# Help Center

Just a click away!

# Module Setup

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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# Module Setup

Use **Module Setup** to configure settings for individual modules, including enabling options and customizing which fields display in each module.

# Age Range Sets

**Age Range Sets** allow you to set up different age ranges to use for evaluation purposes on **Report 2003 - Management Report - Enrollment Demographics**. Because there is no limit to the number of **Age Range Sets** you can create, you can have one or more **Age Range Sets** for each program that your agency operates.

To configure **Age Range Sets** in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> Setup >> Module Setup >> Age Range Sets**.
2. Click **Add an Age Range Set**.
3. Enter the name that you want to assign to the **Age Range Set**.
4. Select a time unit.
5. Enter the age values to assign to the set in the **Age 1** - **Age 5** fields.
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.

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.

# CLASS® Observations

Use this section to enable tracking for CLASS in ChildPlus and configure observation periods and thresholds.

## CLASS® Versions

Use this section to enable tracking for CLASS in ChildPlus.

1. Go to **ChildPlus Desktop >> Setup >> Module Setup >> CLASS® Observations >> CLASS® Versions**.
2. Select each version of CLASS that you want users to have access to in ChildPlus.
3. Save.

## Observation Periods

Use **Observation Periods** to compare CLASS results over time in reports.

To configure **Observation Periods**:

1. Go to **ChildPlus Desktop >> Setup >> Module Setup >> CLASS® Observations >> Observation Periods**.
2. Enter a name for the **Observation Period** in the first empty row.
3. Enter **Begin** and **End Dates** for the **Observation Period**.
4. Check the **Active** checkbox to activate the **Observation Period**.
5. Repeat steps 2-4 for each additional **Observation Period** you want to add.
6. Save.

## Thresholds for Comparison

Use **Thresholds for Comparison** to compare CLASS results against established standards in reports. ChildPlus includes the following thresholds that you can use:

- Recompetition Level
- Quality Thresholds
- National Average (2012-2019)
- Lowest 10% Nationally (2012-2019)

To add a new threshold:

1. Go to **ChildPlus Desktop >> Setup >> Module Setup >> CLASS® Observations >> Thresholds for Comparison**.
2. Select the CLASS version to configure thresholds for.
3. Enter a name for the **Threshold** in the first empty row.
4. Select whether to enter the threshold by **Dimensions** or **Domains Only**.
5. Enter the threshold levels in the remaining fields.
6. Check the **Active** checkbox to activate the threshold.
7. Repeat steps 3-6 for each additional threshold you want to add.
8. Save.

# Disability

You can use this section to set up the following in ChildPlus Desktop:

- **Concern Activity Types**
- **IEP** and **IFSP Types**
- **IEP** and **IFSP Activity Types**

When you configure these options, they will be available for selection in the **Disability** module in ChildPlus Online and ChildPlus Desktop.

## Concerns

Use **Disability Module Setup** to configure **Concern Activity Types** and **Statuses**.

### Add a New Concern Activity Type

To add a new **Concern Activity Type** in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> Setup >> Module Setup >> Disability >> Concerns**.
2. Click **Add Activity Type**.
3. Enter the name you want to assign to the **Activity Type** in the **Description** field.
4. If this is a **Referral Activity Type**:
    1. Select **This Activity is a Type of Referral**.
    2. Select the **Referral Type**.
5. If this is an **Evaluation**, select **This Activity is an Evaluation**.
6. If this requires a responsible staff member, select **Enable Responsible Staff field**.
7. Select each status that you want to be available for the **Activity Type**.
8. Click **Save**.

### Edit an Existing Concern Activity Type

To edit an existing **Concern Activity Type** in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> Setup >> Module Setup >> Disability >> Concerns**.
2. Select the **Activity Type** you want to edit.
3. Click **Edit**.
4. Make your changes to the **Activity Type**.
5. Click **Save**.

### Deactivate a Concern Activity Type

To deactivate a **Concern Activity Type** in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> Setup >> Module Setup >> Disability >> Concerns**.
2. Select the **Activity Type** you want to deactivate.
3. Uncheck the **Active** checkbox next to the name of the **Activity Type**.
4. Save.

## Add a New Concern Activity Status

To add a new **Concern Activity Status** in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> Setup >> Module Setup >> Disability >> Concerns**.
2. Click **Add Status**.
3. Enter a name you want to assign to the status.
4. Check the checkbox to view the status on reports and the **To-Do List** if needed.
5. Click **Save**.

## Edit an Existing Concern Activity Type

To edit an existing **Concern Activity Type** in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> Setup >> Module Setup >> Disability >> Concerns**.
2. Select the **Activity Type** you want to edit.
3. Click **Edit**.
4. Make your changes to the **Activity Type**.
5. Click **Save**.

## Deactivate a Concern Activity Status

To deactivate a **Concern Activity Status** in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> Setup >> Module Setup >> Disability >> Concerns**.
2. Select the status you want to deactivate.
3. Click **Edit**.
4. Uncheck the **Active** checkbox.
5. Click **Save**.

# IEP/IFSP

Use **Disability Module Setup** to configure **IEP/IFSP Types** and **Activity Types**.

## Add a New IEP or IFSP

To add a new **IEP** or **IFSP Type** in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> Setup >> Module Setup >> Disability >> IEP/IFSP**.
2. Click one of the following:
    - **Add IEP Type**
    - **Add IFSP Type**
3. Enter a name to assign to the **IEP** or **IFSP Type**.
4. Click **Save**.

## Deactivate an IEP or IFSP Type

To deactivate an **IEP** or **IFSP Type** in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> Setup >> Module Setup >> Disability >> IEP/IFSP**.
2. Select the **IEP** or **IFSP Type** you want to deactivate.
3. Click **Edit**.
4. Uncheck the **Active** checkbox.
5. Click **Save**.

## Add a New IEP/IFSP Activity Type

To add a new **IEP/IFSP Activity Type** in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> Setup >> Module Setup >> Disability >> IEP/IFSP**.
2. Select the applicable option(s) in the **Does your program track IEPs, IFSPs, or both** field.
3. Click **Add Activity Type**.
4. Enter a name to assign to the **Activity Type**.
5. Select whether the **Activity Type** applies to **IEPs**, **IFSPs** or both.
6. If this requires a responsible staff member, select **Enable Responsible Staff field**.
7. Click **Save**.

## Deactivate an IEP/IFSP Activity Type

To deactivate an **IEP/IFSP Activity Type** in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> Setup >> Module Setup >> Disability >> IEP/IFSP**.
2. Select the **IEP/IFSP Activity Type** you want to deactivate.
3. Click **Edit**.
4. Uncheck the **Active** checkbox.
5. Click **Save**.

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# DRDP Assessment

Use this section to configure settings for the **DRDP Assessment** module.

> Before the **DRDP Assessment** module can be used in ChildPlus Online, ChildPlus Online must be enabled and users must be granted access.

## General Settings

*Setup >> Module Setup >> DRDP Assessment >> General Settings*

Use this section to view your agency's DRDP subscription information and access your agency's ChildPlus Online link.

California agencies can select the data export option if DRDP data will be exported from ChildPlus into the DRDP Online system.

> ChildPlus administrators must activate ChildPlus Online before users can access the **DRDP Assessment** module. Activate ChildPlus Online in **ChildPlus Desktop >> Setup >> Security >> Security Settings >>** General.

# School Year-Specific Settings

Use this section to set up rating schedules and assign them to classrooms. Rating schedules:

- Are used to set due dates
- Can vary by program and classroom
- Can be customized to meet the needs of each location

## Define Rating Schedules

To define a **Rating Schedule** in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> Setup >> Module Setup >> DRDP Assessment**.
2. Select a **School Year**.
3. Click **Add Schedule for [School Year]**.
4. Select one of the following options:
    - **Add a new blank schedule**: create a **Rating Schedule** from scratch
    - **Copy an existing schedule**: copy all settings from an existing **Rating Schedule**
5. Enter a unique name for the schedule.
6. Enter a description explaining the time period to begin and complete assessments for this schedule.
7. Complete the fields in each section to customize the schedule.

| Section | Description |
|---|---|
| Schedule Type | Determine if assessment due dates are based on:<br>• Assessment periods<br>When selecting a schedule based on assessment periods, you will need to determine the cut-off date for late enrollees and the finalize date for the period<br>• Enrollment dates |
| Naming Convention | Select how assessment names should appear in participants' records and on reports. Assessments can be named based on the season and year, numerical order or both |
| Recommended Observations | Set a recommendation for the number of observations needed prior to rating. Observation counts can be monitored on reports and used as a guide for teachers<br>If a teacher attempts to rate a measure with less than the recommended number of observations during the assessment period, you can specify whether they should be prohibited from rating or whether ChildPlus Online should display a notification but allow them to rate anyway |

| Section | Description |
| --- | --- |
| DRDP Views | Select the DRDP view(s) required by your program and specify a default DRDP view to display for participants following this schedule<br><br>Teachers can change the view as needed in the **DRDP Assessment** module. ChildPlus Online displays the measures required for participants with an IEP/IFSP |
| Statewide Identifier | Select this option to provide a statewide identifier for each participant<br><br>Agencies currently tracking statewide identifiers in the **Alternate ID** field should select **Copy the value in Alternate ID to the statewide identifier field** |
| Dual Language Learners | Select this option to automatically open English Language Development (ELD) measures for participants identified as dual language learners on the application |
| Schedule Notes | Enter notes to document important decisions that influenced the **Rating Schedule** setup |

8. Click **Save**.

## Assign Rating Schedules to Classrooms

Use this section to select which classrooms will follow a **Rating Schedule**.

1. Go to **ChildPlus Desktop >>  >> Setup >> Module Setup >> DRDP Assessment >> Assign Rating Schedules to Classrooms**.
2. Select the location(s) required to complete an assessment.
3. Select an option in the **Schedule** column to assign a **Rating Schedule** to each classroom.
4. Select the **Rating Schedule** at the bottom of the window to assign to the classroom (s).
5. Click **Assign**.
6. Repeat steps 4-5 for each **Rating Schedule** that you want to assign.
7. Save.

## Set Up a Period-based Schedule

Create a **Rating Schedule** using dates selected by your agency. Select which DRDP views can be used and assign a default view. Associate the schedule with specific programs and classrooms.

## Set Up an Enrollment-based Schedule

Set up due dates for DRDP ratings based on each participant's enrollment date. Determine which DRDP views can be used in this rating schedule and select a default view. Associate the schedule with specific programs and classrooms.

# Eligibility Criteria

You can configure **Eligibility Sets** in ChildPlus to use with each of your programs. Based on the information you provide when you create these **Eligibility Sets**, ChildPlus will calculate each participant's eligibility points when they apply to a program at your agency.

To create a new **Eligibility Set** in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> Setup >> Module Setup >> Eligibility Criteria**.
2. Click **Add New Eligibility Set**.
3. Select one of the following:
   - **Start with a blank eligibility set**: create an **Eligibility Set** from scratch
   - **Start with a copy of**: copy all settings from an existing **Eligibility Set**
4. Click **OK**.
5. Enter the name you want to assign to the **Eligibility Set**.
6. Complete the fields. If you copied an existing **Eligibility Set**, make the necessary changes to these fields so that they accurately reflect the information for the new **Eligibility Set**.

   Points based on Income

| Field | Description |
|---|---|
| Automatically assign points based on Income | Check this checkbox to automatically assign eligibility points based on the participant's income |
| Foster | Enter the number of points to assign to participants who are in foster care |
| Homeless | Enter the number of points to assign to participants who are experiencing homelessness |
| Public Assistance | Enter the number of points to assign to participants who receive public assistance |
| Percentage of Poverty Level | Configure different **Poverty Level** ranges and associate point values with them<br><br>For example, a family from 0% to 50% of the **Poverty Level** would receive 90 points and a family from 51% to 75% would receive 40 points<br><br>Create a row for each **Poverty Level** range to assign points based on **Poverty Level** percentage |

| Field | Description |
| --- | --- |
| Participant is not eligible if above _ __ % of the Poverty Level | Check this box to restrict participants from being enrolled if their % of **Poverty Level** is above the specified percentage |
| Determine eligibility based on annual income | Check this checkbox to restrict participants from being enrolled based on their annual income. Once you check this check box, click **Set Income Levels** to configure income limits |
| Set Income Levels | Set up maximum family incomes based on family size. ChildPlus will use this information to determine whether participants are eligible based on their annual income |

### Points based on Class Age

| Field | Description |
| --- | --- |
| Automatically assign points based on Income | Check this checkbox to automatically assign eligibility points based on the participant's income |
| Foster | Enter the number of points to assign to participants who are in foster care |
| Homeless | Enter the number of points to assign to participants who are experiencing homelessness |
| Public Assistance | Enter the number of points to assign to participants who receive public assistance |
| Percentage of Poverty Level | Configure different **Poverty Level** ranges and associate point values with them<br><br>For example, a family from 0% to 50% of the **Poverty Level** would receive 90 points and a family from 51% to 75% would receive 40 points<br><br>Create a row for each **Poverty Level** range to assign points based on **Poverty Level** percentage |
| Participant is not eligible if above _ __ % of the Poverty Level | Check this box to restrict participants from being enrolled if their % of **Poverty Level** is above the specified percentage |

| Field | Description |
| --- | --- |
| Determine eligibility based on annual income | Check this checkbox to restrict participants from being enrolled based on their annual income. Once you check this check box, click **Set Income Levels** to configure income limits |
| Set Income Levels | Set up maximum family incomes based on family size. ChildPlus will use this information to determine whether participants are eligible based on their annual income |

7. Click **Add a Criterion** in the **Other Eligibility Criteria** section to add additional eligibility items (for example, **Teen Parent** or **Parental Status**).
8. Click Add a Choice for each criterion item.

| Field | Description |
| --- | --- |
| Choice | Enter the name of the choice that users can choose from when assigning eligibility points on in the **Enrollment** module<br><br>For example, if you created a criterion called **Teen Parent**, you would set up two choices: **Yes** and **No** |
| Points | Specify the number of points to assign to each choice<br><br>For example, if the answer is **Yes**, then the participant would be assigned 15 eligibility points; if the answer is **No**, then the participant would be assigned 0 eligibility points |
| Not Eligible | Check this checkbox for the choice, then if a user selects this choice when filling out the participant's eligibility criteria, ChildPlus will determine that the participant is not eligible |

9. Repeat steps 7-8 for each criterion that you want to add.
10. Select the Agency/Program Term(s) to apply the **Eligibility Set** to.
11. Save.

# Family Outcomes Instruments

Use this section to configure a **Family Outcomes Instrument**.

## Steps to Configure Family Outcomes

Complete the following tasks in the order below to have **Family Outcomes** available and working correctly in ChildPlus.

| Step | Description |
|---|---|
| 1 | • Add a New Family Outcomes Instrument<br>• Set up Scoring<br>• Set up Categories |
| 2 | Add a New School Year |
| 3 | Associate a School Year with a Program Term |
| 4 | Associate a School Year with a Family Outcomes Instrument |

# Add a New Family Outcomes Instrument

To add a new **Family Outcomes Instrument** in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> Setup >> Module Setup >> Family Outcomes Instruments**.
2. Click **Add New Instrument**.
3. Select one of the following options:
   - **Start with a blank instrument**: create a new **Family Outcomes Instrument** from scratch
   - **Start with a copy of**: copy all settings from an existing **Family Outcomes Instrument**
4. Click **OK**.
5. Complete the fields. If you copied an existing **Family Outcomes Instrument**, make the necessary changes to these fields so that they accurately reflect the information for the new **Family Outcomes Instrument**.

| Field | Description |
|---|---|
| Instrument Name | The name of the **Family Outcomes Instrument** |
| Assessments Per Year | The number of times each family will be assessed per year |
| Assessment 1 Name | The name you want to assign to the first assessment of the school year |
| Assessment 2 Name | The name you want to assign to the second assessment of the school year |
| Assessment 3 Name | The name you want to assign to the third assessment of the school year |
| Assessment Worksheet | Select how you want to print each assessment during the school year:<br>• **Multiple Assessments Per Worksheet**: Print each assessment on the same worksheet<br>• **Single Assessment Per Worksheet**: Print each assessment on a different worksheet |

6. Use the **Default Notes** field to track family interview questions that are not scored or additional information for each family. ChildPlus displays any text you add to this field whenever you are entering results for an assessment or printing an **Assessment Worksheet**.

# Scoring Setup

To set up scoring for a **Family Outcomes Instrument** in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> Setup >> Module Setup >> Family Outcomes Instruments >> Scoring Setup**.
2. Select the type of score that indicates a greater need: **Lower** or **Higher**.

   For example, if a score of 5 out of 5 indicates a higher need, select **Higher Score Means Greater Need**. If a score of 1 out of 5 indicates a higher need, select **Lower Score Means Greater Need**.

3. Click **Add**.
4. Enter a score value into the **Family Outcome Score** field. Score values can be either integers (5) or decimals (5.0).
5. Enter a score description into the **Family Outcome Score Description** field.

   For example, a description could be "Family needs immediate support."

6. Click **OK**.
7. Click **Add** for each score choice you want to add to the instrument.
8. Save.

# Category Setup

Use this section to add categories for a **Family Outcomes Instrument**.

1. Go to **ChildPlus Desktop >> Setup >> Module Setup >> Family Outcomes Instruments >> Category Setup**.
2. Click **Add Outcome Category**.
3. Enter the **Family Outcome Category Name**.
4. Click **OK**.
5. Click **Add Outcome Item** to add each of the outcome items that you want to associate with the selected **Category**.
6. Enter a description in the **Item Description** field. Typically, the item will be the actual assessment question.
7. Enter any **Scoring Guidance** (optional) that you would like ChildPlus to display whenever you are entering results for an assessment or printing an **Assessment Worksheet**. Depending on your instrument, **Scoring Guidance** may be helpful.
8. Repeat steps 2-4 for each **Family Outcome Category** you want to add. Depending on your instrument, you may only need one **Family Outcome Category**.
9. Repeat Steps 5-7 for each **Family Outcome Item** you want to add.
10. Save.

After you set up your **Family Outcomes Instrument** in ChildPlus Desktop, you can click **Print** to print a copy of the **Family Outcomes - Assessment Worksheet**. We recommend that you print a copy to review and double check it for any data entry errors.

# Time-saving Tips

- If you have more than one **Family Outcome Category**, click **Move Up** or **Move Down** to adjust the location of the item in the list
- If you have more than one **Family Outcome Item**, click **Move Up** or **Move Down** to adjust the location of the item in the list

# Edit an Existing Family Outcomes Instrument

To edit an existing **Family Outcomes Instrument** in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> Setup >> Module Setup >> Family Outcomes Instruments**.
2. Select the **Family Outcomes Instrument** you want to modify.
3. Go to the section you want to modify.
4. To edit the **Scoring Setup** and **Category Setup** sections, select an item and click **Edit**.
5. Make your changes to the text.
6. Click **OK**.
7. Save.

> The number of assessments and category sections cannot be edited once an assessment is added using the instrument.

# Determine Which Participants Have Assessments

To determine which participants already have assessments associated with a specific instrument in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> Setup >> Module Setup >> Family Outcomes Instruments**.
2. Select the **Family Outcomes Instrument** you want to work with.
3. Click **Show Families that have an Assessment for this Instrument**.
4. Do one of the following:
    - Click **Print** to print the list
    - Click **OK** to return to the instrument setup

# Deactivate a Family Outcomes Instrument

You can deactivate an instrument so that it is no longer available as a choice in drop-down lists. To deactivate a **Family Outcomes Instrument** in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> Setup >> Module Setup >> Family Outcomes Instruments**.
2. Select the **Family Outcomes Instrument** you want to deactivate.
3. Check the **Active** checkbox.
4. Save. ChildPlus Desktop displays **(i)** next to the instrument name when it is inactive.

# Family Service Events

You can use **Family Service Events** to set up each of your **Family Services Events** in ChildPlus. When you configure an **Event**, it will be available for selection in the **Event Type** list in the **Family Services** module.

## Add a New Family Services Event

To add a new **Family Services Event** in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> Setup >> Module Setup >> Family Service Events**.
2. Click **Add Event Type**.
3. Enter the name you want to assign to the **Event** in the **Event Type Name** field.
4. If the **Event** is a **Home Visit**, select **This event type is a home visit**.
5. Select each field that you want to be available for the **Event Type**.
6. Select whether you want the **Event Type** to be associated with the family or the participant.
7. Save.

## Edit an Existing Family Services Event

To edit an existing **Family Services Event** in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> Setup >> Module Setup >> Family Service Events**.
2. Select the **Event Type** you want to edit.
3. Make your changes to the **Event**.
4. Save.

## Utility for Updating Existing Family Services Events

You can use this utility to assign existing **Family Services Events** to a family or a single participant. To use this utility in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> Setup >> Module Setup >> Family Service Events**.
2. Click **Utility for Updating Existing Family Service Events**.
3. Select the **Event Type** that you want to update.
4. Click **Change Records**.
5. Enter **CONFIRM** to confirm that you want to change the records.
6. Click **Confirm Change**. ChildPlus displays a message that the process is complete and the number of records that have been modified.
7. To update additional **Event Types**, repeat steps 3-5.
8. Click **Cancel** to exit the utility.

# Deactivate a Family Services Event

An **Event Type** cannot be deleted if it is associated with a record. However, it can be deactivated.

To deactivate a **Family Services Event** in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> Setup >> Module Setup >> Family Service Events**.
2. Select the **Event Type** you want to deactivate.
3. Uncheck the **Active** checkbox next to the **Event Type Name** field.
4. Save.

# Health and Education Events

You can use this section to set up each of your **Health** and **Education Events** in ChildPlus Desktop. When you configure an **Event**, it will be available for selection in the **Event Type** list in the **Health** and **Education** modules in ChildPlus Online and ChildPlus Desktop.

As part of this setup process, you can also specify the valid periods for each of your **Events**. These valid periods are used for determining the expiration date for each **Event** that takes place. This is particularly useful when programs have different valid periods for the same **Event**. For example, a **Dental Exam** may be valid for one year in your Head Start program but only for six months in another program.

# 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.

# Add a New Well Baby Check Event

You can configure **Events** with sub-events, such as **Well Baby Checks** for Early Head Start programs. If your agency plans to track **Well Baby Checks** at certain time intervals (for example, if you require a **Well Baby Check** at 3 months, 6 months and 9 months), you will need to add a **Health Event** for each interval. Using the previous example, this means that you would need to set up an **Event** for each of the following:

- 3-month **Well Baby Check**
- 6-month **Well Baby Check**
- 9-month **Well Baby Check**

To add a new **Well Baby CheckEvent** 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. Select **This event type has sub-events**.
6. Setting expiration periods for **Events** added based on age is not recommended since the age will only occur once. If the **Event** expires:
    1. Click **Add Program**.
    2. Select a **Program**.
    3. Enter the validity period in months. ChildPlus will 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. Click **Add Sub-Event** for each sub-event you want to add.
    1. Click **OK**.
    2. Repeat these steps if there is more than one sub-event.
9. Select each field that you want to be available for the **Event Type**.
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.

# Edit an Existing Health or Education Event Type

To edit an existing **Health** or **Education Event Type**:

1. Go to **ChildPlus Desktop >> Setup >> Module Setup >> Health and Education Events**.
2. Select the **Event Type** you want to edit.
3. Make your changes to the **Event**.
4. Save.

# Deactivate a Health or Education Event Type

An **Event Type** cannot be deleted if it is associated with a record. However, it can be deactivated.

To deactivate a **Health** or **Education Event Type**:

1. Go to **ChildPlus Desktop >> Setup >> Module Setup >> Health and Education Events**.
2. Select the **Event Type** you want to deactivate.
3. Uncheck the **Active** checkbox next to the **Event Type Name** field.
4. 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 on page 28.

**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)<br><br>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**<br><br>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**<br><br>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<br><br>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<br><br>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:<br><br>• **All participants**<br>• **All adult participants**<br>• **All child participants**<br>• **Child participants who will be at least ___ old on their entry date**<br>• **Child participants who will be less than ___ old on their entry date**<br>• **Child participants who will be between ___ old on their entry date**<br><br>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<br><br>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<br><br>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.

# Immunizations

You can use **Immunizations** setup to select which immunizations and due dates you want ChildPlus to automatically calculate. You can also control the order in which immunizations display in the **Immunizations** module in ChildPlus Online and ChildPlus Desktop.

View the National CDC Guidelines for additional guidance on immunization schedules.

## Set Up an Immunization Schedule

To set up an immunization schedule in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> Setup >> Module Setup >> Immunizations**.
2. Complete the fields for each immunization.

| Field | Description |
|---|---|
| Active | Check this checkbox to track the immunization in ChildPlus<br><br>For more information, see Deactivate an Immunization on page 40. |
| Alternative Name | Enter an alternative name in this field to change the default name of the immunization<br><br>For more information, see Assign Alternative Names on page 39. |
| First Due | Enter the number of days after the participant's birth date in which the first dose of the immunization is due (for example, if you enter 90, then the first dose will be due exactly 90 days after the participant's birth date)<br><br>Additional Options: MX0 |
| Second Due | Enter the number of days after the participant's first dose of an immunization that their second dose in the series is due (for example, if you enter 90, then the participant's second dose will be due exactly 90 days after their first)<br><br>Additional Options: MX0 |

| Field | Description |
| --- | --- |
| Third Due | Enter the number of days after the participant's second dose of an immunization that their third dose in the series is due (for example, if you enter 90, then the participant's third dose in the series will be due exactly 90 days after their second)<br><br>Additional Options: MX0 |
| Fourth Due | Enter the number of days after the participant's third dose of an immunization that their fourth dose in the series is due (for example, if you enter 90, then the participant's fourth dose in the series will be due exactly 90 days after their third)<br><br>Additional Options: MX0 |
| Fifth Due | Enter the number of days after the participant's fourth dose of an immunization that their fifth dose in the series is due (for example, if you enter 90, then the participant's fifth dose in the series will be due exactly 90 days after their fourth)<br><br>Additional Options: MX0 |

**M**: Enter **M** in a due date field to tell ChildPlus that you want to manually calculate **Next Due** dates for an immunization dose. Use this option if you decide that you do not want ChildPlus to automatically calculate due dates for immunizations.

**X**: Enter **X** in a due date field for any dose in a series that you do not want to record a date for. For example, if participants normally only receive two MMR immunizations, then you would enter an **X** in the **Third Due**, **Fourth Due** and **Fifth Due** fields. You can also use the **X** to indicate that you do not want to track any due dates for an immunization.

**0**: Enter **0** in the **First Due** field if you want ChildPlus to use the participant's birthday as the date that their first dose of an immunization is due.

3. Save.

# CDC Immunization Schedule Example

*Setup >> Module Setup >> Immunizations*

You can use the following as an example of how to set up an immunization schedule based on the CDC's recommended intervals in ChildPlus Desktop:

| Immunization | Alternative Name | 1st Due | 2nd Due | 3rd Due | 4th Due | 5th Due |
|---|---|---|---|---|---|---|
| Polio | IPV | 60 | 60 | 60 | 1260 | X |
| DTap | | 30 | 60 | 60 | 270 | 990 |
| MMR | | 360 | 1080 | X | X | X |
| Hib | | 60 | 60 | 240 | X | X |
| Hepatitis B | | 0 | 30 | 150 | X | X |
| Varicella | | 360 | 1080 | X | X | X |
| Hepatitis A | | 360 | 360 | X | X | X |
| PCV | | 60 | 60 | 60 | 180 | X |
| Influenza | | M | M | M | M | M |

# Assign Alternative Names

The **Immunizations** module includes a list of immunizations that are named according to the CDC Immunization Schedule. You can use the **Alternative Name** field to change the name of any immunization in the list. When you specify an **Alternative Name**, ChildPlus uses the **Alternative Name** in the **Immunizations** module and on reports. If you do not specify an alternative name, ChildPlus will use the immunization's default name (for example, **Varicella**, **Influenza**, **Other 1** or **Other 2**). Using **Alternative Names** can be beneficial if, for example, you want to customize the immunization schedule to meet your local requirements.

To assign an alternative name to an immunization in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> Setup >> Module Setup >> Immunizations**.
2. Enter a new name in the **Alternative Name** field.
3. Save.

# Track Additional Immunizations

The **Immunizations** module allows you to track each of the CDC's recommended childhood and adolescent immunizations. You can also track up to five additional immunizations. To track additional immunizations in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> Setup >> Module Setup >> Immunizations**.
2. Check the **Active** checkbox next to each of the additional immunizations you want to track (by default, these immunizations are labeled **Other 1**, **Other 2**, **Other 3**, **Other 4** and **Other 5**.
3. Enter the name that you want to assign to each additional immunization in the **Alternative Name** field.
4. Complete the due date fields for each additional immunization.
5. Save.

# Customize the Immunizations Data Entry Window

You can control the order in which immunizations display in the **Immunizations** module. Organizing immunizations in a specific order can help make data entry more efficient if your staff members are used to recording data in a particular order. For example, you can order each immunization to display in the exact order of the current CDC Immunization Schedule.

To customize the order of immunizations in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> Setup >> Module Setup >> Immunizations >> Customize the Immunization Data Entry Screen**.
2. Select an immunization.
3. Use the up and down arrows to move the immunization up or down the list.
4. Repeat steps 2 and 3 for each immunization you want to organize.
5. Save.

# Deactivate an Immunization

To deactivate an immunization in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> Setup >> Module Setup >> Immunizations**.
2. Uncheck the **Active** checkbox.
3. Save.

When an immunization is inactive, it will not display as an option in the **Immunizations** module or on reports and you will not be able to track or edit information for the immunization.

# Internal Monitoring Checklists

Use **Internal Monitoring Checklists** to add or edit a monitoring checklist.

1. Go to **ChildPlus Desktop >> Setup >> Module Setup >> Internal Monitoring Checklists**.
2. Click **Add New Monitoring Checklist**.
3. Select one of the following:
    - **Start with a blank checklist**
    - **Start with a copy of [Checklist Name]**
4. Click **OK**.
5. Complete the fields in each section.
    - General
    - Setup Results
    - Checklist Setup
    - Monitoring Worksheet
    - Access to this Monitoring Checklist
    - Agencies
6. Save.

You can only modify checklist results and security settings for the built-in OHS protocol. To modify the design of the OHS protocol, select **Start with a copy of** and select the protocol that you want to modify.

# General

Use this section to configure general information for an **Internal Monitoring** checklist.

1. Go to **ChildPlus Desktop >> Setup >> Module Setup >> Internal Monitoring Checklists**.
2. Select the checklist that you want to configure.
3. Go to the **General** section.
4. Complete the fields.

| Field | Description |
|---|---|
| Checklist Name | Enter a name to assign to the checklist |
| Service Area | Select the service area that the monitoring applies to |
| For Monitoring | Select a level to restrict monitoring to |
| Active | ChildPlus activates the monitoring checklist by default. If you inactivate the checklist, users will not be able record monitoring results for it |
| Link this checklist to the OHS Monitoring Protocol for fiscal year | Select this option to link the checklist to the OHS Monitoring Protocol for the fiscal year |
| Track which regulations are associated with each checklist indicator | Select this option to track which regulations are associated with each monitoring item in the checklist |
| Add a Record ID field to the data entry screen (can be used for tracking IDs like ChildPlus ID, Child Name, Item ID, etc.) | Select this option to include a **Record ID** with the monitoring checklist<br><br>ChildPlus uses this field to track information such as **ChildPlus ID**, **Child ID**, **Equipment ID** or any other identifier that needs to be tracked |
| Add a help link for the user entering monitoring results | Select this option to add a help link for the monitoring checklist to the **Internal Monitoring** module<br><br>ChildPlus displays the link on the **General** tab of the monitoring checklist |

| Field | Description |
| --- | --- |
| Add a second help link for the user entering monitoring results | Select this option to add an additional help link for the monitoring checklist to the **Internal Monitoring** module<br><br>ChildPlus displays the link on the **General** tab of the monitoring checklist |
| URL | Enter the URL for the help link |
| URL Description | Enter a description for the help link |

Click **Test** to open the link in your default browser and ensure that it goes to the correct page.

5. Click **OK**.
6. Save.

# Setup Results

Use this section to configure which results will be available for an **Internal Monitoring** checklist.

1. Go to **ChildPlus Desktop >> Setup >> Module Setup >> Internal Monitoring Checklists**.
2. Select the checklist that you want to configure.
3. Go to the **Setup Results** section.
4. Complete the fields.

| Field | Description |
|---|---|
| Select which results will be available for this monitoring checklist | Select each result that you want users to be able to choose from when they are entering monitoring results<br><br>If you do not want to use the default terminology for results (for example, if you use **Satisfactory** and **Needs Improvement** instead of **Compliant** and **Non-Compliant**), you can modify the text of each result in the **Description** field<br><br>Click **Use Default** if you modified the description but want to switch back to the default description |
| When results are entered, default all values to | Select the default result to display when users are entering monitoring results |
| Default days to create a corrective action plan | Enter the default number of days that users will have to create a corrective action plan |
| Default days to resolve Non-Compliant indicators | Enter the default number of days that users will have to resolve **Non-Compliant** checklist items |
| Default days to resolve Non-Compliant - Urgent indicators | Enter the default number of days that users will have to resolve **Non-Compliant - Urgent** checklist items |

ChildPlus displays the calculated dates on the **Monitoring Results** and **Corrective Action Plan (CAP)** tabs, once an indicator is marked as **Non-Compliant**. Calculations are based on the **Actual** date entered on the **General** tab.

5. Save.

## Checklist Setup

Use this section to add indicator items to an **Internal Monitoring** checklist.

1. Go to **ChildPlus Desktop >> Setup >> Module Setup >> Internal Monitoring Checklists**.
2. Select the checklist that you want to configure.
3. Go to the **Checklist Setup** section.
4. Select a list type.
5. Click the first row to add an item.
6. Complete the fields.

| Field | Description |
|---|---|
| Indicator # | Enter a number for the indicator |
| Monitor Guidance | Enter guidance for the indicator |
| Indicator Text | Enter a description for the indicator |

7. Repeat steps 5-6 for each indicator that you want to add.
8. Save.

# Monitoring Worksheet

Use this section to enter any additional information to display on **Report 8020 – Monitoring Worksheet**.

1. Go to **ChildPlus Desktop >> Setup >> Module Setup >> Internal Monitoring Checklists**.
2. Select the checklist that you want to configure.
3. Go to the **Monitoring Worksheet** section.
4. Complete the fields.

| Field | Description |
|---|---|
| Cover Sheet | Enter information that you want a monitor to read prior to conducting a monitoring. Cover sheets print with **Report 8020 – Monitoring Worksheet** |
| Header | Enter any text to display at the top of **Report 8020 – Monitoring Worksheet** |
| Footer | Enter any text to display an the end of **Report 8020 – Monitoring Worksheet** |

5. Save.

# Access to this Monitoring Checklist

Use this section to configure user access to an **Internal Monitoring** checklist.

1. Go to **ChildPlus Desktop >> Setup >> Module Setup >> Internal Monitoring Checklists**.
2. Select the checklist that you want to configure.
3. Go to the **Access to this Monitoring Checklist** section.
4. Select an option for each field.

| Field | Role | Description |
|---|---|---|
| Which users will have administrator access to this checklist? | Administrator | Select the User Security Group(s) to assign administrator access to the monitoring. Users with administrator access will have full access to the monitoring (including all functions in the **Internal Monitoring** module) and can also modify settings in **Internal Monitoring Checklists** |
| Which users will have full access to this checklist in the Internal Monitoring Module? | Compliance Officer | Select the User Security Group(s) to assign full access to the monitoring checklist. Users with this level of security access will have full access to the monitoring (including setting due dates and all other functions in the **Internal Monitoring** module)<br><br>Typically, only compliance officers are granted this level of security access |
| Which users will use this checklist to perform monitorings? | Monitor | Select the User Security Group(s) that will perform monitoring using this checklist. Users with this level of security access will have access to most of the monitoring functions (excluding setting due dates) in the **Internal Monitoring** module)<br><br>Typically, service area managers, compliance monitors and/or staff members who perform monitoring are granted this level of security access |

| Field | Role | Description |
| --- | --- | --- |
| Which users will enter corrective action plans? | Party responsible for corrective action | Select the User Security Group(s) that will enter corrective action plans using this checklist. Users with this level of security access will only have access to monitoring functions on the **Corrective Action Plan (CAP)** tab in the **Internal Monitoring** module)<br><br>Typically, site managers and/or staff members who are responsible for correction action are granted this level of security access |

5. Save.

# Agencies

Use this section to configure agency access to an **Internal Monitoring** checklist if you have more than one agency set up in ChildPlus.

1. Go to **ChildPlus Desktop >> Setup >> Module Setup >> Internal Monitoring Checklists**.
2. Select the checklist that you want to configure.
3. Go to the **Agencies** section.
4. Select one of the following:
    - **This checklist is used by all agencies**
    - **This checklist is only used by the selected agencies**
5. Save.

# Family Pre-application

Use **Family Pre-application** to allow parents/guardians to complete applications online. **Family Pre-applications** can help increase recruitment and valuable data entry time by providing a convenient and contact-free way to perform intake. When **Family Pre-applications** are submitted, the information is saved directly in your agency's ChildPlus database.

- Customize the application's fields, colors and logo
- Create applications in English or Spanish
- Provide a link to allow parents/guardians to access the application online
- Allow parents/guardians to upload important documents which ChildPlus saves as attachments in **Application**
- Disable the **Family Pre-application** feature until you are ready to use it

# General

Use this section to configure general settings for the **Family Pre-application**. These settings include what the application will look to end users and whether it is available in English, Spanish or both.

## General

Use this section to configure general settings for the **Family Pre-application**.

1. Go to **ChildPlus Desktop >> Setup >> Module Setup >> Family Pre-application >> General**.
2. Select an agency.
3. Complete the fields.

| Field | Description |
|---|---|
| Enable online application for this agency | Select this option to make the **Family Pre-application** available for the selected agency<br><br>If **Family Pre-application** is not enabled, you can specify what message to display when parents attempt to access it in the **Display the following message if a user visits the above link when online application is not enabled** field |
| Website Address | Provide this URL to parents/guardians to access the application<br><br>This URL is unique to each agency |
| Show a logo at the top of the online application | Select this option to display your agency's logo or a picture at the top of the application |
| Website Section Header Font Color | Select a color to use for section headings in the application |
| Website Background Color | Select a color to display in the background of the application |
| Website Sidebar Color | Select a color to display in the sidebar of the application |

| Field | Description |
| --- | --- |
| Take the user to this URL after they submit their application | Once a user submits an application, ChildPlus automatically displays a submission confirmation page. The content of this page depends on whether the option to upload attachments is enabled on the **Attachments** tab and whether you specify a webpage in this field.<br>• If you do not select **Allow parents/guardians to upload attachments**, ChildPlus will display **Your application has been submitted** on the confirmation page<br>• If you select **Allow parents/guardians to upload attachments**, ChildPlus will display **Thank you for submitting your application materials** on the confirmation page<br>• If you do not specify a webpage in this field, the confirmation page will be the last page a user sees after they submit an application<br>• If you specify a webpage in this field, the user must click **OK** on the confirmation page to be directed to the specified webpage. For example, you could send them to your agency's homepage or a specific page on your website |
| Introductory Instructions - Optional | Enter general instructions that explain how to complete the application. Any text entered into this field displays at the top of the application |
| Final Instructions - Optional | Enter final instructions and/or a thank you message. Any text entered into this field displays at the bottom of the application |
| Display the following message if a user visits the above link when online application is not enabled | Enter the message to display if someone accesses the application when **Family Pre-application** is not enabled |

4. Save.

## Spanish

Use this section to configure Spanish settings for the **Family Pre-application**.

1. Go to **ChildPlus Desktop >> Setup >> Module Setup >> Family Pre-application >> General**.
2. Select an agency.
3. Complete the fields.

| Field | Description |
|---|---|
| Enable Spanish version of online application | Select this option to make the **Family Pre-application** available in Spanish for the selected agency |
| Website Address - Spanish | Provide this URL to parents/guardians to access the Spanish version of the application<br><br>This URL is unique to each agency |
| Introductory Instructions - Spanish - Optional | Enter general instructions in Spanish that explain how to complete the application. Any text entered into this field will display at the top of the application |
| Final Instructions - Spanish - Optional | Enter final instructions and/or a thank you message in Spanish. Any text entered into this field will display at the bottom of the application |
| Display the following message if a user visits the above link when the Spanish application is not enabled | Enter the message to display in Spanish if someone visits the application URL when the **Family Pre-application** is not enabled |

4. Save.

# Terms & Locations

Use **Terms & Locations** to configure which **Program Terms** parents/guardians can apply to, the dates your agency accepts applications and location and site information for **Family Pre-application**.

1. Go to **ChildPlus Desktop >> Setup >> Module Setup >> Family Pre-application >> Terms & Locations**.
2. Select an agency.
3. Select the correct **Program Term**.
4. Complete the fields.

| Field | Description |
|---|---|
| Current Options | |
| Allow families to apply online for this program term | Select this option to allow parents/guardians to apply online for the selected **Program Term** |
| Allow online applications between ___ and ___ | Specify the date range when the online application is available for parents/guardians |
| Parent Friendly Name for this Program Term | Enter a user-friendly name for the **Program Term** in each applicable language<br><br>For example, **Head Start Program** |
| Parent Friendly Description | Enter a user-friendly description for the **Program Term** in each applicable language<br><br>For example, **Free Preschool for Children Ages 3-5** |
| Location Preferences | |
| Allow families to specify location preferences | Select this option to allow parents/guardians to choose which site location they want to apply for. Locations are listed on a map so that parents/guardians can see their proximity to their home address<br><br>Preview the application to verify that each site displays accurately on the map. If the sites are not accurate, confirm that each site is using the correct post office delivery address<br><br>Configure site addresses in **ChildPlus Desktop >> Setup >> Agency Configuration >> Agency Info >> Sites** |

| Field | Description |
| --- | --- |
| Specify which sites families can select and describe program options offered to help parents choose | Select the correct site to configure the remaining options |
| Allow families to select this site in the list of location preferences | Select this option to make the selected site available as a location preference choice on the **Family Pre-application** |
| Parent Friendly Description of Program Options | Enter a user-friendly description for the selected site's **Program Options** in each applicable language<br><br>For example, **Part Day Preschool** or **Full Day Preschool** |
| Send a notification to the following email address when an online application is submitted with the selected Site as the location preference | Select this option to make ChildPlus automatically email staff at your agency when an application is submitted for the selected site<br><br>You can enter one or more email addresses in this field. Multiple email addresses must be separated by a comma<br><br>For example: jane.doe@example.com, john.doe@example.com<br><br>Configure additional email notification options in **ChildPlus Desktop >> Setup >> Module Setup >> Family Pre-application >>** Email |

5. Save.

# Primary Adult

Use **Primary Adult** to specify what information to collect for a family's **Primary Adult** on the **Family Pre-application**.

1. Go to **ChildPlus Desktop >> Setup >> Module Setup >> Family Pre-application >> Primary Adult**.
2. Select an agency.
3. Complete the fields.

| Field | Description |
|---|---|
| Instructions - English (Optional) | Enter any instructions to display above the **Primary Adult** fields on the application |
| Instructions - Spanish (Optional) | Enter any instructions in Spanish to display above the **Primary Adult** fields on the application |

4. Select the fields to display on the **Family Pre-application**.

| Field |
|---|
| First Name |
| Middle Name |
| Last Name |
| Suffix |
| Nickname |
| Birthday |
| Gender |
| Email Address: ChildPlus checks to ensure that the email address is not already associated with another application |
| Phone Numbers (Mobile, Home and Work) |
| SSN |
| Race |
| Hispanic/Latino |
| English Proficiency |
| Other Language |

| Field |
| --- |
| Other Language Proficiency |
| Highest Grade Completed |
| Employment Status |
| Child's Relationship |
| Custody |
| Lives with Family |
| Provides Financial Support |
| Teen Parent |
| If Teen Parent, Subsidized? |

These fields are required on the **Family Pre-application** and are required for parents/guardians to complete.

If you are using the Spanish **Family Pre-application**, you may need to translate the drop-down choices associated with these fields. You can customize drop-down choices in **ChildPlus Desktop >> Setup >> System Setup >> Customize Dropdown Choices**.

5. Save.

# Address

Use this section to specify what type of address information to collect from a family on the **Family Pre-application**.

1. Go to **ChildPlus Desktop >> Setup >> Module Setup >> Family Pre-application >> Address**.
2. Select an agency.
3. Complete the fields.

| Field | Description |
|---|---|
| Instructions - English (Optional) | Enter any instructions to display above the address fields on the application |
| Instructions - Spanish (Optional) | Enter any instructions in Spanish to display above the address fields on the application |
| Automatically screen applicants by ZIP code | Select this option to only allow applicants with ZIP codes inside of your service area to submit an application<br><br>You can configure ZIP codes for your service area in **ChildPlus Desktop >> Setup >> Agency Configuration >> Agency Info >> Enrollment Options >>** ZIP Codes Served |

4. Select the fields to display on the **Family Pre-application**.

| Field |
|---|
| Is your family experiencing homelessness? |
| Living Address |
| Mailing Address same as Living Address |
| Mailing Address |

These fields are required on the **Family Pre-application** and are required for parents/guardians to complete.

5. Save.

# Secondary Adult

Use **Secondary Adult** to specify what information to collect for a family's **Secondary Adult** on the **Family Pre-application**.

1. Go to **ChildPlus Desktop >> Setup >> Module Setup >> Family Pre-application >> Secondary Adult**.
2. Select an agency.
3. Complete the fields.

| Field | Description |
|---|---|
| Include a section for an additional parent/guardian (secondary adult) | Select this option to display fields for a **Secondary Adult** on the application |
| Instructions - English (Optional) | Enter any instructions to display above the **Secondary Adult** fields on the application |
| Instructions - Spanish (Optional) | Enter any instructions in Spanish to display above the **Secondary Adult** fields on the application |

4. Select the fields to display on the **Family Pre-application**.

| Field |
|---|
| First Name |
| Middle Name |
| Last Name |
| Suffix |
| Nickname |
| Birthday |
| Gender |
| Email Address |
| Phone Numbers (Mobile, Home and Work) |
| SSN |
| Race |

| Field |
| --- |
| Hispanic/Latino |
| English Proficiency |
| Other Language |
| Other Language Proficiency |
| Highest Grade Completed |
| Employment Status |
| Child's Relationship |
| Custody |
| Lives with Family |
| Provides Financial Support |
| Teen Parent |
| If Teen Parent, Subsidized? |

These fields are required on the **Family Pre-application** and are required for parents/guardians to complete.

If you are using the Spanish **Family Pre-application**, you may need to translate the drop-down choices associated with these fields. You can customize drop-down choices in **ChildPlus Desktop >> Setup >> System Setup >> Customize Dropdown Choices**.

5. Save.

# Other Adults

Use **Other Adults** to specify what information to collect for a family's additional adult family members on the **Family Pre-application**.

1. Go to **ChildPlus Desktop >> Setup >> Module Setup >> Family Pre-application >> Other Adults**.
2. Select an agency.
3. Complete the fields.

| Field | Description |
|---|---|
| Include a section for other adults | Select this option to display fields for additional adult family members on the application |
| Instructions - English (Optional) | Enter any instructions to display above the **Other Adults** fields on the application |
| Instructions - Spanish (Optional) | Enter any instructions in Spanish to display above the **Other Adults** fields on the application |

4. Select the fields to display on the **Family Pre-application**.

| Field |
|---|
| First Name |
| Middle Name |
| Last Name |
| Suffix |
| Nickname |
| Birthday |
| Gender |
| Email Address |
| Phone Numbers (Mobile, Home and Work) |
| SSN |
| Race |
| Hispanic/Latino |
| English Proficiency |

| Field |
| --- |
| Other Language |
| Other Language Proficiency |
| Highest Grade Completed |
| Employment Status |
| Child's Relationship |
| Custody |
| Lives with Family |
| Provides Financial Support |
| Teen Parent |
| If Teen Parent, Subsidized? |

These fields are required on the **Family Pre-application** and are required for parents/guardians to complete.

If you are using the Spanish **Family Pre-application**, you may need to translate the drop-down choices associated with these fields. You can customize drop-down choices in **ChildPlus Desktop >> Setup >> System Setup >> Customize Dropdown Choices**.

5. Save.

# Family

Use **Family** to specify what information to collect about an entire family on the **Family Pre-application**.

1. Go to **ChildPlus Desktop >> Setup >> Module Setup >> Family Pre-application >> Family**.
2. Select an agency.
3. Complete the fields.

| Field | Description |
|---|---|
| Include a section for Family Information | Select this option to display fields for family information on the application |
| Instructions - English (Optional) | Enter any instructions to display above the **Family** fields on the application |
| Instructions - Spanish (Optional) | Enter any instructions in Spanish to display above the **Family** fields on the application |

4. Select the fields to display on the **Family Pre-application**.

| Field |
|---|
| Parental Status |
| Relationship to participant(s) |
| Primary Language at Home |
| Another language in addition to English is being acquired or learned at home |
| Number in Household |
| Number in Family |
| Gross Annual Income |
| Is your family receiving cash benefits or other services under the Temporary Assistance for Needy Families (TANF) program? |
| Is your family receiving Supplemental Security Income (SSI)? |
| Is your family receiving services from WIC? |
| WIC ID |

| Field |
| --- |
| Is your family receiving services under the Supplemental Nutrition Assistance Program (SNAP), formerly referred to as Food Stamps? |
| Is at least one parent/guardian an active duty member of the United States military? |
| Is at least one parent/guardian a veteran of the United States military? |
| Include a section for Emergency Contacts: select this option to display fields for emergency contacts |
| Name |
| Relationship |
| Contact |
| Release To |
| Address |
| Phone Numbers (Mobile, Home and Work) |

This field is required on the **Family Pre-application** and is required for parents/guardians to complete.

If you are using the Spanish **Family Pre-application**, you may need to translate the drop-down choices associated with these fields. You can customize drop-down choices in **ChildPlus Desktop >> Setup >> System Setup >> Customize Dropdown Choices**.

5. Save.

# Child (Applicant)

Use this section to specify what information to collect for child applicants on the **Family Pre-application**.

1. Go to **ChildPlus Desktop >> Setup >> Module Setup >> Family Pre-application >> Child (Applicant)**.
2. Select an agency.
3. Complete the fields.

| Field | Description |
|---|---|
| Instructions - English (Optional) | Enter any instructions to display above the **Child (Applicant)** fields on the application |
| Instructions - Spanish (Optional) | Enter any instructions in Spanish to display above the **Child (Applicant)** fields on the application |

4. Select the fields to display on the **Family Pre-application**.

| Field |
|---|
| First Name |
| Middle Name |
| Last Name |
| Suffix |
| Nickname |
| Birthday |
| Gender |
| SSN |
| Race |
| Hispanic/Latino |
| English Proficiency |
| Other Language |
| Other Language Proficiency |
| Primary Health Coverage |

| Field |
| --- |
| Other Coverage |
| Insurance Number |
| Medicaid Eligibility |
| Medicaid Number |
| Doctor / Medical Home |
| Dental Coverage |
| Dental Coverage Number |
| Dentist / Dental Home |
| Does you child have a disability? |
| Is there anything else you want to tell us about your child? (Application Notes): ChildPlus records this information in the Notes field in **Application** |

These fields are required on the **Family Pre-application** and are required for parents/guardians to complete.

If you are using the Spanish **Family Pre-application**, you may need to translate the drop-down choices associated with this field. You can customize drop-down choices in **ChildPlus Desktop >> Setup >> System Setup >> Customize Dropdown Choices**.

5. Save.

# Siblings

Use this section to specify what information to collect for non-applicant children on the **Family Pre-application**.

1. Go to **ChildPlus Desktop >> Setup >> Module Setup >> Family Pre-application >> Siblings**.
2. Select an agency.
3. Complete the fields.

| Field | Description |
|---|---|
| Include a section for siblings | Select this option to display fields for non-applicant children on the application |
| Instructions - English (Optional) | Enter any instructions to display above the **Siblings** fields on the application |
| Instructions - Spanish (Optional) | Enter any instructions in Spanish to display above the **Siblings** fields on the application |

4. Select the fields to display on the **Family Pre-application**.

| Field |
|---|
| First Name |
| Middle Name |
| Last Name |
| Suffix |
| Nickname |
| Birthday |
| Gender |
| SSN |
| Race |
| Hispanic/Latino |
| English Proficiency |
| Other Language |
| Other Language Proficiency |

These fields are required on the **Family Pre-application** and are required for parents/guardians to complete.

If you are using the Spanish **Family Pre-application**, you may need to translate the drop-down choices associated with this field. You can customize drop-down choices in **ChildPlus Desktop >> Setup >> System Setup >> Customize Dropdown Choices**.

5. Save.

# Email

Use this section to configure automatic emails for parents/guardians and staff members when using the **Family Pre-application**.

1. Go to **ChildPlus Desktop >> Setup >> Module Setup >> Family Pre-application >> Email**.
2. Select an agency.
3. Complete the fields.

| Field | Description |
|---|---|
| Send a confirmation email to the primary adult after they submit the application | Select this option to make ChildPlus automatically send a confirmation email to parents/guardians after they submit an application |
| Subject - English | Enter a subject for the **Family Pre-application** confirmation email |
| Subject - Spanish | Enter a subject in Spanish for the **Family Pre-application** confirmation email |
| Body - English | Enter a message for the **Family Pre-application** confirmation email |
| Body - Spanish | Enter a message in Spanish for the **Family Pre-application** confirmation email |

| Field | Description |
| --- | --- |
| When an online application is submitted, send a notification to the following email address | Select this option to make ChildPlus automatically email staff at your agency when an application is submitted for the selected site |
| When an online application that does not have a preferred site is submitted, send a notification to the following email address | Select this option to make ChildPlus automatically email staff at your agency when an application is submitted without a preferred site or location preference<br><br>This option can help you track applications that are not tracked when you've also checked the option that emails you whenever an application is submitted for a specific site |

You can enter one or more email addresses in this field. Multiple email addresses must be separated by a comma. For example: jane.doe@example.com, john.doe@example.com.

4. Save.

# Attachments

Use this section to allow parents/guardians to upload documents when using the **Family Pre-application**.

1. Go to **ChildPlus Desktop >> Setup >> Module Setup >> Family Pre-application >> Attachments**.
2. Select an agency.
3. Complete the fields.

| Field | Description |
|---|---|
| Allow parents/guardians to upload attachments | Select this option to allow parents/guardians to upload documents with **Family Pre-application**<br><br>This options also allows staff members to use Request documents |
| General Instructions - English | Enter any instructions to display above the **Attachments** fields on the application |
| General Instructions - Spanish | Enter any instructions in Spanish to display above the **Attachments** fields on the application |
| Display the following message if a parent visits the document upload page when parent/guardian upload is not enabled | Enter the message to display if someone accesses the application when **Family Pre-application** is not enabled |

4. Select an attachment type.
5. Complete the fields.

| Field | Description |
|---|---|
| Allow parents/guardians to upload this attachment type | Select this option for each attachment type that parents/guardians can upload using **Family Pre-application** |
| Associate with | Select whether to associate the attachment type with the entire family or specific family members |
| Which Family Members | If you elected to associate an attachment type with specific family members, select the family members |
| Service Area | Select the service area to associate the attachment type with |

| Field | Description |
| --- | --- |
| Label - English | Enter a name for the attachment type to display on the application |
| Label - Spanish | Enter a name for the attachment type in Spanish to display on the application |
| Document Specific Instructions - English | Enter any instructions about uploading the attachment type. Any text entered into this field will display below the name of the attachment type on the Upload Documents page |
| Document Specific Instructions - Spanish | Enter any instructions in Spanish about uploading the attachment type. Any text entered into this field will display below the name of the attachment type on the Upload Documents page |

ChildPlus administrators can configure attachment types and add additional attachment types in **ChildPlus Desktop >> Setup >> System Setup >> Customize Dropdown Choices**.

6. Save.

Run **Report 2132 - Participant Attachment Listing** and select **Only show attachments added using the Family Pre-application document upload feature** to check for or view uploaded attachments.

# Transportation Routes

Use **Transportation Routes** to add and manage bus routes. You can track the days that a bus route operates, add riders to bus routes, manage the order in which participants are picked up and dropped off and track additional information, such as arrival and departure locations and times.

## Add a New Route

Use this section to add a new bus route.

## Step 1: Add a New Route

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

1. Go to **ChildPlus Desktop >> Setup >> Module Setup >> Transportation Routes**.
2. Do one of the following:
   - Click **Add New Bus Route** to create a route from scratch
   - Select an existing route and click **Copy this Route** to copy all settings and participants from the route
3. Complete the fields.

| Field | Description |
|---|---|
| Route Name | Enter the name you want to assign to the bus route |
| Pick-up/Drop-off | Select the option that describes the route |
| Destination | Enter the bus route's destination |
| Driver | Enter the name of the bus driver for this route |
| Bus Number | Enter the number of the bus used on this route |
| Departs | Enter the time that the bus departs its point of origin |
| Arrives | Enter the time that the bus arrives at its destination |
| Origin | Enter the location that this bus route will originate from |
| Days this route operates | Select each of the days that the bus route is scheduled to run |

# Step 2: Add Participants to the Route

1. Click **Add Riders** to add participants to the route.
2. Select options to determine which participants to include.
3. Click **Find**.
4. Select participants.
5. Enter the default values for all participants.

> When you specify a default value, ChildPlus will apply the value to each participant that you selected. If a participant's actual information differs from the defaults configured in this step, you can modify their information in the next step.

6. Click **Next**.
7. Optional: Select any participant whose default values you want to change. Modify the participant's information as needed. You can also add notes for each participant, for example, directions or special instructions.
8. Click **Finish**.
9. Use the up and down arrows to modify the order in which participants are picked up/dropped off (if necessary).
10. Save.

> Click **Show on a map** to map the addresses of your participants and sites.

# Add Participants to an Existing Route

To add participants to an existing route in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> Setup >> Module Setup >> Transportation Routes**.
2. Select the route to which you want to add participants.
3. Click **Add Riders**.
4. Select options to determine which participants to include.
5. Click **Find**.
6. Select participants.
7. Enter the default values for all participants.

> When you specify a default value, ChildPlus will apply the value to each participant that you selected. If a participant's actual information differs from the defaults configured in this step, you can modify their information in the next step.

8. Click **Next**.
9. Optional: Select any participant whose default values you want to change. Modify the participant's information as needed. You can also add notes for each participant, for example, directions or special instructions.
10. Click **Finish**.
11. Use the up and down arrows to modify the order in which participants are picked up/dropped off (if necessary).
12. Save.

# Remove Participants from an Existing Route

To remove participants from an existing route in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> Setup >> Module Setup >> Transportation Routes**.
2. Select the route that you want to remove participants from.
3. Click **Delete Riders**.
4. Select the participant(s) you want to remove from the route.
5. Click **Delete Riders**.
6. Save.

# Map a Bus Route

ChildPlus Desktop includes a powerful map generator that maps the addresses of the participants you serve. Using this feature, you can map bus routes, where participants live and the location of each of your sites.

To map a bus route in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> Setup >> Module Setup >> Transportation Routes**.
2. Select the route you want to map.
3. Click **Show on a map**. ChildPlus Desktop generates a map showing the addresses of your participants and sites.

> You can also generate a map using **Report 6001 - Participant Mapping**. Including your sites can be especially useful if you are using this report to plan bus routes or determine where participants live in relation to your sites.

# Delete a Route

To delete a route in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> Setup >> Module Setup >> Transportation Routes**.
2. Select the route you want to delete.
3. Click **Delete Route**.
4. Click **Yes** to confirm that you want to delete the route.