

Help Center

Just a click away!



In-Kind

e-book

ChildPlus
Desktop



800.888.6674
childplus.com

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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](#).
- To learn about the differences between the modules in ChildPlus Desktop and ChildPlus Online, see [Module Comparison](#).

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In-Kind

The **In-Kind** module provides a way to track volunteer activities for individuals or **Community Resources** in the classroom, including tuberculosis information, background information and a variety of services provided by the volunteers.

Volunteer Information

Use this section to add an In-Kind volunteer into ChildPlus.

Make an Existing Parent or Staff Member an In-Kind Volunteer

When you are adding an In-Kind volunteer who has already been entered into ChildPlus (for example, they are a member of a family or an employee at your agency), you can search for their record. Searching for an existing individual can save time and prevent duplicate data entry.

ChildPlus Desktop

To make an existing parent/guardian or staff member an In-Kind volunteer in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> Management >> In-Kind**.
2. Click **Add New In-Kind Volunteer**.
3. Select **Create a new In-Kind Volunteer from a Family Member or Personnel, or a new person**.
4. Click **OK**.
5. Do one of the following:

[Search using the individual's information](#)

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**.
3. Select the individual from the list of possible matches.
4. Click **Select Existing Person**.

[Use the Search for existing person feature](#)




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**.

6. Complete the fields in each section.

Information

Field	Description
Last Name	Enter the individual's name
First	
Middle	
Suffix	
Preferred	Enter the individual's preferred name
Previous	If the individual has a different name that they previously used (for example, a maiden name), enter the name
SSN	Enter the individual's Social Security Number
Birthday	Enter the individual's birth date
Gender	Select the individual's gender
Marital Status	Select the individual's current marital status
Race	Select the option that best describes the individual's race ChildPlus uses this information for reporting race on the PIR
ChildPlus ID	ChildPlus automatically assigns the individual a ChildPlus ID
Language	Select the individual's primary language. If the individual speaks more than one language, select each additional language
Proficiency	Select the individual's level of proficiency for each language they speak
Primary	Select this option to indicate the individual's primary language
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)

Address

Field	Description
Living Address	
Address Line 2	Enter the individual's living address
City	When you enter the ZIP code, ChildPlus automatically populates the city, state and county fields. For more information, see ZIP Code Configuration .
State	
Zip	
County	Click the map marker  to generate a map of the address in ChildPlus
Mailing address is same as living	Select this option if the individual's mailing address is the same as their living address
Mailing Address	Enter a mailing address if the individual'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 .
City	
State	
Zip	Click the map marker  to generate a map of the address in ChildPlus
E-mail	Enter the individual's email address Click email  to open your device's mail client and send an email to the individual
Phone Numbers	
Add Phone Number	Click to add a phone number for the individual
Phone Number	Enter the individual's phone number
Primary Phone	Select this option to indicate the individual's primary phone number
Type of Phone	Select the type of phone number
Opt in for Text Messages	If you add a cell phone number, select whether the individual wants to receive text messages from your agency
Edit Phone Number	Click to edit the individual's existing phone number

Field	Description
Delete Phone Number	Click to delete the individual's existing phone number

Volunteer Information

Field	Description	PIR Question (s)
Volunteer Description PIR	Select the code that best represents the type of in-kind volunteer you are adding	B.2.a
Active	ChildPlus automatically sets new in-kind volunteers as active Uncheck this checkbox to deactivate the volunteer	
TB Test Required	Select this option if a tuberculosis test is required for the individual	
TB Test Received	Enter the date that you received the results of the individual's tuberculosis test	
TB Test Read	Enter the date that the individual's tuberculosis results were read	
TB Test Result	Select the result of the individual's tuberculosis test	
Criminal Check	Select this option if you ran a criminal background check on the individual	
Criminal Check Date	Enter the date that the criminal background check on the individual was completed	
Criminal Check Comments	Enter any comments or notes about the individual's criminal background check	

7. Save.

Make an Existing Community Resource an In-Kind Volunteer

Use this section to add a Community Resource as an In-Kind volunteer.




If a Community Resource is not available in the list, you must first add them through **Management >> Community Resources**.



ChildPlus Desktop

To make an existing Community Resource an In-Kind volunteer in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> Management >> In-Kind**.
2. Click **Add New In-Kind Volunteer**.
3. Select **Create a new In-Kind Volunteer from a Community Resource**.
4. Click **OK**.
5. Select a Community Resource.
6. Click **OK**.
7. Complete the fields in each section.

Information

Field	Description
Name	Enter the name of the resource, individual or organization
Physical Address	
Address Line 2	Enter the address for the resource
City	When you enter the ZIP code, ChildPlus automatically populates the city, state and county fields. For more information, see ZIP Code Configuration .
State	
Zip	Click the map marker  to generate a map of the address in ChildPlus
County	
Mailing address is same as physical address	Select this option if the resource's mailing address is the same as their physical address

Field	Description
Mailing Address	Enter a mailing address if the resource's mailing address differs from their physical address
Address Line 2	
City	When you enter the ZIP code, ChildPlus automatically populates the city, state and county fields. For more information, see ZIP Code Configuration .
State	
Zip	Click the map marker  to generate a map of the address in ChildPlus
Contact	Enter the name of the contact person for the resource
Phone 1	Enter the main phone number for the resource
Phone 2	Enter an additional phone number for the resource
Fax	Enter the fax number for the resource
Email	Enter the email address of the contact person for the resource Click email  to open your device's mail client and send an email to the contact person for the resource
Website	Enter the resource's website
Resource Type(s)	Select the appropriate type(s) to assign to the resource ChildPlus associates the resource type with the appropriate service area
Specialty	Enter the resource's specialty

Volunteer Information

Field	Description	PIR Question(s)
Volunteer Description PIR	Select the code that best represents the type of in-kind volunteer you are adding	B.2.a
Active	ChildPlus automatically sets new in-kind volunteers as active Uncheck this checkbox to deactivate the volunteer	
TB Test Required	Select this option if a tuberculosis test is required for the resource	
TB Test Received	Enter the date that you received the results of the resource's tuberculosis test	
TB Test Read	Enter the date that the resource's tuberculosis results were read	
TB Test Result	Select the result of the resource's tuberculosis test	
Criminal Check	Select this option if you ran a criminal background check on the resource	
Criminal Check Date	Enter the date that the criminal background check on the resource was completed	
Criminal Check Comments	Enter any comments or notes about the resource's criminal background check	

8. Save.

Add a New In-Kind Volunteer to ChildPlus

When you are adding an In-Kind volunteer who has never been tracked in ChildPlus (for example, if this person is a volunteer from the community and does not have a participant enrolled in a program), you can add their information directly through the **In-Kind** module.

ChildPlus Desktop



To add a new In-Kind volunteer through the **In-Kind** module in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> Management >> In-Kind**.
2. Click **Add New In-Kind Volunteer**.
3. Select **Create a new In-Kind Volunteer from a Family Member or Personnel, or a new person**.
4. Click **OK**.
5. Enter the individual's **Last Name**, **First Name** and **Social Security Number** or **Birthday** (ChildPlus requires only one of these pieces of information).
6. Click **OK**.
7. Complete the fields in each section.
Information

Field	Description
Last Name	Enter the individual's name
First	
Middle	
Suffix	
Preferred	Enter the individual's preferred name
Previous	If the individual has a different name that they previously used (for example, a maiden name), enter the name
SSN	Enter the individual's Social Security Number
Birthday	Enter the individual's birth date
Gender	Select the individual's gender
Marital Status	Select the individual's current marital status
Race	Select the option that best describes the individual's race ChildPlus uses this information for reporting race on the PIR

Field	Description
ChildPlus ID	ChildPlus automatically assigns the individual a ChildPlus ID
Language	Select the individual's primary language. If the individual speaks more than one language, select each additional language
Proficiency	Select the individual's level of proficiency for each language they speak
Primary	Select this option to indicate the individual's primary language
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)

Address

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

Field	Description
E-mail	Enter the individual's email address Click email <input type="checkbox"/> to open your device's mail client and send an email to the individual
Phone Numbers	
Add Phone Number	Click to add a phone number for the individual
Phone Number	Enter the individual's phone number
Primary Phone	Select this option to indicate the individual'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 individual's cell phone number from your organization
Edit Phone Number	Click to edit the individual's existing phone number
Delete Phone Number	Click to delete the individual's existing phone number

Volunteer Information

Field	Description	PIR Question(s)
Volunteer Description PIR	Select the code that best represents the type of in-kind volunteer you are adding	B.2.a
Active	ChildPlus automatically sets new in-kind volunteers as active Uncheck this checkbox to deactivate the volunteer	
TB Test Required	Select this option if a tuberculosis test is required for the individual	
TB Test Received	Enter the date that you received the results of the individual's tuberculosis test	

Field	Description	PIR Question (s)
TB Test Read	Enter the date that the individual's tuberculosis results were read	
TB Test Result	Select the result of the individual's tuberculosis test	
Criminal Check	Select this option if you ran a criminal background check on the individual	
Criminal Check Date	Enter the date that the criminal background check on the individual was completed	
Criminal Check Comments	Enter any comments or notes about the individual's criminal background check	

8. Save.

Transactions

Use **In-Kind Transactions** to track all information related to In-Kind services, including a summary of totals for each volunteer.

Set Defaults for In-Kind Transactions

Use **Transactions** to set defaults for individual volunteers. Defaults can be helpful if a volunteer donates consistently throughout the **Program Term**. When you add a new **Transaction**, ChildPlus automatically populates the fields with the default values.



ChildPlus administrators can configure defaults for multiple volunteers in **ChildPlus Desktop >> Setup >> Data Utilities >> In-Kind Defaults Utility**.

ChildPlus Desktop

To set defaults for In-Kind **Transactions** in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> Management >> In-Kind >> Transactions >> Defaults for In-Kind Transactions for this Volunteer**.
2. Complete the [fields](#).

Field	Description
Quantity	Enter the quantity of units for the Transaction For example, if the volunteer donated two hours of their time, then enter 2 in this field
Rate	Enter the monetary rate for the Transaction For example, if an hour of a volunteer's time is rated at \$10, then enter 10 in this field
Units	Enter the following for each service type: <ul style="list-style-type: none">• Time in hours if the service type is hours• Number of units if the service type is materials, space, or other• Number of miles if the service type is automobile
Funding	Select the Funding Source to associate with the Transaction

Field	Description
Type	Select the option that best represents the type of service for the Transaction
Description	Enter a brief description of the Transaction
Service Area	Select the option that best represents the service area associated with the Transaction
Agency	Select the agency where the Transaction took place This option is only available if you have access to more than one agency in ChildPlus
Site	Select the site where the Transaction took place
Classroom	Select the classroom where the Transaction took place
Program	Select the Program to which this Transaction applies
Father / Father Figure related activity	Select this option to count this Transaction as a father/father figure related activity
In Classroom	Select this option if the Transaction took place in a classroom

3. Save.

Add a Transaction

Use this section to add an In-Kind **Transaction** for a volunteer.



ChildPlus administrators can configure ChildPlus to automatically lock In-Kind **Transactions** on a certain day of the week or month, after a certain number of days or prior to a specific date in **ChildPlus Desktop >> Setup >> System Setup >> System Preferences >> In-Kind**. This feature ensures that In-Kind totals will not change after they have been submitted.

ChildPlus Desktop

To add a **Transaction** for a volunteer in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> Management >> In-Kind >> Transactions >> Transactions**.
2. Click **Add Transaction**.
3. Enter the date of the **Transaction**.
4. Click **OK**. ChildPlus automatically populates the fields with the defaults for the volunteer.
5. Complete the **fields**.

Field	Description	PIR Question(s)
Date PIR	Enter the date of the Transaction	B.2
Quantity	Enter the quantity of units for the Transaction For example, if the volunteer donated two hours of their time, then enter 2 in this field	
Rate	Enter the monetary rate for the Transaction For example, if an hour of a volunteer's time is rated at \$10, then enter 10 in this field	
Amount	ChildPlus calculates the total for the Transaction based on the values entered in the Quantity and Rate fields	
Units	Enter the following for each service type: <ul style="list-style-type: none">• Time in hours if the service type is hours• Number of units if the service type is materials, space, or other• Number of miles if the service type is automobile	

Field	Description	PIR Question(s)
Funding	Select the Funding Source to associate with the Transaction . In order for an In-Kind transaction to count on the PIR, it must have a Funding Source identical to the Funding Source that the PIR is being run for	
Type	Select the option that best represents the type of service for the Transaction	
Description	Enter a brief description of the Transaction	
Service Area	Select the option that best represents the service area associated with the Transaction	
Agency	Select the agency where the Transaction took place This option is only available if you have access to more than one agency in ChildPlus	
Site	Select the site where the Transaction took place	
Classroom	Select the classroom where the Transaction took place	
Program	Select the Program to which this Transaction applies	
Father / Father Figure related activity	Select this option to count this Transaction as a father/father figure related activity	
In Classroom	Select this option if the Transaction took place in a classroom	

6. Save.

Copy a Transaction

You can save time by copying existing In-Kind **Transactions**. This feature is useful if the **Transaction** you want to create is similar to a **Transaction** that has already been entered.

[ChildPlus Desktop](#)

To copy an In-Kind **Transaction** in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> Management >> In-Kind >> Transactions >> Transactions**.
 2. Select the **Transaction** you want to copy.
 3. Click **Copy Transaction**. ChildPlus will create a copy of the **Transaction** and highlight it in the list.
 4. Enter the date of the **Transaction**.
 5. Make any additional changes to the **Transaction** as needed.
 6. Save.
-

Delete a Transaction

Use this section to delete an In-Kind **Transaction**.

[ChildPlus Desktop](#)

To delete an In-Kind **Transaction** in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> Management >> In-Kind >> Transactions**.
 2. Select the **Transaction** you want to delete.
 3. Click **Delete Transaction**.
 4. Click **Yes** to confirm that you want to delete the **Transaction**.
-

Delete an In-Kind Volunteer

Use this section to delete an In-Kind volunteer.



You cannot delete In-Kind volunteers who have **Transactions** associated with their records. To delete an In-Kind volunteer with **Transactions**, you must delete all of their **Transactions** first.

ChildPlus Desktop

To delete an In-Kind volunteer in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> Management >> In-Kind**.
 2. Select the volunteer you want to delete.
 3. Click **Delete In-Kind Volunteer**.
 4. Click **Yes** to confirm that you want to delete the volunteer.
-

Entry Express - In-Kind

Use **Entry Express - In-Kind** to add **In-Kind** Transactions for multiple volunteers at the same time.

ChildPlus Desktop

To use **Entry Express - In-Kind** in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> Entry Express >> In-Kind**.
2. Select which volunteers to add a **Transaction** for.
3. Click **Find**.
4. Select the volunteers that you want to work with.
5. Specify the default value for each applicable **field**. To use the defaults established for each volunteer, select **Use the Volunteer's Default**.

Field	Description
Date	Enter the date of the Transaction
Program	Select the Program to which this Transaction applies
Agency	Select the agency where the Transaction took place This option is only available if you have access to more than one agency in ChildPlus
Site	Select the site where the Transaction took place
Classroom	Select the classroom where the Transaction took place
Type	Select the option that best represents the type of service for the Transaction
Description	Enter a brief description of the Transaction
Service Area	Select the option that best represents the service area associated with the Transaction
Funding	Select the Funding Source to associate with the Transaction . In order for an In-Kind Transaction to count on the PIR, it must have a Funding Source identical to the Funding Source that the PIR is being run for
Quantity	Enter the quantity of units for the Transaction For example, if the volunteer donated two hours of their time, then enter 2 in this field

Field	Description
Rate	Enter the monetary rate for the Transaction For example, if an hour of a volunteer's time is rated at \$10, then enter 10 in this field
Units	Enter the following for each service type: <ul style="list-style-type: none"> • Time in hours if the service type is hours • Number of units if the service type is materials, space, or other • Number of miles if the service type is automobile
In Classroom	Select this option if the Transaction took place in a classroom
Father / Father Figure related activity	Select this option to count this Transaction as a father/father figure related activity



You can access the defaults for each volunteer in **Management >> In-Kind >> Transactions**.

6. Click **Next Step**.
7. Select an item in the table for each volunteer whose **Transaction** information you want to modify.
8. Click **Create Transactions**. ChildPlus displays a message confirming that the **Transactions** were created successfully.
9. Click **OK**.



Once you click **Create Transactions**, this action cannot be undone. If you need to make any changes, you must go to each individual volunteer's record and edit.