

# Closeout Program Term Utility

## Teaching Strategies Gold Users



If you are a Teaching Strategies Gold user, please make sure that all of your data and reporting for the year has been completed in Teaching Strategies Gold before running this utility.

You can use the **Closeout Program Term Utility** in ChildPlus.net to close out your program terms when the program term or school year ends. Closing out your program terms is important because doing so allows you to free up the licenses of the participants who have been terminated so you can use them for the next program term. Using this utility, you can:

- Quickly mark all the participants who were enrolled in a program term as *complete*.
- Assign a **Termination Date** and **Termination Reason** to the records of participants who you are terminating.
- Add **Transition Notes** (if applicable) to the records of participants who are transitioning to another program.

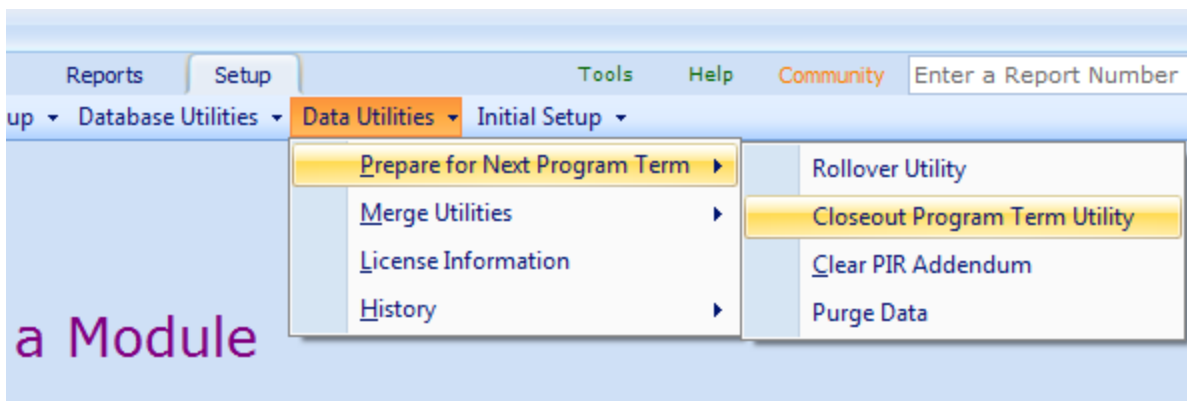
The **Closeout Program Term Utility** gives you the flexibility of working with either **Returning** or **Transitioning** participants. You can also work with both types of participants at the same time, which is especially helpful if you want to close out returning participants differently than transitioning participants. What is the difference between the Closeout Program Term Utility and the Rollover Utility?<sup>1</sup>

## Opening the Closeout Program Term Utility

1. Click on the **Setup** tab
2. Click **Data Utilities** and select **Prepare for Next Program Term**.
3. Click on **Closeout Program Term Utility**.

---

<sup>1</sup>The **Closeout Program Term Utility** is typically used to after a program term or school year ends to mark large groups of participants as having completed the program term. You typically use the **Rollover Utility** when you are getting ready for enrollment to create new participation records for both your returning and transitioning participants.



### Closing out a program term in ChildPlus.net

1. Select the program term you want to closeout from the **Program Term** list.
2. Select the locations you want to closeout by checking each applicable agency, site, classroom, and group.
3. Select the participants you want to closeout by checking **those who are returning to Head Start** and/or **those who are transitioning from Head Start**.
4. Enter the age that participants must be younger than in order to return to Head Start.
5. Enter the birthday cut off for returning participants.
6. Click **Go to Next Step**.
7. Verify that ChildPlus.net assigned each of the participants listed with the correct status (either *Returning* or *Transitioning*). If you want to change a participant's status, you can use the drop down arrow next to the status to change it.



If you do not want to include a participant in the closeout, uncheck the box next to their name.

8. At the bottom of the screen you will see two areas. The first is for the returning participants and the second is for transitioning participants. Complete each of the following **fields** for each group of **Returning** and/or **Transitioning** participants.

Field	Description
Terminate Date	Enter the default <b>Termination Date</b> that you want to assign to each participant in the group.
Terminate Reason	Select the default <b>Termination Reason</b> that you want to assign to each participant in the group.
Completed Program	Select this option if the group as having completed the program.
Completed Program Term	Select this option to mark the group as having completed the program term.

9. Click **Add transition comments for multiple individuals** to write up comments that will apply to each of the transitioning participants (if applicable).



To add comments for each participant individually, click on the **Comments** link in the **Transition** column for each participant you want to add a comment for.

10. Click **Closeout Records**.
11. Confirm that you want to mark the selected records complete by clicking **Mark as complete**.