin>	Edited Person	Aiken, Jason (236642)	BirthDay	12/28/2009	12/8/2009

Data History Log transactions are kept for 120 days [View changes made by ChildPlus.net](#)

[Learn About Transactions](#) [Export](#) [Print](#) [Close](#)

In this example, we've deleted the participant's Preferred Name from their application. The **Old Value** column shows the participant's **Preferred Name** was *Jay* and the **New Value** column is empty because we deleted the data that had been stored in the field.

Application History for the Aiken family

Drag a column header here to group by that column

Transaction Date	User Name	Update Type	Record Description	Field Name	Old Value	New Value
2/3/2015 11:29:09 ...	<admin>	Edited Person	Aiken, Jason (236642)	LanguageEnglishPrim...	True	False
2/3/2015 11:25:15 ...	<admin>	Edited Person	Aiken, Jason (236642)	PreferredName	Jay	
2/3/2015 11:25:11 ...	<admin>	Edited Person	Aiken, Jason (236642)	PreferredName		Jay
2/3/2015 11:23:53 ...	<admin>	Edited Person	Aiken, Jason (236642)	MiddleName		Alexander
2/3/2015 11:25:17 ...	<admin>	Edited Person	Aiken, Jason (236642)	BirthDay	12/28/2009	12/8/2009

Data History Log transactions are kept for 120 days [View changes made by ChildPlus.net](#)

[Learn About Transactions](#) [Export](#) [Print](#) [Close](#)

## Check Boxes

If you check or uncheck a box in ChildPlus, the transaction value will be recorded as either *true* (if the box is checked) or *false* (if the box is unchecked). In the following example, we unchecked the **Primary** language box in the **Application** module.

Application History for the Aiken family

Drag a column header here to group by that column

Transaction Date	User Name	Update Type	Record Description	Field Name	Old Value	New Value
2/3/2015 11:29:09 ...	<admin>	Edited Person	Aiken, Jason (236642)	LanguageEnglishPrim...	True	False
2/3/2015 11:25:15 ...	<admin>	Edited Person	Aiken, Jason (236642)	PreferredName	Jay	
2/3/2015 11:25:11 ...	<admin>	Edited Person	Aiken, Jason (236642)	PreferredName		Jay
2/3/2015 11:23:53 ...	<admin>	Edited Person	Aiken, Jason (236642)	MiddleName		Alexander
2/3/2015 11:23:17 ...	<admin>	Edited Person	Aiken, Jason (236642)	Birthday	12/28/2009	12/8/2009

Data History Log transactions are kept for 120 days View changes made by ChildPlus.net

[Learn About Transactions](#) [Export](#) [Print](#) [Close](#)

## Adding a New Family

Each new family that you add to ChildPlus results in 4 transaction records being recorded in the Data Entry History Log. We've included an example of what adding a new family looks like in the Data Entry History Log below. In addition, below it you will find a table that describes each of the transactions in detail.

Application History for the Robinson family

Drag a column header here to group by that column

Transaction Date	User Name	Update Type	Record Description	Field Name	Old Value	New Value
2/3/2015 11:41:56 ...	<admin>	Added Person	Robinson, Juanita (236751)			
2/3/2015 11:41:56 ...	<admin>	Added Family Members...	Person: Robinson, Juanita (236751) Family: Robinson (79757)			
2/3/2015 11:41:56 ...	<admin>	Added Family Member	Robinson, Juanita (236751)			
2/3/2015 11:41:56 ...	<admin>	Added Family	Robinson (79757)			

Data History Log transactions are kept for 120 days View changes made by ChildPlus.net

[Learn About Transactions](#) [Export](#) [Print](#)

Row Number	This record shows that...
1	Juanita Robinson was added as a person in the system.
2	Juanita Robinson was added as a member of the Robinson family.
3	Juanita Robinson was listed as the primary adult in the Robinson family
4	The Robinson family was added to the system.



# Working with Attachments

You can conduct file reviews directly from your desk using the **Attachments** feature in ChildPlus! **Attachments** gives the ability to store various types of scanned documents in ChildPlus. For example, it's great for storing income verifications, consent forms and signed applications. With the **Attachments** feature, you'll never have to search for a paper copy of a document again.

You can add **Attachments** for each of the different **Service** Area modules (*Family Application, Enrollment, Family Services, Health, Immunizations, Disability, Mental Health, Birth, Transportation, and Education*). You can also store **Attachments** in the **Personnel, In-Kind, Attendance, CLASS®** and **Professional Development** modules.

Regardless of the module you are working in, **Attachments** are always accessible via the **Attachments** tab on the screen.

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Alex Barron ▾ 🚩 🚩 🚩 (+3)  
 DOB: 2/25/11 6y 6m CPID: 199752  
 New 11/18/16 • Year 1 (+3)

Application Enrollment Family Services Health Immunizations Disability

Concerns (1) IESP IEP Additional Info **Attachments (2)**

Concerns

	Identified	Category	Closed	Close
Open	10/17/14			

**Attachments** works with all types of files (for example, Word, Excel, PDF, GIF and JPG). While there is a 20 MB file size limit on individual documents, there is no limit to the number of files you can store in the system.



Administrators can use **System Preferences** to configure what happens to a file once you've added it as an attachment in ChildPlus (for example, leave the file in its current folder or delete it).



See page 219 to view a list of reports that you can use to view the attachments stored in ChildPlus.



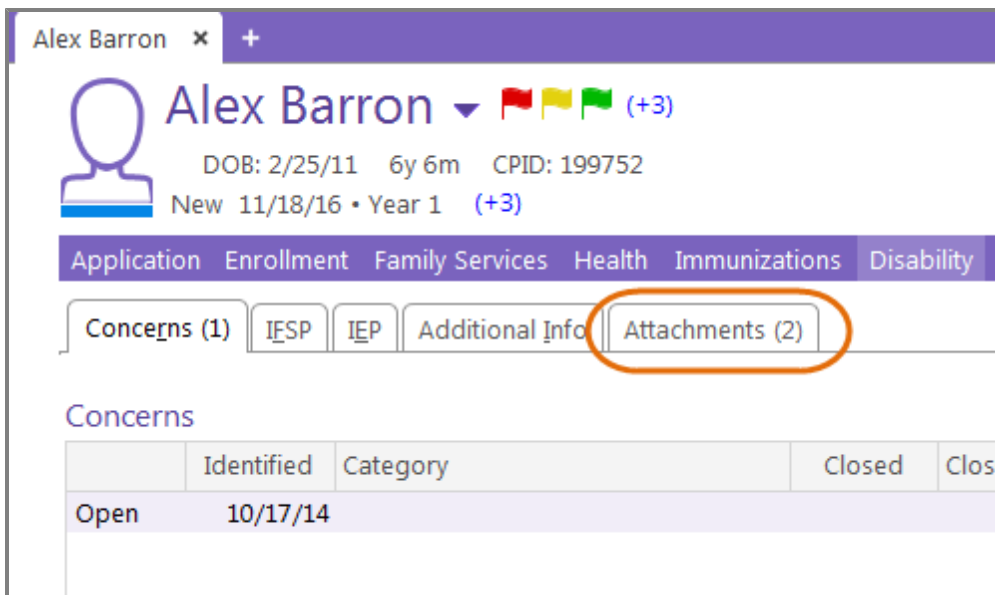
Once you add an attachment to ChildPlus, you'll only be able to view it. Editing an attachment from within ChildPlus is not possible. If a document attached to a participant's record changes, we recommend adding the updated document as a new

attachment.

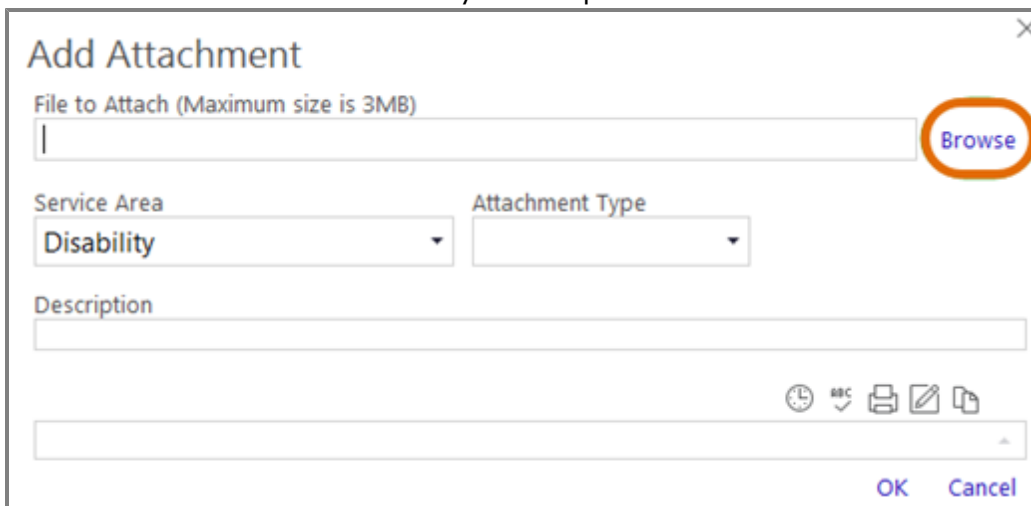
## Adding Attachments

Follow these steps to add an **Attachment** in ChildPlus.

1. Open the module that you want to add an attachment for. As an example, if you want to attach a copy of the participant's IEP, then open the **Disability** module.
2. Click the **Attachments** tab. Regardless of the screen you have open, **Attachments** will always be available as a tab on the screen.



3. Click **Add Attachment**.
4. Click **Browse** to locate the file on your computer.



5. Click **Open** once you've located the file.
6. If applicable, select the **Service Area**, **Attachment Type**, and add a **Description** about the attachment.

7. Click **OK**.
8. Click **Close** to return to the module screen.



Once you add an attachment to ChildPlus, you'll only be able to view it. Editing an attachment from within ChildPlus is not possible. If a document attached to a participant's record changes, we recommend adding the updated document as a new attachment.

## Tips & Tricks for Working with Attachments

To help you get the most of out of **Attachments** in ChildPlus, we've put together a list of some helpful tips and tricks.

### Scanning Tips

- Have your ChildPlus Administrator enable the feature that automatically moves scanned documents after they are attached in ChildPlus. Ideally, you don't want anything in that folder other than scanned documents that have not yet been attached. Your ChildPlus Administrator can access this feature via *Setup > System Setup > System Preferences > General tab*. [Show me](#).



## System Preferences



These preferences are global and apply to all users.

### ▼ General

Family Application - Minimum Length of Filter Criteria required to search for a family.

Tools - Poverty Calculator    [View HHS Poverty Guidelines](#)

Number in Family	Poverty Level
1	10890
2	14710
3	18530
4	22350
5	26170
6	29990
7	33810
8	37630
Each Additional Person	3820

### ChildPlus Community

Show Forums

This will allow users to access the Feature Request Forum and the Head Start Community Question and Answer Forum.

Show Social Media

This will allow users to access ChildPlus Software's social media sites, including the ChildPlus Software Facebook and Twitter pages as well as the YouTube account to view introductory videos.

Note: Access can be controlled for each security group (Setup | User Security | User Security Groups)

Attachments - After a file has been attached to a record in ChildPlus ...

Leave the file in its current folder

Move the file to a sub-folder named "Attached"

After the file is attached, the system will move the file to a folder named "Attached".

The "Attached" folder will be a sub-folder of the file's current folder.

If an "Attached" folder does not exist, the system will automatically create one.

If user does not have permission to create a folder, the file will remain in its current folder.

Delete the file

After the file is attached, the system will delete the file from its current location.

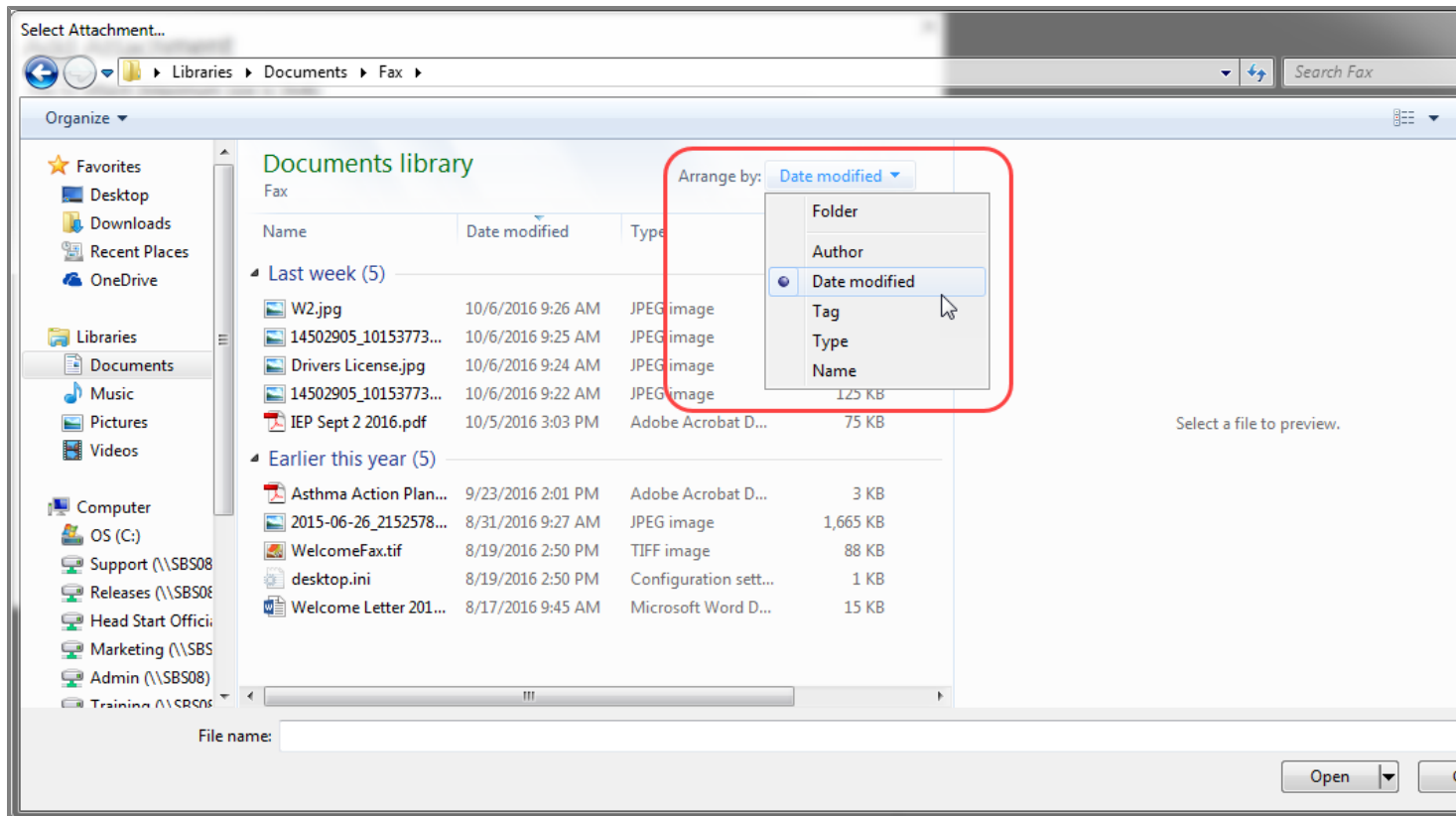
Note: User will not be warned that the file will be deleted from its current location.

Does agency operate an American Indian/Alaska Native program?

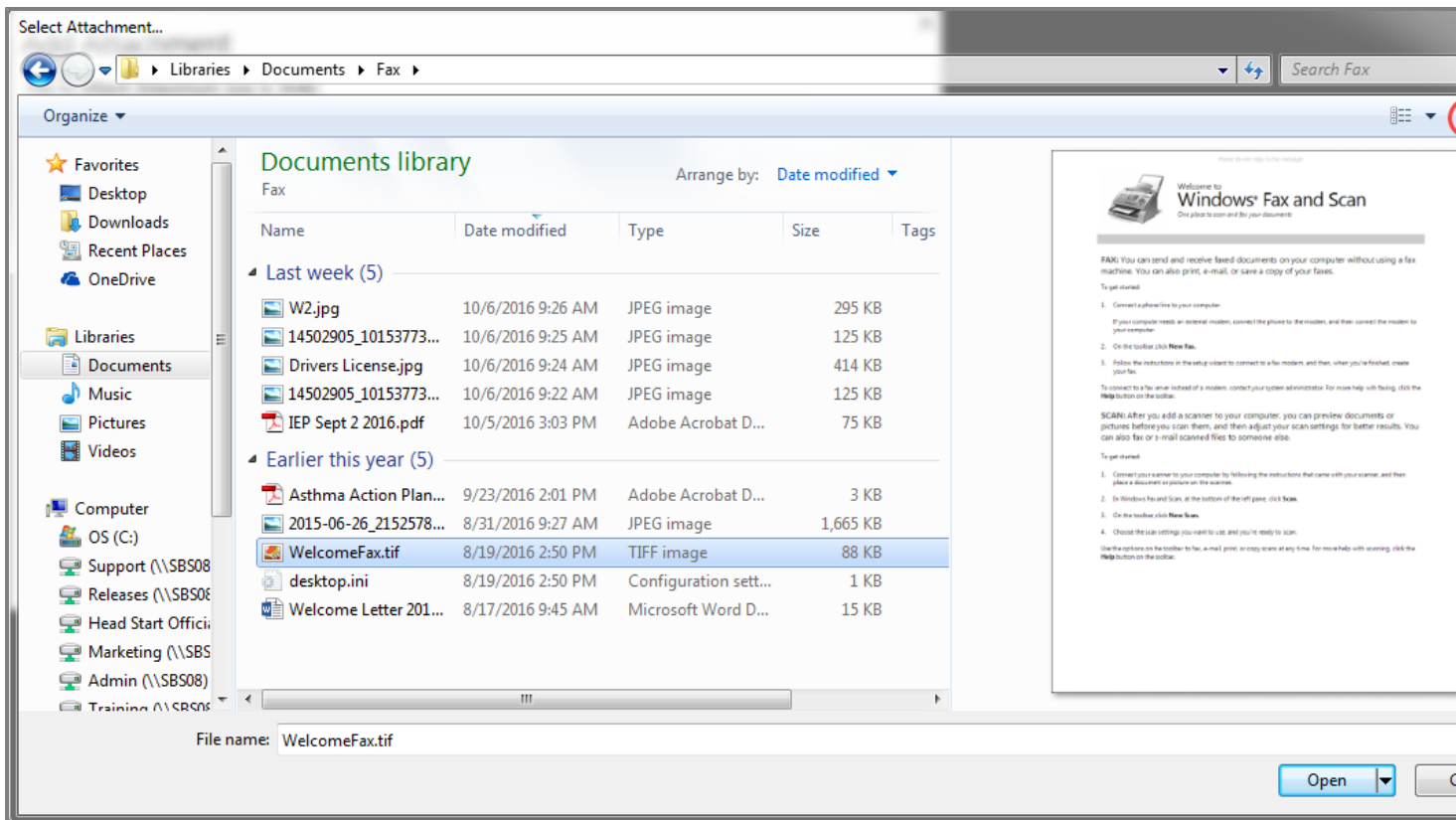
- Try to configure your scanner to scan directly into a folder that contains nothing other than scanned documents, preferably only your own scanned documents. If you don't already have a folder like this or need help setting one up, you can ask a member of your agency's IT staff for help.
- Don't rename the scanned files – it takes time and shouldn't be necessary.
- If you're currently receiving your scanned files via email, see if there is a way to configure your scanner to save them directly to a hard drive instead. This will allow you to skip the email step.
- Experiment with your scanner's resolution and color settings. Try setting your scanner to 300 dpi resolution and either B&W or grayscale so the attached file will be smaller and will upload much faster. For example, if a document is 5 MB when scanned at 1200 dpi in color, the same document will only be 0.3 MB when scanned at 300 dpi grayscale, that's 94% smaller. Even though the file will be smaller, it will still be perfectly readable and you'll be able to save it much faster. If you need help changing your scan resolution, check the documentation for your scanner or ask a member of your agency's IT staff for help.

#### When selecting a scanned file from the list of files

- Sort the list of files on the **Select Attachments** window by **Date Modified** with the most recent at the top of the list. This way, a file you just scanned is at the top of the list. [Show me.](#)



- Turn on the **Preview Pane** for the **Select Attachments** window so you can tell which file you are attaching. [Show me.](#)



## Deleting Attachments

Follow these steps to delete an **Attachment** in ChildPlus:

1. Open the module that is related to the module you want to delete. For example, if you want to view a copy of the participant's IEP, then open the **Disability** module.



Select **All Service Areas** to view all of the participant's attachments, regardless of module.

2. Select the participant whose attachment you want to delete.



- Click the **Attachments** tab. Regardless of the screen you have open, **Attachments** will always be available as a tab on the screen.

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**Alex Barron** ▾ 🚩 🚩 🚩 (+3)  
 DOB: 2/25/11 6y 6m CPID: 199752  
 New 11/18/16 • Year 1 (+3)

Application Enrollment Family Services Health Immunizations Disability

Concerns (1) IESP IEP Additional Info **Attachments (2)**

Concerns

Identified	Category	Closed	Close
Open	10/17/14		

- Select the attachment you want to delete and click **Delete**.

Alex Barron x +

**Alex Barron** ▾ 🚩 🚩 🚩 (+3) 🚩 Flags ✉ Send Message  
 DOB: 2/25/11 6y 8m CPID: 199752  
 New 11/18/16 • Year 1 (+3) HS 16-17 • New Hope Childcare Center •

Application Enrollment Family Services Health Immunizations Disability Mental Health Birth Transportation E

Concerns (1) IESP IEP Additional Info **Attachments (2)**

Disability ▾ Add Attachment

Service Area	Attachment Type	Description	Date Added	Ado
Disability ←	Referral	teacher referr...	8/14/2017	<ac
Disability	Consent Form	Signed Conse...	9/20/2017	<ac

- Click **Yes** to confirm you want to delete the attachment.

## Viewing Attachments

Follow these steps to view an **Attachment** in ChildPlus:

1. Open the module that is related to the module you want to view. For example, if you want to view a copy of the participant's IEP, then open the **Disability** module.



Select **All Service Areas** to view all of the participant's attachments, regardless of module.

2. Select the participant whose attachment you want to view.
3. Click the **Attachments** tab. Regardless of the screen you have open, **Attachments** will always be available as a tab on the screen.

Alex Barron x +

**Alex Barron** ▾ 🚩 🚩 🚩 (+3)  
 DOB: 2/25/11 6y 6m CPID: 199752  
 New 11/18/16 • Year 1 (+3)

Application Enrollment Family Services Health Immunizations Disability

Concerns (1) IESP IEP Additional Info **Attachments (2)**

Concerns

Identified	Category	Closed	Close
Open	10/17/14		

4. Select the attachment you want to view and click **View**.

Alex Barron x +

**Alex Barron** ▾ 🚩 🚩 🚩 (+3) 🚩 Flags ✉ Send Message

DOB: 2/25/11 6y 6m CPID: 199752  
 New 11/18/16 • Year 1 (+3) HS 16-17 • New Hope Childcare Center •

Application Enrollment Family Services Health Immunizations Disability Mental Health Birth Transportation E

Concerns (1) IESP IEP Additional Info **Attachments (2)**

Disability ▾ Add Attachment

Service Area	Attachment Type	Description	Date Added	Ado
Disability ←	Referral	teacher referr...	8/14/2017	<ac
Disability	Consent Form	Signed Conse...	9/20/2017	<ac

## Attachment Reports

To help you make the most out of your attachments, you can use the following reports to view the attachments you've stored in ChildPlus:

**1132 - Personnel Attachment Listing**

2132 - Participant Attachment Listing

**4332 - In-Kind Volunteer Attachment Listing**

**5632 - CLASS Attachment Listing**

**8032 - Monitoring Attachment Listing**

**2332 - Attendance Attachment Listing**