

Help Center

Just a click away!



To-Do List

e-book

ChildPlus
Software



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Table of Contents

To-Do List	4
Assign Access to the To-Do List	5
Calendars	6
Access Privileges and Levels of Requirement	7
Add a To-Do List	8
To-Do List Settings	9
General	9
Sharing	11
Enrollment	12
Family Services	13
Health and Education	15
Immunizations	17
Disability	18
Mental Health	19
Pregnancy	20
Attendance	21
Inspections	23
System-Generated Tasks	24
To-Do List Options	25
Copy Records to the Clipboard	25
Refresh a To-Do List	25
Group by Staff	25
Add an Appointment	26
Delete an Appointment	27
Calendar View	28
Change the Calendar View Format	28
Navigate Through Appointments	28
Select a Date	28
Delete a To-Do List	29

To-Do List

Use the **To-Do List** to:

- Track system-related tasks, such as **Health Events** that are about to expire, follow-ups that need to be completed for absent participants and immunizations coming due
- Set up and assign appointments and reminders for yourself or other users
- Configure ChildPlus to receive automatic emails for tasks and action items

Assign Access to the To-Do List

To assign **Security Groups** access to the **To-Do List**:

1. Go to **ChildPlus Desktop >> Setup >> Security >> User Security Groups**.
2. Select the **Security Group** you want to assign access to.
3. Expand **ChildPlus Desktop**.
4. Right-click **To-Do Lists**.
5. Select a [level of access](#). ChildPlus Desktop will change the icon to correspond with the level of access designated in the legend at the bottom of the window.
6. Save.

Calendars

Configure calendars to use with the **To-Do List**. You can create as many calendars as you want. Once a calendar is created, users can add appointments and reminders to them.

To add a new calendar in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> Setup >> Module Setup >> Calendars**.
2. Click **Add New Calendar**.
3. Enter a name for the calendar.
4. Select the agency to apply the calendar to or select **All Agencies** to apply the calendar to all agencies.



This option is only available if you have more than one agency set up in ChildPlus.

5. Select a level of access to the calendar for each staff member.



To assign a level of access to multiple staff members at once, hold the **Ctrl** or **Shift** keys, select the staff members, select a level of access from the field below the grid and click **Assign**. For more information about levels of access, see [Access Privileges and Levels of Requirement](#) on page 7.

6. Save.



You can also assign access to calendars for individual staff members in **ChildPlus Desktop >> Setup >> Security >> User Security >> Calendars and To-Do List**.

Access Privileges and Levels of Requirement

Access to ChildPlus must be configured by platform:

- ChildPlus Mobile (accessible through any browser)
- ChildPlus Desktop (Windows)
- Attendance App (accessible through any Apple¹, Android² or Kindle Fire³ device)

You can assign the following types of access privileges in ChildPlus:

Access	Description
Full Access	A User Security Group that has been granted full access to a module in ChildPlus can add, change or delete data within the module
View Access	A User Security Group that has been granted view access to a module in ChildPlus can view data within the module but cannot add, change or delete data
No Access	A User Security Group that has been denied access to a module in ChildPlus cannot view, add, change or delete data within the module



Some items will not have all levels of security access.

You can assign the following levels of requirement for fields in ChildPlus:

Requirement	Description
Full Access - Not Required	The field can contain a blank value when the record is updated or saved
Full Access - Recommended	The field can contain a blank value, but ChildPlus will display a warning that the field was not completed when saving
Full Access - Required	The field cannot contain a blank value when the record is updated and the record will not save until the user enters a value



Some fields will not have all levels of requirement.

¹Apple is a trademark of Apple Inc., registered in the U.S. and other countries and regions.

²Android is a trademark of Google LLC.

³Kindle Fire and all related marks are trademarks of Amazon.com, Inc. or its affiliates.

Add a To-Do List

Use this section to create a new **To-Do List**. You can create as many **To-Do Lists** as you want. Each **To-Do List** can include calendars, system-generated tasks or both.

To add a **To-Do List** in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> To-Do List**.
2. Click **Add To-Do List**.
3. Select one of the following options:
 - **Start with a blank To-Do List**: create a **To-Do List** from scratch
 - **Start with a copy of**: copy all settings from an existing **To-Do List**
4. Click **OK**.
5. Configure the [General](#) settings for the **To-Do List**.
6. Complete the [fields](#) in each applicable section.
 - [Sharing](#)
 - [Enrollment](#)
 - [Family Services](#)
 - [Health and Education](#)
 - [Immunizations](#)
 - [Disability](#)
 - [Mental Health](#)
 - [Pregnancy](#)
 - [Attendance](#)
 - [Inspections](#)
7. Click **Save**.



To-Do List Settings

Use this section to configure the **To-Do List** and track tasks for selected modules.

General

Use this section to configure general settings and an email notification schedule for a **To-Do List**.

1. Go to **ChildPlus Desktop >> To-Do List**.
2. Select the **To-Do List** you want to edit.
3. Click **Settings**.
4. Complete the **fields**.

Field	Description
Name	Enter a name for the To-Do List
This is a shared To-Do List	Select this option to allow other staff members to access the To-Do List
Description	Enter a description for the To-Do List . The description can help distinguish between multiple To-Do Lists
 Email this To-Do List	Select this option to send the To-Do List to the email associated with your ChildPlus account Select a frequency at which to email the To-Do List
Also send a copy of each email to	Select this option to send the To-Do List to other staff members Enter each staff member's work email address
If no items are found when the email is to be sent	Select whether to send an email of the To-Do List when no items are found
 Calendars	Select each calendar to include on the To-Do List If you select <Personal Calendars> , select each staff member whose tasks and appointments to include on the To-Do List . If you only want your tasks and appointments included on the To-Do List , select your name only

Field	Description
Modules	<p>Select each module to include in the To-Do List. When you select a module, ChildPlus displays a tab where you can customize the module-related information that will be included on the To-Do List</p> <p>For example, if you want reminders about Health Events that are about to expire, select Health and Education</p>
Show this To-Do List when I sign-in to ChildPlus	Select this option to have ChildPlus automatically display the To-Do List when you sign in to ChildPlus Desktop



ChildPlus administrators can configure staff email addresses in **ChildPlus Desktop >> Management >> Personnel >> General >> Address and Contact** or **ChildPlus Desktop >> Setup >> Security >> User Security >> [Login](#)**.



ChildPlus administrators can:

- Configure calendars in **ChildPlus Desktop >> Setup >> Module Setup >> [Calendars](#)**
- Configure access to personal calendars in **ChildPlus Desktop >> Setup >> Security >> User Security Groups**
- Configure access to agency-created shared calendars in **ChildPlus Desktop >> Setup >> Security >> User Security >> Calendars and To-Do List**

5. Click **Save**.

Sharing

Use this section to share a **To-Do List** with other staff members.

1. Go to **ChildPlus Desktop >> To-Do List**.
2. Select the **To-Do List** you want to share.
3. Click **Settings**.
4. Select **This is a shared To-Do List**.
5. Go to the **Sharing** tab.
6. Select a level of access to the **To-Do List** for each staff member.



To assign a level of access to multiple staff members at once, hold the **Ctrl** or **Shift** keys, select the staff members, select a level of access from the field below the grid and click **Assign**. For more information about levels of access, see [Access Privileges and Levels of Requirement](#) on page 7.

7. Click **Save**.

Enrollment

Use this section to track tasks for **Enrollment** records on a **To-Do List**.

1. Go to **ChildPlus Desktop >> To-Do List**.
2. Select the **To-Do List** you want to edit.
3. Click **Settings**.
4. Select **Enrollment** from the list of modules.
5. Go to the **Enrollment** tab.
6. Complete the **fields**.

Field	Description
Show enrollment records in which the application status is ___ and the application date is more than ___ days ago	Select the application status(es) to display for Enrollment records on the To-Do List and enter a number of days to determine which application dates to include
Only show tasks for enrollment records that meet the following criteria	Select the participants whose data to include on the To-Do List

7. Click **Save**.

Family Services

Use this section to track tasks for **Family Services** records on a **To-Do List**.

1. Go to **ChildPlus Desktop >> To-Do List**.
2. Select the **To-Do List** you want to edit.
3. Click **Settings**.
4. Select **Family Services** from the list of modules.
5. Go to the **Family Services** tab.
6. Complete the **fields**.

Field	Description
Show family service events in which the Closure Expected date is within the next ___ days	Select this option to display Events on the To-Do List with a Closure Expected date within a specified number of days
Show family service actions that are scheduled within the next ___ days	Select this option to display Actions on the To-Do List that are scheduled within a specified number of days
Show family service actions that have a status of	Select this option to display Actions with a specific status on the To-Do List and select the applicable Action status(es)
Show family outcomes assessments that are past due or that are due within the next ___ days	Select this option to display past due or upcoming Family Outcome Assessments within a specified number of days
Only show tasks when the Case Worker for the family service event is	Select the staff member(s) whose tasks will display on the To-Do List If no staff members are assigned to an Event , select the blank option
Only show tasks for these event types	Select the Event Type(s) to display on the To-Do List

Field	Description
Only show tasks for families in which a family member has an enrollment record for	Select the participants whose data to include on the To-Do List
Do not show tasks for events, actions, and assessments that have a Scheduled, Due, Action, or Closure Expected date before	Enter a task cut-off date to exclude records from the To-Do List

7. Click **Save**.

Health and Education

Use this section to track tasks for **Health** and **Education** records on a **To-Do List**.

1. Go to **ChildPlus Desktop >> To-Do List**.
2. Select the **To-Do List** you want to edit.
3. Click **Settings**.
4. Select **Health and Education** from the list of modules.
5. Go to the **Health and Education** tab.
6. Complete the **fields**.

Field	Description
Show required events that are due within the next ___ days	Select this option to display required Events on the To-Do List that are due within a specified number of days
Show open events and actions that are scheduled within the next ___ days	Select this option to display open Events and Actions on the To-Do List that are scheduled within a specified number of days
Show events that will expire within the next ___ days	Select this option to display expiring Events on the To-Do List Enter the number of days that Events are expiring within to display on the To-Do List
Show open events that have a status of	Select this option to display open Events with a specific status on the To-Do List and select the applicable Event status(es)
Show actions that have a status of	Select this option to display Actions with a specific status on the To-Do List and select the applicable Action status(es)
Only show tasks when the agency worker for the event is	Select the staff member(s) whose tasks will display on the To-Do List If no staff members are assigned to an Event , select the blank option
Only show tasks for these events types	Select the Event Type(s) to display on the To-Do List
Only show tasks for individuals who have an enrollment record for	Select the participants whose data to include on the To-Do List

Field	Description
Do not show tasks for events and actions that are required, scheduled, have occurred, or will expire before	Enter a task cut-off date to exclude records from the To-Do List

7. Click **Save**.

Immunizations

Use this section to track tasks for **Immunizations** records on a **To-Do List**.

1. Go to **ChildPlus Desktop >> To-Do List**.
2. Select the **To-Do List** you want to edit.
3. Click **Settings**.
4. Select **Immunizations** from the list of modules.
5. Go to the **Immunizations** tab.
6. Complete the **fields**.

Field	Description
Show immunizations that are due within the next ___ days	Select this option to display Immunizations records on the To-Do List that are due within a specified number of days
Show participants that have a Current Status of	Select this option to display records with a specific status on the To-Do List and select the applicable status(es)
Only show tasks when the responsible staff is	Select the staff member(s) whose tasks will display on the To-Do List If no staff members are assigned to an Event , select the blank option
Only show tasks for individuals who have an enrollment record for	Select the participants whose data to include on the To-Do List
Do not show tasks for immunizations that are due before	Enter a task cut-off date to exclude records from the To-Do List

7. Click **Save**.

Disability

Use this section to track tasks for **Disability** records on a **To-Do List**.

1. Go to **ChildPlus Desktop >> To-Do List**.
2. Select the **To-Do List** you want to edit.
3. Click **Settings**.
4. Select **Disability** from the list of modules.
5. Go to the **Disability** tab.
6. Complete the **fields**.

Field	Description
Include concern activities with a Type of	Select this option to display Concern Activities on the To-Do List and select the Activity Type(s) to display
with a status of	If you elect to display Concern Activities on the To-Do List , select which Activity status(es) to display
Include IEP/IFSPs if the next meeting needs to be completed in ___ days or is past due	Select this option to include IEP/IFSPs with meetings to be completed in a specified number of days
Only show tasks when the responsible staff is	Select the staff member(s) whose tasks will display on the To-Do List If no staff members are assigned to an Event , select the blank option
Only show tasks for individuals who have an enrollment record for	Select the participants whose data to include on the To-Do List

7. Click **Save**.

Mental Health

Use this section to track tasks for **Mental Health** records on a **To-Do List**.

1. Go to **ChildPlus Desktop >> To-Do List**.
2. Select the **To-Do List** you want to edit.
3. Click **Settings**.
4. Select **Mental Health** from the list of modules.
5. Go to the **Mental Health** tab.
6. Complete the **fields**.

Field	Description
Show mental health transactions that are	Select this option to display Mental Health Transactions on the To-Do List and select the Transaction Type(s) to display
and have a status of	If you elect to display Mental Health Transactions on the To-Do List , select which status(es) to display
Show participants that have a treatment status of	Select this option to display Mental Health Transactions with a specific treatment status on the To-Do List and select the applicable status(es)
Only show tasks when the responsible staff is	Select the staff member(s) whose tasks will display on the To-Do List If no staff members are assigned to an Event , select the blank option
Only show tasks for individuals who have an enrollment record for	Select the participants whose data to include on the To-Do List
Do not show tasks for mental health transactions that have a transaction date before	Enter a task cut-off date to exclude records from the To-Do List

7. Click **Save**.

Pregnancy

Use this section to track tasks for **Pregnancy** records on a **To-Do List**.

1. Go to **ChildPlus Desktop >> To-Do List**.
2. Select the **To-Do List** you want to edit.
3. Click **Settings**.
4. Select **Pregnancy** from the list of modules.
5. Go to the **Pregnancy** tab.
6. Complete the **fields**.

Field	Description
Show participants that have an expected delivery date within the next ___ days	Select this option to display Pregnancy records on the To-Do List with a Expected Delivery date within a specified number of days
Only show tasks for individuals who have an enrollment record for	Select the participants whose data to include on the To-Do List
Do not show tasks for pregnancy records that have an expected delivery date before	Enter a task cut-off date to exclude records from the To-Do List

7. Click **Save**.

Attendance

Use this section to track tasks for **Attendance** records on a **To-Do List**.

1. Go to **ChildPlus Desktop >> To-Do List**.
2. Select the **To-Do List** you want to edit.
3. Click **Settings**.
4. Select **Attendance** from the list of modules.
5. Go to the **Attendance** tab.
6. Complete the **fields**.

Field	Description
Show attendance tasks for individuals who have been absent ___ days or more within the last ___ days	Select this option to display Attendance records on the To-Do List for participants with a specified number of absences within the last specified number of days
Show attendance tasks for individuals who have been absent for at least _ ___ consecutive days within the last ___ days	Select this option to display Attendance records on the To-Do List for participants with a specified number of consecutive absences within the last specified number of days
Show attendance tasks for individuals who have been absent more than _ ___ percent of the time they have been enrolled in the program term	Select this option to display Attendance records on the To-Do List for participants with a specified percentage of absences
Show attendance tasks for attendance records that require follow-up	Select this option to display Attendance records on the To-Do List that require follow-up

Field	Description
Only show attendance tasks when the Staff Responsible for the Attendance Alert is	<p>Select the staff member(s) whose tasks will display on the To-Do List</p> <p>If no staff members are assigned to an Event, select the blank option</p>
Only show tasks for enrollment records that meet the following criteria	<p>Select the participants whose data to include on the To-Do List</p>

7. Click **Save**.

Inspections

Use this section to track tasks for **Inspections** on a **To-Do List**.

1. Go to **ChildPlus Desktop >> To-Do List**.
2. Select the **To-Do List** you want to edit.
3. Click **Settings**.
4. Select **Inspections** from the list of modules.
5. Go to the **Inspections** tab.
6. Complete the **fields**.

Field	Description
Show inspections that are due within the next ___ days	Select this option to display Inspections on the To-Do List that are due within a specified number of days
Select the locations for which you would like to receive reminders	Select the locations whose data to include on the To-Do List
Do not show tasks for inspections that are due before	Enter a task cut-off date to exclude records from the To-Do List

7. Click **Save**.

System-Generated Tasks

System-generated tasks are tasks based on the data entered in other modules in ChildPlus, such as **Events**, **Actions** and **Home Visits**. These tasks display as links that you can use to navigate directly to the modules they are associated with in ChildPlus.

To navigate to a system-generated task from the **To-Do List**:

1. Go to **ChildPlus Desktop >> To-Do List**.
2. Select a **To-Do List**.
3. Select the task.
 - In **Calendar View**, do one of the following:
 - Double-click the task
 - Right-click the task and select **Go to Edit Screen**
 - In **List View**, click the task

To-Do List Options

Once you create a **To-Do List**, you can use the options at the bottom of the window to copy records, change how the **To-Do List** displays, print and add appointments.

Copy Records to the Clipboard

You can select items on a **To-Do List** and paste them into another document.

To copy items on a **To-Do List**:

1. Go to **ChildPlus Desktop >> To-Do List**.
2. Select the **To-Do List** with the items you want to copy.
3. If the **To-Do List** is in **Calendar View**, click **Switch to List View**.
4. Do one of the following:
 - Check the checkbox next to each item you want to copy
 - Click **Check All** to select all items on the **To-Do List**
5. Click **Copy the checked records to the clipboard**.
6. Paste the information into any text editor.

Refresh a To-Do List

A **To-Do List** automatically updates when items on it change, including when you:

- Sign in to ChildPlus
- Switch between **List View** and **Calendar View**
- Add, edit or delete an appointment

To manually update a **To-Do List** at any time:

1. Go to **ChildPlus Desktop >> To-Do List**.
2. Select the **To-Do List** you want to update.
3. Click **Refresh**.

Group by Staff

Use this feature to organize all tasks in a **To-Do List** by the staff member responsible for them.

1. Go to **ChildPlus Desktop >> To-Do List**.
2. Select a **To-Do List**.
3. Click **Group by Staff**.





Items not assigned to staff members are listed in an **Unassigned Tasks** group.

Add an Appointment


To add an appointment to a **To-Do List** in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> To-Do List**.
2. Select the **To-Do List** you want to add an appointment to.
3. Click **Add Appointment**.
4. Complete the **fields**.

Field	Description
Description	Enter a description for the appointment
Start time	Enter the date and time the appointment starts
End time	Enter the date and time the appoint ends
Module	Select the module the appointment relates to
All day event	Select this option if the appointment is an all-day event
Calendar	Select the calendar to display the appointment on
 Personal Calendar	Select the staff member whose calendar to display the appointment on
Reminder	Select this option to set a reminder for the appointment Reminders can only be set for Personal Calendars
Notes	Enter any details about the appointment

 When you add an appointment to a **Personal Calendar**, be sure to select the **Personal Calendar** and corresponding staff member(s) in the [To-Do List settings](#). If you skip this step, the appointment will not display on the **To-Do List** after it is refreshed.

5. Click **OK**.

 In **Calendar View**, you can also add an appointment using the following methods:

- Right-click the date you want to add the appointment to and select **Add Appointment**
- Double-click the date you want to add the appointment to

Delete an Appointment

To delete an appointment from a **To-Do List** in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> To-Do List**.
2. Select the **To-Do List** with the appointment you want to delete.
3. Select the appointment.
4. Click **Delete**.
5. Click **Yes** to confirm that you want to delete the appointment.

Calendar View

Use **Calendar View** on a **To-Do List** to quickly select a date and view tasks in multiple calendar formats. You can also use **Calendar View** to navigate through appointments.

Change the Calendar View Format

To change the format of a calendar in a **To-Do List**:

1. Go to **ChildPlus Desktop >> To-Do List**.
2. Select a **To-Do List**.
3. If the **To-Do List** is in **List View**, click **Switch to Calendar View**.
4. Click the drop-down list at the bottom of the window.
5. Select a calendar **format**. ChildPlus will retain your selection each time you sign in until you change it.
 - **Day**
 - **Week**
 - **Work Week**
 - **Month**
 - **Timeline**

Navigate Through Appointments

You can use **Calendar View** on a **To-Do List** to view appointments in order by date and time.

To navigate through appointments on a **To-Do List**:

1. Go to **ChildPlus Desktop >> To-Do List**.
2. Select a **To-Do List**.
3. If the **To-Do List** is in **List View**, click **Switch to Calendar View**.
4. Click **Previous Appointment** or **Next Appointment** on the left and right sides of the calendar.

Select a Date

Use **Calendar View** on a **To-Do List** to quickly navigate to a selected date.

1. Go to **ChildPlus Desktop >> To-Do List**.
2. Select a **To-Do List**.
3. If the **To-Do List** is in **List View**, click **Switch to Calendar View**.
4. Select a date on the calendar in the right sidebar to display the date on the **To-Do List**.



If the **Calendar View** is in **Month** format, ChildPlus will automatically change the **Calendar View** to **Day** format when you select a date from the calendar in the sidebar.

Delete a To-Do List

Use this section to delete a **To-Do List**.

1. Go to **ChildPlus Desktop >> To-Do List**.
2. Select the **To-Do List** you want to delete.
3. Click **Settings**.
4. Click **Delete this To-Do List**.
5. Click **Yes** to confirm that you want to delete the **To-Do List**.