Help Center

Just a click away!

Getting Started - ChildPlus Administrators

e-book

ChildPlus Desktop

800.888.6674
childplus.com

The Help Center and Agency Customization

The articles in the Help Center and videos in the Learning Library are based on the default setup of ChildPlus and assume full security access to all platforms, modules, features and fields. If you cannot find or access a feature referenced in an article, be aware that your agency's specific customization of ChildPlus determines:

- Your access to each platform
- Your access to specific modules or features
- Security or location restrictions for your level of access to ChildPlus
- Whether a module or feature has been turned on
- Which fields are available in each module
- The content of drop-down fields

Contact your ChildPlus administrator to verify your security access and the availability of a feature referenced in an article.

If you are a ChildPlus administrator and need to configure security access or turn on a feature, see User Security Groups or contact us for additional assistance.

Help Center Updates and ChildPlus Platforms

The Help Center is continually updated to reflect the current version of ChildPlus. Ensure that you are using the latest version of ChildPlus and referencing an article for the appropriate ChildPlus platform. Instructions for modules often differ between ChildPlus Online and ChildPlus Desktop and are unique for the Attendance App.

- To find out which version of ChildPlus you are using, see About ChildPlus.
- For more information about the different platforms and how to access them, see Platform Comparison on page 12.
- To learn about the differences between the modules in ChildPlus Desktop and ChildPlus Online, see Module Comparison on page 14.

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About ChildPlus

Learn about ChildPlus Desktop, ChildPlus Online and the Attendance App, the differences between the modules in each platform and how your agency's customized setup affects your access to content mentioned in Help articles.

What is ChildPlus?

ChildPlus is the innovative data management solution for Head Start, Early Head Start, Migrant, State Pre-K, and other early childhood programs. Our seamless design is easy to adopt and allows users to customize nearly every feature for a truly unique experience. With ChildPlus, you can centralize your children's data, analyze reports to make data-driven decisions and track trends to improve your agency's overall impact—all in one dependable software.

ChildPlus is offered as three different platforms and each has distinct uses and benefits for different types of users.

ChildPlus Desktop

When an agency first starts using ChildPlus, all initial tasks take place through ChildPlus Desktop. These tasks include adding the agency's data and staff members, configuring security access and enabling access to modules and features, including access to ChildPlus Online and the Attendance App.

ChildPlus Desktop is best for those responsible for setting up ChildPlus (ChildPlus administrators) and those who run PIR reports or grid reports.

For more information, see ChildPlus Desktop.

ChildPlus Online

ChildPlus Online is the website version of ChildPlus. Once the initial setup of ChildPlus is complete, ChildPlus Online can be enabled from ChildPlus Desktop. While ChildPlus Desktop can only be used on a computer with a Windows[1] operating system, ChildPlus Online can be used from any device with an internet connection and Google Chrome[2] or Apple Safari[3] installed.

Although the user interface of ChildPlus Online differs from that of ChildPlus Desktop, most of the same tasks can be completed in the corresponding modules in both platforms.

ChildPlus Online is continually updated to include all of the same functions and reports as ChildPlus Desktop. It also includes modules and features exclusive to the platform designed to enhance user experience.

ChildPlus Online is best for those who complete data entry and perform management tasks.

For more information, see ChildPlus Online.

[1]Windows is a trademark of the Microsoft group of companies.

[2]Chrome is a trademark of Google LLC.

[3]Safari is a trademark of Apple Inc., registered in the U.S. and other countries and regions.

Attendance App

The Attendance App is a mobile app designed exclusively for tracking attendance and meal counts and collecting parent signatures in classrooms. Once the initial setup of ChildPlus is complete, the Attendance App can be enabled through ChildPlus Desktop. While ChildPlus Online is the website version of ChildPlus, the Attendance App is the mobile app version of the Attendance module. The Attendance App can be downloaded on any mobile device from the device's app store.

The Attendance App is best for those who track attendance and meals in classrooms.

For more information, see Attendance App.

Additional Information

- See system requirements to learn what your device needs to support ChildPlus
- Learn how we host your ChildPlus data

Platform Comparison

Learn about the major differences between ChildPlus Desktop, ChildPlus Online and the Attendance App.

	ChildPlus Desktop	ChildPlus Online	Attendance App
How to access?	Any desktop or laptop with a Windows operating system	Any device with Google Chrome or Apple Safari installed	Any mobile device with an app store
Reports	• Most standard reports • All grid reports • PIR reports	• Most standard reports for each module in ChildPlus Online • All reports for features exclusive to ChildPlus Online	NA
Modules exclusive to this platform	• All Setup modules • Dashboard • Module Designer • Internal Monitoring • To-Do List	• DRDP Assessment (data entry) • Performance Panel • Professional Development	NA

	ChildPlus Desktop	ChildPlus Online	Attendance App
Features exclusive to this platform	• Send a **LiveMessage** through the **Services** modules • Submit a support ticket • Access the **Feature Request Forum** • Access **MyPeers Community** • **Check Me In / Out** • **My Timesheet** • **Poverty Calculator** • **Site Locator** • Change user interface colors • Add time stamps, spell check and print **Notes** fields	• Use on any device • View ChildPlus Online in other languages using settings in Google Chrome and Apple Safari • Watch videos and download e-books directly from the Help Center	Capture parent signatures for checking in and out using a mobile device

Module Comparison

Learn about the major differences between the modules in ChildPlus Desktop and ChildPlus Online.

Module	ChildPlus Desktop	ChildPlus Online
Attachments		
		• Click or tap **More** ··· to view the file name and size • Use the menu to delete an attachment
Dashboard		
	View agency statistics using charts and grids	NA
DRDP Assessment		
	Module Setup only	ChildPlus EXCLUSIVE Online Data entry only: • **Add Observations** • **Edit/View Observations** • **Portfolios and Ratings**
Entry Express		
Assessment	Track and record participant scores on an assessment configured by your agency	NA
Attendance	Record attendance and meal counts for multiple participants at the same time	NA

Module	ChildPlus Desktop	ChildPlus Online
Attendance Scanning, Scanning - Attendance and Scanning - Meals	• **Attendance Scanning** in ChildPlus Desktop • Select what you are scanning from one window • Manually enter a participant's barcode • Use with a barcode scanner	• **Scanning - Attendance** and **Scanning - Meals** in ChildPlus Online • Use the camera on a mobile device to scan a participant's barcode
Education Events	Same functionality	
Enrollment	Create enrollment records for multiple participants at the same time	NA
Family Service Events	Same functionality	
Health Events	Same functionality	
In-Kind	Same functionality	
Log a Communication	Same functionality	
Management		
CLASS	Same functionality	
Community Resources	• Generate a map of the address of a **Community Resource** • Automatically open your device's mail client to send an email to the contact person for a resource	Sort and filter **Community Resources**
Fees	Track batch charges and payments	NA

Module	ChildPlus Desktop	ChildPlus Online
In-Kind	• Generate a map of an **In-Kind** volunteer's address • Automatically open your device's mail client to send an email to the volunteer • View a historical record of your data in the event that ChildPlus makes changes to your data during an update	
Internal Monitoring	Track and enter monitoring results and corrective action plans	NA
PIR	Run PIR Reports	
Personnel	Use **Time Clock** to view, add or edit staff hours	
Professional Development	NA	ChildPlus EXCLUSIVE Online Track and enter staff trainings and attendees
Performance Panel		
	NA	ChildPlus EXCLUSIVE Online View your agency's real-time data in one place

Module	ChildPlus Desktop	ChildPlus Online
Reports		
	Run the following types of reports: • Reports for modules that are not in ChildPlus Online • Grid reports • PIR reports	• Run reports for exclusive ChildPlus Online features • Set favorite reports • View descriptions for each report
Services		
Add Family / Application	• Use the **Request Documents** feature to send a link to parents/guardians • Generate a map the family's address • Automatically open your device's mail client to send an email to an adult family member • For California reporting, print forms CD-7617 and EESD-9600	• Save an incomplete application and return to the **Add Family** window at any time • View a summary of family members in an easy-to-read grid format • Access all fields in **Add Family** from the **Application** module • Access the sections that contain data from other modules (**Enrollment**, **Health**, **Immunizations**, **Family Services**) from the **Application** module

Attendance	• Enter or edit information directly in the **Attendance** window
	• View **Attendance Details** in grid format
		• Access the following through menu options:
		  • Add a responsible staff member
		  • Filter the **Attendance Summary**
		  • Configure settings for **Attendance History** and defaults
		• View **Attendance Summary** data as charts

Birth	Same functionality	

Module	ChildPlus Desktop	ChildPlus Online
Disability	Use **Additional Info** to select a responsible staff member and add or update **PIR** information	• Use **Additional Info** to select a responsible staff member • Use **PIR** to add or update **PIR** information
Education	• View additional details about **Events** or **Actions** in the **Event** list window without having to select an **Event** • Group or ungroup sub-events in the **Event** list window • Use **Education Information** to select a responsible staff member, enter notes, enter screenings and add or update **PIR** information • View all **Requirements** information in one window	• Use **Information** to select a responsible staff member • Enter screenings in **Screening Results** • Use **Notes, PIR** to enter notes and add or update **PIR** information • Use the menu in **Requirements** to display enrollment history • Navigate to associated **Events** from the **Requirements** window
Enrollment	Access additional options using the buttons in the window	• Access additional options using the menus • Add or update and **Enrollment** information through **Add Family/Application**

Module	ChildPlus Desktop	ChildPlus Online
Family Services	• View additional details about **Events** or **Actions** in the **Event** list window without having to select an **Event** • View a summary of results for each assessment indicator • Copy answers from another assessment when entering results for a **Family Outcomes Instrument** • Clear all answers from a **Family Outcomes Instrument** at the same time • Use **Information** to track case workers, document services and enter **Needs Assessment**, **Family Partnership Agreement** and **PIR** information	• Use **Information** to track case workers and document services • Use **FPA, Needs Assessment, PIR** to enter **Needs Assessment**, **Family Partnership Agreement** and **PIR** information • Add or update **Needs Assessment**, **Family Partnership Agreement** and **PIR** information through **Add Family/Application**
Fees	• Track charges for childcare or other services • Manage parent payments	NA

Module	ChildPlus Desktop	ChildPlus Online
Health	• View additional details about **Events** or **Actions** in the **Event** list window without having to select an **Event** • Group or ungroup sub-events in the **Event** list window • Generate **Growth Charts** • Use **Health Information** to select a responsible staff member, enter health coverage information, enter notes, add or update **PIR** information and select a date for calculating **Health** or **Education Requirements** • View all **Requirements** information in one window	• Use **Information** to enter health coverage information and notes • Use **Coverage, PIR** to add or update **PIR** information and select a date for calculating **Health** or **Education Requirements** • Use the menu in **Requirements** to display enrollment history • Navigate to associated **Events** from the **Requirements** window • Add or update **PIR** information through **Add Family**/**Application**
Immunizations	Access a link to the CDC National Guidelines	Add or update **PIR** information through **Add Family** / **Application**
Mental Health	Use **Mental Health Info** to track treatments, responsible staff members, parent/guardian permission and services and referrals provided by a mental health professional	• Use **Information** to track treatments, responsible staff members and parent/guardian permission • Use **Program Information** to track services and referrals provided by a mental health professional • Sort **Transactions** and **Observations**
PIR	**Immunizations** questions display in the **Health** section	**Immunizations** questions display in the **Immunizations** section

Module	ChildPlus Desktop	ChildPlus Online
Pregnancy	Health, education and services questions display in one section	Health, education and services questions display in separate sections
Transportation	Use **Transportation** to enter route information and add or update **PIR** information	• Use **Routes** to enter route information • Use **PIR** to add or update **PIR** information
Setup		
	• Set up your agency • Configure security • Set up modules • Create and archive training databases • Use various utilities to manage your agency's data	NA
To-Do List		
	Track tasks and set up appointments	NA

Data Synchronization and Single Sign-on

ChildPlus ensures that you are always working with the latest version of your data. When you make a change in any platform, the data is automatically synchronized across all of ChildPlus.

ChildPlus also makes it easy to keep you connected across all platforms using single sign-on. All you need is your Agency ID and one user name and password to access ChildPlus Desktop, ChildPlus Online, the Attendance App and the Learning Library.

To learn how to find your Agency ID, see Find Your Agency ID.

If you forget your password, see Reset Your Password.

ChildPlus Administrators

Use the articles in this section to learn how to configure ChildPlus for your agency, enable access to each ChildPlus platform and grant access to users.

Configure ChildPlus

Before users can begin working in any ChildPlus platform, you must customize ChildPlus to meet the specific needs of your agency and program information.

Go to **ChildPlus Desktop >> Setup >> Initial Setup**. Complete each of the following steps in the order below to guide you through the process of setting up ChildPlus for the first time.

Step		Description
1	Add Personnel	• Complete the general information for each staff member • Select each staff member's position
2	Add Funding Sources	• Set up each of your agency's Funding Sources
3	Add Agency Information	• Provide basic information about your agency • Add each of your agency's sites • Add classrooms to each site
4	Add Program Information	• Set up each Program offered by your agency • Add a Program Term for each of your Programs • Set up Poverty Guidelines for each Program • Assign each classroom to a Program Term • Specify the teacher and/or aide for each classroom associated with the Program Term • Specify the days that each classroom operates • Specify the meals that are served daily in each classroom • Specify the program option and funded enrollment for each classroom
5	Add Health and Education Events	• Set up each Health and Education Event that your Program tracks
6	Set up Health and Education Requirements	• Set up Requirements so that you can compare a participant's Events against the actual requirements for a Program • Configure the statuses to count as meeting a requirement • Specify the Requirement Set to associate with each Program Term
7	Set up Immunizations	• Set up our agency's immunization schedule

Step		Description
8	Set up Disability	• Configure how your agency tracks Disability Concerns, IEPs and IFSPs
9	Set up Eligibility Criteria	• Configure your agency's Eligibility Sets
10	Set up Security Settings	• Manage security settings for each module and feature • Configure the password policies for your agency
11	Set up User Security Groups	• Configure user access to different modules and features throughout ChildPlus
12	Set up User Security	• Set up a user name and password for each ChildPlus user • Specify site and classroom level security access for each user • Associate each user with a User Security Group
13	Optional Setup	• Agency-Specific Customizable Fields • Customize Dropdown Choices • Data Entry Defaults • Family Services Events • Family Outcomes Instruments • System Preferences • Region Info • ZIP Code Configuration

Personnel

The **Personnel** module provides a way to add and maintain information for staff members at your agency, including:

- Employment and education information
- Background information
- Responses to PIR questions related to staff qualifications

Regardless of whether your organization uses ChildPlus to track employee information, completing some basic information in the **Personnel** module is necessary in order to use ChildPlus. This is because ChildPlus populates various drop-down lists with the names of your staff members (for example, the Case Worker list in **Family Services**). If this information is not entered in **Personnel**, then you will not be able to select staff members from drop-down lists throughout ChildPlus. At minimum, you should complete the information in the **General** section for each of your staff members and select their positions in the **Employment** section.

Many of the fields in the **Personnel** module contain sensitive and confidential information. For initial setup purposes, we recommend that you initially only complete the basic information in the **General** section and wait until your security settings are implemented before adding any sensitive or confidential information.

ChildPlus administrators can control which **Personnel** records each staff member can access and configure user names and passwords for each staff member in **ChildPlus Desktop >> Setup >> Security >>** User Security.

Add a New Staff Member to Personnel

Use this section to add a new staff member to the **Personnel** module.

ChildPlus Desktop

To add a staff member to **Personnel** in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> Management >> Personnel**.
2. Click **Add New Personnel**.
3. Do one of the following:

   Add a new staff member into ChildPlus

   1. Enter the individual's **First Name**, **Last Name** and **Social Security Number** or **Birthday** (ChildPlus requires only one of these pieces of information).
   2. Click **OK**.

   Search for an existing person

   1. Enter the individual's **First Name** and **Last Name** and/or select **Search for Existing Person**.
   2. Click **Find**.
   3. Select the individual from the list of results.
   4. Click **OK**.

4. Complete the fields in each section.
   - General
   - Employment
   - Education
   - Time Clock
5. Save.

General

Add or update general information for a staff member, including demographic, contact and agency-specific information.

ChildPlus Desktop

To add or update general information for a staff member in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> Management >> Personnel >> General**.
2. Complete the fields in each section.

General

Field	Description	PIR Question (s)
Last Name	Enter the staff member's name ChildPlus automatically populates these fields with the name you entered when you added the staff member	
First		
Middle		
Suffix		
Preferred	Enter the staff member's preferred name	
Previous Name	If the staff member has a different name that they previously used (for example, a maiden name), enter the name	
Active	Select this option to make the staff member's record active If you inactive a staff member, you will not be able to select them from drop-down lists throughout ChildPlus	
SSN	Enter the staff member's Social Security Number	
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	
Race PIR	Select the option that best describes the staff member's race	B.13
Hispanic/ Latino PIR	Select an option for the staff member's ethnicity	B.13

Field	Description	PIR Question (s)
Language PIR	Select each language that the staff member speaks	B.15
Proficiency PIR	Select the staff member's level of proficiency in each language that they speak	B.14
Primary	Select this option for the staff member's primary language	
Photo	Upload a photo of the staff member from your device	
View changes made by ChildPlus	Use this feature to view a historical record of your data in the event that ChildPlus makes changes to your data during an update (for example, if a field is removed)	

If you already have security in place and want to complete the staff member's **Personnel** record, you can complete the fields in the remaining sections.

Address and Contact

Field	Description
Living Address	Enter the staff member's living address When you enter the ZIP code, ChildPlus automatically populates the city, state and county fields. For more information, see ZIP Code Configuration on page 151. Click the map marker to generate a map of the address in ChildPlus
Address Line 2	
Zip	
City	
State	
County	
Mailing address is the same as the living address	Select this option if the staff member's mailing address is the same as their living address

Field	Description
Mailing Address	Enter a mailing address if the staff member's mailing address differs from their living address
Address Line 2	When you enter the ZIP code, ChildPlus automatically populates the city, state and county fields. For more information, see ZIP Code Configuration on page 151.
City	
State	Click the map marker to generate a map of the address in ChildPlus
Zip	
Work Email	Enter the staff member's work email address This step is important if you want staff members to be able to use features such as email notifications in the **To-Do List**, password reset or **LiveMessage**. If you add or edit a staff member's email address in this field, ChildPlus will automatically update the **Email Address** field for the staff member in **User Security** Click email to open your device's mail client and send an email to the staff member
Personal (Home) Email	Enter the staff member's home or personal email address Click email to open your device's mail client and send an email to the staff member
Phone Numbers	
Add Phone Number	Click to add a phone number for the staff member
Phone Number	Enter the staff member's phone number
Primary Phone	Select this option to indicate the staff member's primary phone number
Type of Phone	Select the type of phone number
Opt in for Text Messages	Select whether to send text messages to the staff member's cell phone number from your organization
Edit	Click to edit the staff member's existing phone number
Delete	Click to delete the staff member's existing phone number

Field	Description
Emergency Contact	
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 contact's phone number
Ext.	Enter the extension for the contact's phone number, if applicable
Phone 2	Enter a secondary phone number for the contact
Ext.	Enter an extension for the contact's secondary number, if applicable

Agency-Specific Fields

You can track data for Agency-Specific Fields in this section. For more information, see Agency-Specific Customizable Fields on page 105.

3. Save.

Education

Add or update education information for a staff member.

ChildPlus Desktop

To add or update education information for a staff member in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> Management >> Personnel >> Education**.
2. Complete the fields in each section.

Education

Field	Description	PIR Question (s)
Education Level	Select the staff member's highest level of education	
Highest Degree	Enter the highest degree that the staff member holds	
Health Credential	Select whether the staff member has Health Services Competency Based Credentials	
Social Service Credential	Select whether the staff member has Social Service Competency Based Credentials	
ECE or Related Degree PIR	Select the staff member's highest degree	B.3, B.6
Enrolled in ECE or Related Degree Program PIR	Select whether the staff member is enrolled in an ECE or related program If so, select the type of degree	B.3, B.6
Highest Level of FCP Education	Select the staff member's highest level of FCP education	
Enrolled in FCP or Related Program	Select whether the staff member is currently enrolled in an FCP or related program	
Completed Family Development Related Credential	Select whether the staff member obtained a Family Development related credential	

Field	Description	PIR Question (s)
FCC/Home-Based or Related Degree/ Certification PIR	Select the staff member's highest degree or certification	B.8-B.10
Enrolled in FCC/ Home-Based or Related Degree PIR	Select the degree program that the staff member is currently enrolled in	B.8-B.10
GED or High School Only	Select this option if the staff member's highest degree is a GED or high-school diploma	
Notes	Enter any additional information about the staff member's education	

CDA

Field	Description	PIR Question (s)
Preschool CDA PIR	Select whether the staff member has a preschool CDA credential If so, select their credential status	B.3.d, B.5.a
Infant/Toddler CDA PIR	Select whether the staff member has an infant/toddler CDA credential If so, select their credential status	B.6.d, B.7.a
CDA is appropriate for staff member's Primary Program Option PIR	Select this option if the staff member's CDA credential is appropriate for their **Primary Program** and **Program Option**	B.3.d.1, B.6.d.1
Waiver Expiration	Enter the expiration date for the staff member's CDA waiver	
CDA Start	Enter the staff member's CDA start date	
CDA Obtained	Enter the date that the staff member obtained their CDA credential	

Field	Description	PIR Question (s)
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 Resource File Began	Enter the date that the staff member's CDA Resource File 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 credential	
Next CDA Action Date	Enter the date that the staff member's next CDA action is scheduled to occur	
Total CDA Training Hours	Enter the total number of CDA hours that the staff member completed	
CDA Advisor	Enter the name of the staff member's CDA advisor	
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	Enter any additional details about the staff member's CDA credential	

3. Save.

Employment

Add or update employment information for a staff member.

ChildPlus Desktop

To add or update employment information for a staff member in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> Management >> Personnel >> Employment**.
2. Complete the fields in each section.

Employment

Field	Description	PIR Question (s)
Employee ID	Enter the staff member's 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	
Employment Type PIR	Select the staff member's employment type	B.1
Job Class	Enter the code that represents the staff member's job class	
Position	Select the staff member's current position	
This is a newly-created position	Select this option if the staff member holds a newly-created position	
Date Created	If the staff member holds a newly-created position, enter the date that the position was created	
Works directly with families	Select whether staff member works directly with families	
Vendor Payables Account Number	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	

Field	Description	PIR Question (s)
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	
Primary Age Group PIR	Select the age group that the staff member primarily works with This field only available for staff members whose **Primary Program** is set to **Migrant & Seasonal**	B.6, B.8-B10
Agency	Select the agency where the staff member is employed	
Site	Select the site where the staff member is employed	
Supervisor	Select 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 inactive, enter the number of days inactive	
Terminated PIR	Select this option if the staff member was terminated and is no longer employed at your agency For more information, see Terminate a Staff Member.	B.1, B.3, B.6, B.8-B.10
Termination Date PIR	Enter the date the staff member was terminated	B.16(1)
Termination Code PIR	Select the code that best matches the reason for the staff member's termination	B.18.a-d
Left while classes / home visits in session PIR	Select this option if the staff member was terminated while classes and home visits were in session	B.17.b

Field	Description	PIR Question (s)
Replaced PIR	Select this option if the staff member was replaced after their termination during the Program year	B.16.a
Moved to state pre-K / other early childhood program PIR	Select this option if the staff member left to move to another state pre-K or other early childhood program	B.18.a.1
PIR Position(s) PIR	Select option that best represents the staff member's position at your organization	B.3, B.6, B.8-B.10, B.13, B.15, B.17, B.18
Personnel Notes	Enter any additional details about the staff member's employment	

These fields only display when the **Terminated** field is selected.

Background

Field	Description	PIR Question (s)
Initial Title	Enter the staff member's title when they were hired	
Initial Hire Date PIR	Enter the date that the staff member was initially hired	B.1, B.16
Rehire Title	If the staff member was rehired, enter their title given when rehired	
Rehire Date	If the staff member was rehired, enter their rehire date	
Current / Former Head Start Parent PIR	Select whether the staff member is a parent/guardian of a participant who is or was formerly enrolled in a program at your organization	B.1.a
Criminal Check	Enter the date the staff member's criminal background check was conducted	

Field	Description	PIR Question (s)
Criminal Check Signature	Select this option if the staff member signed a criminal declaration	
Signature Date	If the staff member signed a criminal declaration, enter the date	
Criminal Check Comments	Enter any additional details about the staff member's criminal background check	
Follow-up Needed	Select this option if follow-up information is needed from the staff member	
Follow-up Date	If follow-up is needed from the staff member, enter the date it was provided	
References Verified	Select this option 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 test	
TB Test Results	Select the results of the staff member's last tuberculosis test	
Next TB Test Due	Enter the date that the staff member's next tuberculosis test is due	

Wages

Field	Description
Wage Classification	Select the staff member's wage classification
Wage Frequency	Select the frequency at when the staff member is paid
Hourly Rate	Enter the staff member's hourly rate
Salary Grade	Enter the staff member's salary grade

Field	Description
Last Increase Date	Enter the date that the staff member last received a salary increase
Last Hourly Rate	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	Select the status of the staff member's last review
Review Comments	Enter any additional details about the staff member's review
Next Review Date	Enter the date that the staff member is due for their next review
Wage Allocation PIR	Add a funding source for the staff member's salary If the staff member is paid through more than one source, add funding for each source you want to associate with their salary

3. Save.

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 set up each Funding Source that you want to choose from when making these assignments.

1. Go to **ChildPlus Desktop >> Setup >> Agency Configuration >> Funding Source**.
2. Click **Add New Funding Source**.
3. Enter a name for the Funding Source.

> The **Funding Source Name** typically refers to the funder of the grant. For example, ACF.

4. Complete the fields.

Field	Description
Grant Name	Enter the name you want to assign to the funding grant For example, **Head Start Grant**
Active	ChildPlus activates the new Funding Source by default If you deactivate a Funding Source, it will not be available for selection from drop-down lists
Grant Number or Funding ID	Enter the number assigned to the funding grant For example, **2018-001**. ChildPlus accepts grant numbers up to 14 characters long
Award Amount	Enter the amount of the grant award
Funded Enrollment	Enter the number of enrolled participants that the grant funds
Begin Date	Enter the date the grant takes effect
End Date	Enter the date the grant expires

5. If the Funding Source has multiple grants, click **Add Grant** and complete the fields for each additional grant.
6. Save.

Agency Info

Use **Agency Info** to enter basic information about your agencies, program sites and funding sources. You must configure **Agency Info** prior to running reports or entering participants in ChildPlus.

> You should only consider setting up more than one agency if your agency is a grantee with multiple delegates. The main benefit of setting up multiple agencies is that you will have access to aggregate reporting by delegate without having to select which sites belong to which delegates.

Agency Information

Configure basic information for your agency before using ChildPlus.

To add a new agency in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> Setup >> Agency Configuration >> Agency Info**.
2. Click **Add New Agency**.
3. Complete the fields.

Field	Description
Agency Name	Enter the name of the agency. ChildPlus uses this field to answer question 4 in the **General Program Information** section of the PIR
Tax ID	Enter the agency's tax identification number
Phone	Enter the main phone number for the agency. ChildPlus uses this field to answer question 10 in the **General Program Information** section of the PIR
Fax	Enter the fax number for the agency. ChildPlus uses this field to answer question 11 in the **General Program Information** section of the PIR
Note	Enter an extension or other notes related to the agency's phone/fax number
Active	ChildPlus activates the new agency by default. Uncheck this field to deactivate an agency
Physical Address	Enter the address for the agency Click the map marker to generate a map of the address in ChildPlus
Address 2	
City	
State	
Zip	
Mailing address is the same as the Physical Address	Select this option if the agency's mailing address is the same as the physical address

Field	Description
Mailing Address	
Address 2	If the agency's mailing address differs from the physical address, enter the mailing address Click the map marker to generate a map of the address in ChildPlus
City	
State	
Zip	
Email	Enter the email address for the agency. ChildPlus uses this field to answer question 14 in the **General Program Information** section of the PIR
Website	Enter the website for the agency. ChildPlus uses this field to answer question 15 in the **General Program Information** section of the PIR
Notes	Enter any additional details about the agency
Agency Logo	Add a logo for the agency. ChildPlus displays this logo at the top of every bar code ID printed on **Report 2340 - Attendance Scanning Barcodes**. For more information, see Agency Logos.

4. Save.

If you are setting up more than one agency in ChildPlus, repeat steps 2-4 for each additional agency you want to add.

Sites

Use **Sites** to enter information pertaining to all sites at an agency.

Add a New Site

To add a new site in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> Setup >> Agency Configuration >> Agency Info**.
2. Select the agency that you want to add a site to.
3. Go to **Sites**.
4. Click **Add Site**.
5. Complete the fields on the **General** tab.

Field	Description
Site Name	Enter the name of the site
Short Name	Enter a short name for the site. ChildPlus uses this field to abbreviate the site's name certain windows and reports
Site Label	Enter a label for the site. ChildPlus uses this field to abbreviate the site's name certain windows and reports
License Number	Enter the license number for the site
License Expiration	Enter the date that the site's license expires
Active	ChildPlus activates the new site by default. Uncheck this field to deactivate a site
Maximum Capacity	Enter the maximum capacity or number of people that the site can have at one time
Total Staff	Enter the total number of staff members (regardless of position) 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	Select this option if the site is a contract site
A Federal Interest has been Established at this Site	Select this option if a federal interest has been established at the site

Field	Description
Address	Enter the address for the site Click the map marker to generate a map of the address in ChildPlus
City	
State	
Zip	
County	
Region	Select a region to associate the site with (if applicable). For more information, see Region Info on page 150.
Phone	Enter the main phone number for the site
Fax	Enter the fax number for the site
Note	Enter an extension or other notes related to the site's phone/fax number
Responsible Staff	Enter the name of the responsible staff member for the site
Responsible Staff Position	Enter the position or title of the responsible staff member

6. Save.
7. Go to Classrooms or Inspections to continue configuring the site.

Add a New Classroom

To add a new classroom to a site in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> Setup >> Agency Configuration >> Agency Info >> Sites**.
2. Select the site that you want to add a classroom to.
3. Go to **Classrooms**.
4. Click the first row in the table.
5. Complete the fields.

Field	Description
Active	Select this option to activate the classroom and have it display in drop-down lists throughout ChildPlus
Classroom Name	Enter a name for the classroom
Label	Enter a one-character label for the classroom (for example, a or 1). ChildPlus uses this field to abbreviate the classroom on certain windows and reports
Capacity	Enter the maximum number of participants for the classroom

6. Save.

Before you can enroll participants in a new classroom, you must associate the classroom with a Program Term. For more information, see Add Classrooms to a Program Term on page 57.

Add Site Inspection Information

Use **Inspections** to record up to 50 site inspections. When you track the dates of inspections, ChildPlus displays an asterisk next to the name of the next inspection due.

You can either use the default inspection items included with ChildPlus or configure your own customized inspection items in **ChildPlus Desktop >> Setup >> System Setup >> Agency-Specific Customizable Fields >>** Site Inspections.

To track site inspections in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> Setup >> Agency Configuration >> Agency Info**.
2. Select the site that you want to add inspection information for.
3. Go to **Sites >> Inspections**.
4. Complete the fields for each inspection item.

Field	Description
Last	Enter the date of the last inspection
Next	Enter the date of the next inspection
Inspection Comments	Enter any additional details about the inspection

5. Save.

Funding

Use this section to associate a Funding Source with a Program. Funding Sources are an important part of running the PIR because they link funding for programs to funding for individuals, program personnel and In-Kind transactions.

> Before you can associate a Funding Source with a Program, you must configure each of your Funding Sources and Programs.

To associate a Funding Source with a Program:

1. Go to **ChildPlus Desktop >> Setup >> Agency Configuration >> Agency Info**.
2. Select the agency that offers the Program that you want to associate with a Funding Source.
3. Go to **Funding**.
4. Click **Add Grant or Other Funding**.
5. Complete the fields.

Field	Description
Grant or Other Funding	Select the Funding Source to associate with the Program
Delegate ID	Enter the identification number for the delegate
Program	Select the Program that the Funding Source is associated with
Amount	Enter the amount of the grant for the Program
Funded Enrollment	Enter the number of enrolled participants the grant funds
Begin Date	Enter the date the grant for the Program takes effect
End Date	Enter the date the grant for the Program expires
Director	Select the Program's director

6. If the Program has multiple Funding Sources, repeat steps 4-5 for each additional Funding Source.
7. Save.

Enrollment Options

Use **Enrollment Options** to configure **Waitlist Options** and **ZIP Codes Served** for your agency.

Waitlist Options

Use **Waitlist Options** to control how ChildPlus handles participants who do not get accepted or enrolled at their first location preference.

To configure waitlist options in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> Setup >> Agency Configuration >> Agency Info**.
2. Select the agency that you want to configure waitlist options for.
3. Go to **Enrollment Options >> Waitlist Options**.
4. Select one of the following options (note that there are separate options for participants who do not get accepted and for participants who do not get enrolled):

Option	Description
Keep the participant on the waitlist for the more preferred locations	Select this option to have ChildPlus save a participant's **Location Preferences** if they are not enrolled at their first location preference. Once the participant is enrolled, they will automatically be placed on the waitlist for any location whose priority is higher than the location where they were actually enrolled. You can view these participants on **Report 2025 - Enrollment Priority Listing**. When running this report, include **Enrolled participants who have a location preference** matching the location criteria option
Remove the participant from the waitlist	Select this option to not have ChildPlus save any of a participant's **Location Preferences** that were recorded prior to their enrollment. If the participant wants to transfer to another location after they are enrolled, you will need to record their possible transfer locations manually in **Manage Location Preferences** in the **Enrollment** module

5. Save.

ZIP Codes Served

Use **ZIP Codes Served** to restrict enrollment to your programs by ZIP code.

1. Go to **ChildPlus Desktop >> Setup >> Agency Configuration >> Agency Info**.
2. Select the agency that you want to restrict enrollment for.
3. Go to **Enrollment Options >> ZIP Codes Served**.
4. Select **Restrict enrollment in this agency by ZIP Code**.
5. Enter each ZIP code served by your agency. Applicants who live in any ZIP code not listed will not be able to enroll in any programs at your agency.
6. Save.

Program Info

For ChildPlus to function properly, it is critical that the **Program Info** module is set up correctly. Use **Program Info** to:

- Add **Programs**
- Add and track different **Program Terms**
- Associate **Requirement Sets** to a specific **Program Term**
- Populate a class age using the **School Year Cut-off Date**
- Aid in tracking funded enrollment
- Track all **Classrooms** associated with each **Program Term**
- Set **Classroom** beginning and end dates, days of operation and meals served

Add a New Program

You should only add a new **Program** when you first set up ChildPlus or when your agency will be providing a new type of program (for example, a new after school program).

To add a new **Program** in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> Setup >> Agency Configuration >> Program Info**.
2. Click **Add New Program**.
3. Enter **CONTINUE**.
4. Click **OK**.
5. Complete the fields.

Field	Description
Program Name	Enter the name of the **Program**
Program Type	Select the type of **Program** you are adding
Program Label	Enter an abbreviated name for the **Program**. ChildPlus uses this field on certain windows and reports
Active	ChildPlus activates the new **Program** by default
Track CACFP Information	Select this option to track CACFP for the **Program**

6. To add a **Program Term**, see Add a New Program Term on the facing page.
7. Save.

Add a New Program Term

To add a new **Program Term** to an existing **Program** in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> Setup >> Agency Configuration >> Program Info**.
2. Select the **Program** that you want to add a **Program Term** to.
3. Click **Add Another Program Term**.
4. Select one of the following options:
   - **Add a New Blank Program Term**: create a **Program Term** from scratch
   - **Add a Copy of [Program Term]**: copy all settings and classrooms from an existing **Program Term**
5. Click **OK**.
6. Complete the fields. If you copied an existing **Program Term**, make the necessary changes to these fields so that they accurately reflect the information for the new **Program Term**.

Field	Description
Program Term Name	Enter a new name for the **Program Term**
Active	ChildPlus activates the new **Program Term** by default Uncheck this field to deactivate a **Program Term**. Inactive **Program Terms** are not available for selection in drop-down lists throughout ChildPlus
Locked	Select this option to lock a **Program Term**. Once a **Program Term** is locked, you will no longer be able to edit data associated with it. This includes data in the **PIR** module as well as data in other modules, including **Enrollment**, **Family Services**, **Health**, **Immunizations** and **Pregnancy**. This field is automatically unchecked when you add a new **Program Term**
School Year	Select the **School Year** that you want to associate with the **Program Term**. You must complete this step before you can save the **Program Term**. For more information, see Associate a School Year with a Program Term on page 55.
Funded Enrollment	Enter the number of participants that this **Program Term** is funded for
Begin Date	Enter the date the **Program Term** begins
End Date	Enter the date the **Program Term** ends

Field	Description
School Year Cut-off Date	Enter the date in which a participant must have attained a certain age in order to be enrolled in the **Program Term** For example, a participant must reach the age of 3 prior to September 1 in order to be enrolled in the upcoming Head Start **Program Term**
Health and Education Requirement Set	Select the **Requirement Set** to associate with the **Program Term** Associating a **Requirement Set** with a **Program Term** lets ChildPlus know which **Health** and **Education Requirements** to use for program tracking and compliance
Poverty Level for a one-person family	Enter the **Poverty Level** amount you want to use for a one-person family participating in the **Program**
Poverty Level for each additional person	Enter the **Poverty Level** amount you want to add to the total for a one-person family participating in the **Program**
Does this Program Term use the option from Section 645(a)(1)(B)(II) to include an additional 35% of participants that are Over Income but below 130% of the poverty guidelines?	Select **Yes** if you want the **101-130%** option to be available as an **Income Status** for participants who are Over Income but below 130% of the poverty guidelines The **Income Status** field, available in the **Enrollment** and **Application** (when adding a new family) modules, is used to determine a participant's eligibility for a **Program**. It is also used for PIR calculations
If yes, how should ChildPlus set the income status of participants that meet this criteria?	If you selected **Yes** to the above question, select whether you want ChildPlus to set the **Income Status** of participants who are Over Income (but below 130% of the poverty guidelines) as **Income 100 < 130%** or **Over Income**

7. Save.
8. Go to Classrooms to continue setting up the **Program Term**.

Associate a School Year with a Program Term

Once you set up a new **School Year**, you must associate it with your **Program Term(s)**.

1. Go to **ChildPlus Desktop >> Setup >> Agency Configuration >> Program Info**.
2. Select the **Program Term** that you want to add associate a **School Year** with.
3. Select the **School Year** that you want to associate with the selected **Program Term**. If the **School Year** you want to associate with the **Program Term** is not in the drop-down list:
    1. Click **Add a School Year**.
    2. Enter the **Begin Year** and **End Year** dates. These fields cannot be empty.
    3. ChildPlus defaults the name from the **Begin Year** and **End Year** fields. Change the name as needed.
    4. Click **OK**.
4. Save.

> Once you associate a **School Year** with a **Program Term**, you can associate the **School Year** with a **Family Outcomes Instrument**. For more information, see Family Outcome Assessments on page 148.

Poverty Guidelines

Poverty Guidelines are used to calculate the % of Poverty data in the **Enrollment** module. Visit HHS Poverty Guidelines for the latest poverty guideline information.

To set up Poverty Guidelines in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> Setup >> Agency Configuration >> Program Info**.
2. Select the correct **Program Term**.
3. Enter the current HHS poverty guideline amounts for a household of up to eight family members.
4. Enter the current amount for each additional person in the family.

You can use the **Poverty Guidelines Update Utility** to recalculate poverty information for existing applications without impacting the percent of poverty calculations for participants who are already enrolled. This step is optional and is generally used when your agency adopts new Poverty Guidelines during the middle of the **Program Term** or school year.

Classrooms

You can use this section to add classrooms, associate classrooms with a **Program Term** and configure various settings for each classroom.

Add Classrooms to a Program Term

Use this section to add classrooms and associate them with a **Program Term**.

1. Go to **ChildPlus Desktop >> Setup >> Agency Configuration >> Program Info**.
2. Select the correct **Program Term**.
3. Go to **Classrooms**.
4. Click **Add Classrooms**.
5. Select the classrooms you want to add to the **Program Term**.
6. Click **Add Selected Classrooms**.
7. Select each classroom to complete the fields on the following tabs:
    - Options
    - Staffing
    - Operating Days and Hours
    - Meals Served

If you are looking for a classroom that is not in the list, go to **ChildPlus Desktop >> Setup >> Agency Configuration >> Agency Info >> Sites >>** Classrooms to make sure it is active. Add the classroom if it does not exist.

Options

Configure general options for each classroom associated with a **Program Term** in ChildPlus Desktop.

1. Go to **ChildPlus Desktop >> Setup >> Program Info**.
2. Select the correct **Program Term**.
3. Go to **Classrooms**.
4. Select a classroom.
5. Go to **Options**.
6. Complete the fields.

Field	Description	PIR Question(s)
Program Option PIR	Select the program that best describes the number of days and hours the classroom operates	A.2-A.6, A.9, A.22
Funded Enrollment PIR	Enter the number of participants funded for enrollment in the selected classroom The number entered in this field is used to calculate **Funded Enrollment** and vacancies on reports	A.2-A.8
Minimum Age	Enter the minimum age required for attendance in the classroom	
Maximum Age	Enter the maximum age required for attendance in the classroom	

These fields are optional and used for informational purposes only.

7. Save.

Staffing

Configure which staff members are assigned to each classroom associated with a **Program Term**.

1. Go to **ChildPlus Desktop >> Setup >> Program Info**.
2. Select the correct **Program Term**.
3. Go to **Classrooms**.
4. Select a classroom.
5. Go to **Staffing**.
6. Complete the fields.

Field	Description
Teacher(s)	Select the **Teacher(s)** to assign to the classroom
Aide(s)	Select the **Aide(s)** assign to the classroom
Responsible Staff by Service Area	Select the default staff members to assign to participants who are accepted and enrolled in the classroom

7. Save.

Operating Days and Hours

Configure the operating days and hours for each classroom associated with a **Program Term**.

1. Go to **ChildPlus Desktop >> Setup >> Program Info**.
2. Select the correct **Program Term**.
3. Go to **Classrooms**.
4. Select a classroom.
5. Go to **Operating Days and Hours**.
6. Complete the fields.

Field	Description	PIR Question(s)
Days the Classroom Operates	Select all days the classroom is in operation for participants	
Begin Date	Enter the date the classroom begins	
End Date PIR	Enter the date the classroom ends	A.22.a.1
Hours the Classroom Operates - Begin Time	Enter the time the classroom begins	
Hours the Classroom Operates - End Time	Enter the time the classroom ends	
Provides 1,020 annual hours for Head Start preschool children or 1,380 hours for Early Head Start infants and toddlers PIR	Select this option if your program is center-based and provides either **equal to or greater than** or **fewer than** the number of hours listed for Head Start and Early Head Start participants	A.2.a, A.2.b
Available for the full-working-day and full-calendar-year PIR	Select this option if your program is center-based and provides services for the full working day and the full calendar year	A2.a.1, A.2.b.2

7. Save.

When you enroll a participant in a **Program**, ChildPlus will automatically use the operating days and meals served for the classroom and apply them to the participant's attendance record.

For example, if you configure the classroom as operating Monday-Friday and a snack and lunch served daily, then the participant will be marked as attending Monday-Friday and eating a snack and lunch. If this information is not accurate for the participant, you can uncheck each option that does not apply.

Meals Served

Configure the meals served for each classroom associated with a **Program Term**.

1. Go to **ChildPlus Desktop >> Setup >> Program Info**.
2. Select the correct **Program Term**.
3. Go to **Classrooms**.
4. Select a classroom.
5. Go to **Meals Served**.
6. Complete the fields.

Field	Description
Served	Select each meal that is served during the classroom session ChildPlus populates the days and meals served in the **Attendance** module for participants enrolled in the classroom
Begin Time	Enter the time meal service begins
End Time	Enter the time meal service ends

To ensure accurate meal times, make sure that the **Begin** and **End Times** do not overlap different meals.

7. Save.

When you enroll a participant in a **Program**, ChildPlus will automatically use the operating days and meals served for the classroom and apply them to the participant's attendance record.

For example, if you configure the classroom as operating Monday-Friday and a snack and lunch served daily, then the participant will be marked as attending Monday-Friday and eating a snack and lunch. If this information is not accurate for the participant, you can uncheck each option that does not apply.

Attendance

Use this section to enable attendance and meal scanning for Program Terms and classrooms.

1. Go to **ChildPlus Desktop >> Setup >> Agency Configuration >> Program Info**.
2. Select the correct **Program Term**.
3. Go to **Attendance**.
4. Select **Enable Attendance and Meal Tracking**.
5. Save.

Add a New School Year

To add a new **School Year** in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> Setup >> Agency Configuration >> School Year**.
2. Click **Add New School Year**.
3. Complete the fields.

Field	Description
Active	ChildPlus defaults the new **School Year** to **Active**
Begin Year	Enter the year the **School Year** begins
End Year	Enter the year the **School Year** ends
School Year Name	Enter a name for the **School Year** **School Year** names can contain up to 20 characters

4. Save.

Once you add a new **School Year**, you must associate it with a Program Term. For more information, see Associate a School Year with a Program Term on page 55.

Health and Education Events

You can use this section to set up each of your **Health** and **Education Events** in ChildPlus Desktop. When you configure an **Event**, it will be available for selection in the **Event Type** list in the **Health** and **Education** modules in ChildPlus Online and ChildPlus Desktop.

As part of this setup 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.

Add a New Health or Education Event

To add a new **Health** or **Education Event** in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> Setup >> Module Setup >> Health and Education Events**.
2. Click **Add Event Type**.
3. Enter the name you want to assign to the **Event** in the **Event Type Name** field.
4. Select which module(s) the **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, such as a Well Baby Check), select the type of **Event** it is.
6. If the **Event** expires:
    1. Click **Add Program**.
    2. Select a **Program**.
    3. Enter the validity period in months. ChildPlus uses this to automatically populate an expiration date.
7. Select whether the **Event** should be available for the following PIR questions:
    - **Professional Dental Exam**: Head Start and Migrant programs
    - **Oral Health Screening** and **Professional Oral Exam**: Early Head Start and Migrant programs; up-to-date on a schedule of age-appropriate preventative and primary oral health care
    - **Sensory (Auditory and Visual)**, **Developmental** and **Behavioral Screenings**: based on newly enrolled participants who completed required screenings since the last PIR was reported
8. Select each field that you want to be available for the **Event Type**.
9. Select if the **Event Type** should count towards PIR question C.17 and select a default status.

    > PIR question C.17 is for Head Start and Migrant participants who are 3 years and older. Select this option to map it to the same **Event** mapped to question C.18.

10. Select if the **Event Type** should include the ability to track chronic conditions for PIR questions C.7.a, C.7.b and C.8.
11. Select each status that you want to be available for the **Event Type**.
12. Save.

Add a New Well Baby Check Event

You can configure **Events** with sub-events, such as **Well Baby Checks** for Early Head Start programs. If your agency plans to track **Well Baby Checks** at certain time intervals (for example, if you require 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 each of the following:

- 3-month **Well Baby Check**
- 6-month **Well Baby Check**
- 9-month **Well Baby Check**

To add a new **Well Baby CheckEvent** in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> Setup >> Module Setup >> Health and Education Events**.
2. Click **Add Event Type**.
3. Enter the name you want to assign to the **Event** in the **Event Type Name** field.
4. Select which module(s) the **Event** should be available for in ChildPlus.
5. Select **This event type has sub-events**.
6. Setting expiration periods for **Events** added based on age is not recommended since the age will only occur once. If the **Event** expires:
    1. Click **Add Program**.
    2. Select a **Program**.
    3. Enter the validity period in months. ChildPlus will automatically populate an expiration date.
7. Select whether the **Event** should be available for the following PIR questions:
    - **Professional Dental Exam**: Head Start and Migrant programs
    - **Oral Health Screening** and **Professional Oral Exam**: Early Head Start and Migrant programs; up-to-date on a schedule of age-appropriate preventative and primary oral health care
    - **Sensory (Auditory and Visual)**, **Developmental** and **Behavioral Screenings**: based on newly enrolled participants who completed required screenings since the last PIR was reported
8. Click **Add Sub-Event** for each sub-event you want to add.
    1. Click **OK**.
    2. Repeat these steps if there is more than one sub-event.
9. Select each field that you want to be available for the **Event Type**.
10. Select if the **Event Type** should include the ability to track chronic conditions for PIR questions C.7.a, C.7.b and C.8.
11. Select each status that you want to be available for the **Event Type**.
12. Save.

Edit an Existing Health or Education Event Type

To edit an existing **Health** or **Education Event Type**:

1. Go to **ChildPlus Desktop >> Setup >> Module Setup >> Health and Education Events**.
2. Select the **Event Type** you want to edit.
3. Make your changes to the **Event**.
4. Save.

Deactivate a Health or Education Event Type

An **Event Type** cannot be deleted if it is associated with a record. However, it can be deactivated.

To deactivate a **Health** or **Education Event Type**:

1. Go to **ChildPlus Desktop >> Setup >> Module Setup >> Health and Education Events**.
2. Select the **Event Type** you want to deactivate.
3. Uncheck the **Active** checkbox next to the **Event Type Name** field.
4. Save.

Health and Education Requirements

You can use **Health and Education Requirements** to track the specific enrollment and age requirements for participants at your agency. Once your requirements are set up, ChildPlus can 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.

Since 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. If you have different programs that have the same requirements, then you can set up one **Requirement Set** and assign it to each program that uses those 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 requirements for your programs over time. For example, you used one **Requirement Set** for the 2020-2021 school year but the requirements changed for the 2021-2022 school year. In this case, you would create a new **Requirement Set** for the 2021-2022 school year and use it moving forward. However, your requirements for the 2020-2021 school year will remain intact and you will still have the option of referring back to them.

ChildPlus administrators can configure **Health and Education Events** to automatically trigger **Health Events** as having met requirements. For more information, see Health and Education Events on page 65.

Health Requirement Sets may be customized to include your agency's local EPSDT requirements.

Add a Requirement Set Based on Entry Date

Requirements based on entry date are used track **Health Events** that are required each year or at enrollment. To add a **Requirement Set** based on entry date in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> Setup >> Module Setup >> Health and Education Requirements**.
2. Click **Add New Requirement Set**.
3. Select one of the following options:
   - **Start with a blank requirement set**: create a new **Requirement Set** from scratch
   - **Start with a copy of**: copy all settings from an existing **Requirement Set**
4. Click **OK**.
5. Enter a name for the **Requirement Set**.
6. Go to the **Requirements based on Entry Date** tab.
7. Click **Add Requirement**.
8. Select an **Event Type**.
9. Complete the fields.

Field	Description
Calculate this requirement using the ___ entry date	Select whether you want ChildPlus to calculate requirements based on **Program** or **Program Term** (ChildPlus calculates requirements using the **Program Term** by default) 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 other 45/90-day requirements that have to be met annually at the beginning of the **Program Term** In addition to the **Program** or **Program Term** entry date, you can also specify a unique date for ChildPlus to use when calculating requirements
This event is due within ___ days of entry date	Enter the number of days after a participant enters a program that the **Event** is due. ChildPlus will populate the **Days to Complete** column in the **Event Type** list For example, if you enter 7, then the **Event** will be due within 7 days of the date you provided in the **Entry Date** field. This means that the requirement will be considered past due if the **Event** is not completed within 7 days

Field	Description
Exclude events that occurred more than ___ months prior to entry date	Enter the number of months that an **Event** can be completed prior to entry into your program and still be considered as meeting the enrollment requirement For example, if you enter 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
___ this event for PIR Question C.7	Select whether you want to **Count** or **Do Not Count** this **Event** towards PIR question C.7
This requirement applies to	Specify which participants you want the requirements to apply towards. For each requirement, you can select whether you want them to apply towards: • **All participants** • **All adult participants** • **All child participants** • **Child participants who will be at least ___ old on their entry date** • **Child participants who will be less than ___ old on their entry date** • **Child participants who will be between ___ old on their entry date** These options are useful for agencies that enroll adults and participants in the same program (for example, Early Head Start and Migrant programs)

In order to see this option, you must select **Yes** for **Do you serve adult participants?** in **ChildPlus Desktop >> Setup >> System Setup >> System Preferences >> Enrollment >>** Applications.

10. Repeat steps 7-9 for each requirement that you want to add.
11. Save.

Add a Requirement Set Based on Age

Requirements based on age are used track **Health Events** that are administered at a specific age (for example, a required **Growth Assessment** at 6 months). To add a **Requirement Set** based on age in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> Setup >> Module Setup >> Health and Education Requirements**.
2. Click **Add New Requirement Set**.
3. Select one of the following options:
   - **Start with a blank requirement set**: create a new **Requirement Set** from scratch
   - **Start with a copy of**: copy all settings from an existing **Requirement Set**
4. Click **OK**.
5. Enter a name for the **Requirement Set**.
6. Go to the **Requirements based on Age** tab.
7. Select whether you want to calculate requirements using the participant's entry date into the **Program** or **Program Term**.
8. Click **Add Requirement**.
9. Select an **Event Type**.
10. Complete the fields.

Field	Description
This event is required if a participant turns ___ old after their entry date and while enrolled, or if the participant's entry date/re-enrollment date is within ___ days after 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

Field	Description
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
___ this event for PIR Question C.7	Select whether you want to **Count** or **Do Not Count** this **Event** towards PIR question C.7

11. Repeat steps 8-10 for each requirement that you want to add.
12. Save.

Immunizations

You can use **Immunizations** setup to select which immunizations and due dates you want ChildPlus to automatically calculate. You can also control the order in which immunizations display in the **Immunizations** module in ChildPlus Online and ChildPlus Desktop.

View the National CDC Guidelines for additional guidance on immunization schedules.

Set Up an Immunization Schedule

To set up an immunization schedule in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> Setup >> Module Setup >> Immunizations**.
2. Complete the fields for each immunization.

Field	Description
Active	Check this checkbox to track the immunization in ChildPlus For more information, see Deactivate an Immunization on page 80.
Alternative Name	Enter an alternative name in this field to change the default name of the immunization For more information, see Assign Alternative Names on page 78.
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 90, then the first dose will be due exactly 90 days after the participant's birth date) Additional Options: MX0
Second Due	Enter the number of days after the participant's first dose of an immunization that their second dose in the series is due (for example, if you enter 90, then the participant's second dose will be due exactly 90 days after their first) Additional Options: MX0
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 90, then the participant's third dose in the series will be due exactly 90 days after their second) Additional Options: MX0
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 90, then the participant's fourth dose in the series will be due exactly 90 days after their third) Additional Options: MX0

Field	Description
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 90, then the participant's fifth dose in the series will be due exactly 90 days after their fourth) Additional Options: MX0

M: Enter **M** in a due date field to tell ChildPlus that you want to manually calculate **Next Due** dates for an immunization dose. Use this option if you decide that you do not want ChildPlus to automatically calculate due dates for immunizations.

X: Enter **X** in a due date field for any dose in a series that you do not want to record a date for. For example, if participants normally only receive two MMR immunizations, then you would enter an **X** in the **Third Due**, **Fourth Due** and **Fifth Due** fields. You can also use the **X** to indicate that you do not want to track any due dates for an immunization.

0: Enter **0** in the **First Due** field if you want ChildPlus to use the participant's birthday as the date that their first dose of an immunization is due.

3. Save.

CDC Immunization Schedule Example

Setup >> Module Setup >> Immunizations

You can use the following as an example of how to set up an immunization schedule based on the CDC's recommended intervals in ChildPlus Desktop:

Immunization	Alternative Name	1st Due	2nd Due	3rd Due	4th Due	5th Due
Polio	IPV	60	60	60	1260	X
DTap		30	60	60	270	990
MMR		360	1080	X	X	X
Hib		60	60	240	X	X
Hepatitis B		0	30	150	X	X
Varicella		360	1080	X	X	X
Hepatitis A		360	360	X	X	X
PCV		60	60	60	180	X
Influenza		M	M	M	M	M

Assign Alternative Names

The **Immunizations** module includes a list of immunizations that are named according to the CDC Immunization Schedule. You can use the **Alternative Name** field to change the name of any immunization in the list. When you specify an **Alternative Name**, ChildPlus uses the **Alternative Name** in the **Immunizations** module and on reports. If you do not specify an alternative name, ChildPlus will use the immunization's default name (for example, **Varicella**, **Influenza**, **Other 1** or **Other 2**). Using **Alternative Names** can be beneficial if, for example, you want to customize the immunization schedule to meet your local requirements.

To assign an alternative name to an immunization in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> Setup >> Module Setup >> Immunizations**.
2. Enter a new name in the **Alternative Name** field.
3. Save.

Track Additional Immunizations

The **Immunizations** module allows you to track each of the CDC's recommended childhood and adolescent immunizations. You can also track up to five additional immunizations. To track additional immunizations in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> Setup >> Module Setup >> Immunizations**.
2. Check the **Active** checkbox next to each of the additional immunizations you want to track (by default, these immunizations are labeled **Other 1**, **Other 2**, **Other 3**, **Other 4** and **Other 5**.
3. Enter the name that you want to assign to each additional immunization in the **Alternative Name** field.
4. Complete the due date fields for each additional immunization.
5. Save.

Customize the Immunizations Data Entry Window

You can control the order in which immunizations display in the **Immunizations** module. 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 to display in the exact order of the current CDC Immunization Schedule.

To customize the order of immunizations in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> Setup >> Module Setup >> Immunizations >> Customize the Immunization Data Entry Screen**.
2. Select an immunization.
3. Use the up and down arrows to move the immunization up or down the list.
4. Repeat steps 2 and 3 for each immunization you want to organize.
5. Save.

Deactivate an Immunization

To deactivate an immunization in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> Setup >> Module Setup >> Immunizations**.
2. Uncheck the **Active** checkbox.
3. Save.

When an immunization is inactive, it will not display as an option in the **Immunizations** module or on reports and you will not be able to track or edit information for the immunization.

Disability

You can use this section to set up the following in ChildPlus Desktop:

- **Concern Activity Types**
- **IEP** and **IFSP Types**
- **IEP** and **IFSP Activity Types**

When you configure these options, they will be available for selection in the **Disability** module in ChildPlus Online and ChildPlus Desktop.

Concerns

Use **Disability Module Setup** to configure **Concern Activity Types** and **Statuses**.

Add a New Concern Activity Type

To add a new **Concern Activity Type** in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> Setup >> Module Setup >> Disability >> Concerns**.
2. Click **Add Activity Type**.
3. Enter the name you want to assign to the **Activity Type** in the **Description** field.
4. If this is a **Referral Activity Type**:
    1. Select **This Activity is a Type of Referral**.
    2. Select the **Referral Type**.
5. If this is an **Evaluation**, select **This Activity is an Evaluation**.
6. If this requires a responsible staff member, select **Enable Responsible Staff field**.
7. Select each status that you want to be available for the **Activity Type**.
8. Click **Save**.

Edit an Existing Concern Activity Type

To edit an existing **Concern Activity Type** in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> Setup >> Module Setup >> Disability >> Concerns**.
2. Select the **Activity Type** you want to edit.
3. Click **Edit**.
4. Make your changes to the **Activity Type**.
5. Click **Save**.

Deactivate a Concern Activity Type

To deactivate a **Concern Activity Type** in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> Setup >> Module Setup >> Disability >> Concerns**.
2. Select the **Activity Type** you want to deactivate.
3. Uncheck the **Active** checkbox next to the name of the **Activity Type**.
4. Save.

Add a New Concern Activity Status

To add a new **Concern Activity Status** in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> Setup >> Module Setup >> Disability >> Concerns**.
2. Click **Add Status**.
3. Enter a name you want to assign to the status.
4. Check the checkbox to view the status on reports and the **To-Do List** if needed.
5. Click **Save**.

Edit an Existing Concern Activity Type

To edit an existing **Concern Activity Type** in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> Setup >> Module Setup >> Disability >> Concerns**.
2. Select the **Activity Type** you want to edit.
3. Click **Edit**.
4. Make your changes to the **Activity Type**.
5. Click **Save**.

Deactivate a Concern Activity Status

To deactivate a **Concern Activity Status** in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> Setup >> Module Setup >> Disability >> Concerns**.
2. Select the status you want to deactivate.
3. Click **Edit**.
4. Uncheck the **Active** checkbox.
5. Click **Save**.

IEP/IFSP

Use **Disability Module Setup** to configure **IEP/IFSP Types** and **Activity Types**.

Add a New IEP or IFSP

To add a new **IEP** or **IFSP Type** in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> Setup >> Module Setup >> Disability >> IEP/IFSP**.
2. Click one of the following:
    - **Add IEP Type**
    - **Add IFSP Type**
3. Enter a name to assign to the **IEP** or **IFSP Type**.
4. Click **Save**.

Deactivate an IEP or IFSP Type

To deactivate an **IEP** or **IFSP Type** in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> Setup >> Module Setup >> Disability >> IEP/IFSP**.
2. Select the **IEP** or **IFSP Type** you want to deactivate.
3. Click **Edit**.
4. Uncheck the **Active** checkbox.
5. Click **Save**.

Add a New IEP/IFSP Activity Type

To add a new **IEP/IFSP Activity Type** in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> Setup >> Module Setup >> Disability >> IEP/IFSP**.
2. Select the applicable option(s) in the **Does your program track IEPs, IFSPs, or both** field.
3. Click **Add Activity Type**.
4. Enter a name to assign to the **Activity Type**.
5. Select whether the **Activity Type** applies to **IEPs**, **IFSPs** or both.
6. If this requires a responsible staff member, select **Enable Responsible Staff field**.
7. Click **Save**.

Deactivate an IEP/IFSP Activity Type

To deactivate an **IEP/IFSP Activity Type** in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> Setup >> Module Setup >> Disability >> IEP/IFSP**.
2. Select the **IEP/IFSP Activity Type** you want to deactivate.
3. Click **Edit**.
4. Uncheck the **Active** checkbox.
5. Click **Save**.

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 calculate each participant's eligibility points when they apply to a program at your agency.

To create a new **Eligibility Set** in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> Setup >> Module Setup >> Eligibility Criteria**.
2. Click **Add New Eligibility Set**.
3. Select one of the following:
   - **Start with a blank eligibility set**: create an **Eligibility Set** from scratch
   - **Start with a copy of**: copy all settings from an existing **Eligibility Set**
4. Click **OK**.
5. Enter the name you want to assign to the **Eligibility Set**.
6. Complete the fields. If you copied an existing **Eligibility Set**, make the necessary changes to these fields so that they accurately reflect the information for the new **Eligibility Set**.

   Points based on Income

Field	Description
Automatically assign points based on Income	Check this checkbox to automatically assign eligibility points based on the participant's income
Foster	Enter the number of points to assign to participants who are in foster care
Homeless	Enter the number of points to assign to participants who are experiencing homelessness
Public Assistance	Enter the number of points to assign to participants who receive public assistance
Percentage of Poverty Level	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 Create a row for each **Poverty Level** range to assign points based on **Poverty Level** percentage

Field	Description
Participant is not eligible if above _ __ % of the Poverty Level	Check this box to restrict participants from being enrolled if their % of **Poverty Level** is above the specified percentage
Determine eligibility based on annual income	Check this checkbox to restrict participants from being enrolled based on their annual income. Once you check this check box, click **Set Income Levels** to configure income limits
Set Income Levels	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

Points based on Class Age

Field	Description
Automatically assign points based on Income	Check this checkbox to automatically assign eligibility points based on the participant's income
Foster	Enter the number of points to assign to participants who are in foster care
Homeless	Enter the number of points to assign to participants who are experiencing homelessness
Public Assistance	Enter the number of points to assign to participants who receive public assistance
Percentage of Poverty Level	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 Create a row for each **Poverty Level** range to assign points based on **Poverty Level** percentage
Participant is not eligible if above _ __ % of the Poverty Level	Check this box to restrict participants from being enrolled if their % of **Poverty Level** is above the specified percentage

Field	Description
Determine eligibility based on annual income	Check this checkbox to restrict participants from being enrolled based on their annual income. Once you check this check box, click **Set Income Levels** to configure income limits
Set Income Levels	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. Click **Add a Criterion** in the **Other Eligibility Criteria** section to add additional eligibility items (for example, **Teen Parent** or **Parental Status**).
8. Click Add a Choice for each criterion item.

Field	Description
Choice	Enter the name of the choice that users can choose from when assigning eligibility points on in the **Enrollment** module For example, if you created a criterion called **Teen Parent**, you would set up two choices: **Yes** and **No**
Points	Specify the number of points to assign to each choice For example, if the answer is **Yes**, then the participant would be assigned 15 eligibility points; if the answer is **No**, then the participant would be assigned 0 eligibility points
Not Eligible	Check this checkbox for the choice, then if a user selects this choice when filling out the participant's eligibility criteria, ChildPlus will determine that the participant is not eligible

9. Repeat steps 7-8 for each criterion that you want to add.
10. Select the Agency/Program Term(s) to apply the **Eligibility Set** to.
11. Save.

Security Settings

Use **Security Settings** to manage security settings for different modules and features in ChildPlus, including:

- Enable access to ChildPlus Online using a web browser
- Allow users to request new passwords from the sign-in window
- Force users to periodically change passwords
- Enable access restrictions by location
- Require users to reenter passwords after a period of inactivity in ChildPlus Desktop

General

Use this section to:

- Enable ChildPlus Online
- Configure user access restrictions by agency region

Enable ChildPlus Online

Enable ChildPlus Online for your agency.

1. Go to **ChildPlus Desktop >> Security >> Security Settings >> General**.
2. Select **Allow users to access ChildPlus using a web browser**.
3. Save.

> To learn how staff members can access ChildPlus Online, see Access ChildPlus Online.

Configure User Security by Region

When you assign user security by region, ChildPlus will automatically grant users access to each site and classroom associated with the region(s) you select. If you do not want users to have access to all of a region's sites and classrooms, you will need to manually uncheck any site and/or classroom that you do not want users to have access to. If you decide to assign user security by region (rather than by agency, which is the default method), you will need to set an option in System Preferences.

1. Go to **ChildPlus Desktop >> Security >> Security Settings >> General**.
2. Select **Yes** or **No** to restrict user access by region.

> Make sure you have already assigned sites to regions before you attempt to assign security using this method. To do this, configure the options for each site and select a region in **ChildPlus Desktop >> Setup >> Agency Configuration >> Agency Info >>** Sites.

Password Policy Enforcement

Use this section to:

- Manage your database's security settings by requiring strong or very strong passwords
- Determine a schedule for updating staff passwords
- Allow individual users to reset forgotten passwords

Password Strength

To configure password strength in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> Security >> Security Settings >> Password Policy Enforcement**.
2. Select a password strength. All ChildPlus products require passwords that are at least 8 characters long and contain at least 3 of the following character types:
    - lower case letters
    - upper case letters
    - numbers
    - symbols (~ ! @ # $ % ^ * ( ) _ - + = { } [ ] \ | : ; “ ‘ < > , . ? /)
3. Save.

Password Update Schedule

To enable a schedule for updating staff passwords:

1. Go to **ChildPlus Desktop >> Security >> Security Settings >> Password Policy Enforcement**.
2. Select **Force users to change their passwords after ___ days**.
3. Enter the number of days after which staff must change their passwords.
4. Select **Warn users ___ days before their password expires**.
5. Enter the number of days to warn users before requiring them to change their passwords.
6. Save.

Password Reset

To allow individual users to reset forgotten passwords:

1. Go to **ChildPlus Desktop >> Security >> Security Settings >> Password Policy Enforcement**.
2. Select **Enable the "I Forgot My Password" feature**.
3. Save.

If a user attempts to recover their password using this feature, ChildPlus will ask them to verify their identity by entering their birthday. We recommend that you verify the **Birthday** and **Work Email** for each staff member in the **Personnel** module.

After 7 consecutive failed sign-in attempts, users will be temporarily locked out of their account. The account will be locked for a period of 5 minutes before they can attempt to sign in again.

Restrict Access by Location

ChildPlus has several options for restricting access to records by individual users. Use this section to restrict access to records in specific modules.

1. Go to **ChildPlus Desktop >> Security >> Security Settings >> Restrict Access by Location**.
2. Complete the fields.

Option	Description
In-Kind	Select 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 **User Security** profile
Entry Express - Enrollment	Select whether you want users to be able to assign participants to any site or classroom or to only be able to assign participants to sites and classrooms that they have access to in their **User Security** profile If you restrict access to only the sites and classrooms a user has access to, 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 **User Security** profile
Location Preferences - Enrollment	Select whether you want users to be able to assign participants to a waitlist for all sites and classrooms or only to only be able to assign participants to a waitlist for sites and classrooms that they have access to in their **User Security** profile
Transportation	Select whether you want users to be able to see all bus route or to only be able to see bus routes for the sites that they have access to in their **User Security** profile In order to take full advantage of this feature, you must select an **Agency** and **Site** for each route in **Transportation Routes**
Professional Development	Select 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 **User Security** profile
Community Resources	Select whether you want users to be able to choose any community resource from drop-down lists or if drop-down lists should only include community resources that are associated with agencies that the user has access to in their **User Security** profile

Option	Description
Personnel	These settings give you greater control over security access to **Personnel** and **User Security** 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 lets you determine if you want drop-down lists 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

These features are only available when you have multiple agencies set up in ChildPlus.

3. Save.

ChildPlus administrators can configure each user's agency, site and classroom access in **ChildPlus Desktop >> Setup >> Security >> User Security >> Restrict Access by Location**.

Inactivity Timeout

To enhance the security of your data, you can configure how long users can be inactive before having to sign back in to ChildPlus Desktop.

> These settings only apply to ChildPlus Desktop. ChildPlus Online signs users out after 4 hours of inactivity.

1. Go to **ChildPlus Desktop >> Security >> Security Settings >> Inactivity Timeout**.
2. Select **Require users to reenter their password after a period of inactivity**.
3. Enter the number of minutes of inactivity after which users must reenter their passwords.
4. Select **Log the user out completely after an additional ___ minutes of inactivity**.
5. Enter an additional number of minutes of inactivity after which users will be signed out of ChildPlus Desktop.
6. Save.

User Security Groups

ChildPlus administrators can use **User Security Groups** to set up groups with designated access privileges to modules, windows and functions in ChildPlus. Once you have set up **User Security Groups**, you can assign users to them. Any users assigned to these groups will automatically be granted the same access privileges as their group assignments.

Access Privileges and Levels of Requirement

Access to ChildPlus must be configured by platform:

- ChildPlus Online (accessible through any browser)
- ChildPlus Desktop (Windows)
- Attendance App (accessible through any Apple®[1], Android™[2] or Kindle Fire™[3] device)

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

Access	Description
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

Some items will not have all levels of security access.

You can assign the following levels of requirement for fields in ChildPlus:

Requirement	Description
Full Access - Not Required	The field can contain a blank value when the record is updated or saved
Full Access - Recommended	The field can contain a blank value, but ChildPlus will display a warning that the field was not completed when saving
Full Access - Required	The field cannot contain a blank value when the record is updated and the record will not save until the user enters a value

Some fields will not have all levels of requirement.

[1]Apple is a trademark of Apple Inc., registered in the U.S. and other countries and regions.
[2]Android is a trademark of Google LLC.
[3]Kindle Fire and all related marks are trademarks of Amazon.com, Inc. or its affiliates.

Add a New User Security Group

To add a new **User Security Group** in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> Setup >> Security >> User Security Groups**.
2. Click **Add New Security Group**.
3. Select one of the following:
   - **Start with a blank security group**: create a new **Security Group** from scratch
   - **Start with a copy of**: copy all settings from an existing **Security Group**
4. Enter the name you want to assign to the **Security Group** in the **Security Group Name**.
5. Enter a brief description of the **Security Group** in the **Security Group Description** field.
6. Expand the item that you want to assign access to. You can assign access to entire modules, sections available through those modules and individual functions available in each module.
7. Right-click the item.
8. Select a level of access. ChildPlus Desktop will change the icon to correspond with the level of access designated in the legend at the bottom of the window.
9. Save.

Many of the windows and reports in ChildPlus contain sensitive and confidential information. We recommend that only ChildPlus administrators have full access to everything in ChildPlus when setting up your **Security Groups**. Security is especially a concern for features accessible through **Management** and **Setup**.

Users cannot access any data until they:

- Verify their identity using a security access code
- Are granted access to one or more sites
- Are assigned to at least one **Security Group**

Time-Saving Tips

- Click **Expand All** to expand all the options in the list
- Click **Collapse All** to collapse all the options in the list if it 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)

Grant Access to ChildPlus

Learn how to grant users access to each ChildPlus platform.

Grant Access to Download ChildPlus Desktop

To grant users access to download ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> Setup >> Security >> User Security Groups**.
2. Select the **Security Group** you want to assign access to.
3. Expand **ChildPlus Desktop**.
4. Right-click **Download from the Web**.
5. Select **Full Access**. ChildPlus Desktop will change the icon to correspond with the level of access designated in the legend at the bottom of the window.
6. Save.

> Repeat these steps for any additional **Security Groups**.

Grant Access to ChildPlus Online

To grant users access to ChildPlus Online:

1. Go to **ChildPlus Desktop >> Setup >> Security >> User Security Groups**.
2. Select the **Security Group** you want to assign access to.
3. Do one of the following:
   - Right-click **ChildPlus Online** and select **Full Access**
   - Expand **ChildPlus Online** and select a level of access for each item

   > ChildPlus Desktop will change the icon to correspond with the level of access designated in the legend at the bottom of the window.

4. Save.

> Repeat these steps for any additional **Security Groups**.

Grant Access to the Attendance App

To grant users access to the Attendance App:

1. Go to **ChildPlus Desktop >> Setup >> Security >> User Security Groups**.
2. Select the **Security Group** you want to assign access to.
3. Right-click **Attendance App**.
4. Select **Full Access**. ChildPlus Desktop will change the icon to correspond with the level of access designated in the legend at the bottom of the window.
5. Save.

Repeat these steps for any additional **Security Groups**.

User Security

Use **User Security** to configure each user's security settings, including:

- Passwords
- User names
- Contact information
- Access to assigned Security Groups

All users must be added through the **Personnel** module before you can configure their security settings. Users cannot access data until they have been granted access to one or more sites and have been assigned to at least one **User Security Group**.

Login

Use **Login** to set up each user's user name and password in **User Security**.

1. Go to **ChildPlus Desktop >> Setup >> Security >> User Security >> Login**.
2. Enter a user name.
3. Click **Assign New Password**.
4. Do one of the following:
   - Enter a password
   - Click **Generate a Random Password** to make ChildPlus create a password
5. Click **Force user to change password at next login** to make ChildPlus prompt the user to change their password the next time they sign in to ChildPlus.
6. Click **Save New Password**.
7. Enter the user's work email address.

   The user must have a work email address on file in order to use the email notification feature in the **To-Do List**. When you add or edit a user's email address, ChildPlus updates the **Work Email** field in **Personnel**.

8. Do one of the following:
   - Click **Add Phone Number** to add a new phone number
   - Click **Edit** to update an existing phone number
9. Enter the user's phone number.
10. Select the type of phone number.
11. Enter any notes about the phone number.
12. Select if the phone number is the user's primary phone number.
13. Click **Save**.
14. Save the record.

ChildPlus uses 2-Step Verification to identify each user. In order for 2-Step Verification to work, each user must have a valid email address and mobile phone number on file.

Use **Report 1049 - User Verification (Grid)** to identify which users are missing an email address or phone number.

Lock a User Out of ChildPlus

Use this section in **User Security** to disable a user's access to ChildPlus.

1. Go to **ChildPlus Desktop >> Setup >> Security >> User Security >> Login**.
2. Select **Lock this user out of ChildPlus**.
3. Save.

The user will be locked out of ChildPlus the next time they attempt to sign in.

Restrict Access by Location

Use this section in **User Security** to configure a user's access to agencies, sites and locations.

1. Go to **ChildPlus Desktop >> Setup >> Security >> User Security >> Restrict Access by Location**.
2. Select one of the following:
   - **This user may access all agencies, sites and classrooms**
   - **Restrict access to selected agencies, sites and classrooms**
3. If you are restricting the user's access to select locations, select each agency, site and classroom that the user can access.

   > The **Agencies** section is only available if you have more than one agency in ChildPlus.

4. Save.

User Security Groups

Use this section in **User Security** to assign a user to a **Security Group**.

1. Go to **ChildPlus Desktop >> Setup >> Security >> User Security >> User Security Groups**.
2. Select each **Security Group** to assign the user to.
3. Save.

Calendars and To-Do List

Use this section in **User Security** to assign a user's access to calendars and **To-Do Lists**.

1. Go to **ChildPlus Desktop >> Setup >> Security >> User Security >> Calendars and To-Do List**.
2. Select the level of access to assign to each calendar and **To-Do List**. For more information about levels of access, see Access Privileges and Levels of Requirement on page 96.
3. Save.

> You can also assign access to calendars in **ChildPlus Desktop >> Setup >> Module Setup >>** Calendars.

Personnel

Use this section in **User Security** to configure a user's access to records in the **Personnel** module.

1. Go to **ChildPlus Desktop >> Setup >> Security >> User Security >> Personnel**.
2. Select a level of access.
3. If the user has a supervisor, select their supervisor.

   This field determines access when a user's access level includes the records of subordinates and for **Report 1160 - Personnel Hierarchy**.

4. Save.

Agency-Specific Customizable Fields

Use **Agency-Specific Customizable Fields** to create custom fields and track information in various modules throughout ChildPlus.

Family Member

Use **Family Member** to create custom fields in the **Application** module. You can:

- Capture additional family member information not listed in ChildPlus
- Track up to 220 Agency-Specific Fields for family members
- Control which Agency-Specific Fields display for each family member type

This feature is useful if, for example, you only want to track certain information for the children but not the adults in a family or vice versa.

To set up Agency-Specific Fields for family members:

1. Go to **ChildPlus Desktop >> Setup >> System Setup >> Agency-Specific Customizable Fields >> Family Member**.
2. Click the arrow ▸ next to the field type you want to add.

Field Type	Description
Text(15)	Text field that can contain up to 15 characters
Text(64)	Text field that can contain up to 64 characters
Numeric	Numeric field that displays up to two decimal places
Date	Date field
Dropdown	Drop-down list with customizable choices Configure drop-down list choices in **ChildPlus Desktop >> Setup >> System Setup >> Customize Dropdown Choices >> Family Application - [field name]**
Checkbox	Check box
Yes/No Dropdown	Drop-down list with the choices of **Yes** or **No**
Notes	Notes field that can contain an unlimited number of characters
Section Label	A label used to group Agency-Specific Fields

3. Complete the fields.

Field	Description
Active	Select this option to activate the field
Field Name	Enter a name for the field. Field names can contain up to 25 characters
Row #	Enter the row to display the field in
Item #	Enter the column to display the field in
Child Applicant	Select how to display the field for each family member type. You can select the following: • **Not Used**: do not display the field for the family member type • **On Screen**: display the field in the **Application** window for the family member type • **On Screen and Printed App**: display the field in the **Application** window and on printed applications for the family member type
Child Non-Applicant	
Adult Applicant	
Adult Non-Applicant	

For more information about row and item numbers, see Section Labels, Row Numbers and Item Numbers on page 111.

4. Repeat steps 2-3 for each Agency-Specific Field you want to add.
5. Save.

Personnel

Use **Personnel** to create custom fields in the **Personnel** module. You can:

- Capture additional staff member information not listed in ChildPlus
- Track up to 220 Agency-Specific Fields for staff members

To set up Agency-Specific Fields for staff members:

1. Go to **ChildPlus Desktop >> Setup >> System Setup >> Agency-Specific Customizable Fields >> Personnel**.
2. Click the arrow ▸ next to the field type you want to add.

Field Type	Description
Text(15)	Text field that can contain up to 15 characters
Text(100)	Text field that can contain up to 100 characters
Numeric	Numeric field that displays up to two decimal places
Date	Date field
Dropdown	Drop-down list with customizable choices Configure drop-down list choices in **ChildPlus Desktop >> Setup >> System Setup >> Customize Dropdown Choices >> Personnel - [field name]**
Checkbox	Check box
Yes/No Dropdown	Drop-down list with the choices of **Yes** or **No**
Notes	Notes field that can contain an unlimited number of characters
Section Label	A label used to group Agency-Specific Fields

3. Complete the fields.

Field	Description
Active	Select this option to activate the field
Your Agency's Name for this Field	Enter a name for the field. Field names can contain up to 25 characters
Row #	Enter the row to display the field in
Item #	Enter the column to display the field in

For more information about row and item numbers, see Section Labels, Row Numbers and Item Numbers on page 111.

4. Repeat steps 2-3 for each Agency-Specific Field you want to add.
5. Save.

Education

Use **Education** to create up to two custom screening tools in the **Education** module. You can track up to 12 Agency-Specific Fields for each screening tool.

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

1. Go to **ChildPlus Desktop >> Setup >> System Setup >> Agency-Specific Customizable Fields >> Education**.
2. Complete the fields.

Field	Description
Header	Enter a name for the screening tool. The header can contain up to 15 characters
Active	Select this option to activate the field
Your Agency's Name for this Field	Enter a name for the field. Field names can contain up to 25 characters You can add up to 12 fields per screening tool

3. Save.

Once you configure the screening tool(s), you can enter data in:

- **ChildPlus Online >> Services >> Education >> Screening Results**
- **ChildPlus Desktop >> Services >> Education >> Education Information**

Site Inspections

Use **Site Inspections** to customize the inspection items that display in **Inspections** for each site. You can track up to 50 inspection items.

1. Go to **ChildPlus Desktop >> Setup >> System Setup >> Agency-Specific Customizable Fields >> Site Inspections**.
2. Complete the fields.

Field	Description
Your Agency's Name for this Field	Enter a name for the inspection. Inspection names can contain up to 25 characters

3. Save.

Once you set up the inspection items, you can track dates in **ChildPlus Desktop >> Setup >> Agency Configuration >> Agency Info >> Sites >> Inspections**.

Section Labels, Row Numbers and Item Numbers

Setup ***>>*** *System Setup* ***>>*** *Agency-Specific Customizable Fields*

Use section labels, row numbers and item numbers to control the order in which Agency-Specific Fields display in the **Application** and **Personnel** modules. For example, if you have a set of Agency-Specific Fields that are all related to eligibility, you can create a section called **Eligibility** and group all eligibility-related fields together in it.

Agency-Specific Fields are organized in grid format such as the following:

	Item 1	Item 2	Item 3
Row 1			
Row 2			
Row 3			

- Fields without a **Row** or **Item Number** display in the order listed in the **Field Name** column
- Fields with an assigned **Row** or **Item Number** display below fields without an assigned **Row** or **Item Number**

Example

Use the following as an example of the structure and placement of fields in **Application** for a child applicant and an adult family member.

Field Assignments

Field Name	Row #	Item #	Child Applicant	Adult Non-Applicant
ERSEA Manager Info	1	1	On Screen	Not Used
Application taken by	2	1	On Screen	Not Used
Recruitment	2	2	On Screen	Not Used
Transportation Needed	2	3	On Screen	Not Used
Grantee Info	3	1	On Screen	On Screen
Received UGA Grant	4	1	On Screen	Not Used
Registered Voter	4	2	Not Used	On Screen
Veteran	4	3	Not Used	On Screen

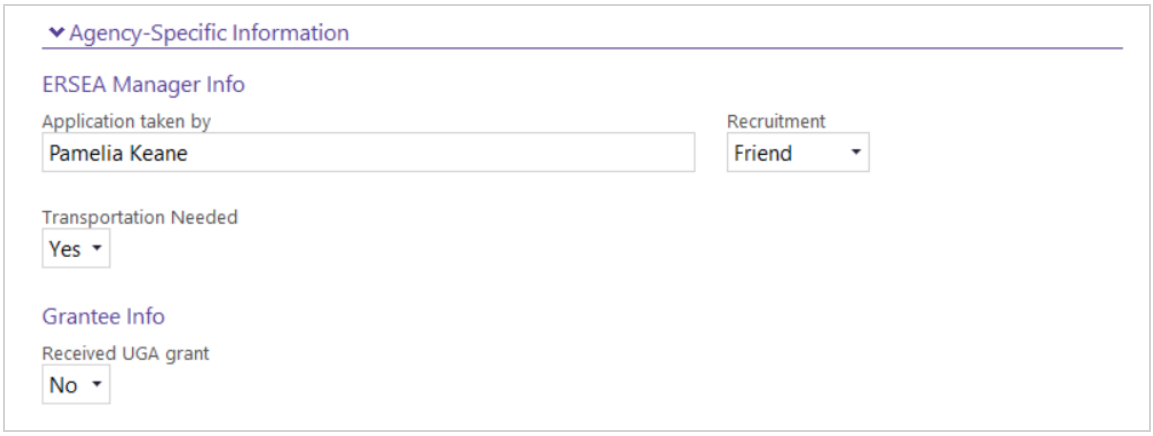
Field Structure

	Item 1	Item 2	Item 3
Row 1	ERSEA Manager Info		
Row 2	Application taken by	Recruitment	Transportation Needed
Row 3	Grantee Info		
Row 4	Received UGA Grant	Registered Voter	Veteran

ChildPlus Output

ChildPlus Desktop

Child Participant



Adult Family Member

Fields with **Item Numbers** greater than **1** may display on the next row, depending on the width of the fields and the width of your application window, browser window or mobile device.

Customize Dropdown Choices

Use **Customize Dropdown Choices** to add, delete, or deactivate the options used in drop-down lists throughout ChildPlus.

Add a Drop-down Choice

To add a drop-down choice to a list in ChildPlus:

1. Go to **ChildPlus Desktop >> Setup >> System Setup >> Customize Dropdown Choices**.
2. Select the drop-down list that you want to add a choice to.
3. Click **Add a Choice**.
4. Enter a code for the new choice.
5. Enter how you want the choice to display in the drop-down list in the **Description** field.
6. Save.

Edit a Drop-down Choice

To edit a drop-down choice in ChildPlus:

1. Go to **ChildPlus Desktop >> Setup >> System Setup >> Customize Dropdown Choices**.
2. Select the drop-down list that contains the choice you want to edit.
3. Select the drop-down choice.
4. Update the **Code** and **Description** fields.
5. Save.

You can only modify drop-down choices with **Yes** in the **Editable** column. Drop-down choices with **No** in the **Editable** column are created by ChildPlus and cannot be edited or deleted. However, they can be deactivated.

Associate an Event Status with Requirements

Use **Customize Dropdown Choices** to configure, for each status, which **Health** and **Education Events** should be considered when ChildPlus evaluates requirements. Once you configure each status, ChildPlus will automatically determine whether or not an **Event** should count towards satisfying a participant's requirements on the PIR.

1. Go to **ChildPlus Desktop >> Setup >> System Setup >> Customize Dropdown Choices**.
2. Select **Status (Health/Education Events)**
3. Select a status.
4. Check **Consider events with this status when evaluating requirements**.
5. Repeat steps 3 and 4 for each applicable status.
6. Save.

Merge Duplicate Event Statuses

Use **Customize Dropdown Choices** to merge duplicate **Event** statuses or those used to describe the same outcome.

1. Go to **ChildPlus Desktop >> Setup >> System Setup >> Customize Dropdown Choices**.
2. Select **Status (Health/Education Events)**.
3. Select the status that you want to merge away. This status will be deleted after the merge.
4. Click **Merge this status into another status**.
5. Select the status to that you want to merge the status you selected in step 3 into.
6. Click **Merge Statuses**. ChildPlus will delete the status that you selected in step 3 and change any **Events** with the original status to the new status.
7. Save.

Associate Family Services Issues with Services Areas

Use **Customize Dropdown Choices** to determine which **Issues** will be available for each **Service Area** in the **Family Services** module.

1. Go to **ChildPlus Desktop >> Setup >> System Setup >> Customize Dropdown Choices**.
2. Select **Service Area (Family Services)**.
3. Select a **Service Area**.
4. Select each issue to display as a drop-down choice for the selected **Service Area**.
5. Save.

If you add a new choice to the **Issue (Family Services)** drop-down, you must associate it with a **Service Area**.

Deactivate a Drop-down Choice

To deactivate a drop-down choice in ChildPlus:

1. Go to **ChildPlus Desktop >> Setup >> System Setup >> Customize Dropdown Choices**.
2. Select the drop-down list that contains the choice you want to deactivate.
3. Select the drop-down choice.
4. Uncheck the **Active** checkbox. ChildPlus displays **(Inactive)** next to the drop-down choice.
5. Save.

When you deactivate a drop-down choice, it will no longer display as an option in drop-down lists. However, if you deactivate a drop-down choice that is currently selected in a list, ChildPlus will display **(i)** next to the choice.

Delete a Drop-down Choice

To delete a drop-down choice in ChildPlus:

1. Go to **ChildPlus Desktop >> Setup >> System Setup >> Customize Dropdown Choices**.
2. Select the drop-down list that contains the choice you want to delete.
3. Select the drop-down choice.
4. Click **Delete a Choice**.
5. Save.

You can only modify drop-down choices with **Yes** in the **Editable** column. Drop-down choices with **No** in the **Editable** column are created by ChildPlus and cannot be edited or deleted. However, they can be deactivated.

Data Entry Defaults

Use **Data Entry Defaults** to eliminate repetitive data entry keystrokes and let ChildPlus automatically populate information for you. For example, if most of your families share the same area code, then you can configure that area code as a data entry default. Whenever you add a new family, ChildPlus will populate the family's area code with the data entry default.

Data Entry Defaults apply to the **Application** and **Enrollment** modules and can be configured by ChildPlus administrators or created by each user.

Configure Data Entry Defaults for All Users

ChildPlus administrators can use this section to create **Data Entry Defaults** that can be accessed by all users. This option is beneficial because it ensures that all staff are using the same set of defaults.

1. Go to **ChildPlus Desktop >> Setup >> System Setup >> Data Entry Defaults**.
2. Complete each field in each section that you want to create a default for.

Section	Defaults for...
Family Information	The **Family Information** section of the **Application** module
Family Members	Each individual family member added to the **Application** module
Enrollment	Each participation record in the **Enrollment** module

3. Save.

When non-admin users see this window, they will have the option to select **Use the default values set up by the Administrator**. The fields will be disabled for editing under this option.

Configure Individual Data Entry Defaults

Use this section to create **Data Entry Defaults** per user. ChildPlus administrators must assign security access for this option to be available for each user.

1. Go to **ChildPlus Desktop >> Setup >> System Setup >> Data Entry Defaults**.
2. Select **Create my own default values**.
3. Complete each field in each section that you want to create a default for.

Section	Defaults for...
Family Information	The **Family Information** section of the **Application** module
Family Members	Each individual family member added to the **Application** module
Enrollment	Each participation record in the **Enrollment** module

4. Save.

System Preferences

Use **System Preferences** to apply agency-wide data settings to ChildPlus.

General

Use this section to configure general **System Preferences** in ChildPlus.

General

To configure preferences for this section, go to **ChildPlus Desktop >> System Setup >> System Preferences >> General**.

Preference	Description
Family Application - Minimum Length of Filter Criteria Required to search for a family	Enter the minimum number of characters users must enter when searching for a family member in **Application** 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
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 HHS Poverty Guidelines for the latest poverty guideline information
ChildPlus Community	Select which features are available to users in the **Community** menu
Show Forums	Select this option to allow users to access the **ChildPlus Feature Request Forum** and the **My Peers Community Forum**
Show Social Media	Select this option to allow users to access ChildPlus Software's social media sites
Attachments	Control what happens to a file once it is attached to a record in ChildPlus
Leave the file in its current folder	Select this option to leave the file in its current folder on your computer

Preference	Description
Move the file to a sub-folder named "Attached"	Select this option to move the file on your computer to folder called **Attached**. If a folder called **Attached** does not already exist, ChildPlus will create the folder for you and add it as a sub-folder under the file's original folder For example, if the file was stored in **C:\My Documents**, ChildPlus will create the sub-folder and move the file to **C:\My Documents\Attached** If a user does not have permission to create folders on their computer, ChildPlus will not move the file and will leave it in its current location
Delete the file	Select this option to delete the file from it's location on your computer
Does agency operate an American Indian/Alaska Native program?	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
No	ChildPlus will check the **Counted as part of 10% of maximum for non-AI/AN programs** sub-option on the Eligibility Verification page
Yes	ChildPlus will check **Counted as part of the 49% of maximum for AI/AN programs Over Income** sub-option on the Eligibility Verification page
Blank	ChildPlus will not check either of the **Over Income** sub-options on the Eligibility Verification page
Duplicate Social Security Numbers	Restrict or allow duplicate Social Security Numbers in ChildPlus

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.

PIR System Preferences

To configure preferences for this section, go to **ChildPlus Desktop >> System Setup >> System Preferences >> General >> PIR**.

Preference	Description
Default value for PIR Yes/No questions	Select a default value for Yes/No PIR questions in ChildPlus. You can select: • Yes • No • Blank
Show red links above fields that impact the PIR	Select this option to show PIR indicators above applicable fields throughout ChildPlus

Enrollment

Use this section to customize how ChildPlus handles your agency's participation records.

Applications

To configure preferences for this section, go to **ChildPlus Desktop >> System Setup >> System Preferences >> Enrollment >> Applications**.

Preference	Description
When adding a new family, first member should default as:	Select which family member type for ChildPlus to automatically add first whenever a user adds a new family
No Default	Lets the user choose which type of family member they want to add to the family
Child Applicant	Force the user to add a child applicant as the first member of any new family
Primary (Adult)	Force the user to add the primary adult as the first member of any new family
When adding a new family, should Other Adults be included in the Number in Family?	Specify whether ChildPlus should count family members marked as an **Other Adult** in the **Number in Family** field By default, this preference is set to **Yes** in ChildPlus
When adding a new family, should family members that do not live with the family be included in the Number in Family?	Specify whether ChildPlus should count family members that do not live with the family in the **Number in Family** field By default, this preference is set to **Yes** in ChildPlus
Do you serve adult participants? (e.g. Expectant Mothers)	Specify whether adults can be added as applicants For example, if you are an Early Head Start program that serves pregnant mothers, then you would want to make it possible for adults to be applicants
Track specific races for multi-racial individuals	Specify whether users can select multiple races for individuals in ChildPlus If you select **No**, users will be able to set an individual's race as **Multi-Racial/Biracial** but will not be able to specify the different races

Preference	Description
Track descriptions when Other is selected	Specify whether users must manually enter an individual's race when **Other** is selected for **Race**
Application Signatures	Specify whether ChildPlus will display a **Verifying Staff** signature and date line at the bottom of the **Application Eligibility & Enrollment Information** page of paper applications printed using **Report 2135 - Print Applications**

We recommend keeping the default value and adding child applicants first if you are using paper applications specifically designed for **Application**. If you are still entering applications that were filled out on the original paper application form or internal forms used by your agency, you may need to adjust this setting.

Enrolling

To configure preferences for this section, go to **ChildPlus Desktop >> System Setup >> System Preferences >> Enrollment >> Enrolling**.

Preference	Description
When enrolling a participant, should the Enrollment Date be used as the default Entry Date?	Select **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, however, ChildPlus will automatically populate the **Entry Date** field with the participant's **Enrollment Date** If you select **No**, users will always have to manually enter a date into the **Entry Date** field
Restrict enrollment by classroom's funding	Specify whether 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

To configure preferences for this section, go to **ChildPlus Desktop >> System Setup >> System Preferences >> Enrollment >> Eligibility**.

Preference	Description
Also show the CACFP Status on the Poverty Level Calculator	Check this checkbox to make each participant's **CACFP Status** display on the **Poverty Calculator**

Data History Log

To configure preferences for this section, go to **ChildPlus Desktop >> System Setup >> System Preferences >> Data History Log**.

Preference	Description
Data History Log - Track changes made to records?	Select this option to use the **Data History Log** to track changes made to records
Data History Log transactions should be kept for ___ days (maximum 365 days)	Enter the number of days for ChildPlus to save changes in the **Data History Log**
Track changes for selected modules	Select each module to track changes for

Attendance

Use this section to customize how ChildPlus handles your agency's attendance records.

Entry Express

To configure preferences for this section, go to **ChildPlus Desktop >> System Setup >> System Preferences >> Attendance >> Entry Express**.

Preference	Description
When a classroom is set to Open, the participants' Statuses should default using the following	
Participants who normally participate	Select the attendance code for ChildPlus to automatically assign to participants who normally participate ChildPlus determines normal participation based on the Participation Days and Meals information stored for each participant in the **Enrollment** module Select blank to prevent ChildPlus from automatically assigning a status. If you select blank, users will have to manually set the status of each participant
Participants who normally do not participate	Select the attendance code for ChildPlus to automatically assign to participants who do not normally participate
Prior to participant's Entry date (or if blank)	Select the attendance code for ChildPlus to automatically assign to participants if you take attendance prior to their actual **Entry Date**
Default the classroom status to Open	Select this option for ChildPlus to always default the **Classroom Status** to **Open**
Default the scheduled meals when participant is marked Present	Select this option for ChildPlus to automatically count each participant as having been served a meal or snack (if one is normally served in the classroom) To make data entry staff manually check each meal served, leave this option blank

Attendance Scanning

To configure preferences for this section, go to **ChildPlus Desktop >> System Setup >> System Preferences >> Attendance >> Attendance Scanning**.

Preference	Description
If a child is not checked in, default his attendance as	Select the attendance code for ChildPlus to automatically assign to participants who are not checked in via **Attendance Scanning** For example, if you have a classroom with 10 participants in it and nine of those participants were checked in using **Attendance Scanning** on a specific date. This status would apply to the one participant who was not checked in that day
When participants are checked in, mark all of their scheduled meals as served	Automatically mark all participant's meals for the day as served. Only select this option if your agency is not going to use **Attendance Scanning** to track meals. If you select this option, **Meals** will not be available in the **Attendance Scanning** module If a participant arrived late or left early and was not served a meal, you will have to manually remove the meal in their attendance record for the day in **Entry Express >> Attendance**
Mark a participant Tardy if they check in ___ minutes or more after the classroom begin time	Automatically mark a participant as **Tardy** if they check in ___ minutes after the classroom's **Begin Time**. To use this option, you must specify the number of minutes to wait until a participant is marked as **Tardy**
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 **Left Early** if they check out ___ minutes before the classroom's **End Time**. To use this option, you must specify the number of minutes before the classroom **End Time** to wait until a participant is marked as **Left Early**

Preference	Description
Mark a participant as Late Pickup (or Tardy/Late Pickup if they were also Tardy) if they check out ___ minutes or more after the classroom end time	Automatically mark a participant as **Late Pickup** if they check out ___ minutes after the classroom's **End Time**. To use this option, you must specify the number of minutes after the classroom **End Time** to wait until a participant is marked as **Late Pickup**

ChildPlus administrators can configure a classroom's **Begin** and **End Times** in **ChildPlus Desktop >> Setup >> Agency Configuration >> Program Info >> Classrooms >>** Operating Days and Hours.

Staff Time Clock

To configure preferences for this section, go to **ChildPlus Desktop >> System Setup >> System Preferences >> Attendance >> Staff Time Clock**.

Preference	Description
Enable Staff Time Clock	Select this option to turn on the **Staff Time Clock**
Employees will...	Specify how staff members should record their hours. They can either: • Check in and out through **Attendance Scanning** or through **Check Me In / Out** on the **Gear Menu** or • Manually enter their hours using **My Timesheet** on the **Gear Menu**
Lock time clock records prior to...	Use this option to lock time clock records prior to a specified date

Attendance App

To configure preferences for this section, go to **ChildPlus Desktop >> System Setup >> System Preferences >> Attendance >> Attendance App**.

Preference	Description
Enable Access to Attendance App	Select this option to turn on the **Attendance App**
Enable the "Parent Check In" feature	Select this option to allow parents/guardians to check their children in/out
Record the parent's signature when a participant is checked in or checked out	Record parent/guardian signatures when they drop off/pick up their children
Mark a participant as Tardy if they check in ___ minutes or more after the classroom begin time	Automatically mark a participant as **Tardy** if they check in ___ minutes after the classroom's **Begin Time**. To use this option, you must specify the number of minutes to wait until a participant is marked as **Tardy**
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 **Left Early** if they check out ___ minutes before the classroom's **End Time**. To use this option, you must specify the number of minutes before the classroom **End Time** to wait until a participant is marked as **Left Early**
Mark a participant as Late Pickup (or Tardy/Late Pickup if they were also Tardy) if they check out ___ minutes or more after the classroom end time	Automatically mark a participant as **Late Pickup** if they check out ___ minutes after the classroom's **End Time**. To use this option, you must specify the number of minutes after the classroom **End Time** to wait until a participant is marked as **Late Pickup**
Only allow meals to be recorded for a participant that is checked in at the time the meal is recorded	Require that participants be checked in on the **Attendance App** before you can record a meal for them. If you leave this option unchecked, meals can be recorded on the **Attendance App** for participants who are not checked in but who have an Attendance status of **Present**, **Tardy**, **Left Early** or **Tardy/Left Early**

Preference	Description
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 select this option, you must manually uncheck each meal that was not eaten by each participant
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 five minutes before or five minutes after the meal's regularly scheduled **Begin** and **End Times**

ChildPlus administrators can configure a classroom's **Begin** and **End Times** in **ChildPlus Desktop >> Setup >> Agency Configuration >> Program Info >> Classrooms >>** Operating Days and Hours.

ADA

To configure preferences for this section, go to **ChildPlus Desktop >> System Setup >> System Preferences >> Attendance >> ADA**.

Preference	Description
Present	By default, ChildPlus will count these attendance codes as **Present** when calculating ADA and attendance percentages on reports
Present Offsite	
Tardy	
Left Early	
Tardy and Left Early	
Virtual	
Late Pickup	
Tardy and Late Pickup	
Absent	By default, ChildPlus will count these attendance codes as **Absent** when calculating ADA and attendance percentages on reports
Excused	
Unexcused	
Best Interest Day	Select how you want attendance counts on these days to count towards your ADA and attendance percentages
Not Scheduled	
No Class	

Locking

The **Lock Attendance Records** preference helps prevent attendance records from being modified after CACFP reimbursement counts have been submitted.

To configure preferences for this section, go to **ChildPlus Desktop >> System Setup >> System Preferences >> Attendance >> Locking**.

Preference	Description
Lock Attendance Records	Select this option to enable locking attendance records
Automatically on every _ __ Lock the previous week's attendance records	Select this option if you close out attendance on a specific day each week For example, if you select Tuesday, the previous week's records will be locked on Tuesday of each week
Automatically on this day of every month: ___ Lock the previous month's attendance records	Select this option if you close out attendance on a specific day of each month If you set this option to 10, ChildPlus will lock your previous month's attendance records on the 10th day of each month 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	Select this option 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 that have a date within the last 30 days
Prior to a specific date	Select this option to lock attendance records prior to a specific date For example, if you enter April 30th, then users will not be able to add or edit attendance for any date prior to April 30th

Migrant

To configure preferences for this section, go to **ChildPlus Desktop >> System Setup >> System Preferences >> Migrant**.

Preference	Description
Track Agricultural Income	Select this option to allow users to indicate whether a source of income is from agricultural work When this option is selected, ChildPlus adds an **Ag** income column 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
Track Agricultural Activities	Select this option to track the primary crop and activity performed along with the each income source for a family When this option is selected, ChildPlus adds an **Agricultural Activity** column to the **Family Income** section of the **Application** module
Track Migrant and Seasonal Eligibility	Select this option to allow users to indicate whether a participant's eligibility is migrant or seasonal When this option is selected, ChildPlus adds an **M/S Eligibility** field to the **Eligibility** section of the **Enrollment** module
Track Migrant and Seasonal Initial Enrollment Status	Select this option to allow users to indicate whether a participant's initial enrollment status was newly enrolled or re-enrolled. ChildPlus uses this information so it knows how to report participants for the first month of their enrollment When this option is selected, ChildPlus adds an **Initial M/S Enrollment Status** field to the **Eligibility** section of the **Enrollment** module
Record previous addresses at the time the application is added	Select this option to allow users to record previous addresses where the family lived while adding an application

Preference	Description
Show the 2280 - Migrant and Seasonal Enrollment Report	Select this option to allow users to access **Report 2280 - Migrant and Seasonal Enrollment Report** This report tracks Migrant and Seasonal enrollment and can be used to submit monthly enrollment information to the Head Start Enterprise System
Only count participants who were enrolled on the last day that services were provided for the reporting month	Select this option for ChildPlus to include participants who were enrolled for at least one day during the month for which the report is run For example, if the **Last Day of Services Provided** is 10/25/22, then the report will count any participant who was enrolled for at least one day between 10/1/22 and 10/25/22
Count participants who were enrolled for at least one day during the reporting month	Select this option for ChildPlus to count any participant who was enrolled for one day during the reporting month When this option is selected, **Report 2280 - Migrant and Seasonal Enrollment Report** will count every participant who was enrolled on the date you enter in the **Last day of services provided** field, regardless of whether the participant is still enrolled

These fields will also be available when you add a new family to ChildPlus.

If your agency has 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 in **ChildPlus Desktop >> Setup >> Security >>** User Security Groups.

In-Kind

The **Lock in-kind transactions** preference helps prevent In-Kind totals from changing after they have been submitted.

To configure preferences for this section, go to **ChildPlus Desktop >> System Setup >> System Preferences >> In-Kind**.

Preference	Description
Lock in-kind transactions	Select this option to enable locking **In-Kind** transactions
Automatically on this day of every month: ___ Lock the previous month's in-kind transactions	Select this option if you close out **In-Kind** transactions on a specific day of each month If you set this option to 10, ChildPlus will lock your previous month's transactions on the 10th day of each month For example, on November 10th, ChildPlus will lock all of October's **In-Kind** transactions
Automatically lock in-kind transactions that are more than ___ days old	Select this option to lock **In-Kind** transactions that are more than a certain number of days old For example, if you lock transactions that are more than 30 days old, then users will only be able to add and edit transactions that have a date within the last 30 days
Prior to a specific date	Select this option to lock **In-Kind** transactions that occur prior to a specific date For example, if you enter April 30th, then users will not be able to add or edit transactions for any date prior to April 30th. In addition, users will only be able to add new transactions that have a date that is on or after April 30th

Notes

To configure preferences for this section, go to **ChildPlus Desktop >> System Setup >> System Preferences >> Notes**.

Preference	Description
Notes Fields - Date/Time/User Stamp Options	Select each stamp option to include when a user clicks the time stamp icon above a **Notes** field For example, if you select **Date**, **Time** and **User's Initials**, then ChildPlus will output: 6/1/22 12:00 JAD If you select **Date**, **Time**, **User's Name (First Last)** and **User's Title**, then ChildPlus will output: 6/1/22 12:00 Jane Doe Family Services Worker
Notes Fields - Quick Notes Setup	The **Quick Notes** feature allows users to enter notes created from shorthand for the words and phrases typed most often. **Quick Notes** automatically converts shorthand into the full words and phrases that users specify For example, if you frequently type "My next home visit is scheduled for", you can make its shorthand abbreviation "NHV". Whenever you enter "NHV" into a **Notes** field, ChildPlus will convert it to "My next home visit is scheduled for" **Quick Notes** defined in this section are available to all users. Users can also define their own Quick Notes

Configure Global Quick Notes

Create **Quick Notes** that can be used by all users at your agency.

1. Go to **ChildPlus Desktop >> Setup >> System Setup >> System Preferences >> Notes >> Notes Fields - Quick Notes Setup**.
2. Click in the **When I type** column.
3. Enter a shorthand abbreviation.
4. Click in the **Change it to** column.
5. Enter the text that you want ChildPlus to convert the shorthand abbreviation to.
6. Click **OK**.
7. Repeat steps 2-6 for each Quick Note you want to create.
8. Save.

Any **Quick Note** that a user creates will override the global **Quick Note**.

State Specific

To configure preferences for this section, go to **ChildPlus Desktop >> System Setup >> System Preferences >> State Specific**.

Preference	Description
CDD-801A - Activate CDD-801A handling?	Select whether to track your agency's CDD-801A data in ChildPlus
If a child has a Race that us snot valid for the CDD-801A (Hispanic, Unspecified or Other), the system should count the child as ___	Select the race for ChildPlus to automatically count the participant towards if their **Race (PIR)** field is set to **Unspecified** or **Other**
CD-7617 - Activate CD-7617 handling?	Select whether to track CD-7617 data in ChildPlus
CD-9400 - Activate CD-9400 handling?	Select whether to track CD-9400 data in ChildPlus
EESD-9600 - Activate EESD-9600 handling?	Select whether to track EESD-9600 data in ChildPlus
Immunization Export - Activate handling?	Select whether to enable **Report 7500 - California Immunizations Registry Export**

Fees

To configure preferences for this section, go to **ChildPlus Desktop >> System Setup >> System Preferences >> Fees**.

Preference	Description
Enable Fee Tracking	Select this option to enable fee tracking

Email

To configure preferences for this section, go to **ChildPlus Desktop >> System Setup >> System Preferences >> Email**.

Preference	Description
Enable options for sending automatic emails from the To-Do List and Dashboard modules	Select this option to enable email notifactions from the **To-Do List** and **Dashboard**
Privacy	
Show the individual's name using this format	Select how to display each user's name when sending emails
Show the individual's ChildPlus ID	Select whether display each user's ChildPlus ID when sending emails

Dashboards

To configure preferences for this section, go to **ChildPlus Desktop >> System Setup >> System Preferences >> Dashboards**.

Preference	Description
Highlight values below/above	Enter the threshold for each **Dashboard** indicator. Values that do not meet the threshold will be highlighted on the **Dashboard** To learn about each indicator and the default thresholds in ChildPlus, see Dashboard Indicators.

Family Service Events

You can use **Family Service Events** to set up each of your **Family Services Events** in ChildPlus. When you configure an **Event**, it will be available for selection in the **Event Type** list in the **Family Services** module.

Add a New Family Services Event

To add a new **Family Services Event** in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> Setup >> Module Setup >> Family Service Events**.
2. Click **Add Event Type**.
3. Enter the name you want to assign to the **Event** in the **Event Type Name** field.
4. If the **Event** is a **Home Visit**, select **This event type is a home visit**.
5. Select each field that you want to be available for the **Event Type**.
6. Select whether you want the **Event Type** to be associated with the family or the participant.
7. Save.

Edit an Existing Family Services Event

To edit an existing **Family Services Event** in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> Setup >> Module Setup >> Family Service Events**.
2. Select the **Event Type** you want to edit.
3. Make your changes to the **Event**.
4. Save.

Utility for Updating Existing Family Services Events

You can use this utility to assign existing **Family Services Events** to a family or a single participant. To use this utility in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> Setup >> Module Setup >> Family Service Events**.
2. Click **Utility for Updating Existing Family Service Events**.
3. Select the **Event Type** that you want to update.
4. Click **Change Records**.
5. Enter **CONFIRM** to confirm that you want to change the records.
6. Click **Confirm Change**. ChildPlus displays a message that the process is complete and the number of records that have been modified.
7. To update additional **Event Types**, repeat steps 3-5.
8. Click **Cancel** to exit the utility.

Deactivate a Family Services Event

An **Event Type** cannot be deleted if it is associated with a record. However, it can be deactivated.

To deactivate a **Family Services Event** in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> Setup >> Module Setup >> Family Service Events**.
2. Select the **Event Type** you want to deactivate.
3. Uncheck the **Active** checkbox next to the **Event Type Name** field.
4. Save.

Family Outcomes Instruments

Use this section to configure a **Family Outcomes Instrument**.

Steps to Configure Family Outcomes

Complete the following tasks in the order below to have **Family Outcomes** available and working correctly in ChildPlus.

Step	Description
1	• Add a New Family Outcomes Instrument • Set up Scoring • Set up Categories
2	Add a New School Year
3	Associate a School Year with a Program Term
4	Associate a School Year with a Family Outcomes Instrument

Add a New Family Outcomes Instrument

To add a new **Family Outcomes Instrument** in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> Setup >> Module Setup >> Family Outcomes Instruments**.
2. Click **Add New Instrument**.
3. Select one of the following options:
   - **Start with a blank instrument**: create a new **Family Outcomes Instrument** from scratch
   - **Start with a copy of**: copy all settings from an existing **Family Outcomes Instrument**
4. Click **OK**.
5. Complete the fields. If you copied an existing **Family Outcomes Instrument**, make the necessary changes to these fields so that they accurately reflect the information for the new **Family Outcomes Instrument**.

Field	Description
Instrument Name	The name of the **Family Outcomes Instrument**
Assessments Per Year	The number of times each family will be assessed per year
Assessment 1 Name	The name you want to assign to the first assessment of the school year
Assessment 2 Name	The name you want to assign to the second assessment of the school year
Assessment 3 Name	The name you want to assign to the third assessment of the school year
Assessment Worksheet	Select how you want to print each assessment during the school year: • **Multiple Assessments Per Worksheet**: Print each assessment on the same worksheet • **Single Assessment Per Worksheet**: Print each assessment on a different worksheet

6. Use the **Default Notes** field to track family interview questions that are not scored or additional information for each family. ChildPlus displays any text you add to this field whenever you are entering results for an assessment or printing an **Assessment Worksheet**.

Scoring Setup

To set up scoring for a **Family Outcomes Instrument** in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> Setup >> Module Setup >> Family Outcomes Instruments >> Scoring Setup**.
2. Select the 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, select **Higher Score Means Greater Need**. If a score of 1 out of 5 indicates a higher need, select **Lower Score Means Greater Need**.

3. Click **Add**.
4. Enter a score value into the **Family Outcome Score** field. Score values can be either integers (5) or decimals (5.0).
5. Enter a score description into the **Family Outcome Score Description** field.

   For example, a description could be "Family needs immediate support."

6. Click **OK**.
7. Click **Add** for each score choice you want to add to the instrument.
8. Save.

Category Setup

Use this section to add categories for a **Family Outcomes Instrument**.

1. Go to **ChildPlus Desktop >> Setup >> Module Setup >> Family Outcomes Instruments >> Category Setup**.
2. Click **Add Outcome Category**.
3. Enter the **Family Outcome Category Name**.
4. Click **OK**.
5. Click **Add Outcome Item** to add each of the outcome items that you want to associate with the selected **Category**.
6. Enter a description in the **Item Description** field. Typically, the item will be the actual assessment question.
7. Enter any **Scoring Guidance** (optional) that you would like ChildPlus to display whenever you are entering results for an assessment or printing an **Assessment Worksheet**. Depending on your instrument, **Scoring Guidance** may be helpful.
8. 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**.
9. Repeat Steps 5-7 for each **Family Outcome Item** you want to add.
10. Save.

After you set up your **Family Outcomes Instrument** in ChildPlus Desktop, 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.

Time-saving Tips

- If you have more than one **Family Outcome Category**, click **Move Up** or **Move Down** to adjust the location of the item in the list
- If you have more than one **Family Outcome Item**, click **Move Up** or **Move Down** to adjust the location of the item in the list

Family Outcome Assessments

Once you set up a **School Year** and associate it with a **Program Term**, your **Family Outcomes Instrument** must be associated with a **School Year**.

1. Go to **ChildPlus Desktop >> Setup >> Agency Configuration >> School Year**.
2. Select the **School Year** that you want to work with.
3. Go to **Family Outcome Assessments**.
4. Select an agency.
5. Select the **Family Outcomes Instrument** that your agency will use during the school year.
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).

   > This option will not be available unless you have configured two or three assessments per year for the **Family Outcomes Instrument**.

8. Enter the date that the family's third assessment must be completed by (if applicable).

   > This option will not be available unless you have configured three assessments per year for the **Family Outcomes Instrument**.

9. Save.
10. Repeat steps 4-8 for each additional agency if applicable.

Edit an Existing Family Outcomes Instrument

To edit an existing **Family Outcomes Instrument** in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> Setup >> Module Setup >> Family Outcomes Instruments**.
2. Select the **Family Outcomes Instrument** you want to modify.
3. Go to the section you want to modify.
4. To edit the **Scoring Setup** and **Category Setup** sections, select an item and click **Edit**.
5. Make your changes to the text.
6. Click **OK**.
7. Save.

> The number of assessments and category sections cannot be edited once an assessment is added using the instrument.

Determine Which Participants Have Assessments

To determine which participants already have assessments associated with a specific instrument in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> Setup >> Module Setup >> Family Outcomes Instruments**.
2. Select the **Family Outcomes Instrument** you want to work with.
3. Click **Show Families that have an Assessment for this Instrument**.
4. Do one of the following:
    - Click **Print** to print the list
    - Click **OK** to return to the instrument setup

Deactivate a Family Outcomes Instrument

You can deactivate an instrument so that it is no longer available as a choice in drop-down lists. To deactivate a **Family Outcomes Instrument** in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> Setup >> Module Setup >> Family Outcomes Instruments**.
2. Select the **Family Outcomes Instrument** you want to deactivate.
3. Check the **Active** checkbox.
4. Save. ChildPlus Desktop displays **(i)** next to the instrument name when it is inactive.

Region Info

Regions provide an additional way to group and manage your sites. Region setup is optional, but it can be helpful for tracking, reporting and security purposes.

To add a region in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> Setup >> Agency Configuration >> Region Info**.
2. Click **Add Region**.
3. Enter a name to assign to the region.
4. Repeat steps 2-3 for each region you want to add.
5. Save.

Once you add a region, you can associate sites with each region. For more information, see Add a New Site on page 44. You can also configure **User Security** by region. For more information, see Configure User Security by Region on page 89.

ZIP Code Configuration

ZIP Code Configuration provides a way to help make data entry more efficient and accurate in ChildPlus Desktop. ChildPlus administrators can configure the city, state and county associated with each ZIP code in your area. When the **ZIP Code Lookup** feature is enabled, ChildPlus Desktop will automatically populate the city, state and county fields when staff members enter a ZIP code during data entry.

To configure ZIP codes in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> Setup >> System Setup >> ZIP Code Configuration**.
2. Select **Turn on ZIP Code Lookup**.
3. Use **Click here for the United States Postal Service ZIP code lookup** to search for ZIP codes by address, city or company.
4. Click the first row of the table.
5. Enter a ZIP code and the associated city, state and county.

> If the same ZIP Code is used for more than one city or county, add a new entry for each combination. During data entry, if a user enters a ZIP code with more than one city or county associated with it, ChildPlus will display a list of choices.

6. Repeat steps 4-5 for each additional ZIP code you want to add.
7. Save.