

Help Center

Just a click away!



System 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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System Setup

Use the sections in this module to configure system-wide settings for your agency's specific needs.

Agency-Specific Customizable Fields

Use **Agency-Specific Customizable Fields** to create custom fields and track information in various modules throughout ChildPlus.

Family Member

Use **Family Member** to create custom fields in the **Application** module. You can:

- Capture additional family member information not listed in ChildPlus
- Track up to 220 Agency-Specific Fields for family members
- Control which Agency-Specific Fields display for each family member type



This feature is useful if, for example, you only want to track certain information for the children but not the adults in a family or vice versa.

To set up Agency-Specific Fields for family members:

1. Go to **ChildPlus Desktop >> Setup >> System Setup >> Agency-Specific Customizable Fields >> Family Member**.
2. Click the arrow ► next to the [field type](#) you want to add.

Field Type	Description
Text(15)	Text field that can contain up to 15 characters
Text(64)	Text field that can contain up to 64 characters
Numeric	Numeric field that displays up to two decimal places
Date	Date field
Dropdown	Drop-down list with customizable choices Configure drop-down list choices in ChildPlus Desktop >> Setup >> System Setup >> Customize Dropdown Choices >> Family Application - [field name]
Checkbox	Check box
Yes/No Dropdown	Drop-down list with the choices of Yes or No
Notes	Notes field that can contain an unlimited number of characters
Section Label	A label used to group Agency-Specific Fields

3. Complete the [fields](#).

Field	Description
Active	Select this option to activate the field
Field Name	Enter a name for the field. Field names can contain up to 25 characters
 Row #	Enter the row to display the field in
 Item #	Enter the column to display the field in
Child Applicant	Select how to display the field for each family member type. You can select the following:
Child Non-Applicant	<ul style="list-style-type: none"> • Not Used: do not display the field for the family member type • On Screen: display the field in the Application window for the family member type • On Screen and Printed App: display the field in the Application window and on printed applications for the family member type
Adult Applicant	
Adult Non-Applicant	



For more information about row and item numbers, see [Section Labels, Row Numbers and Item Numbers](#) on page 12.

4. Repeat steps 2-3 for each Agency-Specific Field you want to add.
5. Save.

Personnel

Use **Personnel** to create custom fields in the **Personnel** module. You can:



- Capture additional staff member information not listed in ChildPlus
- Track up to 220 Agency-Specific Fields for staff members

To set up Agency-Specific Fields for staff members:

1. Go to **ChildPlus Desktop >> Setup >> System Setup >> Agency-Specific Customizable Fields >> Personnel**.
2. Click the arrow ► next to the [field type](#) you want to add.

Field Type	Description
Text(15)	Text field that can contain up to 15 characters
Text(100)	Text field that can contain up to 100 characters
Numeric	Numeric field that displays up to two decimal places
Date	Date field
Dropdown	Drop-down list with customizable choices Configure drop-down list choices in ChildPlus Desktop >> Setup >> System Setup >> Customize Dropdown Choices >> Personnel - [field name]
Checkbox	Check box
Yes/No Dropdown	Drop-down list with the choices of Yes or No
Notes	Notes field that can contain an unlimited number of characters
Section Label	A label used to group Agency-Specific Fields

3. Complete the [fields](#).

Field	Description
Active	Select this option to activate the field
Your Agency's Name for this Field	Enter a name for the field. Field names can contain up to 25 characters
 Row #	Enter the row to display the field in
 Item #	Enter the column to display the field in



For more information about row and item numbers, see [Section Labels, Row Numbers and Item Numbers](#) on page 12.

4. Repeat steps 2-3 for each Agency-Specific Field you want to add.
5. Save.

Education

Use **Education** to create up to two custom screening tools in the **Education** module. You can track up to 12 Agency-Specific Fields for each screening tool.

To set up Agency-Specific Fields for the **Education** module:

1. Go to **ChildPlus Desktop >> Setup >> System Setup >> Agency-Specific Customizable Fields >> Education**.
2. Complete the [fields](#).

Field	Description
Header	Enter a name for the screening tool. The header can contain up to 15 characters
Active	Select this option to activate the field
Your Agency's Name for this Field	Enter a name for the field. Field names can contain up to 25 characters You can add up to 12 fields per screening tool

3. Save.



Once you configure the screening tool(s), you can enter data in:

- **ChildPlus Online >> Services >> Education >> Screening Results**
- **ChildPlus Desktop >> Services >> Education >> Education Information**

Site Inspections

Use **Site Inspections** to customize the inspection items that display in **Inspections** for each site. You can track up to 50 inspection items.

1. Go to **ChildPlus Desktop >> Setup >> System Setup >> Agency-Specific Customizable Fields >> Site Inspections**.
2. Complete the [fields](#).

Field	Description
Your Agency's Name for this Field	Enter a name for the inspection. Inspection names can contain up to 25 characters

3. Save.



Once you set up the inspection items, you can track dates in **ChildPlus Desktop >> Setup >> Agency Configuration >> Agency Info >> Sites >> Inspections**.

Section Labels, Row Numbers and Item Numbers

Setup >> System Setup >> Agency-Specific Customizable Fields

Use section labels, row numbers and item numbers to control the order in which Agency-Specific Fields display in the **Application** and **Personnel** modules. For example, if you have a set of Agency-Specific Fields that are all related to eligibility, you can create a section called **Eligibility** and group all eligibility-related fields together in it.

Agency-Specific Fields are organized in grid format such as the following:

	Item 1	Item 2	Item 3
Row 1			
Row 2			
Row 3			

- Fields without a **Row** or **Item Number** display in the order listed in the **Field Name** column
- Fields with an assigned **Row** or **Item Number** display below fields without an assigned **Row** or **Item Number**

Example

Use the following as an example of the structure and placement of fields in **Application** for a child applicant and an adult family member.

Field Assignments

Field Name	Row #	Item #	Child Applicant	Adult Non-Applicant
ERSEA Manager Info	1	1	On Screen	Not Used
Application taken by	2	1	On Screen	Not Used
Recruitment	2	2	On Screen	Not Used
Transportation Needed	2	3	On Screen	Not Used
Grantee Info	3	1	On Screen	On Screen
Received UGA Grant	4	1	On Screen	Not Used
Registered Voter	4	2	Not Used	On Screen
Veteran	4	3	Not Used	On Screen

Field Structure

	Item 1	Item 2	Item 3
Row 1	ERSEA Manager Info		
Row 2	Application taken by	Recruitment	Transportation Needed
Row 3	Grantee Info		
Row 4	Received UGA Grant	Registered Voter	Veteran

ChildPlus Output

[ChildPlus Desktop](#)

Child Participant

▼ Agency-Specific Information

ERSEA Manager Info

Application taken by

Pamelia Keane

Recruitment

Friend

Transportation Needed

Yes

Grantee Info

Received UGA grant

No

Adult Family Member

▼ Agency-Specific Information

Grantee Info

Registered Voter

Yes

Veteran

No



Fields with **Item Numbers** greater than **1** may display on the next row, depending on the width of the fields and the width of your application window, browser window or mobile device.

Customize Dropdown Choices

Use **Customize Dropdown Choices** to add, delete, or deactivate the options used in drop-down lists throughout ChildPlus.

Add a Drop-down Choice

To add a drop-down choice to a list in ChildPlus:

1. Go to **ChildPlus Desktop >> Setup >> System Setup >> Customize Dropdown Choices**.
2. Select the drop-down list that you want to add a choice to.
3. Click **Add a Choice**.
4. Enter a code for the new choice.
5. Enter how you want the choice to display in the drop-down list in the **Description** field.
6. Save.

Edit a Drop-down Choice

To edit a drop-down choice in ChildPlus:

1. Go to **ChildPlus Desktop >> Setup >> System Setup >> Customize Dropdown Choices**.
2. Select the drop-down list that contains the choice you want to edit.
3. Select the drop-down choice.
4. Update the **Code** and **Description** fields.
5. Save.



You can only modify drop-down choices with **Yes** in the **Editable** column. Drop-down choices with **No** in the **Editable** column are created by ChildPlus and cannot be edited or deleted. However, they can be deactivated.

Associate an Event Status with Requirements

Use **Customize Dropdown Choices** to configure, for each status, which **Health** and **Education Events** should be considered when ChildPlus evaluates requirements. Once you configure each status, ChildPlus will automatically determine whether or not an **Event** should count towards satisfying a participant's requirements on the PIR.

1. Go to **ChildPlus Desktop >> Setup >> System Setup >> Customize Dropdown Choices**.
2. Select **Status (Health/Education Events)**.
3. Select a status.
4. Check **Consider events with this status when evaluating requirements**.
5. Repeat steps 3 and 4 for each applicable status.
6. Save.

Merge Duplicate Event Statuses

Use **Customize Dropdown Choices** to merge duplicate **Event** statuses or those used to describe the same outcome.

1. Go to **ChildPlus Desktop >> Setup >> System Setup >> Customize Dropdown Choices**.
2. Select **Status (Health/Education Events)**.
3. Select the status that you want to merge away. This status will be deleted after the merge.
4. Click **Merge this status into another status**.
5. Select the status to that you want to merge the status you selected in step 3 into.
6. Click **Merge Statuses**. ChildPlus will delete the status that you selected in step 3 and change any **Events** with the original status to the new status.
7. Save.

Associate Family Services Issues with Services Areas

Use **Customize Dropdown Choices** to determine which **Issues** will be available for each **Service Area** in the **Family Services** module.

1. Go to **ChildPlus Desktop >> Setup >> System Setup >> Customize Dropdown Choices**.
2. Select **Service Area (Family Services)**.
3. Select a **Service Area**.
4. Select each issue to display as a drop-down choice for the selected **Service Area**.
5. Save.



If you add a new choice to the **Issue (Family Services)** drop-down, you must associate it with a **Service Area**.

Deactivate a Drop-down Choice

To deactivate a drop-down choice in ChildPlus:

1. Go to **ChildPlus Desktop >> Setup >> System Setup >> Customize Dropdown Choices**.
2. Select the drop-down list that contains the choice you want to deactivate.
3. Select the drop-down choice.
4. Uncheck the **Active** checkbox. ChildPlus displays **(Inactive)** next to the drop-down choice.
5. Save.



When you deactivate a drop-down choice, it will no longer display as an option in drop-down lists. However, if you deactivate a drop-down choice that is currently selected in a list, ChildPlus will display **(i)** next to the choice.

Delete a Drop-down Choice

To delete a drop-down choice in ChildPlus:

1. Go to **ChildPlus Desktop >> Setup >> System Setup >> Customize Dropdown Choices**.
2. Select the drop-down list that contains the choice you want to delete.
3. Select the drop-down choice.
4. Click **Delete a Choice**.
5. Save.



You can only modify drop-down choices with **Yes** in the **Editable** column. Drop-down choices with **No** in the **Editable** column are created by ChildPlus and cannot be edited or deleted. However, they can be deactivated.

Data Entry Defaults

Use **Data Entry Defaults** to eliminate repetitive data entry keystrokes and let ChildPlus automatically populate information for you. For example, if most of your families share the same area code, then you can configure that area code as a data entry default. Whenever you add a new family, ChildPlus will populate the family's area code with the data entry default.

Data Entry Defaults apply to the **Application** and **Enrollment** modules and can be configured by ChildPlus administrators or created by each user.

Configure Data Entry Defaults for All Users

ChildPlus administrators can use this section to create **Data Entry Defaults** that can be accessed by all users. This option is beneficial because it ensures that all staff are using the same set of defaults.

1. Go to **ChildPlus Desktop >> Setup >> System Setup >> Data Entry Defaults**.
2. Complete each field in each [section](#) that you want to create a default for.

Section	Defaults for...
Family Information	The Family Information section of the Application module
Family Members	Each individual family member added to the Application module
Enrollment	Each participation record in the Enrollment module

3. Save.



When non-admin users see this window, they will have the option to select **Use the default values set up by the Administrator**. The fields will be disabled for editing under this option.

Configure Individual Data Entry Defaults

Use this section to create **Data Entry Defaults** per user. ChildPlus administrators must assign security access for this option to be available for each user.

1. Go to **ChildPlus Desktop >> Setup >> System Setup >> Data Entry Defaults**.
2. Select **Create my own default values**.
3. Complete each field in each [section](#) that you want to create a default for.

Section	Defaults for...
Family Information	The Family Information section of the Application module
Family Members	Each individual family member added to the Application module
Enrollment	Each participation record in the Enrollment module

4. Save.

Participant Groups

Use **Participant Groups** to organize individuals serviced by your agency into distinguishable groups. Assigning individuals to groups can make it easier to track and filter participants in ChildPlus and on reports. You can customize and create as many participant groups as you want. Once you create a participant group, you can associate a flag with it to ensure group members immediately stand out. You can create groups such as the following:

- Program Participation: use to distinguish between full year and partial year participants
- Father Figures: identify fathers/father figures of program participants
- Medication Administration: identify participants who receive medication during the day
- Policy Council: identify individuals who are Policy Council members
- Pregnant Mothers: identify pregnant and expectant mothers

Participant Flags

Participant Flags serve as visual cues that can help you quickly identify certain groups of individuals. When a flag is associated with a **Participant Group** that an individual is part of, ChildPlus displays the flag next to the individual's name in **Services**, on tool tips and on the following reports:

- **Report 1520 - Contact Information**
- **Report 2025 - Enrollment Priority Listing**
- **Report 2110 - Master List of Participants**
- **Report 4015 - Family Participant Groups**

You can also use **Participant Flags** to communicate important information to other users when they click on a flag. For example, you can create a group called **Protection Orders** and add a note to it that says: There is a protection order for this participant. Do not release information to anyone other than the mother.

Add a New Participant Group

To add a new **Participant Group** in ChildPlus:

1. Go to **ChildPlus Desktop >> Setup >> System Setup >> Define Participant Group**.
2. Click **Add New Participant Group**.
3. Enter a name for the **Participant Group**.
4. Select **Flag members of this group** to add a flag. For more information about flags, see [Participant Flags](#) on the previous page.
5. If you added a flag, select a flag color.
6. Click **Add Members** to add individuals to the group.
7. Select each individual to assign to the group.
8. Click **Add**.
9. Select an individual and click **Edit Flag Notes** to add any additional details for the selected individual.
10. Click **OK**.
11. Save.



Individuals can be members of more than one group. You can also add individuals to **Participant Groups** through the **Application** module.

Add a Flag to an Existing Participant Group

To add a flag to an existing **Participant Group** in ChildPlus:

1. Go to **ChildPlus Desktop >> Setup >> System Setup >> Define Participant Group**.
2. Select the **Participant Group** you want to associate a flag with.
3. Select **Flag members of this group**. For more information about flags, see [Participant Flags](#) on the previous page.
4. Select a flag color.
5. Save.

Add Members to an Existing Participant Group

To add members to an existing **Participant Group** in ChildPlus:

1. Go to **ChildPlus Desktop >> Setup >> System Setup >> Define Participant Group**.
2. Select the **Participant Group** you want to add a member to.
3. Click **Add Members**.
4. Select each individual to assign to the group.
5. Select an individual and click **Edit Flag Notes** to add any additional details for the selected individual.
6. Click **Add**.
7. Save.

Deactivate a Participant Group

To deactivate a **Participant Group** in ChildPlus:

1. Go to **ChildPlus Desktop >> Setup >> System Setup >> Define Participant Group**.
2. Select the **Participant Group** you want to deactivate.
3. Uncheck **Active**.
4. Save.

System Preferences


Use **System Preferences** to apply agency-wide data settings to ChildPlus.

General

Use this section to configure general **System Preferences** in ChildPlus.

General

To configure preferences for this section, go to **ChildPlus Desktop >> System Setup >> System Preferences >> General**.

Preference	Description
 Family Application - Minimum Length of Filter Criteria Required to search for a family	<p>Enter the minimum number of characters users must enter when searching for a family member in Application</p> <p>For example, if you set this preference to 5 and are searching for a family with the last name of Appleton, users will be required to enter Apple (the first 5 characters of the name) before you can search for matches</p>
Tools - Poverty Calculator	<p>To configure default values for the Poverty Calculator, enter the amount you want to use as the Poverty Level for a one person family and then enter the amount that you want ChildPlus to add for each additional person in the family</p> <p>Visit HHS Poverty Guidelines for the latest poverty guideline information</p>
ChildPlus Community	Select which features are available to users in the Community menu
Show Forums	Select this option to allow users to access the ChildPlus Feature Request Forum and the My Peers Community Forum
Show Social Media	Select this option to allow users to access ChildPlus Software's social media sites
Attachments	Control what happens to a file once it is attached to a record in ChildPlus
Leave the file in its current folder	Select this option to leave the file in its current folder on your computer

Preference	Description
Move the file to a sub-folder named "Attached"	<p>Select this option to move the file on your computer to folder called Attached. If a folder called Attached does not already exist, ChildPlus will create the folder for you and add it as a sub-folder under the file's original folder</p> <p>For example, if the file was stored in C:\My Documents, ChildPlus will create the sub-folder and move the file to C:\My Documents\Attached</p> <p>If a user does not have permission to create folders on their computer, ChildPlus will not move the file and will leave it in its current location</p>
Delete the file	Select this option to delete the file from it's location on your computer
Does agency operate an American Indian/Alaska Native program?	Indicate if your agency operates an American Indian/Alaska Native program. ChildPlus uses this information for the Eligibility Verification page of the printed family application
No	ChildPlus will check the Counted as part of 10% of maximum for non-AI/AN programs sub-option on the Eligibility Verification page
Yes	ChildPlus will check Counted as part of the 49% of maximum for AI/AN programs Over Income sub-option on the Eligibility Verification page
Blank	ChildPlus will not check either of the Over Income sub-options on the Eligibility Verification page
Duplicate Social Security Numbers	Restrict or allow duplicate Social Security Numbers in ChildPlus



This preference only applies to users who do not have security access to all sites and classrooms in ChildPlus. Users who have access to all sites and classrooms will be unaffected by this preference setting.

PIR System Preferences

To configure preferences for this section, go to **ChildPlus Desktop >> System Setup >> System Preferences >> General >> PIR.**


Preference	Description
Default value for PIR Yes/No questions	Select a default value for Yes/No PIR questions in ChildPlus. You can select: <ul style="list-style-type: none">• Yes• No• Blank
Show red links above fields that impact the PIR	Select this option to show PIR indicators above applicable fields throughout ChildPlus

Enrollment

Use this section to customize how ChildPlus handles your agency's participation records.

Applications

To configure preferences for this section, go to **ChildPlus Desktop >> System Setup >> System Preferences >> Enrollment >> Applications**.

Preference	Description
 When adding a new family, first member should default as:	Select which family member type for ChildPlus to automatically add first whenever a user adds a new family
No Default	Lets the user choose which type of family member they want to add to the family
Child Applicant	Force the user to add a child applicant as the first member of any new family
Primary (Adult)	Force the user to add the primary adult as the first member of any new family
When adding a new family, should Other Adults be included in the Number in Family?	Specify whether ChildPlus should count family members marked as an Other Adult in the Number in Family field By default, this preference is set to Yes in ChildPlus
When adding a new family, should family members that do not live with the family be included in the Number in Family?	Specify whether ChildPlus should count family members that do not live with the family in the Number in Family field By default, this preference is set to Yes in ChildPlus
Do you serve adult participants? (e.g. Expectant Mothers)	Specify whether adults can be added as applicants For example, if you are an Early Head Start program that serves pregnant mothers, then you would want to make it possible for adults to be applicants
Track specific races for multi-racial individuals	Specify whether users can select multiple races for individuals in ChildPlus If you select No , users will be able to set an individual's race as Multi-Racial/Biracial but will not be able to specify the different races

Preference	Description
Track descriptions when Other is selected	Specify whether users must manually enter an individual's race when Other is selected for Race
Application Signatures	Specify whether ChildPlus will display a Verifying Staff signature and date line at the bottom of the Application Eligibility & Enrollment Information page of paper applications printed using Report 2135 - Print Applications



We recommend keeping the default value and adding child applicants first if you are using paper applications specifically designed for **Application**. If you are still entering applications that were filled out on the original paper application form or internal forms used by your agency, you may need to adjust this setting.

Enrolling

To configure preferences for this section, go to **ChildPlus Desktop >> System Setup >> System Preferences >> Enrollment >> Enrolling**.

Preference	Description
When enrolling a participant, should the Enrollment Date be used as the default Entry Date?	<p>Select Yes if you want ChildPlus to automatically use the participant's Enrollment Date as their default Entry Date</p> <p>Users will still have the option of changing the Entry Date before enrolling a participant, however, ChildPlus will automatically populate the Entry Date field with the participant's Enrollment Date</p> <p>If you select No, users will always have to manually enter a date into the Entry Date field</p>
Restrict enrollment by classroom's funding	<p>Specify whether to restrict the number of participants who can be enrolled in a classroom based on the classroom's funded enrollment</p> <p>This option prevents users from enrolling participants in a classroom once the classroom's funded slots have been filled</p>

Eligibility

To configure preferences for this section, go to **ChildPlus Desktop >> System Setup >> System Preferences >> Enrollment >> Eligibility**.

Preference	Description
Also show the CACFP Status on the Poverty Level Calculator	Check this checkbox to make each participant's CACFP Status display on the Poverty Calculator

Data History Log

To configure preferences for this section, go to **ChildPlus Desktop >> System Setup >> System Preferences >> Data History Log**.

Preference	Description
Data History Log - Track changes made to records?	Select this option to use the Data History Log to track changes made to records
Data History Log transactions should be kept for ___ days (maximum 365 days)	Enter the number of days for ChildPlus to save changes in the Data History Log
Track changes for selected modules	Select each module to track changes for

Attendance

Use this section to customize how ChildPlus handles your agency's attendance records.



Entry Express


To configure preferences for this section, go to **ChildPlus Desktop >> System Setup >> System Preferences >> Attendance >> Entry Express**.

Preference	Description
When a classroom is set to Open, the participants' Statuses should default using the following	
Participants who normally participate	<p>Select the attendance code for ChildPlus to automatically assign to participants who normally participate</p> <p>ChildPlus determines normal participation based on the Participation Days and Meals information stored for each participant in the Enrollment module</p> <p>Select blank to prevent ChildPlus from automatically assigning a status. If you select blank, users will have to manually set the status of each participant</p>
Participants who normally do not participate	<p>Select the attendance code for ChildPlus to automatically assign to participants who do not normally participate</p>
Prior to participant's Entry date (or if blank)	<p>Select the attendance code for ChildPlus to automatically assign to participants if you take attendance prior to their actual Entry Date</p>
Default the classroom status to Open	<p>Select this option for ChildPlus to always default the Classroom Status to Open</p>
Default the scheduled meals when participant is marked Present	<p>Select this option for ChildPlus to automatically count each participant as having been served a meal or snack (if one is normally served in the classroom)</p> <p>To make data entry staff manually check each meal served, leave this option blank</p>

Attendance Scanning

To configure preferences for this section, go to **ChildPlus Desktop >> System Setup >> System Preferences >> Attendance >> Attendance Scanning**.

Preference	Description
If a child is not checked in, default his attendance as	<p>Select the attendance code for ChildPlus to automatically assign to participants who are not checked in via Attendance Scanning</p> <p>For example, if you have a classroom with 10 participants in it and nine of those participants were checked in using Attendance Scanning on a specific date. This status would apply to the one participant who was not checked in that day</p>
When participants are checked in, mark all of their scheduled meals as served	<p>Automatically mark all participant's meals for the day as served. Only select this option if your agency is not going to use Attendance Scanning to track meals. If you select this option, Meals will not be available in the Attendance Scanning module</p> <p>If a participant arrived late or left early and was not served a meal, you will have to manually remove the meal in their attendance record for the day in Entry Express >> Attendance</p>
 Mark a participant Tardy if they check in ___ minutes or more after the classroom begin time	Automatically mark a participant as Tardy if they check in ___ minutes after the classroom's Begin Time . To use this option, you must specify the number of minutes to wait until a participant is marked as Tardy
 Mark a participant as Left Early (or Tardy/Left Early if they were also Tardy) if they check out ___ minutes or more before the classroom end time	Automatically mark a participant as Left Early if they check out ___ minutes before the classroom's End Time . To use this option, you must specify the number of minutes before the classroom End Time to wait until a participant is marked as Left Early

Preference	Description
 Mark a participant as Late Pickup (or Tardy/Late Pickup if they were also Tardy) if they check out ___ minutes or more after the classroom end time	Automatically mark a participant as Late Pickup if they check out ___ minutes after the classroom's End Time . To use this option, you must specify the number of minutes after the classroom End Time to wait until a participant is marked as Late Pickup



ChildPlus administrators can configure a classroom's **Begin** and **End Times** in **ChildPlus Desktop >> Setup >> Agency Configuration >> Program Info >> Classrooms >> [Operating Days and Hours](#)**.




Staff Time Clock


To configure preferences for this section, go to **ChildPlus Desktop >> System Setup >> System Preferences >> Attendance >> Staff Time Clock**.

Preference	Description
Enable Staff Time Clock	Select this option to turn on the Staff Time Clock
Employees will...	Specify how staff members should record their hours. They can either: <ul style="list-style-type: none"> • Check in and out through Attendance Scanning or through Check Me In / Out on the Gear Menu or • Manually enter their hours using My Timesheet on the Gear Menu
Lock time clock records prior to...	Use this option to lock time clock records prior to a specified date

Attendance App

To configure preferences for this section, go to **ChildPlus Desktop >> System Setup >> System Preferences >> Attendance >> Attendance App**.

Preference	Description
Enable Access to Attendance App	Select this option to turn on the Attendance App
Enable the "Parent Check In" feature	Select this option to allow parents/guardians to check their children in/out
Record the parent's signature when a participant is checked in or checked out	Record parent/guardian signatures when they drop off/pick up their children
 Mark a participant as Tardy if they check in ___ minutes or more after the classroom begin time	Automatically mark a participant as Tardy if they check in ___ minutes after the classroom's Begin Time . To use this option, you must specify the number of minutes to wait until a participant is marked as Tardy
 Mark a participant as Left Early (or Tardy/Left Early if they were also Tardy) if they check out ___ minutes or more before the classroom end time	Automatically mark a participant as Left Early if they check out ___ minutes before the classroom's End Time . To use this option, you must specify the number of minutes before the classroom End Time to wait until a participant is marked as Left Early
 Mark a participant as Late Pickup (or Tardy/Late Pickup if they were also Tardy) if they check out ___ minutes or more after the classroom end time	Automatically mark a participant as Late Pickup if they check out ___ minutes after the classroom's End Time . To use this option, you must specify the number of minutes after the classroom End Time to wait until a participant is marked as Late Pickup
Only allow meals to be recorded for a participant that is checked in at the time the meal is recorded	Require that participants be checked in on the Attendance App before you can record a meal for them. If you leave this option unchecked, meals can be recorded on the Attendance App for participants who are not checked in but who have an Attendance status of Present, Tardy, Left Early or Tardy/Left Early

Preference	Description
When participants are checked in, mark all of their scheduled meals as served	Automatically check all meals for participants when they are checked in. If you select this option, you must manually uncheck each meal that was not eaten by each participant
 Require meals to be counted at the point of service. Do not allow meals to be records more than ___ minutes before the meal begin time or more than ___ minutes after the meal end time	<p>Require that meals be counted at the point of service</p> <p>For example, you can set this option up so that meals are not counted if you attempt to record them five minutes before or five minutes after the meal's regularly scheduled Begin and End Times</p>



ChildPlus administrators can configure a classroom's **Begin** and **End Times** in **ChildPlus Desktop >> Setup >> Agency Configuration >> Program Info >> Classrooms >> [Operating Days and Hours](#)**.

ADA

To configure preferences for this section, go to **ChildPlus Desktop >> System Setup >> System Preferences >> Attendance >> ADA**.

Preference	Description
Present	By default, ChildPlus will count these attendance codes as Present when calculating ADA and attendance percentages on reports
Present Offsite	
Tardy	
Left Early	
Tardy and Left Early	
Virtual	
Late Pickup	
Tardy and Late Pickup	
Absent	By default, ChildPlus will count these attendance codes as Absent when calculating ADA and attendance percentages on reports
Excused	
Unexcused	
Best Interest Day	Select how you want attendance counts on these days to count towards your ADA and attendance percentages
Not Scheduled	
No Class	

Locking





The **Lock Attendance Records** preference helps prevent attendance records from being modified after CACFP reimbursement counts have been submitted.

To configure preferences for this section, go to **ChildPlus Desktop >> System Setup >> System Preferences >> Attendance >> Locking**.

Preference	Description
Lock Attendance Records	Select this option to enable locking attendance records
Automatically on every _ ___ Lock the previous week's attendance records	Select this option if you close out attendance on a specific day each week For example, if you select Tuesday, the previous week's records will be locked on Tuesday of each week
Automatically on this day of every month: ___ Lock the previous month's attendance records	Select this option if you close out attendance on a specific day of each month If you set this option to 10, ChildPlus will lock your previous month's attendance records on the 10th day of each month For example, on November 10th, ChildPlus will lock all of the attendance records for October
Automatically lock attendance records that are more than ___ days old	Select this option to lock attendance records that are more than a certain number of days old For example, if you lock records that are more than 30 days old, then users will only be able to add and edit records that have a date within the last 30 days
Prior to a specific date	Select this option to lock attendance records prior to a specific date For example, if you enter April 30th, then users will not be able to add or edit attendance for any date prior to April 30th

Migrant

To configure preferences for this section, go to **ChildPlus Desktop >> System Setup >> System Preferences >> Migrant**.

Preference	Description
 Track Agricultural Income	<p>Select this option to allow users to indicate whether a source of income is from agricultural work</p> <p> When this option is selected, ChildPlus adds an Ag income column to the Family Income section of the Application module. Users can then choose whether a source of income is agricultural. If it is, ChildPlus will count it in the Agricultural income totals</p>
Track Agricultural Activities	<p>Select this option to track the primary crop and activity performed along with the each income source for a family</p> <p>When this option is selected, ChildPlus adds an Agricultural Activity column to the Family Income section of the Application module</p>
Track Migrant and Seasonal Eligibility	<p>Select this option to allow users to indicate whether a participant's eligibility is migrant or seasonal</p> <p> When this option is selected, ChildPlus adds an M/S Eligibility field to the Eligibility section of the Enrollment module</p>
Track Migrant and Seasonal Initial Enrollment Status	<p>Select this option to allow users to indicate whether a participant's initial enrollment status was newly enrolled or re-enrolled. ChildPlus uses this information so it knows how to report participants for the first month of their enrollment</p> <p> When this option is selected, ChildPlus adds an Initial M/S Enrollment Status field to the Eligibility section of the Enrollment module</p>
Record previous addresses at the time the application is added	<p>Select this option to allow users to record previous addresses where the family lived while adding an application</p>

Preference	Description
Show the 2280 - Migrant and Seasonal Enrollment Report	<p>Select this option to allow users to access Report 2280 - Migrant and Seasonal Enrollment Report</p> <p>This report tracks Migrant and Seasonal enrollment and can be used to submit monthly enrollment information to the Head Start Enterprise System</p>
Only count participants who were enrolled on the last day that services were provided for the reporting month	<p>Select this option for ChildPlus to include participants who were enrolled for at least one day during the month for which the report is run</p> <p>For example, if the Last Day of Services Provided is 10/25/22, then the report will count any participant who was enrolled for at least one day between 10/1/22 and 10/25/22</p>
Count participants who were enrolled for at least one day during the reporting month	<p>Select this option for ChildPlus to count any participant who was enrolled for one day during the reporting month</p> <p>When this option is selected, Report 2280 - Migrant and Seasonal Enrollment Report will count every participant who was enrolled on the date you enter in the Last day of services provided field, regardless of whether the participant is still enrolled</p>



These fields will also be available when you add a new family to ChildPlus.



If your agency has users who only work with non-migrant programs (for example, Head Start or Early Head Start), you can either have your non-migrant users leave the **Ag** income choice blank or you can disable their security privileges to this field in **ChildPlus Desktop >> Setup >> Security >> [User Security Groups](#)**.

In-Kind

The **Lock in-kind transactions** preference helps prevent In-Kind totals from changing after they have been submitted.

To configure preferences for this section, go to **ChildPlus Desktop >> System Setup >> System Preferences >> In-Kind**.

Preference	Description
Lock in-kind transactions	Select this option to enable locking In-Kind transactions
Automatically on this day of every month: ____ Lock the previous month's in-kind transactions	Select this option if you close out In-Kind transactions on a specific day of each month If you set this option to 10, ChildPlus will lock your previous month's transactions on the 10th day of each month For example, on November 10th, ChildPlus will lock all of October's In-Kind transactions
Automatically lock in-kind transactions that are more than ____ days old	Select this option to lock In-Kind transactions that are more than a certain number of days old For example, if you lock transactions that are more than 30 days old, then users will only be able to add and edit transactions that have a date within the last 30 days
Prior to a specific date	Select this option to lock In-Kind transactions that occur prior to a specific date For example, if you enter April 30th, then users will not be able to add or edit transactions for any date prior to April 30th. In addition, users will only be able to add new transactions that have a date that is on or after April 30th

Notes

To configure preferences for this section, go to **ChildPlus Desktop >> System Setup >> System Preferences >> Notes**.

Preference	Description
Notes Fields - Date/Time/User Stamp Options	<p>Select each stamp option to include when a user clicks the time stamp icon above a Notes field</p> <p>For example, if you select Date, Time and User's Initials, then ChildPlus will output: 6/1/22 12:00 JAD</p> <p>If you select Date, Time, User's Name (First Last) and User's Title, then ChildPlus will output: 6/1/22 12:00 Jane Doe Family Services Worker</p>
Notes Fields - Quick Notes Setup	<p>The Quick Notes feature allows users to enter notes created from shorthand for the words and phrases typed most often. Quick Notes automatically converts shorthand into the full words and phrases that users specify</p> <p>For example, if you frequently type "My next home visit is scheduled for", you can make its shorthand abbreviation "NHV". Whenever you enter "NHV" into a Notes field, ChildPlus will convert it to "My next home visit is scheduled for"</p> <p>Quick Notes defined in this section are available to all users. Users can also define their own Quick Notes</p>

Configure Global Quick Notes

Create **Quick Notes** that can be used by all users at your agency.

1. Go to **ChildPlus Desktop >> Setup >> System Setup >> System Preferences >> Notes >> Notes Fields - Quick Notes Setup**.
2. Click in the **When I type** column.
3. Enter a shorthand abbreviation.
4. Click in the **Change it to** column.
5. Enter the text that you want ChildPlus to convert the shorthand abbreviation to.
6. Click **OK**.
7. Repeat steps 2-6 for each Quick Note you want to create.
8. Save.



Any **Quick Note** that a user creates will override the global **Quick Note**.

State Specific

To configure preferences for this section, go to **ChildPlus Desktop >> System Setup >> System Preferences >> State Specific**.

Preference	Description
CDD-801A - Activate CDD-801A handling?	Select whether to track your agency's CDD-801A data in ChildPlus
If a child has a Race that is not valid for the CDD-801A (Hispanic, Unspecified or Other), the system should count the child as ____	Select the race for ChildPlus to automatically count the participant towards if their Race (PIR) field is set to Unspecified or Other
CD-7617 - Activate CD-7617 handling?	Select whether to track CD-7617 data in ChildPlus
CD-9400 - Activate CD-9400 handling?	Select whether to track CD-9400 data in ChildPlus
EESD-9600 - Activate EESD-9600 handling?	Select whether to track EESD-9600 data in ChildPlus
Immunization Export - Activate handling?	Select whether to enable Report 7500 - California Immunizations Registry Export

Fees

To configure preferences for this section, go to **ChildPlus Desktop >> System Setup >> System Preferences >> Fees**.

Preference	Description
Enable Fee Tracking	Select this option to enable fee tracking

Email

To configure preferences for this section, go to **ChildPlus Desktop >> System Setup >> System Preferences >> Email**.

Preference	Description
Enable options for sending automatic emails from the To-Do List and Dashboard modules	Select this option to enable email notifications from the To-Do List and Dashboard
Privacy	
Show the individual's name using this format	Select how to display each user's name when sending emails
Show the individual's ChildPlus ID	Select whether display each user's ChildPlus ID when sending emails

Dashboards

To configure preferences for this section, go to **ChildPlus Desktop >> System Setup >> System Preferences >> Dashboards**.

Preference	Description
Highlight values below/above	<p>Enter the threshold for each Dashboard indicator. Values that do not meet the threshold will be highlighted on the Dashboard</p> <p>To learn about each indicator and the default thresholds in ChildPlus, see Dashboard Indicators.</p>

ZIP Code Configuration

ZIP Code Configuration provides a way to help make data entry more efficient and accurate in ChildPlus Desktop. ChildPlus administrators can configure the city, state and county associated with each ZIP code in your area. When the **ZIP Code Lookup** feature is enabled, ChildPlus Desktop will automatically populate the city, state and county fields when staff members enter a ZIP code during data entry.

To configure ZIP codes in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> Setup >> System Setup >> ZIP Code Configuration**.
2. Select **Turn on ZIP Code Lookup**.
3. Use **Click here for the United States Postal Service ZIP code lookup** to search for ZIP codes by address, city or company.
4. Click the first row of the table.
5. Enter a ZIP code and the associated city, state and county.



If the same ZIP Code is used for more than one city or county, add a new entry for each combination. During data entry, if a user enters a ZIP code with more than one city or county associated with it, ChildPlus will display a list of choices.

6. Repeat steps 4-5 for each additional ZIP code you want to add.
7. Save.