

Help Center

Just a click away!



Internal Monitoring

e-book

ChildPlus
Desktop



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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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Internal Monitoring

Use **Internal Monitoring** to track and enter monitoring results and corrective action plans.

Set Due Dates

Use **Set Due Dates** to schedule recurring monitorings for an **Internal Monitoring** checklist.

1. Go to **ChildPlus Desktop >> Management >> Internal Monitoring >> Set Due Dates**.
2. Select the checklist to schedule monitorings for.
3. Select each location where the monitoring will need to be performed.
4. Select how often the monitoring will occur.
5. Complete the **fields** associated with the selected duration.

Duration	Option	Description
Monthly	by the last day of each month	Select this option to make the monitoring due by the last day of each month
	by day ____ of each month	Select this option to make the monitoring due on a specific day of each month. For example, if it is due on the 15th or the 1st of the month If you select this option, enter the day of the month that the monitoring is due
	beginning ____ and ending ____	Select the dates in which you want the monitoring to begin and end. For example, if you want the monitoring to follow the school year, use the first day of school as the beginning date and the last day of school as the ending date
	if the due date falls on the weekend	Select what should happen to a monitoring if it falls on a weekend: <ul style="list-style-type: none"> • Move it to the following Monday • Move it to the previous Friday • Leave it due on the weekend
Weekly	by ____ of each week beginning ____ and ending ____	Select the day of each week that the monitoring will be due. Then select the dates in which you want the monitoring to begin and end. For example, if you want the monitoring to follow the school year, use the first day of school as the beginning date and the last day of school as the ending date

Duration	Option	Description
Daily	beginning ____ and ending ____	Select the dates in which you want the monitoring to begin and end. For example, if you want the monitoring to follow the school year, use the first day of school as the beginning date and the last day of school as the ending date
	Excluding weekends	Select this option to prevent monitorings from occurring on weekends
	Including weekends	Select this option to allow monitorings to occur on weekends
Other	____ times	Enter the number of times in which the monitoring will take place then click outside of the field or press Tab . Enter the dates in which the monitoring will occur

6. Complete the remaining [fields](#).

Field	Description
Responsible Staff	Select the staff member responsible for the monitoring
Set Scheduled Monitor	Select Set Scheduled Monitor the same as Responsible Staff to automatically populate the same person you selected as the Responsible Staff member as the Scheduled Monitor
Set Scheduled Date	Select Set Scheduled Date the same as the Due Date to automatically populate the Scheduled Date with the same date as the monitoring's Due Date

- Click **Preview Due Dates**.
- Review each of the scheduled monitorings and edit the fields as needed.
- Click **Save Due Dates**. ChildPlus displays a message confirming that monitoring records have been created.
- Click **OK**.



Once you set due dates, you can view each scheduled monitoring on the **Monitoring** tab.

Monitoring

Use **Monitoring** to add or edit monitoring records and track the status of each monitoring checklist with assigned due dates or scheduled dates.

Add a New Monitoring Record

Use this section to add a new monitoring record in ChildPlus.

1. Go to **ChildPlus Desktop >> Management >> Internal Monitoring**.
2. Click **Add Monitoring Record**.
3. Select the monitoring checklist on which you want to base the record.
4. Click **OK**.
5. Complete the [fields](#) on the **General** tab.

Field	Description
Agency	Select the agency that the monitoring applies to. This field is only available to users with more than one agency set up in ChildPlus
Site	Select the site that the monitoring applies to
Due by	Enter the due date for the monitoring and select the staff member responsible for the monitoring
Scheduled	If the monitoring has been scheduled, enter the date and time it was scheduled for. Then select the staff member who is scheduled to perform the monitoring
Monitoring Status	Use this field to view the current status of the monitoring
Actual	If the monitoring has already taken place, enter the date and time that it occurred. Then select the staff member who performed the monitoring
CAP Status	Use this field to view the current status of the monitoring's corrective action plan
Monitoring Notes	Enter any additional details about the monitoring

6. Click **Save Changes**.

Enter Monitoring Results

Use this section to enter results for a monitoring.



You can use **Report 8020 – Monitoring Worksheet** to collect monitoring results.

1. Go to **ChildPlus Desktop >> Management >> Internal Monitoring**.
2. Select the monitoring checklist that you want to record results for.
3. Go to **Monitoring Results**.
4. Click **Enter Results**. You can skip this step if results have already been entered for the monitoring.
5. Select a **Result** for each indicator in the monitoring checklist.
6. Use the **Notes** field to enter any additional details about each indicator as needed.
7. Enter a date in the **Address By** field for each indicator that needs to be addressed.
8. Click **Save Changes**.



- Click **Hide Indicator** to hide the indicator description as you enter results
- Click **Show Regulation Number** to display the **Regulation Number** column as you enter results

Monitoring Statuses

Management >> Internal Monitoring

Use this section to learn about each of the possible statuses available for a monitoring record.

Status	This status displays when the monitoring record has...
Not Due	No Due by , Scheduled or Actual date
Coming Due	<ul style="list-style-type: none">• A Due by date that occurs either today or in the future• No Scheduled or Actual date
Past Due	<ul style="list-style-type: none">• A Due by date that occurred in the past• No Actual date
Scheduled	<ul style="list-style-type: none">• A Due by date that occurs either today or in the future• A Scheduled date that occurs either today or in the future• No Actual date
Past Scheduled Due	<ul style="list-style-type: none">• A Due by date that occurred in the past• A Scheduled date that occurred in the past• No Actual date
Closed	An Actual date



Monitoring Status refers to the status of the original monitoring. Monitoring records can also have a [CAP Status](#), which refers to the status of the corrective action plan.

Add a Corrective Action Plan

Use this section to add a corrective action plan for a monitoring.



Before you can add a corrective action plan, you must enter **Monitoring Results**. In addition, you can only add a corrective action plan for non-compliant indicators.

1. Go to **ChildPlus Desktop >> Management >> Internal Monitoring**.
2. Select the monitoring checklist that you want to add a corrective action plan for.
3. Go to **Corrective Action Plan (CAP)**.
4. Complete the [fields](#).

Field	Description
CAP Responsible Staff	Select the staff member responsible for the corrective action plan
Due Date to Create	Enter a deadline to create the corrective action plan. This date is determined by the data entered in the Setup Results section of Internal Monitoring Checklists . For more information, see Setup Results .
CAP Created	Enter the date that the corrective action plan was created
Date Verified	Enter the date that the corrective action plan was verified
Verified By	Select the staff member who verified the corrective action plan
CAP Status	Use this field to view the current status of the corrective action plan
Notes	Enter any additional details about the corrective action plan
Non-Compliant Indicators	This section displays each indicator marked as non-compliant on the Monitoring Results tab, including the data in the Result Notes and Address By fields
Date Completed	Enter the date that the corrective action plan was completed for the selected indicator
Corrective Action Plan	Enter the procedure to be followed to correct the non-compliant issue for the selected indicator
Corrective Action Plan Notes	Enter the steps that were taken to correct the non-compliant issue. Add a date and time stamp for each step

5. Click **Save Changes**.

CAP Statuses

Management >> Internal Monitoring

Use this section to learn about each of the possible corrective action plan statuses available for a monitoring record.

CAP Status	This CAP status displays when the monitoring record...
N/A (Monitoring Pending)	Has no Actual date
No Findings	Has an Actual date. However, none of the indicators for the monitoring record are marked as non-compliant
CAP Creation Coming Due	Meets the following conditions: <ul style="list-style-type: none">Has an Actual date with one or more indicators marked as non-compliantOn the Corrective Action Plan (CAP) tab:<ul style="list-style-type: none">Due Date to Create CAP is in the futureCAP Created is empty
CAP Creation Past Due	Meets the following conditions: <ul style="list-style-type: none">Has an Actual date with one or more indicators marked as non-compliantOn the Corrective Action Plan (CAP) tab:<ul style="list-style-type: none">Due Date to Create CAP is in the pastCAP Created is empty
CAP Items Pending Address	Meets the following conditions: <ul style="list-style-type: none">Has an Actual date with one or more indicators marked as non-compliantOne of the non-compliant indicators has an Address By date that occurs either today or in the futureOn the Corrective Action Plan (CAP) tab:<ul style="list-style-type: none">CAP Created has a dateDate Completed is empty

CAP Status	This CAP status displays when the monitoring record...
CAP Items Past Due	<p>Meets the following conditions:</p> <ul style="list-style-type: none"> Has an Actual date with one or more indicators marked as non-compliant One of the non-compliant indicators has an Address By date that occurred in the past On the Corrective Action Plan (CAP) tab: <ul style="list-style-type: none"> CAP Created has a date Date Completed is empty
CAP Items All Addressed	<p>Meets the following conditions:</p> <ul style="list-style-type: none"> Has an Actual date with one or more indicators marked as non-compliant One of the non-compliant indicators has an Address By date that occurred in the past On the Corrective Action Plan (CAP) tab: <ul style="list-style-type: none"> CAP Created has a date Each corrective action has a Date Completed
CAP Items All Verified Addressed	<p>Meets the following conditions:</p> <ul style="list-style-type: none"> Has an Actual date with one or more indicators marked as non-compliant On the Corrective Action Plan (CAP) tab, the Date Verified field has a date



CAP Status refers to the status of the corrective action plan. Monitoring records can also have a [Monitoring Status](#), which refers to the status of the monitoring.

Add Monitor's Follow-Up

Use this section to add follow-up for a monitoring. You can schedule and document follow-up for areas that are not documented frequently or that may require additional support. Follow-up can also be used to ensure that a corrective action plan has been created or that non-compliant indicators have been addressed.

1. Go to **ChildPlus Desktop >> Management >> Internal Monitoring**.
2. Select the monitoring checklist that you want to add follow-up for.
3. Go to **Monitor's Follow-Up**.
4. Complete the [fields](#).

Field	Description
Scheduled Date	Enter the date that the follow-up is scheduled to occur
Completed Date	Enter the date that the follow-up was completed
Responsible Staff	Select the staff member responsible for the follow-up
Follow-up Notes	Enter details related to the follow-up

5. Click **Save Changes**.



Monitor scheduled or completed follow-ups with **Report 8030 - Monitoring Follow-Up**.

Additional Monitoring Record Features

You can access the following tools from any tab in a monitoring record.

Copy Monitoring Results to the Clipboard

Use this feature to copy the data from a monitoring record to the clipboard. This can be helpful if you want to use the data in another application, such as an email.

1. Go to **ChildPlus Desktop >> Management >> Internal Monitoring**.
2. Select the monitoring checklist that you want to copy.
3. Click **Copy to Clipboard**.
4. Select each type of monitoring data that you want to copy.
5. Click **OK** to copy the data to the clipboard.
6. Click **OK** to confirm that the data was copied.
7. Paste the clipboard contents into the application where you want to copy the monitoring data.

Lock a Monitoring Record

Users with the appropriate security privileges can lock a monitoring record once a monitoring is complete. Once a record is locked, no additional changes can be made. Only users with the appropriate security privileges can modify the data after a record has been locked.

1. Go to **ChildPlus Desktop >> Management >> Internal Monitoring**.
2. Select the monitoring checklist that you want to lock.
3. Click **Lock this monitoring record**. ChildPlus displays the date the record was locked and by which user.



To unlock a record, click **Unlock this monitoring record**. ChildPlus displays the date the record was unlocked and by which user.

Sort, Filter and Group Monitoring Records

Filter the records that display in the **Monitoring** window. You can filter records by date or by column heading and group records by column header. You can also search for individual records and have multiple records open at the same time.

Filter Records by Date

To filter monitoring records by date:

1. Go to **ChildPlus Desktop >> Management >> Internal Monitoring >> Monitoring**.
2. Enter a date range in the **Show monitoring scheduled, occurring, or due between _ _ and _ _** fields.
3. Click **Refresh**.



Select **Include Unscheduled** to include monitoring records with no **Due Date**, **Scheduled Date** or **Actual** date.

ChildPlus will reset the **Monitoring** window to the default view when you exit the module.

Filter a Column

ChildPlus displays different filter options for each column in the list of monitoring records. To apply a filter to a column:

1. Go to **ChildPlus Desktop >> Management >> Internal Monitoring >> Monitoring**.
2. Locate the column header that you want to filter.
3. Hover over the column and click **Filter**.
4. Select a filter to apply to the column. ChildPlus displays a summary of the selected filters at the bottom of the window.
5. Click **Close**.



To remove a filter, right-click the column header and select **Clear Filter** or click **X** next to the list of applied filters at the bottom of the window.

ChildPlus will reset the **Monitoring** window to the default view when you exit the module.

Sort a Column

You can sort the list of monitoring records by column in ascending or descending order.

1. Go to **ChildPlus Desktop >> Management >> Internal Monitoring >> Monitoring**.
2. Locate the column header that you want to sort.
3. Click the column header. ChildPlus displays **Ascending ▲** or **Descending ▼** on the sorted column header.



To remove the sorting on a column, right-click the column and select **Clear Sorting**.

ChildPlus will reset the **Monitoring** window to the default view when you exit the module.

Group Records by Column Header

You can group monitoring records by a selected column header.

1. Go to **ChildPlus Desktop >> Management >> Internal Monitoring >> Monitoring**.
2. Locate the column header that you want to group the list of monitoring records by.
3. Click and hold the column header.
4. Drag the column header up to the row above the grid. ChildPlus displays up and down arrows above and below the column header to indicate where you can place it.
5. Drop the column header.
6. Repeat steps 2-5 for each column header that you want to group the records by.



To remove the grouping by a column header, drag and drop the column header from the row above the grid back to the first row in the grid. ChildPlus displays up and down arrows above and below the column header to indicate where you can place it.

ChildPlus will reset the **Monitoring** window to the default view when you exit the module.

Open Multiple Monitoring Records

You can have multiple monitoring records open at the same time.

1. Go to **ChildPlus Desktop >> Management >> Internal Monitoring >> Monitoring**.
2. Select a monitoring record.
3. To open an additional record, go back to the **Monitoring** tab.
4. Select another record. ChildPlus opens the additional record in a new tab.
5. Repeat steps 3-4 for each record you want to open.

Search for a Monitoring Record

Use this feature to search for a monitoring record.

1. Go to **ChildPlus Desktop >> Management >> Internal Monitoring >> Monitoring**.
2. Enter your search criteria.
3. Click **Find**. ChildPlus highlights the search term in the column(s) in all associated records.



Click **Clear** to reset the list to the default view.

Delete Monitoring Results

Use this section to delete results from a monitoring checklist.

1. Go to **ChildPlus Desktop >> Management >> Internal Monitoring**.
2. Select the monitoring checklist that you want to delete results from.
3. Go to the **Monitoring Results** tab.
4. Click **Delete Results**.
5. Click **Yes** to confirm that you want to delete all results from the monitoring.

Delete a Monitoring Record

Use this section to delete a monitoring record.

1. Go to **ChildPlus Desktop >> Management >> Internal Monitoring**.
2. Select the monitoring checklist that you want to delete.
3. Click **Delete**.
4. Click **Yes** to confirm that you want to delete the record.