Help Center

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Prepare for Next Program Term

e-book

ChildPlus
Software

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Prepare for Next Program Term

Complete the following tasks in the order below to prepare your system for another program term.

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- **Step 5**: Purge Data

Additional tasks:

- Purge In-Kind
- Fees Rollover Utility

Create an Archive

Create an archive of your data before a major database change or before or after submitting your PIR. This will preserve your data and questions related to the submitted year's PIR form. Without an archived copy of your data, you may not be able to review a complete history of the data you reported.

To create an archive of your database in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> Setup >> Database Utilities >> Manage Archive and Training Databases**.
2. Click **Create Archive/Training Database**.
3. Select **Archive**.
4. Enter a name for the archive database. Archive names can only contain numbers, letters and underscores. The first character of the archive name must begin with a letter. ChildPlus appends the current date to the end of the archive database name.
5. Complete the remaining fields as needed.
6. Click **OK**.

> We recommend that you create regular archives of your database. Each time you create an archive, a copy of your database is created. You are limited to creating a maximum of 20 archive/training databases. Contact us to purchase additional space.

Add a New Program Term

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

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

Field	Description
Program Term Name	Enter a new name for the **Program Term**
Active	ChildPlus checks this field when you add a new **Program Term**. Leave this field checked if you want the **Program Term** to be active. Active **Program Terms** are available for selection in drop-down lists throughout ChildPlus Uncheck this field to inactivate a **Program Term**. Inactive **Program Terms** are not available for selection in drop-down lists throughout ChildPlus
Locked	Select to locks the **Program Term** Once a **Program Term** is locked, you will no longer be able to edit data associated with it. This includes data in the **PIR** module as well as data in other modules, including **Enrollment**, **Family Services**, **Health**, **Immunizations** and **Pregnancy**. This field is automatically unchecked when you add a new **Program Term**
School Year	Select the **School Year** that you want to associate with the **Program Term**
Funded Enrollment	Enter the number of participants that this **Program Term** is funded for
Begin Date	Enter the date the **Program Term** begins
End Date	Enter the date the **Program Term** ends

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

7. Select a **School Year** to associate the **Program Term** with a **School Year**. You must complete this step before you can save the **Program Term**. If the **School Year** you want to associate with the **Program Term** is not in the drop-down list:
   1. Click **Add a School Year**.
   2. Enter the **Begin Year** and **End Year** dates. These fields cannot be empty.
   3. ChildPlus defaults the name from the **Begin Year** and **End Year** fields. Change the name as needed.
   4. Click **OK**.
8. Save.

What is the difference between the Rollover Utility and the Closeout Program Term Utility?

Rollover Utility	Closeout Program Term Utility
Used BEFORE a new **Program Term** or school year BEGINS.	Used AFTER **Program Term** or school year ENDS.
Used when you are getting ready for enrollment to create new participation records for both your returning and transitioning participants.	Used to mark large groups of participants as having completed the **Program** or **Program Term**.

Rollover Utility

You can use the **Rollover Utility** in ChildPlus Desktop to:

- Determine which participants are eligible to return to the program they are currently in
- Determine which participants will need to transition to another program
- Create new participation records for both returning and transitioning participants
- Update new participation records with the correct information
- Update information on existing participation records

To get started using the **Rollover Utility**, run **Report 2030 - PNPT Rollover** to generate lists of participants who are either transitioning to another **Program** or are eligible to return to the same **Program**. This report can help you as you perform the rollover process.

Step 1: Select Participants to Roll Over

Specify the participants you want to roll over to the next **Program Term**. New participation records will be created for each eligible participant.

> New **Program Terms** must be created before you can assign participants to them and cannot be created in the **Rollover Utility**. For more information, see Add a New Program Term on page 6.

To roll over participants:

1. Go to **ChildPlus Desktop >> Setup >> Data Utilities >> Prepare for Next Program Term >> Rollover Utility**.
2. Click **OK** to start the **Rollover Utility**.
3. Select the **Current Program Term** the participants you want to roll over are associated with.
4. Select one of the following options:
   - **returning to**: mark participants as returning to the same **Program**
   - **transitioning to**: mark participants as transitioning to another **Program**
5. Select the **Program Term** that the participants will be returning or transitioning to as their **New Program Term**.
6. Enter the cut-off age and **School Year Cut-off Date** that you want to use to determine age eligibility.

Participants who are younger than this age on or before the **School Year Cut-off Date** will be eligible to return for the next **Program Term**. If participants are transitioning, they will need to be older than this age on the **School Year Cut-off Date**.

7. Select the current enrollment status of the participants who are returning or transitioning.

When using the **Rollover Utility**, it is usually easier to work with smaller groups of participants. We recommend that you run this utility for only one site at a time until you are familiar with the process.

Step 2: Determine How Participants' Records Will Roll Over

Specify the information that you want each of the new records to contain.

1. Complete the fields for each **Current Status** listed. ChildPlus Desktop groups the records of the participants you are rolling over by their **Current Enrollment Status**.

Field	Description
New Status	The enrollment status that you want to assign to the participants you are rolling over
New Status Date	The enrollment status date that you want to assign to the participants you are rolling over. This will be each participant's enrollment status date in their new participation record
New Application Status	The application status that you want to assign to the participants you are rolling over. This will be each participant's application status in their new participation record
Select Fields to be Copied	The field(s) that you want copied from the participant's current participation record into their new one. You can choose from the following fields: • Application Date • CACFP (Date, Income, Per, Status) • California Information • Education Assessments (Dates and Scores) • Eligibility Criteria (Questions, Answers, Points) • Eligibility Income (Date, Income amount, Status) • Eligibility Notes • Enrollment Notes • Funding • Location Preferences • Needs Assessment and Family Partnership Information • PIR Information (except overrides)
Returning Points	The number of eligibility points you want to carry over from the participant's current participation record. The points value you enter here will automatically be copied into the new participation record

2. Select whether you want to assign the participants to the same **Agency**, **Site** and **Classroom** that they are currently assigned to.
   - **Yes**: ChildPlus Desktop will automatically assign each participant to their current **Agency**, **Site** and **Classroom**
   - **No**: Select their new **Agency**, **Site** and **Classroom** assignments

3. Enter the number of calendar days you want ChildPlus Desktop to use as the cut-off when determining whether or not to increment the participation year. This field must be populated and should contain a value greater than 1.
4. Click **Next Step**.

Step 3: Select Participants to Create New Records

Review and select all of the participants you want to create new participation records for.

1. Review the names of each participant. ChildPlus Desktop will create a new participation record for each participant whose name is checked. Uncheck the checkbox next to each participant's name who you do not want to create a participation record for.
2. Click **Preview** or **Print** to view a list of the participants who will be rolled over.

> 📋 If you need to make any changes to any participant's new record, you can do so in the next step.

3. Click **Next Step**.
4. Click **Confirm** to create new participation records for all selected participants.

Step 4: Modify Individual Records

Modify information for each participant as needed.

1. To modify a participant's new participation record, click their name and make your changes in the sections below **New Participation Record for: [Participant's Name]**.
2. Repeat step 2 for each participant whose record you need to modify.
3. Click **Finish editing records**.
4. Do one of the following:
   - Click **Roll over more individuals** to use the **Rollover Utility** with another group of participants
   - Click **Exit the Rollover Utility** to return to the main window in ChildPlus Desktop

Closeout Program Term Utility

You can use the **Closeout Program Term Utility** in ChildPlus Desktop to:

- Close out your **Program Terms** when the enrollment year ends
- Quickly mark all the participants who were enrolled in a **Program Term** or **Program** as complete
- Assign a **Drop Date** and **Drop Reason** to the records of participants who you are terminating
- Add **Transition Notes** to the records of participants who are transitioning to another **Program**

Closing out your **Program Term** is important because doing so:

- Frees up the licenses of the participants who have been dropped so that you can use them for the next **Program Term**
- Gives you the flexibility of working with either **Returning** or **Transitioning** participants
- Allows you to work with both types of participants at the same time, which is especially helpful if you want to close out returning participants differently than transitioning participants

Step 1: Select the Program Terms, Locations and Participants to Close Out

To close out a **Program Term** in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> Setup >> Data Utilities >> Prepare for Next Program Term >> Closeout Program Term Utility**.
2. Click **OK** to start the **Closeout Program Term Utility**.
3. Select the **Program Term** you want to close out from the **Program Term** list.
4. Select the locations you want to close out by checking each applicable agency, site, classroom and group.
5. Select the participants you want to close out by checking **Those who are returning to** and/or **Those who are transitioning from**.
6. The **Age** and **School Year Cut-off Date** fields should default to the information provided for the selected **Program Term** in **ChildPlus Desktop >> Setup >> Agency Configuration >> Program Info**. **Age** is the that participants must be younger than in order to return to the **Program**.
7. Click **Next Step**.

Step 2: Modify Individual Records

Review and select all of the participants whose records you want to close out.

1. Verify that each of the participants listed is assigned with the correct status (either **Returning** or **Transitioning**). To change a participant's status, click the status in the **Returning** column to change it. Uncheck the checkbox next to each participant's name who you do not want to close out.
2. Complete the fields for each group of **Returning** and/or **Transitioning** participants.

Field	Description

Drop Date	Select one of the following options to determine how ChildPlus Desktop will calculate the participant's drop date:
	
	• Use each participant's classroom end date
	• Use selected date for all participants
	    • Defaults to the last day of the **Program Term**
	    • Enter a different date if needed

Drop Reason	Assigns a **Drop Reason** to each participant in the group ChildPlus Desktop uses this field to calculate question A.16 on the PIR
Completed Program Term	Marks each participant in the group as having completed the **Program Term**
Completed Program	Marks each participant in the group as having completed the **Program**

3. Add comments for transitioning participants (if applicable). To enter comments for:
   - Individual participants: click the **Comments** link in the **Transition** column for each participant
   - Multiple participants: click **Add transition comments for multiple individuals**
4. Click **Closeout records**.
5. Confirm that the number of records is correct then do one of the following:
   - If the number of records is correct, click **Mark as complete** to mark the selected records as complete
   - If the number of records is incorrect, click **Do NOT mark as complete** to return to the previous window and make changes as needed
6. Do one of the following:
   - Click **Yes** to use the **Closeout Program Term Utility** with another group of participants
   - Click **No** to exit the **Closeout Program Term Utility** and return to the main window in ChildPlus Desktop

Purge Data

You can use the **Purge Data** utility in ChildPlus Desktop to permanently delete records that you no longer need in ChildPlus. The **Purge Data** utility purges records by **Program Term** and affects your data in two ways:

- Any family or participant who has a participation record for the **Program Term** you are purging will be removed from all ChildPlus products (ChildPlus Desktop, ChildPlus Mobile and the Attendance App)
- If a family or participant has a participation record for a **Program Term** not being purged, the record will not be removed from ChildPlus and you will still be able to view the purged **Program Term** in the **Enrollment** module (inactivated and available to view only)

Once a **Program Term** has been purged, a list of family members who were purged will be available to print.

> Before using the **Purge Data** utility, we recommend completing **Steps 1-4** of the **Prepare for Next Program Term** process in order. If you purge a **Program Term** before completing the preceding steps in the process, you will delete participants who are eligible to participate next year. For more information, see Prepare for Next Program Term on page 4.

To purge data in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> Setup >> Data Utilities >> Prepare for Next Program Term >> Purge Data**.
2. Click **OK** to confirm that you want to purge data.
3. Select each **Program Term** that you want to purge.
4. Click **Print Purge Report** to print a list all participants and family members whose records will be purged.
5. Click **Purge**.
6. Enter **PURGE** to confirm that you want to purge the records.

> If there are still participants enrolled in the selected **Program Term(s)**, you will not be able to purge the data. You must drop the participants using the **Closeout Program Term Utility** before they can be purged.

7. Click **Purge** to start the process. When the purge is complete, ChildPlus Desktop displays a message confirming completion and creates a log file of the purged participants.

Purge In-Kind

You can use the **Purge In-Kind** utility in ChildPlus Desktop to remove old **In-Kind** transactions and **In-Kind** volunteers from ChildPlus.

Step 1: Purge Transactions

To purge **In-Kind** transactions in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> Setup >> Data Utilities >> Prepare for Next Program Term >> Purge In-Kind**.
2. Enter a date that you want to purge transactions prior to.
3. Click **Purge Transactions**.
4. Enter **DELETE** to confirm that you want to purge the records.
5. Click **Delete**.
6. Click **OK**.

Step 2: Purge Volunteers

To purge **In-Kind** volunteers in ChildPlus Desktop:

1. Enter a date that you want to purge volunteers prior to.

> Enter a date that is far enough in the past to avoid purging recently added volunteers who do not have transactions yet.

2. Click **Purge Volunteers**.
3. Enter **DELETE** to confirm that you want to purge the records.
4. Click **Delete**.
5. Click **OK**.

When the purge is complete, ChildPlus Desktop displays a message confirming completion and adds the following details of the purge to the **In-Kind Purge History** section:

- The date of the purge
- Who deleted the records
- The type of purge
- The date used for the purge
- The number of records deleted

> Once you purge records, they are permanently deleted from all ChildPlus products and cannot be recovered.

Fees Rollover Utility

You can use the **Fees Rollover Utility** to roll over **Fees** balances in ChildPlus Desktop from one **Program** participation record to the next.

Step 1: Select the Fees Information to Roll Over

Specify which **Fees** transactions and information you want to roll over.

1. Go to **ChildPlus Desktop >> Setup >> Data Utilities >> Prepare for Next Program Term >> Fees Rollover Utility**.
2. Select the **Previous Program Term** that you want to roll over **Fees** information for.

> 📝 For example, if you just finished your 2020-2021 **Program Term** and want to roll over outstanding **Fees** balances to the next **Program Term**, then select the 2020-2021 **Program Term** from the **Previous Program Term** list.

3. Select the **New Program Term** that you want to roll outstanding balances from the **Previous Program Term** into.
4. Select the **Fees** information that you want to roll over into the **New Program Term**.

Step 2: Create Adjustment Transactions

Create adjustment transactions to move balances from the **Previous Program Term** to the **New Program Term**.

1. Complete the fields.

Field	Description
Date	The date that you want to assign to the adjustment transaction
Description - Previous Program Term	The **Description** for the adjustment transaction that will be created for the **Previous Program Term**
Description - New Program Term	The **Description** for the adjustment transaction that will be created for the **New Program Term**
Comment - Previous Program Term	The **Comment** for the adjustment transaction that will be created for the **Previous Program Term**
Comment - New Program Term	The **Comment** for the adjustment transaction that will be created for the **New Program Term**

> 📝 ChildPlus Desktop automatically populates the **Description** and **Comment** fields with default text. You can use the default descriptions and comments or enter your own.

2. Click **Next Step**.
3. Review each participant's record. ChildPlus Desktop will create a new adjustment transaction record for each participant whose name is checked. Uncheck the checkbox next to each participant's name who you do not want to create an adjustment transaction record for.
4. Click **Rollover Fees**.
5. Click **Confirm** to create adjustment transaction records for all selected participants.

> 📝 After you confirm, two adjustment transactions are created. One transaction removes the balance from the **Previous Program Term**. The other transaction adds the balance from the **Previous Program Term** to the **New Program Term**.

6. Click **OK** to return to the main window.