Help Center

Just a click away!

PIR

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.
- To learn about the differences between the modules in ChildPlus Desktop and ChildPlus Online, see Module Comparison.

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PIR

The **Management PIR** module in ChildPlus provides a way to help you prepare for the annual Program Information Report (PIR). When you complete a PIR in ChildPlus, you can:

- Extract your PIR information from ChildPlus
- Compile your statistical data in a format that allows you to edit your PIR information
- Print a copy of the PIR
- Transmit your PIR data to the Head Start Enterprise System

While the primary purpose of this module is to assist with producing the annual PIR, we recommend that you use it throughout the year to check for data problems before the PIR is due.

Steps to Complete the PIR

Complete the following tasks in the order below to prepare your program's annual PIR.

Step	Description
1	Learn how to access PIR resources
2	Create an archive of your database
3	Verify that all of your Funding Sources have been set up properly
4	Create and set up a new PIR
5	Map Health and Education Events to the correct PIR questions
6	Map required Health and Education Events to PIR question C.7
7	Calculate the PIR
8	View or Override Calculations
9	Run PIR audit reports
10	Print the PIR
11	Create a PIR export file and import the file into the HSES

PIR Resources

Use this section to learn about PIR resources.

Resource	Description
Office of Head Start	To help you fully understand PIR questions and answers, we recommend that you visit the Office of Head Start website where you can download an official copy of the PIR as well as additional supporting documentation
ChildPlus PIR Calculation Guide	Use this guide to learn how ChildPlus calculates each PIR answer. This document changes annually, so be sure to download a new copy each year before you begin working on your PIR
Knowledge Base	Visit the Knowledge Base to see the answers to the most frequently asked PIR questions
PIR Links (PIR)	Each field that ChildPlus uses to calculate the PIR contains a red PIR link next to it. Click the PIR links in ChildPlus to find out which PIR question ChildPlus uses the field to calculate

Create an Archive

Create an archive of your data before a major database change or before or after submitting your PIR. This will preserve your data and questions related to the submitted year's PIR form. Without an archived copy of your data, you may not be able to review a complete history of the data you reported.

To create an archive of your database in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> Setup >> Database Utilities >> Manage Archive and Training Databases**.
2. Click **Create Archive/Training Database**.
3. Select **Archive**.
4. Enter a name for the archive database. Archive names can only contain numbers, letters and underscores. The first character of the archive name must begin with a letter. ChildPlus appends the current date to the end of the archive database name.
5. Complete the remaining fields as needed.
6. Click **OK**.

We recommend that you create regular archives of your database. Each time you create an archive, a copy of your database is created. You are limited to creating a maximum of 20 archive/training databases. Contact us to purchase additional space.

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.

Add a New PIR

Use this section to add and set up a new PIR in ChildPlus.

General Setup

Use this section to configure general settings for a new PIR in ChildPlus.

ChildPlus Desktop

To add a new PIR in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> Management >> PIR**.
2. Click **Add New PIR**.
3. Complete the fields in the **General Setup** section.

Field	Description
PIR Name	Assign a name for the PIR
Active	The new PIR is active by default Inactive PIRs do not appear as an option on reports
Program Type	Select a **Program** type
Grant Number	Enter your grant number This number is required to upload your data into the Head Start Enterprise System (HSES). However, it is not required to save, calculate or monitor your PIR
Delegate	Enter your Delegate ID
DUNS Number	Enter your DUNS number
Program Year Begin Date	Enter the date your program will begin services for the current enrollment year
Funding	Select the correct funding associated with the individuals who will count on the PIR ChildPlus uses **Funding** to associate participants and staff members to a PIR

Field	Description
Enrollment Begin Date	Enter the first date of the Program's PIR enrollment year ChildPlus uses this date to determine when to start counting services for specific PIR questions In order for the PIR to calculate correctly, the PIR **Enrollment Begin Date** must be on or before the **Program Term Begin Date** For more information, see Enrollment Begin and End Dates.
Enrollment End Date	Enter the last date of the Program's PIR enrollment year ChildPlus uses this date to determine when to stop counting services for specific PIR questions In order for the PIR to calculate correctly, the PIR **Enrollment End Date** must be on or after the **Program Term End Date** For more information, see Enrollment Begin and End Dates.
Public School Cut-off Date	Enter the Program's public year school cut-off date for kindergarten ChildPlus uses this date to calculate ages for PIR question A.10 If your Program uses multiple dates to determine Class Age, choose one date for **PIR Setup**. Use **Report 2003 - Management Report - Enrollment Demographics** to generate totals for the remaining dates
Date screenings started for this PIR year	Enter the date that health screenings start for this PIR year. ChildPlus will not count any **Health Event** that occurred prior to this date towards PIR question C.27

4. Save.

PIR Question Setup

Use this section to set up PIR questions A.16-C.37 in ChildPlus.

ChildPlus Desktop

To set up PIR questions A.16-C.37 in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> Management >> PIR**.
2. Select the PIR you want to edit.
3. Complete the fields in each section in **PIR Setup**.

PIR Question	Description
A.16	Select each drop code that you **do not** want to count as dropped on the PIR For example, if you select **Finished Program Term**, then any participant who has a drop code of **Finished Program Term** will not be counted for PIR question A.16
A.18	Select each drop code that you **do not** want to count as dropped on the PIR For example, if you select **Finished Program Term**, then any participant who has a drop code of **Finished Program Term** will not be counted for PIR question A.18
A.19	Select each drop code that you **do not** want to count as dropped on the PIR Any pregnant mother who has this drop code will not count for PIR question A.19
A.21	Select each drop code that you **do not** want to count as dropped on the PIR For example, if you select **Finished Program Term**, then any participant who has a drop code of **Finished Program Term** will not be counted for PIR question A.21
A.25, B.13	Map which race you want participants and staff members with an ethnicity of Hispanic/Latino to be counted as

PIR Question	Description
A.26, B.15	Map each language to a PIR category For example, if you map **Bosnian** to **Western European**, any family with **Bosnian** as their **Primary Language at Home** will count towards PIR question A.26.i
B.1	Map each **Employment Type** to a PIR category
B.2.a	Select each volunteer type that you want to count as a parent or former parent for PIR question B.2.a
B.18	Map each **Personnel Termination Code** to a PIR category
C.9	Enter the number of days that a growth assessment event should occur within a participant's entry in the Program Term Only growth assessments that occur within this time frame will count toward PIR question C.9
C.35	Map each parent/guardian's **Highest Grade Completed** to a PIR category
C.36, C.37	Map each **Description of Adult's Occupation** to a PIR category

4. Save.

Click **Calculation Guide** to open the ChildPlus PIR Calculation Guide for each corresponding PIR question.

Click **Report** to open the report used for monitoring each corresponding PIR question.

Manual Entry PIR Fields

While ChildPlus performs the majority of the PIR calculations, some of the PIR fields are manual entry and must be completed by a staff member at your agency. ChildPlus does not calculate these questions based on your agency's data because many manual entry fields are designed to hold comments and notes related to specific PIR items. Once you calculate a PIR, these manual entry fields can be identified by their lack of data.

ChildPlus Desktop

To complete manual entry fields in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> Management >> PIR**.
2. Select a PIR.
3. Select the section that you want to enter data for.
4. Complete the fields.

Section	Manual Entry Fields
A	A.1.a-c
	A.6
	A.7.a
	A.14
	A.23
	A.25.g.1
	A.25.h.1
	A.26.l.1
	A.29.b-c

Section	Manual Entry Fields
B	B.11.a-d
	B.12.a-e
	B.13.g.1
	B.13.h.1
	B.15.k.1
	B.18.d.1
	B.19
C	C.7.b.6.1
	C.18.b.9.1
	C.20.a
	C.22.d.1
	C.28
	C.29
	C.30.a-e
	C.31
	C.32
	C.34.e.1
D	D.1
	D.2
	D.3
	D.4
	D.5
	D.6
	D.7

5. Save.

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.

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.

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.

Calculate a PIR

Once you have set up your PIR in ChildPlus, you can calculate it. As you go through the process of preparing the PIR in ChildPlus, you may have to calculate the PIR answers multiple times. Each time you calculate your answers, you can choose which section you want to calculate. You can either calculate one section at a time or all sections at once, depending on your preferences.

Why calculate one section at a time?

Let's say, for example, that you have already calculated the entire PIR. After running an audit report, you realize that you need to make adjustments to Section B. Once you have made your changes, you can choose to calculate only **Section B** again since this is the only area you made changes to.

> Refer to the ChildPlus PIR Calculation Guide and the official PIR when compiling the PIR.

ChildPlus Desktop

To calculate a PIR in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> Management >> PIR**.
2. Select a PIR.
3. Click **Calculate PIR**.
4. Select the sections you want to calculate.
5. Click **Calculate**. ChildPlus displays a confirmation message.
6. Click **OK**.

View or Override Calculations

Once you have calculated a PIR, you can view and edit the results in each section. In addition, you can edit any calculated value on the PIR by entering an alternate value in the **Override** field.

> Use PIR Reports to verify and troubleshoot calculated values on your PIR.

ChildPlus Desktop

To view or override PIR calculations in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> Management >> PIR**.
2. Select a PIR.
3. Go to the section you want to view or edit.
4. Do one of the following:
   - To edit a calculated value, enter a new value in the corresponding value's **Override** field
   - To edit a manual entry field, enter a new value in the field

   > For more information, see Manual Entry PIR Fields on page 14.

5. Save.

Print a PIR

Once you have calculated your PIR, you can print a copy of it to review calculations and verify that all manual entry fields have been completed.

To print a PIR in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> Management >> PIR**.
2. Select a PIR.
3. Click **Print**.

You can also print a copy of the PIR form in **Reports >> Report 9700 - PIR Report (precalculated values and overrides)**.

Create a PIR Export File

Once you have completed your PIR in ChildPlus, you can create an export file that you can import directly to the HSES.

ChildPlus Desktop

To create an export file in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> Management >> PIR**.
2. Select a PIR.
3. Click **Export PIR Data**.
4. Click **Create Export File**. ChildPlus displays a message recommending that you create an archive of your finalized PIR.
5. Click **OK**.
6. Enter a name to assign to the file.
7. Select a folder to save the file to.
8. Click **Save**.