Help Center

Just a click away!

To-Do List

e-book

ChildPlus
Desktop

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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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To-Do List

Use the **To-Do List** to:

- Track system-related tasks, such as **Health Events** that are about to expire, follow-ups that need to be completed for absent participants and immunizations coming due
- Set up and assign appointments and reminders for yourself or other users
- Configure ChildPlus to receive automatic emails for tasks and action items

Assign Access to the To-Do List

To assign **Security Groups** access to the **To-Do List**:

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 **To-Do Lists**.
5. 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.
6. Save.

Calendars

Configure calendars to use with the **To-Do List**. You can create as many calendars as you want. Once a calendar is created, users can add appointments and reminders to them.

To add a new calendar in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> Setup >> Module Setup >> Calendars**.
2. Click **Add New Calendar**.
3. Enter a name for the calendar.
4. Select the agency to apply the calendar to or select **All Agencies** to apply the calendar to all agencies.

   This option is only available if you have more than one agency set up in ChildPlus.

5. Select a level of access to the calendar for each staff member.

   To assign a level of access to multiple staff members at once, hold the **Ctrl** or **Shift** keys, select the staff members, select a level of access from the field below the grid and click **Assign**. For more information about levels of access, see Access Privileges and Levels of Requirement on page 8.

6. Save.

You can also assign access to calendars for individual staff members in **ChildPlus Desktop >> Setup >> Security >> User Security >>** Calendars and To-Do List.

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.

[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.

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.

Add a To-Do List

Use this section to create a new **To-Do List**. You can create as many **To-Do Lists** as you want. Each **To-Do List** can include calendars, system-generated tasks or both.

To add a **To-Do List** in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> To-Do List**.
2. Click **Add To-Do List**.
3. Select one of the following options:
    - **Start with a blank To-Do List**: create a **To-Do List** from scratch
    - **Start with a copy of**: copy all settings from an existing **To-Do List**
4. Click **OK**.
5. Configure the General settings for the **To-Do List**.
6. Complete the fields in each applicable section.
    - Sharing
    - Enrollment
    - Family Services
    - Health and Education
    - Immunizations
    - Disability
    - Mental Health
    - Pregnancy
    - Attendance
    - Inspections
7. Click **Save**.

To-Do List Settings

Use this section to configure the **To-Do List** and track tasks for selected modules.

General

Use this section to configure general settings and an email notification schedule for a **To-Do List**.

1. Go to **ChildPlus Desktop >> To-Do List**.
2. Select the **To-Do List** you want to edit.
3. Click **Settings**.
4. Complete the fields.

Field	Description
Name	Enter a name for the **To-Do List**
This is a shared To-Do List	Select this option to allow other staff members to access the **To-Do List**
Description	Enter a description for the **To-Do List**. The description can help distinguish between multiple **To-Do Lists**
Email this To-Do List	Select this option to send the **To-Do List** to the email associated with your ChildPlus account Select a frequency at which to email the **To-Do List**
Also send a copy of each email to	Select this option to send the **To-Do List** to other staff members Enter each staff member's work email address
If no items are found when the email is to be sent	Select whether to send an email of the **To-Do List** when no items are found
Calendars	Select each calendar to include on the **To-Do List** If you select **<Personal Calendars>**, select each staff member whose tasks and appointments to include on the **To-Do List**. If you only want your tasks and appointments included on the **To-Do List**, select your name only

Field	Description
Modules	Select each module to include in the **To-Do List**. When you select a module, ChildPlus displays a tab where you can customize the module-related information that will be included on the **To-Do List** For example, if you want reminders about **Health Events** that are about to expire, select **Health and Education**
Show this To-Do List when I sign-in to ChildPlus	Select this option to have ChildPlus automatically display the **To-Do List** when you sign in to ChildPlus Desktop

ChildPlus administrators can configure staff email addresses in **ChildPlus Desktop >> Management >> Personnel >> General >> Address and Contact** or **ChildPlus Desktop >> Setup >> Security >> User Security >>** Login.

ChildPlus administrators can:

- Configure calendars in **ChildPlus Desktop >> Setup >> Module Setup >>** Calendars
- Configure access to personal calendars in **ChildPlus Desktop >> Setup >> Security >>** User Security Groups
- Configure access to agency-created shared calendars in **ChildPlus Desktop >> Setup >> Security >> User Security >>** Calendars and To-Do List

5. Click **Save**.

Sharing

Use this section to share a **To-Do List** with other staff members.

1. Go to **ChildPlus Desktop >> To-Do List**.
2. Select the **To-Do List** you want to share.
3. Click **Settings**.
4. Select **This is a shared To-Do List**.
5. Go to the **Sharing** tab.
6. Select a level of access to the **To-Do List** for each staff member.

   To assign a level of access to multiple staff members at once, hold the **Ctrl** or **Shift** keys, select the staff members, select a level of access from the field below the grid and click **Assign**. For more information about levels of access, see Access Privileges and Levels of Requirement on page 8.

7. Click **Save**.

Enrollment

Use this section to track tasks for **Enrollment** records on a **To-Do List**.

1. Go to **ChildPlus Desktop >> To-Do List**.
2. Select the **To-Do List** you want to edit.
3. Click **Settings**.
4. Select **Enrollment** from the list of modules.
5. Go to the **Enrollment** tab.
6. Complete the fields.

Field	Description
Show enrollment records in which the application status is ___ and the application date is more than ___ days ago	Select the application status(es) to display for **Enrollment** records on the **To-Do List** and enter a number of days to determine which application dates to include
Only show tasks for enrollment records that meet the following criteria	Select the participants whose data to include on the **To-Do List**

7. Click **Save**.

Family Services

Use this section to track tasks for **Family Services** records on a **To-Do List**.

1. Go to **ChildPlus Desktop >> To-Do List**.
2. Select the **To-Do List** you want to edit.
3. Click **Settings**.
4. Select **Family Services** from the list of modules.
5. Go to the **Family Services** tab.
6. Complete the fields.

Field	Description
Show family service events in which the Closure Expected date is within the next ___ days	Select this option to display **Events** on the **To-Do List** with a **Closure Expected** date within a specified number of days
Show family service actions that are scheduled within the next ___ days	Select this option to display **Actions** on the **To-Do List** that are scheduled within a specified number of days
Show family service actions that have a status of	Select this option to display **Actions** with a specific status on the **To-Do List** and select the applicable **Action** status(es)
Show family outcomes assessments that are past due or that are due within the next ___ days	Select this option to display past due or upcoming **Family Outcome Assessments** within a specified number of days
Only show tasks when the Case Worker for the family service event is	Select the staff member(s) whose tasks will display on the **To-Do List** If no staff members are assigned to an **Event**, select the blank option
Only show tasks for these event types	Select the **Event Type(s)** to display on the **To-Do List**

Field	Description
Only show tasks for families in which a family member has an enrollment record for	Select the participants whose data to include on the **To-Do List**
Do not show tasks for events, actions, and assessments that have a Scheduled, Due, Action, or Closure Expected date before	Enter a task cut-off date to exclude records from the **To-Do List**

7. Click **Save**.

Health and Education

Use this section to track tasks for **Health** and **Education** records on a **To-Do List**.

1. Go to **ChildPlus Desktop >> To-Do List**.
2. Select the **To-Do List** you want to edit.
3. Click **Settings**.
4. Select **Health and Education** from the list of modules.
5. Go to the **Health and Education** tab.
6. Complete the fields.

Field	Description
Show required events that are due within the next ___ days	Select this option to display required **Events** on the **To-Do List** that are due within a specified number of days
Show open events and actions that are scheduled within the next ___ days	Select this option to display open **Events** and **Actions** on the **To-Do List** that are scheduled within a specified number of days
Show events that will expire within the next ___ days	Select this option to display expiring **Events** on the **To-Do List** Enter the number of days that **Events** are expiring within to display on the **To-Do List**
Show open events that have a status of	Select this option to display open **Events** with a specific status on the **To-Do List** and select the applicable **Event** status(es)
Show actions that have a status of	Select this option to display **Actions** with a specific status on the **To-Do List** and select the applicable **Action** status(es)
Only show tasks when the agency worker for the event is	Select the staff member(s) whose tasks will display on the **To-Do List** If no staff members are assigned to an **Event**, select the blank option
Only show tasks for these events types	Select the **Event Type(s)** to display on the **To-Do List**
Only show tasks for individuals who have an enrollment record for	Select the participants whose data to include on the **To-Do List**

Field	Description
Do not show tasks for events and actions that are required, scheduled, have occurred, or will expire before	Enter a task cut-off date to exclude records from the **To-Do List**

7. Click **Save**.

Immunizations

Use this section to track tasks for **Immunizations** records on a **To-Do List**.

1. Go to **ChildPlus Desktop >> To-Do List**.
2. Select the **To-Do List** you want to edit.
3. Click **Settings**.
4. Select **Immunizations** from the list of modules.
5. Go to the **Immunizations** tab.
6. Complete the fields.

Field	Description
Show immunizations that are due within the next ___ days	Select this option to display **Immunizations** records on the **To-Do List** that are due within a specified number of days
Show participants that have a Current Status of	Select this option to display records with a specific status on the **To-Do List** and select the applicable status(es)
Only show tasks when the responsible staff is	Select the staff member(s) whose tasks will display on the **To-Do List** If no staff members are assigned to an **Event**, select the blank option
Only show tasks for individuals who have an enrollment record for	Select the participants whose data to include on the **To-Do List**
Do not show tasks for immunizations that are due before	Enter a task cut-off date to exclude records from the **To-Do List**

7. Click **Save**.

Disability

Use this section to track tasks for **Disability** records on a **To-Do List**.

1. Go to **ChildPlus Desktop >> To-Do List**.
2. Select the **To-Do List** you want to edit.
3. Click **Settings**.
4. Select **Disability** from the list of modules.
5. Go to the **Disability** tab.
6. Complete the fields.

Field	Description
Include concern activities with a Type of	Select this option to display **Concern Activities** on the **To-Do List** and select the **Activity Type(s)** to display
with a status of	If you elect to display **Concern Activities** on the **To-Do List**, select which **Activity** status(es) to display
Include IEP/IFSPs if the next meeting needs to be completed in ___ days or is past due	Select this option to include **IEP/IFSPs** with meetings to be completed in a specified number of days
Only show tasks when the responsible staff is	Select the staff member(s) whose tasks will display on the **To-Do List** If no staff members are assigned to an **Event**, select the blank option
Only show tasks for individuals who have an enrollment record for	Select the participants whose data to include on the **To-Do List**

7. Click **Save**.

Mental Health

Use this section to track tasks for **Mental Health** records on a **To-Do List**.

1. Go to **ChildPlus Desktop >> To-Do List**.
2. Select the **To-Do List** you want to edit.
3. Click **Settings**.
4. Select **Mental Health** from the list of modules.
5. Go to the **Mental Health** tab.
6. Complete the fields.

Field	Description
Show mental health transactions that are	Select this option to display **Mental Health Transactions** on the **To-Do List** and select the **Transaction Type(s)** to display
and have a status of	If you elect to display **Mental Health Transactions** on the **To-Do List**, select which status(es) to display
Show participants that have a treatment status of	Select this option to display **Mental Health Transactions** with a specific treatment status on the **To-Do List** and select the applicable status(es)
Only show tasks when the responsible staff is	Select the staff member(s) whose tasks will display on the **To-Do List** If no staff members are assigned to an **Event**, select the blank option
Only show tasks for individuals who have an enrollment record for	Select the participants whose data to include on the **To-Do List**
Do not show tasks for mental health transactions that have a transaction date before	Enter a task cut-off date to exclude records from the **To-Do List**

7. Click **Save**.

Pregnancy

Use this section to track tasks for **Pregnancy** records on a **To-Do List**.

1. Go to **ChildPlus Desktop >> To-Do List**.
2. Select the **To-Do List** you want to edit.
3. Click **Settings**.
4. Select **Pregnancy** from the list of modules.
5. Go to the **Pregnancy** tab.
6. Complete the fields.

Field	Description
Show participants that have an expected delivery date within the next ___ days	Select this option to display **Pregnancy** records on the **To-Do List** with a **Expected Delivery** date within a specified number of days
Only show tasks for individuals who have an enrollment record for	Select the participants whose data to include on the **To-Do List**
Do not show tasks for pregnancy records that have an expected delivery date before	Enter a task cut-off date to exclude records from the **To-Do List**

7. Click **Save**.

Attendance

Use this section to track tasks for **Attendance** records on a **To-Do List**.

1. Go to **ChildPlus Desktop >> To-Do List**.
2. Select the **To-Do List** you want to edit.
3. Click **Settings**.
4. Select **Attendance** from the list of modules.
5. Go to the **Attendance** tab.
6. Complete the fields.

Field	Description
Show attendance tasks for individuals who have been absent ___ days or more within the last ___ days	Select this option to display **Attendance** records on the **To-Do List** for participants with a specified number of absences within the last specified number of days
Show attendance tasks for individuals who have been absent for at least ___ consecutive days within the last ___ days	Select this option to display **Attendance** records on the **To-Do List** for participants with a specified number of consecutive absences within the last specified number of days
Show attendance tasks for individuals who have been absent more than ___ percent of the time they have been enrolled in the program term	Select this option to display **Attendance** records on the **To-Do List** for participants with a specified percentage of absences
Show attendance tasks for attendance records that require follow-up	Select this option to display **Attendance** records on the **To-Do List** that require follow-up

Field	Description
Only show attendance tasks when the Staff Responsible for the Attendance Alert is	Select the staff member(s) whose tasks will display on the **To-Do List** If no staff members are assigned to an **Event**, select the blank option
Only show tasks for enrollment records that meet the following criteria	Select the participants whose data to include on the **To-Do List**

7. Click **Save**.

Inspections

Use this section to track tasks for **Inspections** on a **To-Do List**.

1. Go to **ChildPlus Desktop >> To-Do List**.
2. Select the **To-Do List** you want to edit.
3. Click **Settings**.
4. Select **Inspections** from the list of modules.
5. Go to the **Inspections** tab.
6. Complete the fields.

Field	Description
Show inspections that are due within the next ___ days	Select this option to display **Inspections** on the **To-Do List** that are due within a specified number of days
Select the locations for which you would like to receive reminders	Select the locations whose data to include on the **To-Do List**
Do not show tasks for inspections that are due before	Enter a task cut-off date to exclude records from the **To-Do List**

7. Click **Save**.

System-Generated Tasks

System-generated tasks are tasks based on the data entered in other modules in ChildPlus, such as **Events**, **Actions** and **Home Visits**. These tasks display as links that you can use to navigate directly to the modules they are associated with in ChildPlus.

To navigate to a system-generated task from the **To-Do List**:

1. Go to **ChildPlus Desktop >> To-Do List**.
2. Select a **To-Do List**.
3. Select the task.
    - In **Calendar View**, do one of the following:
        - Double-click the task
        - Right-click the task and select **Go to Edit Screen**
    - In **List View**, click the task

To-Do List Options

Once you create a **To-Do List**, you can use the options at the bottom of the window to copy records, change how the **To-Do List** displays, print and add appointments.

Copy Records to the Clipboard

Use this option to select items on a **To-Do List** and paste them into another document.

To copy items on a **To-Do List**:

1. Go to **ChildPlus Desktop >> To-Do List**.
2. Select the **To-Do List** with the items you want to copy.
3. If the **To-Do List** is in **Calendar View**, click **Switch to List View**.
4. Do one of the following:
    - Check the checkbox next to each item you want to copy
    - Click **Check All** to select all items on the **To-Do List**
5. Click **Copy the checked records to the clipboard**.
6. Paste the information into any text editor.

Refresh a To-Do List

A **To-Do List** automatically updates when items on it change, including when you:

- Sign in to ChildPlus
- Switch between **List View** and **Calendar View**
- Add, edit or delete an appointment

To manually update a **To-Do List** at any time:

1. Go to **ChildPlus Desktop >> To-Do List**.
2. Select the **To-Do List** you want to update.
3. Click **Refresh**.

Group by Staff

Use this feature to organize all tasks in a **To-Do List** by the staff member responsible for them.

1. Go to **ChildPlus Desktop >> To-Do List**.
2. Select a **To-Do List**.
3. Click **Group by Staff**.

Items not assigned to staff members are listed in an **Unassigned Tasks** group.

Add an Appointment

To add an appointment to a **To-Do List** in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> To-Do List**.
2. Select the **To-Do List** you want to add an appointment to.
3. Click **Add Appointment**.
4. Complete the fields.

Field	Description
Description	Enter a description for the appointment
Start time	Enter the date and time the appointment starts
End time	Enter the date and time the appoint ends
Module	Select the module the appointment relates to
All day event	Select this option if the appointment is an all-day event
Calendar	Select the calendar to display the appointment on
Personal Calendar	Select the staff member whose calendar to display the appointment on
Reminder	Select this option to set a reminder for the appointment Reminders can only be set for **Personal Calendars**
Notes	Enter any details about the appointment

When you add an appointment to a **Personal Calendar**, be sure to select the **Personal Calendar** and corresponding staff member(s) in the To-Do List settings. If you skip this step, the appointment will not display on the **To-Do List** after it is refreshed.

5. Click **OK**.

In **Calendar View**, you can also add an appointment using the following methods:

- Right-click the date you want to add the appointment to and select **Add Appointment**
- Double-click the date you want to add the appointment to

Delete an Appointment

To delete an appointment from a **To-Do List** in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> To-Do List**.
2. Select the **To-Do List** with the appointment you want to delete.
3. Select the appointment.
4. Click **Delete**.
5. Click **Yes** to confirm that you want to delete the appointment.

Calendar View

Use **Calendar View** on a **To-Do List** to quickly select a date and view tasks in multiple calendar formats. You can also use **Calendar View** to navigate through appointments.

Change the Calendar View Format

To change the format of a calendar in a **To-Do List**:

1. Go to **ChildPlus Desktop >> To-Do List**.
2. Select a **To-Do List**.
3. If the **To-Do List** is in **List View**, click **Switch to Calendar View**.
4. Click the drop-down list at the bottom of the window.
5. Select a calendar format. ChildPlus will retain your selection each time you sign in until you change it.
    - **Day**
    - **Week**
    - **Work Week**
    - **Month**
    - **Timeline**

Navigate Through Appointments

You can use **Calendar View** on a **To-Do List** to view appointments in order by date and time.

To navigate through appointments on a **To-Do List**:

1. Go to **ChildPlus Desktop >> To-Do List**.
2. Select a **To-Do List**.
3. If the **To-Do List** is in **List View**, click **Switch to Calendar View**.
4. Click **Previous Appointment** or **Next Appointment** on the left and right sides of the calendar.

Select a Date

Use **Calendar View** on a **To-Do List** to quickly navigate to a selected date.

1. Go to **ChildPlus Desktop >> To-Do List**.
2. Select a **To-Do List**.
3. If the **To-Do List** is in **List View**, click **Switch to Calendar View**.
4. Select a date on the calendar in the right sidebar to display the date on the **To-Do List**.

If the **Calendar View** is in **Month** format, ChildPlus will automatically change the **Calendar View** to **Day** format when you select a date from the calendar in the sidebar.

Delete a To-Do List

Use this section to delete a **To-Do List**.

1. Go to **ChildPlus Desktop >> To-Do List**.
2. Select the **To-Do List** you want to delete.
3. Click **Settings**.
4. Click **Delete this To-Do List**.
5. Click **Yes** to confirm that you want to delete the **To-Do List**.