

Help Center

Just a click away!



Enrollment

e-book

ChildPlus
Online



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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Enrollment

The **Enrollment** module provides a way to view a summary of each participation record, including:

- Assign enrollment statuses
- Track **Entry Dates** for participants who drop and return to your program
- Track each participant's complete enrollment history
- View and update eligibility records

Participation Records

You can use **Participation Records** to enroll, drop, waitlist or transfer participants from a site or classroom. You can also calculate each participant's eligibility points and specify how they should be counted on the PIR.



To enroll multiple participants at the same time, go to **ChildPlus Desktop >> Entry Express >> Enrollment**.

Add a Participation Record

Use this section to create a participation record for an applicant. A participation record must be created before you can waitlist, accept or enroll an applicant into your program.

ChildPlus Online

To add a participation record in ChildPlus Online:

1. Go to **ChildPlus Online >> Services >> Enrollment >> Participation Records**.
2. Click or tap **Add Participation Record**.
3. Complete the [fields](#).

Field	Description
Program Term	Select the Program Term that you want to associate with the participation record
Agency	If the Program Term you selected includes more than one agency, select the agency that the participation record is for
Initial Status	Select the first status the participant will hold for the Program Term . For more information, see Edit Enrollment Status on page 9.
Status Begin	<p>Enter the first day of the initial status. You can enter any date on or prior to the earliest date that the applicant can be enrolled</p> <p>For example, if the applicant was waitlisted on 3/1/2022, their Initial Status would be Waitlisted and their Status Begin date would be 3/1/2022</p>
Location Preferences	Add at least one location preference for the applicant. If you do not know the site or classroom preference, you can leave these fields blank. For more information, see Edit Location Preferences on page 13.
Would you like to copy information from another participation record?	<p>Select one of the following:</p> <ul style="list-style-type: none">• Yes: copy the information from a previous participation record to this new record. If you select Yes, select the participation record that you want to copy from and the fields that you want to copy and indicate whether you want to increment the participation year. Once the new participation record is created, re-verify the applicant's eligibility• No: do not to copy information from another participation record or if one does not exist

4. Click or tap **Save**.



You can also add a participation record in **Services >> Add Family** or **Application >> Additional Information for Applicants**.

Enrollment

Use this section to view and edit a participant's enrollment status, **Status Begin Date**, **Program Information**, **Location Preferences** and **Enrollment History**.

Edit Enrollment Status


Use this section to edit a participant's enrollment status. The statuses available depend on the participant's current status.

ChildPlus Online

To edit a participant's enrollment status in ChildPlus Online:

1. Go to **ChildPlus Online >> Services >> Enrollment >> Participation Records**.
2. Select the correct **Program Term** record.
3. Click or tap **Change Status**.
4. Select a [status](#).

Status	Description
New	New applicants who have not been waitlisted, accepted or enrolled
Waitlist	<p>Applicants whose applications are complete, are eligible for the program and are waiting to be assigned vacant slots</p> <p>You can waitlist applicants with a status of New, Accepted, Dropped or Abandoned</p> <p>For more information about how ChildPlus handles applications who do not get accepted to or enrolled at their first Location Preference, see Waitlist Options.</p>
Abandon	Applicants who never enrolled and are no longer eligible for or interested in the program. They completed an application, but should no longer be included on the waitlist
Accept	<p>Applicants whose applications are complete, are eligible to participate, have been assigned slots and are waiting to attend class or the first home visit</p> <p>You can waitlist applicants with a status of New, Waitlisted, Dropped or Abandoned</p>

Status	Description
Enroll	<p>Participants who have been accepted and attended at least one class for the center-based or family child care option or at least one home visit for the home-based option</p> <p>You can enroll applicants with a status of New, Accepted, Waitlisted or Dropped</p> <p>If a participant has more than one Location Preference, you should only enroll them at one location. To ensure that you are only enrolling the participant at one location, only select the location where they are being enrolled</p> <p>See Status Begin Date and Entry Date for more information</p>
Drop	<p>Participants who were enrolled in your program, left before the end of the Program Term and do not anticipate returning for the current Program Term</p> <p>You should only unenroll a participant if they were enrolled in error or if they were never enrolled</p> <div>  A participant cannot be dropped if their attendance is locked </div>
Drop/Wait	Participants who left your program and anticipate returning for the current Program Term
Drop/Accept	Participants who left your program and have been accepted back into the program for the current Program Term
Re-Enroll (Enroll)	<p>Participants who returned during the current Program Term and were re-enrolled. For more information, see Enroll</p> <p>ChildPlus defaults to the last classroom the participant was in</p>

5. Complete the fields. The fields available depend on the selected status.
6. Click or tap **Save** to save the status.
7. Click or tap **Save** to save the record.



You can also edit a participant's enrollment status in **Services >> Application >> Additional Information for Participants >> Enrollment**.

Transfer a Participant

You can use the **Enrollment** module to transfer a participant to another **Site** or **Classroom** or change their **Funding** source.



A participant cannot be transferred if their attendance is locked.

ChildPlus Online

To transfer a participant in ChildPlus Online:

1. Go to **ChildPlus Online >> Services >> Enrollment >> Participation Records**.
2. Select the correct **Program Term** record.
3. Click or tap **Transfer**.
4. Enter the last date that the participant will be in the old classroom.
5. Select the **Site, Classroom** and **Funding** to transfer the participant to.
6. Click or tap **Save**. ChildPlus Online automatically updates the participant's **Enrollment History** with the changes.



You can also transfer a participant in **Services >> Application >> Additional Information for Participants >> Enrollment**.

Edit Status Begin Date

Use this section to edit a participant's **Status Begin Date**.

ChildPlus Online

To edit a participant's **Status Begin Date** in ChildPlus Online:

1. Go to **ChildPlus Online >> Services >> Enrollment >> Participation Records >> Enrollment**.
2. Select the correct **Program Term** record.
3. Click or tap **More** .
4. Select **Edit Current Information**.
5. Enter a new **Status Begin Date**.
6. Click or tap **Save**. ChildPlus Online automatically updates the **Enrollment History** with the changes.



You can also edit the **Status Begin Date** in **Services >> Application >> Additional Information for Participants >> Enrollment**.

Edit Location Preferences

You can use **Location Preferences** to document a family's preferred **Site** prior to an applicant's enrollment. **Location Preferences** appear on selected reports and help assist with placing an applicant in a **Site** most convenient to the family. Program staff can enter a preferred **Classroom** to aid in selection. Multiple **Location Preferences** can be entered for each participation record and ranked in order of **Priority**.

[ChildPlus Online](#)

To edit **Location Preferences** in ChildPlus Online, go to **ChildPlus Online >> Services >> Enrollment >> Participation Records >> Enrollment**:


Option 1

1. Click or tap **Edit**.
2. Do one of the following:
 - Select a location to edit or remove it
 - Click or tap **Add** to add a new **Location Preference**
3. Complete the [fields](#).

Field	Description
Priority	If the family has more than one Location Preference , use priority to rank each preference
Site	Select the preferred Site
Classroom	Select a preferred Classroom or select No Classroom if there is no preference
Funding	Select the type of Funding . Funding is used to map enrolled participants to the PIR

4. Click or tap **Save** to save the location preferences.
5. Click or tap **Save** to save the record.

Option 2

1. Click or tap **More** .
2. Select **Edit Current Information**.
3. Do one of the following:
 - Select a location to edit or remove it
 - Click or tap **Add** to add a new **Location Preference**
4. Complete the **fields**.

Field	Description
Priority	If the family has more than one Location Preference , use priority to rank each preference
Site	Select the preferred Site
Classroom	Select a preferred Classroom or select No Classroom if there is no preference
Funding	Select the type of Funding . Funding is used to map enrolled participants to the PIR

5. Click or tap **Save** to save the location preferences.
6. Click or tap **Save** to save the record.



You can also edit **Location Preferences** in **Services >> Application >> Additional Information for Participants >> Enrollment**.

Edit Enrollment History

This section provides detailed, historical tracking information for each participant. ChildPlus displays a list of every status change, **Location Preference** and action that takes place in **Enrollment**.

ChildPlus Online

To edit a participant's enrollment history in ChildPlus Online:

1. Go to **ChildPlus Online >> Services >> Enrollment >> Participation Records**.
2. Select the correct **Program Term** record.
3. Go the **Enrollment History** section.
4. Click or tap **Edit**.
5. Do one of the following:
 - Edit an **Enrollment** record
 - Click or tap **Insert into History**
 - Delete an **Enrollment** record
6. Make changes as needed.
7. Click or tap **OK**.



You can also edit a participant's enrollment history in **Services >> Application >> Additional Information for Participants >> Enrollment**.

Edit an Enrollment Record

1. Make changes to the record as needed.
2. Click or tap **Save**.

Insert into History

This option is useful if, for example, you make a mistake and skip a status while recording a participant's enrollment history.

1. Select a **Status to Insert**.
2. Enter a **Status Begin Date**.
3. Click or tap **Save**.

Delete an Enrollment Record

1. Click or tap **Delete**.
2. Click or tap **Yes** to confirm that you want to delete the record.

Override Transfer and Deletion Restrictions

If a participant has attendance records associated with a classroom, ChildPlus will display a message before completing a transfer or deleting an enrollment record. You can either cancel the action or override the restriction and continue the action. If you choose to override the restriction, review the participant's information before continuing.

ChildPlus Online

To override restriction for a participant's enrollment record in ChildPlus Online:

1. Go to **ChildPlus Online >> Services >> Enrollment >> Participation Records**.
2. Do one of the following:
 - Transfer the participant
 - Delete the participation record



ChildPlus displays a message that the action is restricted.

3. Select **Override**.
4. Click or tap **OK**. ChildPlus Online automatically updates the participant's **Enrollment History** with the changes.




You can also override restrictions for a participant in **Services >> Application >> Additional Information for Participants >> Enrollment**.

Undo Current Status

Use this option to revert a participant's current status to their previous status. For example, if a participant's current status is **Enrolled** and their previous status is **Accepted**, using this option will change the participant's current status to **Accepted**.

ChildPlus Online

To undo a current status in ChildPlus Online:

1. Go to **ChildPlus Online >> Services >> Enrollment >> Participation Records >> Enrollment**.
2. Click or tap **More** .
3. Click or tap **Yes** to confirm that you want to delete the current status. ChildPlus Online automatically updates the **Enrollment History** with the changes.



You can also undo a participant's current status in **Services >> Application >> Additional Information for Participants >> Enrollment**.

Change Program Term

If an applicant has not yet been enrolled into your program, you can change the **Program Term** associated with their participation record.



If a participation record already exists for the applicant, you will not be able to change the **Program Term**.

Changing an applicant's **Program Term** will delete their **Location Preferences** and eligibility information.

ChildPlus Online

To change the **Program Term** for a participant in ChildPlus Online:

1. Go to **ChildPlus Online >> Services >> Enrollment >> Participation Records**.
2. Select the correct **Program Term** record.
3. Click or tap **More ...**.
4. Select **Change Program Term**.
5. Select a **Program**.
6. Select a **Program Term**.
7. Click or tap **OK**. ChildPlus displays a warning message that changing the agency will remove all location data for the participation record.
8. Click or tap **Yes** to confirm that you want to remove the location data to change the applicant's associated **Program Term**. ChildPlus displays a warning message that eligibility data will be removed, as it will no longer match the current agency.
9. Click or tap **Yes** to confirm that you want to remove the eligibility information to change the applicant's associated **Program Term**. ChildPlus automatically updates the **Enrollment History** with the changes.



You can also change the **Program Term** for a participant in **Services >> Application >> Additional Information for Participants >> Enrollment**.

Change Agency

If an applicant has not yet been enrolled into your program, you can change the agency associated with their participation record.



If a participation record already exists for the applicant, you will not be able to change the agency.

Changing an applicant's agency will delete their **Location Preferences** and eligibility information.

ChildPlus Online

To change the agency for a participant in ChildPlus Online:

1. Go to **ChildPlus Online >> Services >> Enrollment >> Participation Records**.
2. Select the correct **Program Term** record.
3. Click or tap **More ...**.
4. Select **Change Agency**.
5. Select an agency.
6. Click or tap **OK**. ChildPlus displays a warning message that changing the agency will remove all location data for the participation record.
7. Click or tap **Yes** to confirm that you want to remove the location data to change the applicant's associated agency. ChildPlus displays a warning message that eligibility data will be removed, as it will no longer match the current agency.
8. Click or tap **Yes** to confirm that you want to remove the eligibility information to change the applicant's associated agency. ChildPlus automatically updates the **Enrollment History** with the changes.



You can also change the agency for a participant in **Services >> Application >> Additional Information for Participants >> Enrollment**.

Delete Participation Record

Use this option to delete a participation record. When a participation record is deleted, the participant's information in associated service areas, such as **Family Services, Health, Immunizations** and the **PIR**, is also deleted and cannot be recovered.

ChildPlus Online

To delete a participation record in ChildPlus Online:

1. Go to **ChildPlus Online >> Services >> Enrollment >> Participation Records**.
2. Select the participation record you want to delete.
3. Click or tap **More ...**.
4. Select **Delete Participation Record**.
5. Enter **DELETE** to confirm that you want to delete the participation record and all associated information.
6. Click or tap **Delete**.



You can also delete a participation record in **Services >> Application >> Additional Information for Participants >> Enrollment**.




Eligibility





Use this section to track an applicant's eligibility information. You can also use this section to re-verify an applicant's eligibility at any time.

ChildPlus Online

To track eligibility information in ChildPlus Online:

1. Go to **ChildPlus Online >> Services >> Enrollment >> Participation Records**.
2. Complete the [fields](#).

Field	Description	PIR Question(s)
Application Date	Enter the date of application	
Application Status	Select the status	
Application Number	Enter the application number	
Participation Year PIR	Select the applicant's participation year	A.15
Eligibility Date	Enter the date that you want to use to determine the applicant's eligibility for the program	
Number in Family	ChildPlus defaults this number to the number of family members added during the application process. You can edit this number as needed ChildPlus uses this field to calculate the percent of poverty for the applicant's CACFP Income and Eligibility Income	
Eligibility Income	Enter the income amount you want to use to determine the applicant's eligibility for the program ChildPlus uses this field to calculate the percent of poverty for the applicant's Eligibility Income	
 CACFP Date	Enter the date that you want to use to determine the applicant's eligibility for the CACFP	
 CACFP Income	Enter the income amount you want to use to determine the applicant's eligibility for the CACFP	
 Per	Select the interval at which CACFP Income is determined	

Field	Description	PIR Question(s)
 CACFP Status	Select the applicant's CACFP status	
Eligible to Participate	Select if the applicant is eligible to participate in the program	
Interview Type	Select the type of interview used to determine the applicant's eligibility	
Income Status PIR	Select the applicant's income status	A.13
Documentation Used	Select the type of documentation used to determine the applicant's eligibility	
Documentation of No Income	Enter details if income documentation was not provided	
 Ag Income	<p>ChildPlus uses this field to display the family's agricultural income</p> <p>This information is calculated in the Family Income section of the Application module</p>	
 M/S Eligibility	Indicate if the applicant's eligibility is migrant or seasonal	
 Initial M/S Status	<p>Indicate if the applicant's initial enrollment status is newly enrolled or re-enrolled</p> <p>ChildPlus uses this information to determine how to report the applicant during their first month of enrollment</p>	
Eligibility Notes	Enter any additional details about the applicant's eligibility	



ChildPlus administrators can enable tracking for CACFP information in **ChildPlus Desktop >> Setup >> Agency Configuration >> Program Info >> [Program Information](#)**. ChildPlus Online also displays these fields in **Application** and **Attendance**.



ChildPlus Online only displays these fields for agencies that operate Migrant/Seasonal programs.

3. Click or tap **Save**.



To make a copy of eligibility information, click or tap **More ...** next to **Eligibility** and select **Copy Eligibility to Clipboard**. You can paste the information into any text editor and save it for future reference.

You can also track eligibility information in **Services >> Application >> Additional Information for Participants >> Eligibility**.

Re-verify Eligibility

You can re-verify a participant's eligibility at any time.

ChildPlus Online

To re-verify a participant's eligibility in ChildPlus Online:

1. Go to **ChildPlus Online >> Services >> Enrollment >> Participation Records**.
2. Select the correct **Program Term** record.
3. Go to the **Eligibility** section.
4. Click or tap **More ...** next to **Eligibility**.
5. Select **Re-verify Eligibility**.
6. Determine what you want ChildPlus to do with the current eligibility and CACFP fields:
 - Check the checkbox to clear the fields so that you can use them for the new eligibility record
 - Keep the checkbox unchecked to keep the information in the fields
7. Click or tap **OK**. ChildPlus copies all of the information from the current eligibility and CACFP fields into the **Eligibility Notes** field so that you can refer back to them at a later date.

Selection Criteria


Use this section to track an applicant's eligibility criteria and assign points.



Once you select an participant's eligibility criteria, ChildPlus will automatically calculate their **Total Points**.

ChildPlus Online

1. Go to **ChildPlus Online >> Services >> Enrollment >> Participation Records >> Selection Criteria**.
2. Complete the **fields**.

Field	Description
Criteria Set	Select the Eligibility Set associated with the agency and Program Term
 Criteria	These points are automatically assigned based on the selected Criteria Set
Returning	These points are automatically assigned to an participant returning to a program. These points are also assigned when an participant is marked as Returning in the Rollover Utility
Adjustment	Enter points to add or lower the participant's total eligibility points
Adjustment Notes	Enter details about the adjustment



ChildPlus administrators can configure **Eligibility Sets** in **ChildPlus Desktop >> Setup >> Module Setup >> [Eligibility Criteria](#)**.

3. Click or tap **Save**.



You can also track a participant's eligibility criteria in **Services >> Application >> Additional Information for Participants >> Selection Criteria**.