

Help Center

Just a click away!



Agency Configuration

e-book

ChildPlus
Desktop



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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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Agency Configuration

Use **Agency Configuration** to:

- Enter information about your agency
- Add **School Years**
- Add new **Programs** and **Program Terms**
- Set up regions
- Add funding sources
- Set up default staff members for each Service Area

Agency Info

Use **Agency Info** to enter basic information about your agencies, program sites and funding sources. You must configure **Agency Info** prior to running reports or entering participants in ChildPlus.




You should only consider setting up more than one agency if your agency is a grantee with multiple delegates. The main benefit of setting up multiple agencies is that you will have access to aggregate reporting by delegate without having to select which sites belong to which delegates.


Agency Information

Configure basic information for your agency before using ChildPlus.

To add a new agency in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> Setup >> Agency Configuration >> Agency Info.**
2. Click **Add New Agency.**
3. Complete the [fields](#).

Field	Description
Agency Name	Enter the name of the agency. ChildPlus uses this field to answer question 4 in the General Program Information section of the PIR
Tax ID	Enter the agency's tax identification number
Phone	Enter the main phone number for the agency. ChildPlus uses this field to answer question 10 in the General Program Information section of the PIR
Fax	Enter the fax number for the agency. ChildPlus uses this field to answer question 11 in the General Program Information section of the PIR
Note	Enter an extension or other notes related to the agency's phone/fax number
Active	ChildPlus activates the new agency by default. Uncheck this field to deactivate an agency
Physical Address	Enter the address for the agency Click the map marker  to generate a map of the address in ChildPlus
Address 2	
City	
State	
Zip	Select this option if the agency's mailing address is the same as the physical address
Mailing address is the same as the Physical Address	

Field	Description
Mailing Address	
Address 2	If the agency's mailing address differs from the physical address, enter the mailing address Click the map marker  to generate a map of the address in ChildPlus
City	
State	
Zip	
Email	Enter the email address for the agency. ChildPlus uses this field to answer question 14 in the General Program Information section of the PIR
Website	Enter the website for the agency. ChildPlus uses this field to answer question 15 in the General Program Information section of the PIR
Notes	Enter any additional details about the agency
Agency Logo	Add a logo for the agency. ChildPlus displays this logo at the top of every bar code ID printed on Report 2340 - Attendance Scanning Barcodes . For more information, see Agency Logos .

4. Save.



If you are setting up more than one agency in ChildPlus, repeat steps 2-4 for each additional agency you want to add.

Sites


Use **Sites** to enter information pertaining to all sites at an agency.

Add a New Site

To add a new site in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> Setup >> Agency Configuration >> Agency Info.**
2. Select the agency that you want to add a site to.
3. Go to **Sites.**
4. Click **Add Site.**
5. Complete the **fields** on the **General** tab.

Field	Description
Site Name	Enter the name of the site
Short Name	Enter a short name for the site. ChildPlus uses this field to abbreviate the site's name certain windows and reports
Site Label	Enter a label for the site. ChildPlus uses this field to abbreviate the site's name certain windows and reports
License Number	Enter the license number for the site
License Expiration	Enter the date that the site's license expires
Active	ChildPlus activates the new site by default. Uncheck this field to deactivate a site
Maximum Capacity	Enter the maximum capacity or number of people that the site can have at one time
Total Staff	Enter the total number of staff members (regardless of position) at the site
Total Teachers	Enter the total number of teachers at the site
Total Assistants	Enter the total number of assistants at the site
This is a Contract Site	Select this option if the site is a contract site
A Federal Interest has been Established at this Site	Select this option if a federal interest has been established at the site

Field	Description
Address	Enter the address for the site Click the map marker  to generate a map of the address in ChildPlus
City	
State	
Zip	
County	
Region	Select a region to associate the site with (if applicable). For more information, see Region Info on page 29.
Phone	Enter the main phone number for the site
Fax	Enter the fax number for the site
Note	Enter an extension or other notes related to the site's phone/fax number
Responsible Staff	Enter the name of the responsible staff member for the site
Responsible Staff Position	Enter the position or title of the responsible staff member

6. Save.

7. Go to [Classrooms](#) or [Inspections](#) to continue configuring the site.

Add a New Classroom

To add a new classroom to a site in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> Setup >> Agency Configuration >> Agency Info >> Sites**.
2. Select the site that you want to add a classroom to.
3. Go to **Classrooms**.
4. Click the first row in the table.
5. Complete the [fields](#).

Field	Description
Active	Select this option to activate the classroom and have it display in drop-down lists throughout ChildPlus
Classroom Name	Enter a name for the classroom
Label	Enter a one-character label for the classroom (for example, a or 1). ChildPlus uses this field to abbreviate the classroom on certain windows and reports
Capacity	Enter the maximum number of participants for the classroom

6. Save.



Before you can enroll participants in a new classroom, you must associate the classroom with a Program Term. For more information, see [Add Classrooms to a Program Term](#) on page 22.

Add Site Inspection Information

Use **Inspections** to record up to 50 site inspections. When you track the dates of inspections, ChildPlus displays an asterisk next to the name of the next inspection due.

You can either use the default inspection items included with ChildPlus or configure your own customized inspection items in **ChildPlus Desktop >> Setup >> System Setup >> Agency-Specific Customizable Fields >> Site Inspections**.

To track site inspections in ChildPlus Desktop:

- 1. Go to **ChildPlus Desktop >> Setup >> Agency Configuration >> Agency Info**.
- 2. Select the site that you want to add inspection information for.
- 3. Go to **Sites >> Inspections**.
- 4. Complete the [fields](#) for each inspection item.

Field	Description
Last	Enter the date of the last inspection
Next	Enter the date of the next inspection
Inspection Comments	Enter any additional details about the inspection

- 5. Save.

Funding

Use this section to associate a Funding Source with a Program. Funding Sources are an important part of running the PIR because they link funding for programs to funding for individuals, program personnel and In-Kind transactions.



Before you can associate a Funding Source with a Program, you must configure each of your Funding Sources and Programs.

To associate a Funding Source with a Program:

1. Go to **ChildPlus Desktop >> Setup >> Agency Configuration >> Agency Info.**
2. Select the agency that offers the Program that you want to associate with a Funding Source.
3. Go to **Funding.**
4. Click **Add Grant or Other Funding.**
5. Complete the [fields](#).

Field	Description
Grant or Other Funding	Select the Funding Source to associate with the Program
Delegate ID	Enter the identification number for the delegate
Program	Select the Program that the Funding Source is associated with
Amount	Enter the amount of the grant for the Program
Funded Enrollment	Enter the number of enrolled participants the grant funds
Begin Date	Enter the date the grant for the Program takes effect
End Date	Enter the date the grant for the Program expires
Director	Select the Program's director

6. If the Program has multiple Funding Sources, repeat steps 4-5 for each additional Funding Source.
7. Save.

Enrollment Options

Use **Enrollment Options** to configure **Waitlist Options** and **ZIP Codes Served** for your agency.

Waitlist Options

Use **Waitlist Options** to control how ChildPlus handles participants who do not get accepted or enrolled at their first location preference.

To configure waitlist options in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> Setup >> Agency Configuration >> Agency Info**.
2. Select the agency that you want to configure waitlist options for.
3. Go to **Enrollment Options >> Waitlist Options**.
4. Select one of the following options (note that there are separate options for participants who do not get accepted and for participants who do not get enrolled):

Option	Description
Keep the participant on the waitlist for the more preferred locations	Select this option to have ChildPlus save a participant's Location Preferences if they are not enrolled at their first location preference. Once the participant is enrolled, they will automatically be placed on the waitlist for any location whose priority is higher than the location where they were actually enrolled. You can view these participants on Report 2025 - Enrollment Priority Listing . When running this report, include Enrolled participants who have a location preference matching the location criteria option
Remove the participant from the waitlist	Select this option to not have ChildPlus save any of a participant's Location Preferences that were recorded prior to their enrollment. If the participant wants to transfer to another location after they are enrolled, you will need to record their possible transfer locations manually in Manage Location Preferences in the Enrollment module

5. Save.

ZIP Codes Served

Use **ZIP Codes Served** to restrict enrollment to your programs by ZIP code.

1. Go to **ChildPlus Desktop >> Setup >> Agency Configuration >> Agency Info.**
2. Select the agency that you want to restrict enrollment for.
3. Go to **Enrollment Options >> ZIP Codes Served.**
4. Select **Restrict enrollment in this agency by ZIP Code.**
5. Enter each ZIP code served by your agency. Applicants who live in any ZIP code not listed will not be able to enroll in any programs at your agency.
6. Save.

School Year

ChildPlus uses the **School Year** as the date range for grouping data in select modules. **School Year** is also used to group **Program Terms** in the **Programs** list in **Program Info** and on reports.

Add a New School Year

To add a new **School Year** in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> Setup >> Agency Configuration >> School Year**.
2. Click **Add New School Year**.
3. Complete the [fields](#).

Field	Description
Active	ChildPlus defaults the new School Year to Active
Begin Year	Enter the year the School Year begins
End Year	Enter the year the School Year ends
School Year Name	Enter a name for the School Year School Year names can contain up to 20 characters

4. Save.



Once you add a new **School Year**, you must associate it with a Program Term. For more information, see [Associate a School Year with a Program Term](#) on page 21.

Family Outcome Assessments

Once you set up a **School Year** and associate it with a **Program Term**, your **Family Outcomes Instrument** must be associated with a **School Year**.

1. Go to **ChildPlus Desktop >> Setup >> Agency Configuration >> School Year**.
2. Select the **School Year** that you want to work with.
3. Go to **Family Outcome Assessments**.
4. Select an agency.
5. Select the **Family Outcomes Instrument** that your agency will use during the school year.
6. Enter the number of days that the family's first assessment will be due after a family member enrolls.
7. Enter the date that the family's second assessment must be completed by (if applicable).



This option will not be available unless you have configured two or three assessments per year for the **Family Outcomes Instrument**.

8. Enter the date that the family's third assessment must be completed by (if applicable).



This option will not be available unless you have configured three assessments per year for the **Family Outcomes Instrument**.

9. Save.
10. Repeat steps 4-8 for each additional agency if applicable.

Program Info

For ChildPlus to function properly, it is critical that the **Program Info** module is set up correctly. Use **Program Info** to:

- Add **Programs**
- Add and track different **Program Terms**
- Associate **Requirement Sets** to a specific **Program Term**
- Populate a class age using the **School Year Cut-off Date**
- Aid in tracking funded enrollment
- Track all **Classrooms** associated with each **Program Term**
- Set **Classroom** beginning and end dates, days of operation and meals served

Add a New Program

You should only add a new **Program** when you first set up ChildPlus or when your agency will be providing a new type of program (for example, a new after school program).

To add a new **Program** in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> Setup >> Agency Configuration >> Program Info**.
2. Click **Add New Program**.
3. Enter **CONTINUE**.
4. Click **OK**.
5. Complete the [fields](#).

Field	Description
Program Name	Enter the name of the Program
Program Type	Select the type of Program you are adding
Program Label	Enter an abbreviated name for the Program . ChildPlus uses this field on certain windows and reports
Active	ChildPlus activates the new Program by default
Track CACFP Information	Select this option to track CACFP for the Program

6. To add a **Program Term**, see [Add a New Program Term](#) on the facing page.
7. Save.

Add a New Program Term

To add a new **Program Term** to an existing **Program** in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> Setup >> Agency Configuration >> Program Info.**
2. Select the **Program** that you want to add a **Program Term** to.
3. Click **Add Another Program Term.**
4. Select one of the following options:
 - **Add a New Blank Program Term:** create a **Program Term** from scratch
 - **Add a Copy of [Program Term]:** copy all settings and classrooms from an existing **Program Term**
5. Click **OK.**
6. Complete the **fields**. If you copied an existing **Program Term**, make the necessary changes to these fields so that they accurately reflect the information for the new **Program Term.**

Field	Description
Program Term Name	Enter a new name for the Program Term
Active	ChildPlus activates the new Program Term by default Uncheck this field to deactivate a Program Term . Inactive Program Terms are not available for selection in drop-down lists throughout ChildPlus
Locked	Select this option to lock a Program Term . Once a Program Term is locked, you will no longer be able to edit data associated with it. This includes data in the PIR module as well as data in other modules, including Enrollment, Family Services, Health, Immunizations and Pregnancy . This field is automatically unchecked when you add a new Program Term
School Year	Select the School Year that you want to associate with the Program Term . You must complete this step before you can save the Program Term . For more information, see Associate a School Year with a Program Term on page 21.
Funded Enrollment	Enter the number of participants that this Program Term is funded for
Begin Date	Enter the date the Program Term begins
End Date	Enter the date the Program Term ends

Field	Description
School Year Cut-off Date	<p>Enter the date in which a participant must have attained a certain age in order to be enrolled in the Program Term</p> <p>For example, a participant must reach the age of 3 prior to September 1 in order to be enrolled in the upcoming Head Start Program Term</p>
Health and Education Requirement Set	<p>Select the Requirement Set to associate with the Program Term</p> <p>Associating a Requirement Set with a Program Term lets ChildPlus know which Health and Education Requirements to use for program tracking and compliance</p>
Poverty Level for a one-person family	Enter the Poverty Level amount you want to use for a one-person family participating in the Program
Poverty Level for each additional person	Enter the Poverty Level amount you want to add to the total for a one-person family participating in the Program
Does this Program Term use the option from Section 645(a)(1)(B)(II) to include an additional 35% of participants that are Over Income but below 130% of the poverty guidelines?	<p>Select Yes if you want the 101-130% option to be available as an Income Status for participants who are Over Income but below 130% of the poverty guidelines</p> <p>The Income Status field, available in the Enrollment and Application (when adding a new family) modules, is used to determine a participant's eligibility for a Program. It is also used for PIR calculations</p>
If yes, how should ChildPlus set the income status of participants that meet this criteria?	If you selected Yes to the above question, select whether you want ChildPlus to set the Income Status of participants who are Over Income (but below 130% of the poverty guidelines) as Income 100 < 130% or Over Income

7. Save.

8. Go to [Classrooms](#) to continue setting up the **Program Term**.

Associate a School Year with a Program Term

Once you set up a new **School Year**, you must associate it with your **Program Term(s)**.

1. Go to **ChildPlus Desktop >> Setup >> Agency Configuration >> Program Info**.
2. Select the **Program Term** that you want to add associate a **School Year** with.
3. Select the **School Year** that you want to associate with the selected **Program Term**. If the **School Year** you want to associate with the **Program Term** is not in the drop-down list:
 1. Click **Add a School Year**.
 2. Enter the **Begin Year** and **End Year** dates. These fields cannot be empty.
 3. ChildPlus defaults the name from the **Begin Year** and **End Year** fields. Change the name as needed.
 4. Click **OK**.
4. Save.



Once you associate a **School Year** with a **Program Term**, you can associate the **School Year** with a **Family Outcomes Instrument**. For more information, see [Family Outcome Assessments](#) on page 17.

Poverty Guidelines

Poverty Guidelines are used to calculate the % of Poverty data in the **Enrollment** module. Visit [HHS Poverty Guidelines](#) for the latest poverty guideline information.

To set up Poverty Guidelines in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> Setup >> Agency Configuration >> Program Info**.
2. Select the correct **Program Term**.
3. Enter the current HHS poverty guideline amounts for a household of up to eight family members.
4. Enter the current amount for each additional person in the family.



You can use the **Poverty Guidelines Update Utility** to recalculate poverty information for existing applications without impacting the percent of poverty calculations for participants who are already enrolled. This step is optional and is generally used when your agency adopts new Poverty Guidelines during the middle of the **Program Term** or school year.

Classrooms

You can use this section to add classrooms, associate classrooms with a **Program Term** and configure various settings for each classroom.

Add Classrooms to a Program Term

Use this section to add classrooms and associate them with a **Program Term**.

1. Go to **ChildPlus Desktop >> Setup >> Agency Configuration >> Program Info**.
2. Select the correct **Program Term**.
3. Go to **Classrooms**.
4. Click **Add Classrooms**.
5. Select the classrooms you want to add to the **Program Term**.
6. Click **Add Selected Classrooms**.
7. Select each classroom to complete the fields on the following tabs:
 - [Options](#)
 - [Staffing](#)
 - [Operating Days and Hours](#)
 - [Meals Served](#)





If you are looking for a classroom that is not in the list, go to **ChildPlus Desktop >> Setup >> Agency Configuration >> Agency Info >> Sites >> Classrooms** to make sure it is active. Add the classroom if it does not exist.

Options

Configure general options for each classroom associated with a **Program Term** in ChildPlus Desktop.

1. Go to **ChildPlus Desktop >> Setup >> Program Info.**
2. Select the correct **Program Term.**
3. Go to **Classrooms.**
4. Select a classroom.
5. Go to **Options.**
6. Complete the **fields.**

Field	Description	PIR Question(s)
Program Option PIR	Select the program that best describes the number of days and hours the classroom operates	A.2-A.6, A.9, A.22
Funded Enrollment PIR	Enter the number of participants funded for enrollment in the selected classroom The number entered in this field is used to calculate Funded Enrollment and vacancies on reports	A.2-A.8
 Minimum Age	Enter the minimum age required for attendance in the classroom	
 Maximum Age	Enter the maximum age required for attendance in the classroom	



These fields are optional and used for informational purposes only.

7. Save.

Staffing

Configure which staff members are assigned to each classroom associated with a **Program Term**.

1. Go to **ChildPlus Desktop >> Setup >> Program Info**.
2. Select the correct **Program Term**.
3. Go to **Classrooms**.
4. Select a classroom.
5. Go to **Staffing**.
6. Complete the [fields](#).

Field	Description
Teacher(s)	Select the Teacher(s) to assign to the classroom
Aide(s)	Select the Aide(s) assign to the classroom
Responsible Staff by Service Area	Select the default staff members to assign to participants who are accepted and enrolled in the classroom

7. Save.

Operating Days and Hours

Configure the operating days and hours for each classroom associated with a **Program Term**.

1. Go to **ChildPlus Desktop >> Setup >> Program Info**.
2. Select the correct **Program Term**.
3. Go to **Classrooms**.
4. Select a classroom.
5. Go to **Operating Days and Hours**.
6. Complete the [fields](#).

Field	Description	PIR Question(s)
Days the Classroom Operates	Select all days the classroom is in operation for participants	
Begin Date	Enter the date the classroom begins	
End Date PIR	Enter the date the classroom ends	A.22.a.1
Hours the Classroom Operates - Begin Time	Enter the time the classroom begins	
Hours the Classroom Operates - End Time	Enter the time the classroom ends	
Provides 1,020 annual hours for Head Start preschool children or 1,380 hours for Early Head Start infants and toddlers PIR	Select this option if your program is center-based and provides either equal to or greater than or fewer than the number of hours listed for Head Start and Early Head Start participants	A.2.a, A.2.b
Available for the full-working-day and full-calendar-year PIR	Select this option if your program is center-based and provides services for the full working day and the full calendar year	A2.a.1, A.2.b.2

7. Save.



When you enroll a participant in a **Program**, ChildPlus will automatically use the operating days and meals served for the classroom and apply them to the participant's attendance record.

For example, if you configure the classroom as operating Monday-Friday and a snack and lunch served daily, then the participant will be marked as attending Monday-Friday and eating a snack and lunch. If this information is not accurate for the participant, you can uncheck each option that does not apply.

Meals Served

Configure the meals served for each classroom associated with a **Program Term**.

1. Go to **ChildPlus Desktop >> Setup >> Program Info**.
2. Select the correct **Program Term**.
3. Go to **Classrooms**.
4. Select a classroom.
5. Go to **Meals Served**.
6. Complete the [fields](#).

Field	Description
Served	Select each meal that is served during the classroom session ChildPlus populates the days and meals served in the Attendance module for participants enrolled in the classroom
Begin Time	Enter the time meal service begins
End Time	Enter the time meal service ends



To ensure accurate meal times, make sure that the **Begin** and **End Times** do not overlap different meals.

7. Save.



When you enroll a participant in a **Program**, ChildPlus will automatically use the operating days and meals served for the classroom and apply them to the participant's attendance record.

For example, if you configure the classroom as operating Monday-Friday and a snack and lunch served daily, then the participant will be marked as attending Monday-Friday and eating a snack and lunch. If this information is not accurate for the participant, you can uncheck each option that does not apply.

Attendance

Use this section to enable attendance and meal scanning for Program Terms and classrooms.

1. Go to **ChildPlus Desktop >> Setup >> Agency Configuration >> Program Info.**
2. Select the correct **Program Term.**
3. Go to **Attendance.**
4. Select **Enable Attendance and Meal Tracking.**
5. Save.

Region Info

Regions provide an additional way to group and manage your sites. Region setup is optional, but it can be helpful for tracking, reporting and security purposes.

To add a region in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> Setup >> Agency Configuration >> Region Info**.
2. Click **Add Region**.
3. Enter a name to assign to the region.
4. Repeat steps 2-3 for each region you want to add.
5. Save.



Once you add a region, you can associate sites with each region. For more information, see [Add a New Site](#) on page 9. You can also configure **User Security** by region. For more information, see [Configure User Security by Region](#).

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.