Help Center
Just a click away!

Reports

e-book

ChildPlus
Software

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Software

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Reports

Use **Reports** to view and compile data. Each report is designed for a specific purpose and knowing which report to use depends on the type of data you want to see.

Locate a Report

All ChildPlus reports have an assigned number and are grouped by category. You can access reports through the report search feature or by selecting a report from the category listing.

Report Search

Use the report search feature to locate a report by its assigned number. This feature is helpful if you know the report number and want to access it immediately.

ChildPlus Mobile

You can search for a report by name or number in ChildPlus Mobile.

1. Go to **ChildPlus Mobile >> Services >> Reports**.
2. Enter a report number or any part of the report name.
3. Click or tap **Go**.
4. Select the report.

ChildPlus Desktop

To locate a report by number in ChildPlus Desktop:

1. Go to **ChildPlus Desktop**.
2. Enter a report number in the report search field from any window in ChildPlus Desktop.

> As you enter a number in the report search field, ChildPlus will display all reports that match the number. For example, if you enter the number 2, ChildPlus will display all reports that begin with 2.

3. Select the report.

Report Category Listing

Use the report category listing to locate a report. This feature is helpful if you know the category of the report you want to run but do not know the report name or number. Some report categories are combined. For example, **Application** reports display in the **Enrollment** category and **Immunizations** reports display in the **Health** category. Most reports only appear in one category and are listed in numerical order.

[ChildPlus Mobile](#)

To locate a report by category in ChildPlus Mobile:

1. Go to **ChildPlus Mobile >> Services >> Reports**.
2. Click or tap **All Categories**.
3. Select a category.
4. Select the report. Your device's screen resolution determines where you can click or tap on the grid to open the report.

Screen Resolution Width	Visible Columns in the Grid	Action(s)
1023 pixels or less	• Report name • Report number	Click or tap the report name or number to display the report category and description Click or tap any part of the expanded report details to open the report
1024 - 1504 pixels	• Report name • Report number • Report category	Click or tap **More** to display the report description Click or tap any part of the report details to open the report
1505 pixels or more	All columns	Click or tap any part of the report details to open the report

📝 You can click or tap the column headers in the grid to sort the reports.

ChildPlus Desktop

To locate a report by category in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> Reports**.
2. Select a category.
3. Select the report.

Run a Report

Configure the options on the report setup window to decide who and what to display on a report. Each report has default settings that you can use to immediately view data. Clear or edit the default settings as needed. Explore each option on the report setup window to ensure that the data you want to see will display on the report.

Filter Participants

Use participant filters to determine which participants to include on a report. Participant filters display on the left side of the report setup window and display on both standard and grid reports. Filter options must be selected before you can run a report. ChildPlus retains the settings you select until you change them.

Most **Personnel** reports include the option to filter by position. Reports created using **LiveReport** and **LiveMessage** include additional filters. **Module Designer** reports include the same filters used on standard reports.

ChildPlus Mobile

To filter participants in ChildPlus Mobile:

1. Go to **ChildPlus Mobile >> Services >> Reports**.
2. Select a report.
3. Select an option for each applicable filter.

Filter	Description
Program Term	Display participants with a participation record associated with a specific Program Term
Location	Display participants associated with a selected agency, site or classroom
	Click or tap **Options** to arrange locations by region or to include applicants who have not yet been enrolled
	Select **Include Inactive** to include participants from previous Program Terms whose sites and classrooms may be closed

Filter	Description
Enrollment Status	Display participants with a selected enrollment status

Status	Description
New	New applicants who have not been waitlisted, accepted or enrolled
Waitlisted	Applicants whose applications are complete, are eligible for the Program and are waiting to be assigned vacant slots
Accepted	Applicants whose applications are complete, are eligible to participate, have been assigned slots and are waiting to attend class or the first home visit
Enrolled	Participants who have been accepted and attended at least one class for the center-based or family child care option or at least one home visit for the home-based option
Dropped	Participants who were enrolled in your Program, left before the end of the Program Term and do not anticipate returning for the current Program Term
Drop/Wait	Participants who left your Program and anticipate returning for the current Program Term
Drop/Accept	Participants who left your Program and have been accepted back into the Program for the current Program Term
Completed	Participants who made it to the end of the Program or Program Term
Abandoned	Applicants who never enrolled and are no longer eligible for or interested in the Program. They completed an application, but should no longer be included on the waitlist

Filter	Description
⚙ Flag/Group	Display participants from a specific **Participant Group**

Filter	Description
Program Option	Display participants within a specific Program option Use the default selection of **ALL** if your Program only operates with one option
Responsible Staff	Display participants associated with the staff member listed in their records for a selected service area
Custom Filter	Display participants associated with specific custom filters

⚙️ ChildPlus administrators can configure **Participant Groups** in **ChildPlus Desktop >> Setup >> System Setup >> Define Participant Group**.

📝 Some report setup filters allow you to select one or more options. When all options are selected for a filter, the checkbox will contain a blue checkmark. When some but not all options are selected for a filter, the checkbox will contain a blue square.

ChildPlus Desktop

To filter participants in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> Reports**.
2. Select a report.
3. Select an option for each applicable filter.

Filter	Description
Program Term	Display participants with a participation record associated with a specific Program Term
Program Option	Display participants within a specific Program option Use the default selection of **ALL** if your Program only operates with one option
⚙ Group	Display participants from a specific **Participant Group**
Group By Agency	Group data by agency
Group By Region	Group data by region Regions are associated with sites, which can be grouped by location or responsible staff member This option is only available if regions are set up in your database
Agency	Display participants associated with a selected agency
Site	Display participants associated with a selected site
Classroom	Display participants associated with a selected classroom
Responsible Staff	Display participants associated with the staff member listed in their records for a selected service area

> ⚙ ChildPlus administrators can configure **Participant Groups** in **ChildPlus Desktop >> Setup >> System Setup >> Define Participant Group**.

4. Use **Advanced Setup** to apply more than one filter. You can apply additional filters for all settings except **Responsible Staff**.

> 📓 Click **Show Inactive Locations** to include participants from previous program terms whose sites and classrooms may be closed.
>
> When you apply filters using **Advanced Setup**, ChildPlus disables the fields on the report setup window. To enable the fields and remove the filters applied in **Advanced Setup**, uncheck **Use Advanced Setup**.

5. Select each applicable enrollment status.

Status	Description
New	New applicants who have not been waitlisted, accepted or enrolled
Waitlisted	Applicants whose applications are complete, are eligible for the Program and are waiting to be assigned vacant slots
Accepted	Applicants whose applications are complete, are eligible to participate, have been assigned slots and are waiting to attend class or the first home visit
Enrolled	Participants who have been accepted and attended at least one class for the center-based or family child care option or at least one home visit for the home-based option
Dropped	Participants who were enrolled in your Program, left before the end of the Program Term and do not anticipate returning for the current Program Term
Drop/Wait	Participants who left your Program and anticipate returning for the current Program Term
Drop/Accept	Participants who left your Program and have been accepted back into the Program for the current Program Term
Completed	Participants who made it to the end of the Program or Program Term
Abandoned	Applicants who never enrolled and are no longer eligible for or interested in the Program. They completed an application, but should no longer be included on the waitlist

Filter Data

Use data filters to determine what data to include on a report. Data filters display on the right side of the window and are specific to each report. Use data filters to determine which records will appear on a report and include or exclude specific data. ChildPlus retains the settings you select until you change them.

ChildPlus Mobile

To filter data in ChildPlus Mobile:

1. Go to **ChildPlus Mobile >> Services >> Reports**.
2. Select a report.
3. Select an option for each applicable filter.

ChildPlus Desktop

To filter data in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> Reports**.
2. Select a report.
3. Select an option for each applicable filter.

Format a Report

Use report formatting to determine how you want data to display on a report. Report formatting options include **Grouping** and **Report Type**. Use **Grouping** to group participants by location. Use **Report Type** to determine the level of detail to display. Not all formatting options are available for all reports. ChildPlus retains the settings you select until you change them.

ChildPlus Mobile

To format a report in ChildPlus Mobile:

1. Go to **ChildPlus Mobile >> Services >> Reports**.
2. Select a report.
3. Select a **Grouping** option. Data can be grouped by **Agency**, **Site** or **Classroom**.
4. Select a Report Type.

Report Type	Description
Detail	Display participants' names and data
Summary	Displays the sum totals for data and hides participants' names
Worksheet	Displays the report as a form that can be used to collect data manually
Individual	Inserts a page break after each individual participant or family

ChildPlus Desktop

To format a report in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> Reports**.
2. Select a report.
3. Select a **Grouping** option. Data can be grouped by **Agency**, **Site** or **Classroom**.
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Report Type	Description
Detail	Display participants' names and data
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Worksheet	Displays the report as a form that can be used to collect data manually
Individual	Inserts a page break after each individual participant or family

View a Report

Learn how to view a report in ChildPlus.

ChildPlus Mobile

To view a report in ChildPlus Mobile:

1. Go to **ChildPlus Mobile >> Services >> Reports**.
2. Select a report.
3. Click or tap **View**. ChildPlus Mobile displays the report in a new tab.

ChildPlus Desktop

To view a report in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> Reports**.
2. Select a report.
3. Select a viewing option.

Report Type	Viewing Option	
	Preview	View in Grid
Standard	Displays the report	NA
LiveReport	Displays the report	Displays the report in a customizable grid
Grid	Displays the report in print preview You cannot manipulate the report layout or select links when you select this option	Displays the report in a customizable grid

Report Navigation

Use this section to learn how to move through the pages of a report, locate participants or data within a report and ensure that you are viewing the most recent data.

ChildPlus Mobile

Icon/Text	Description
	Toolbar
◀	First page
◀	Previous page
1 of ___	Select a page
▶	Next page
▶	Last page
	Toggle multipage mode: enable continuous scrolling
	Toggle multipage mode: disable continuous scrolling
—	Zoom out
Whole Page	Select a zoom level
+	Zoom in
	Highlight editing fields
	Print the report
	Print the current page of the report
	Export the report to a selected file type
🔍	Search for data in the report

Icon/Text	Description
	Sidebar
‹	Expand the sidebar
›	Collapse the sidebar
⚙	Display export options

ChildPlus Desktop

Icon/Text	Description
I<	First page
<	Previous page
>	Next page
>I	Last page
Go to Page	Go to a specific page in the report
⊖	Zoom out
100%	Select a zoom level
⊕	Zoom in
Save As PDF, Excel, etc.	Export the report to a selected file type
Search	Search for data in the report
Print	Print the report
Refresh	View the most recent data
Close	Close the report
Grid Reports	
Export	Export the report to a selected file type
View in Grid	View the report in a customizable grid
Preview	Preview the report in printed output

View Individuals

Use this option to view data for specific individuals on a report.

ChildPlus Mobile

To display selected individuals on a report in ChildPlus Mobile:

1. Go to **ChildPlus Mobile >> Services >> Reports**.
2. Select a report.
3. Click or tap **Individuals**.
4. Select the individual(s) to display on the report.
5. Click or tap **View**. ChildPlus Mobile displays the report in a new tab.

> To display data for all individuals on a report, click or tap **Close** on the **Individuals** window then click or tap **View** on the report setup window. ChildPlus Mobile opens the report in a new tab.

ChildPlus Desktop

To display selected individuals on a report in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> Reports**.
2. Select a report.
3. Click **Individuals**. ChildPlus Desktop displays individuals based on the filters you selected on the **General** and **Custom Filters** tabs and selects all individuals by default.
4. Select the individual(s) to display on the report.

> Click **All** to uncheck all selected individuals.

5. Click **Preview**.

> When you leave the **Individuals** tab to make changes to the filters on the **General** or **Custom Filters** tabs, ChildPlus Desktop will reset the **Individuals** tab to the default selection of all individuals.

Close a Report

Learn how to close a report in ChildPlus.

ChildPlus Mobile

To close a single report in ChildPlus Mobile, close the tab.

The options for closing multiple tabs depend on your browser and device.

> When you close a report tab, ChildPlus Mobile will remain open in the tab with the report setup window.

ChildPlus Desktop

To close a single report in ChildPlus Desktop, do one of the following:

- Click **X** in the upper right corner of the report setup window
- Click **Close** on the report to return to the report setup window
- Click **X** on the report tab

To close multiple reports in ChildPlus Desktop, right-click a report tab and select one of the following options:

- **Close This Report**
- **Close All Reports**
- **Close All Reports Except This One**

> When you sign out of ChildPlus, all reports automatically close.

Custom Filters

Custom Filters provide a way to create specialized lists of participants and reports. You can use **Custom Filters** to filter participant lists in various parts of ChildPlus on the setup windows for most reports. When you create **Custom Filters** in one location, they can be saved and accessed in filter lists across ChildPlus.

Custom Filters generally consist of four parts: a table name, a field name, a query operator and the data to match. The table and field names tell ChildPlus where to look for data; the query operator tells ChildPlus how to compare the data in the specified field to the data to match; and the data to match tells ChildPlus what it is looking for.

If your search is for incidences where a field name is empty or not empty, the custom filter will only consist of three parts: a table name, a field name and a query operator.

Apply a Custom Filter

Use this section to apply a custom filter to a report. ChildPlus retains the settings you select until you change them.

ChildPlus Mobile

To apply a custom filter to a report in ChildPlus Mobile:

1. Go to **ChildPlus Mobile >> Services >> Reports**.
2. Select a report.
3. Click or tap **Custom Filter**.
4. Select the filter(s) to apply to the report.
5. Select whether to match every filter or any filter. **Match Every Filter (AND)** is selected by default.
6. Click or tap **OK**.

ChildPlus Desktop

To apply a custom filter to a report in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> Reports**.
2. Select a report.
3. Click **Custom Filters**.
4. Select the filter(s) to apply to the report.
5. Select whether to match every filter or any filter. **Match Every Filter (AND)** is selected by default. ChildPlus displays:
   - A count of the total number of filters selected in the tab
   - A summary of the selected filters at the bottom of the window
6. Click one of the following to change how the filter description will display:

   - **Show Details**
   - **Show Summary**

> 📔 The type of description you select is what will display in the report header.

Create a Single Expression Filter

Use this section to create a single expression custom filter.

To create a single expression custom filter in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> Reports**.
2. Select a report.
3. Click **Custom Filters**.
4. Click **Add**.
5. Complete the fields.

Field	Description
Category	Select the category to base the custom filter on
Name	Enter a name for the custom filter
⚙ Group	Select a group to assign the custom filter to If you do not assign the custom filter to a group, ChildPlus will add it to the **ALL** group by default
Filter Expressions	
Table	Select the table where the data to filter is located The available tables are based on the selected category
Field	Select a field The available fields are based on the selected table
Operation	Select a query operator The available query operators are based on the selected field
Value	Select or enter a value The available values are based on the selected query operator To filter on records with blank or missing values (for example, gender is missing from a participant's application), leave this field blank

> ⚙ ChildPlus administrators can configure groups for custom filters in **ChildPlus Desktop >> Setup >> System Setup >> Customize Dropdown Choices >> Custom Filter Group Codes**.

6. Click **Save**, then **Close**. ChildPlus returns to the **Custom Filters** tab.

Example

Use the following as an example of the structure of a single expression custom filter. In this example, the filter generates a list of participants who receive public assistance.

- **Report 2125 - Participant Alphabetical List**
- **Category**: Participants
- **Name**: Public Assistance Income

And/Or	Open ('s	Table	Field	Operation	Value	Close)'s
	0	Enrollment	Income Status Code	EQUALS	Public Assistance	0

Create a Multiple Expression Filter

Use this section to create a multiple expression custom filter. You can use multiple expression filters to search for records that match every expression in the filter using **AND** or any expression in the filter using **OR**. For more information about these query operators, see Additional Query Operators on page 33.

To create a multiple expression custom filter in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> Reports**.
2. Select a report.
3. Click **Custom Filters**.
4. Click **Add**.
5. Complete the fields for the first filter expression.

Field	Description
Category	Select the category to base the custom filter on
Name	Enter a name for the custom filter
⚙ Group	Select a group to assign the custom filter to If you do not assign the custom filter to a group, ChildPlus will add it to the **ALL** group by default
Filter Expressions	
Table	Select the table where the data to filter is located The available tables are based on the selected category
Field	Select a field The available fields are based on the selected table
Operation	Select a query operator The available query operators are based on the selected field
Value	Select or enter a value The available values are based on the selected query operator To filter on records with blank or missing values (for example, gender is missing from a participant's application), leave this field blank

> ⚙️ ChildPlus administrators can configure groups for custom filters in **ChildPlus Desktop >> Setup >> System Setup >> Customize Dropdown Choices >> Custom Filter Group Codes**.

6. Click **Add** to add another filter expression.
7. Select a query operator from the **And/Or** field. These query operators are only available for selection when at least one filter expression has been added.
8. Complete the fields for each additional expression you want to add to the filter.
9. Click **Save**, then **Close**. ChildPlus returns to the **Custom Filters** tab.

Example

Use the following as an example of the structure of a multiple expression custom filter. In this example, the filter generates a list of participants who receive public assistance and live in Atlanta.

- **Report 2125 - Participant Alphabetical List**
- **Category**: Participants
- **Name**: Public Assistance and Lives in Atlanta

And/Or	Open ('s	Table	Field	Operation	Value	Close)'s
	0	Enrollment	Income Status Code	EQUALS	Public Assistance	0
AND	0	Family	Physical City	EQUALS	Atlanta	0

Create a Multiple Expression Filter Using Parentheses

Use this section to create a multiple expression custom filter that uses both **AND** and **OR** operators in the query. Using **AND** and **OR** operators together requires the use of parentheses. Parentheses in queries separate the data and tell ChildPlus which part of the query to execute first. For more information about these query operators, see Additional Query Operators on page 33.

To create a multiple expression custom filter using parentheses in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> Reports**.
2. Select a report.
3. Click **Custom Filters**.
4. Click **Add**.
5. Complete the fields for the first filter expression.

Field	Description
Category	Select the category to base the custom filter on
Name	Enter a name for the custom filter
⚙ Group	Select a group to assign the custom filter to If you do not assign the custom filter to a group, ChildPlus will add it to the **ALL** group by default
Filter Expressions	
Table	Select the table where the data to filter is located The available tables are based on the selected category
Field	Select a field The available fields are based on the selected table
Operation	Select a query operator The available query operators are based on the selected field
Value	Select or enter a value The available values are based on the selected query operator To filter on records with blank or missing values (for example, gender is missing from a participant's application), leave this field blank

6. Click **Add** to add another filter expression.
7. Select a query operator from the **And/Or** field. These query operators are only available for selection when at least one filter expression has been added.
8. Complete the fields for each additional expression you want to add to the filter.

> Be sure to enter the filter expressions that you want ChildPlus to execute as a group in consecutive order.

9. Enter **1** in the **Open ('s** column of the first filter expression in the group.
10. Enter **1** in the **Close)'s** column of the last filter expression in the group.
11. Repeat steps 9-10 for each additional group of filter expressions that you want ChildPlus to execute together.
12. Click **Save**, then **Close**. ChildPlus returns to the **Custom Filters** tab.

Example

Use the following as an example of the structure of a multiple expression custom filter using parentheses. In this example, the filter generates a list of participants who live in Atlanta or Conyers and receive public assistance.

- **Report 2125 - Participant Alphabetical List**
- **Category**: Participants
- **Name**: Lives in Atlanta or Conyers and Receives Public Assistance

And/ Or	Open ('s	Table	Field	Operation	Value	Close)'s
	1	Family	Physical City	EQUALS	Atlanta	0
OR	0	Family	Physical City	EQUALS	Conyers	1
AND	0	Enrollment	Income Status Code	EQUALS	Public Assistance	0

Custom Filter Templates

ChildPlus provides custom filter templates in the **Custom Filter Templates (To Copy)** group that you can use immediately or copy and edit as needed. Use the following table to see the custom filter templates grouped by function.

Function	Custom Filter Name
Age	Actual Age is 4 Years
	Actual Age is 6 Months
	Actual Age is 6 Weeks
	Class Age is 3 Years
CACFP	CACFP Equals Full Reimbursement
Dental	Participant has a Failed Dental Exam
Entry Date	Participant entry date is less than 30 days ago
	Participant entry date is less than 45 days ago
	Participant entry date is less than 90 days ago
	Participant entry date is more than 30 days ago
	Participant entry date is more than 45 days ago
	Participant entry date is more than 90 days ago
Health	Treatment Need but not Received
Hispanic	Participant Race is Hispanic
Immunization	Next Immunization is Due
Income	Eligibility Income is Zero
	Participants who are Over Income
Medicaid	Income Eligible Participants not on Medicaid
Participant Information	Participants Live in Specific City/Town
WIC	Participants Not Receiving WIC

Basic Query Operators

Use query operators to specify the type of information you are looking for when using **Custom Filters**. Use the following table to learn about all of the basic query operators available for custom filters.

> The query operators available for each custom filter depend on the type of information you are filtering on.

Operator	Description
ENDS WITH	Selects records that end with a specific character(s) or number(s)
EQUALS	Selects records containing an exact match for the condition you specify For example, **Gender EQUALS Female** selects only females
GREATER THAN	• Date fields: selects records after the specified date • Numeric fields: selects records greater than the specified amount
GREATER THAN OR EQUAL TO	• Date fields: selects records on or after the specified date • Numeric fields: selects records greater than or equal to the specified amount
IS EMPTY	Selects records in which the selected field is empty
IS NOT EMPTY	Selects records in which the selected field is not empty
LESS THAN	• Date fields: selects records before the specified date • Numeric fields: selects records less than the specified amount
LESS THAN OR EQUAL TO	• Date fields: selects records before or on the specified date • Numeric fields: selects records less than or equal to the specified amount
NOT EQUAL TO	Selects records that do not contain the specified condition For example, **Gender NOT EQUAL TO Female** selects records that are not for females
STARTS WITH	Selects records that start with a specific character(s) or number(s)
IS TODAY	Date fields: selects records with the current date

Operator	Description
IS WITHIN THE LAST X DAYS	Date fields: selects records within the specified number of days and current date
IS WITHIN THE NEXT X DAYS	Date fields: selects records within the specified number of days and current date
IS OVER X DAYS AGO	Date fields: selects records within the specified number of days and current date
CONTAINS	Selects records that contain a specific character(s) or number(s)

Additional Query Operators

These additional query operators control the behavior of custom filters and are helpful when running more than one filter. Use the following table to learn about the additional query operators available for custom filters.

Operator	Description
AND	Use **AND** when using two or more custom filters. **AND** joins two custom filters together and is used in situations where you want your results to match both custom filters; it narrows the number of records returned For example, two custom filters are set up - one is for **Medicaid Eligibility Code EQUALS P – Potentially Eligible** and the other is for **Gender EQUALS Female**. If you join these two custom filters with an **AND** operator, then ChildPlus will return records for individuals who have a Medicaid Eligibility Code of P and whose gender is also female. No males or individuals with a Medicaid Eligibility Code other than P will be returned in your query results
OR	Use **OR** when using two or more custom filters. **OR** joins two custom filters together and is used in situations where you want your results to match one of the custom filters; it broadens the number of records that are returned For example, two custom filters are set up - one is for **Medicaid Eligibility Code EQUALS P – Potentially Eligible** and the other is for **Gender EQUALS Female**. If you join these two custom filters with an **OR** operator, then ChildPlus will return records for individuals who either have a Medicaid Eligibility Code of P or whose gender is female. Males may be returned in your query result if they have a Medicaid Eligibility Code of P
Parentheses ()	Use parentheses to control the behavior of custom filters. They are necessary if you are generating a custom filter that uses both **AND** and **OR** operators. Parentheses separate data and tell ChildPlus which part of the query to execute first