ChildPlus Getting Started Guide

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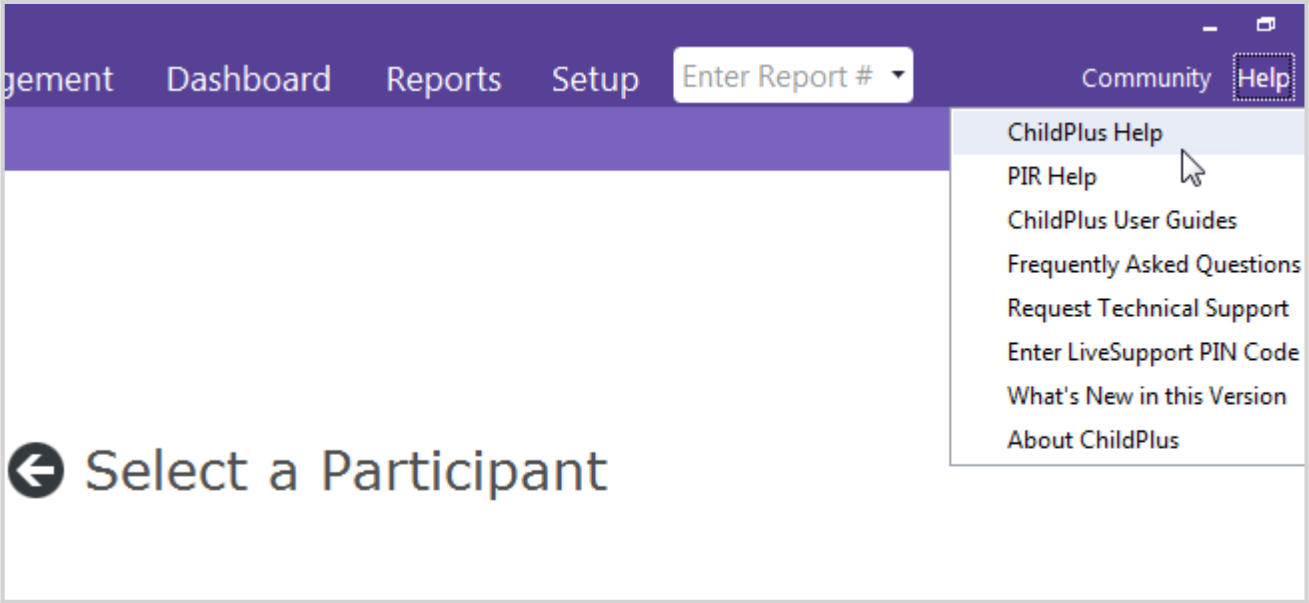
Welcome to ChildPlus!

Welcome to ChildPlus! Whether you are a new user or a seasoned ChildPlus veteran, we've designed this book to familiarize you with the **To-Do List** and the **Dashboard**.

You can use the **To-Do List** to keep track of your appointments in either a calendar or list view. The **Dashboard** lets you see a quick overview of your agency's progress. The **To-Do List** also displays reminders and alerts you when you have important deadlines or tasks that requires immediate attention.

Additional Resources

In addition to this guide, you can also access this information through the **Help** menu in ChildPlus. Click on any item on the **Help** menu to go directly to the help topic associated with it. To access ChildPlus Help, click on **Help** > **ChildPlus Help**:



ChildPlus and the PIR

The fields that ChildPlus uses to calculate your PIR are easily identifiable in both this guide and within ChildPlus because they have a red PIR label next to them. Within ChildPlus, you can click on these red PIR labels to find out how ChildPlus uses the field to calculate the PIR.

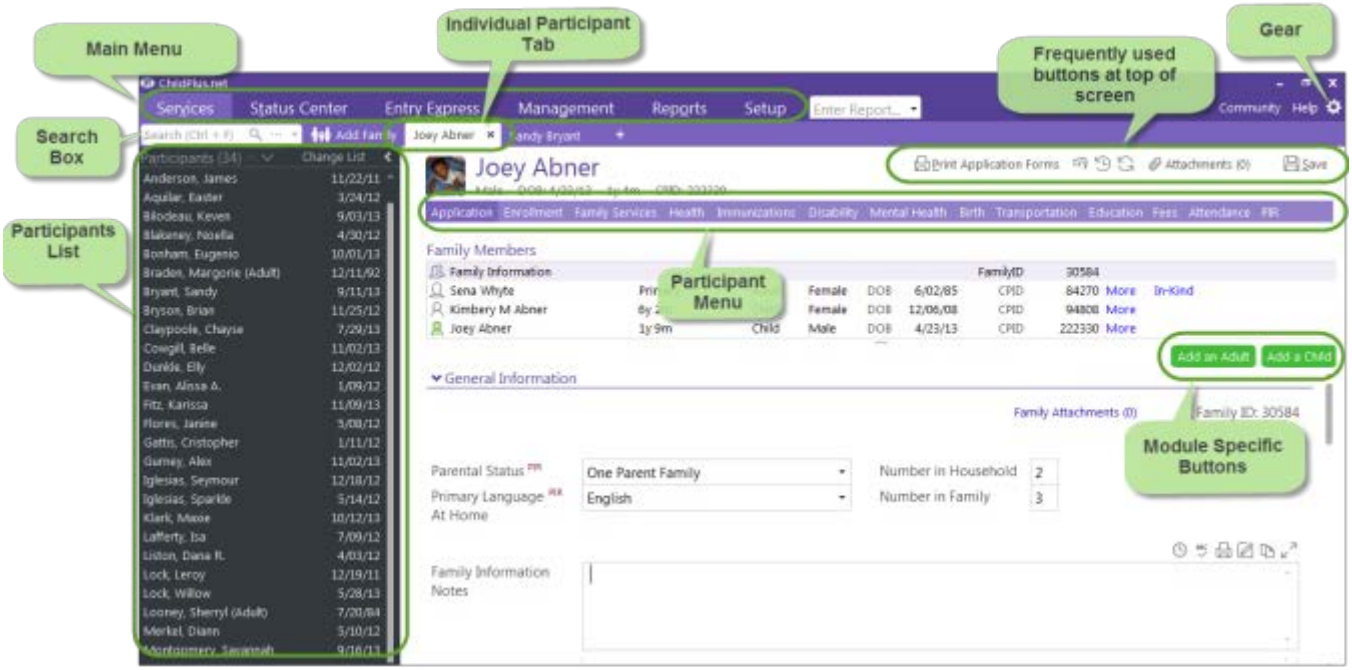
Tour of ChildPlus

ChildPlus's user interface includes a **Main Menu** bar at the top of the screen. Through the **Main Menu** you can access different areas of ChildPlus (**Services**, **To-Do List**, **Entry Express**, **Management**, **Dashboard**, **Reports** and **Setup**).

Directly below the **Main Menu**, you'll find a **Search** box that you can use to quickly search for participants and family members.

On the left side of the screen, you'll find the ChildPlus **Participants List**. The **Participants List** is a customizable list of participants who are available for you to work with in ChildPlus. Using this list, you can quickly select the participant whose record you want to work with.

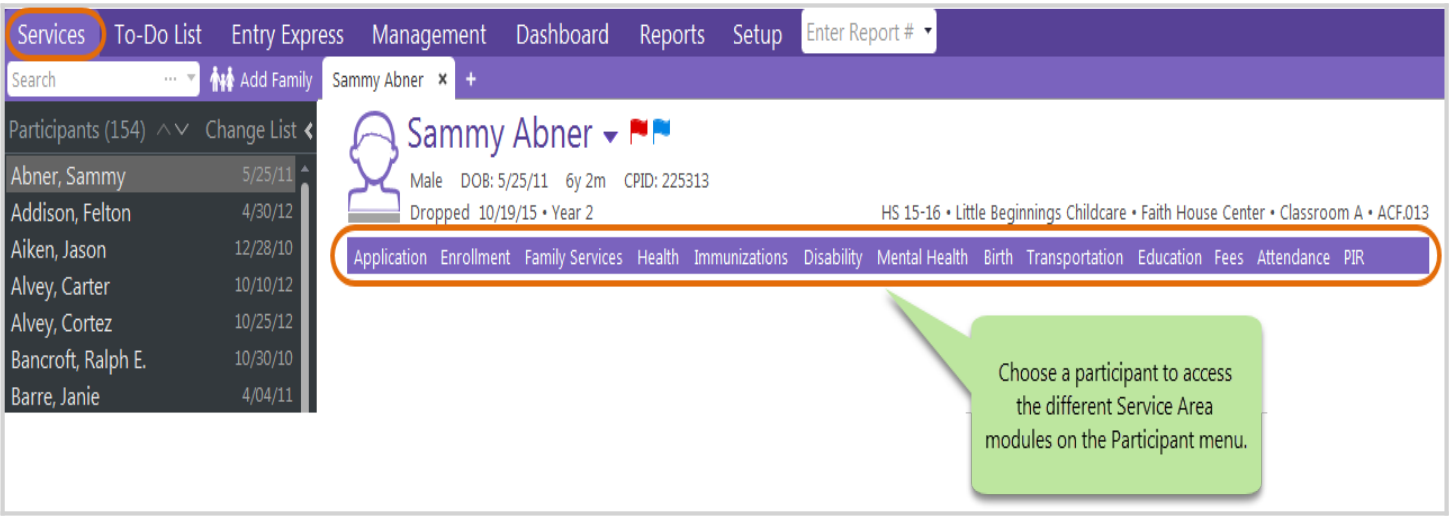
Once you select a participant to work with, you'll be able to choose a service area module from the **Participant Menu**.



ChildPlus Main Menu

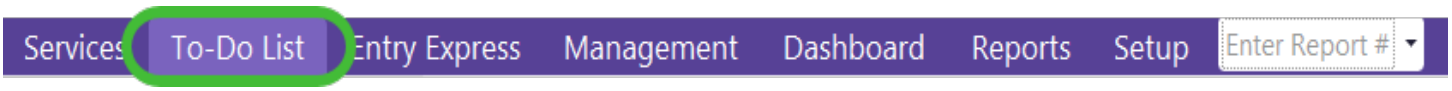
Services

Click **Services** to access the different service area modules for participants. **Service** area modules include: **Application, Enrollment, Family Services, Health, Immunizations, Disability, Mental Health, Birth, Transportation, Education, Fees, Attendance** and **PIR**.



To-Do List

Click **To-Do List** to access the **To-Do List** module.

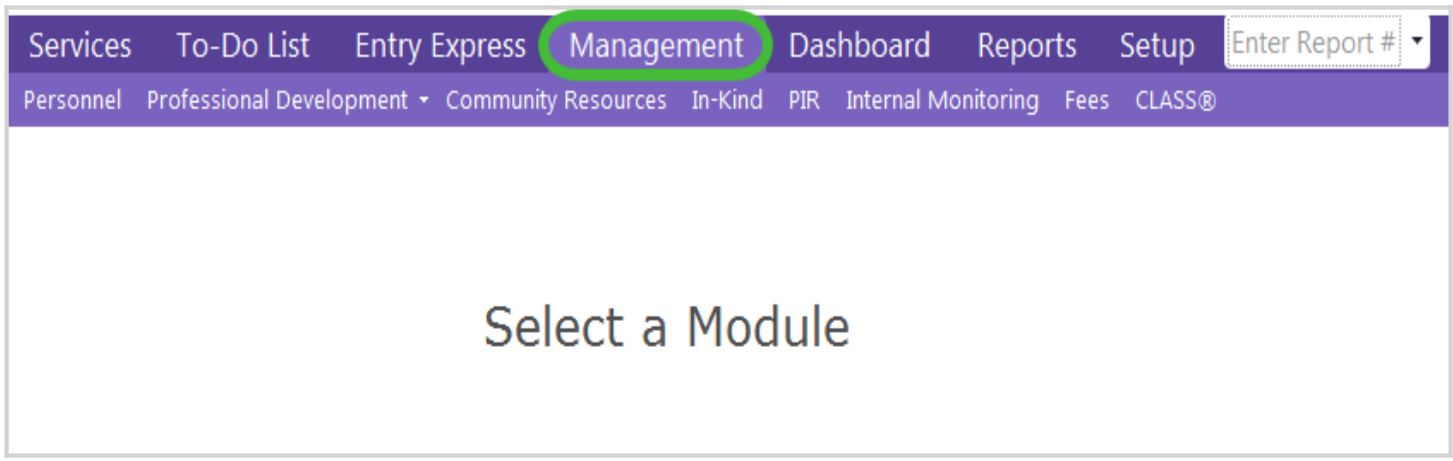


Entry Express

Click **Entry Express** to access the different entry express modules for participant data entry. **Entry Express** modules include: **Attendance, Attendance Scanning, Summary Attendance, Enrollment, Family Services, Health, In-Kind,** and **Assessment**.

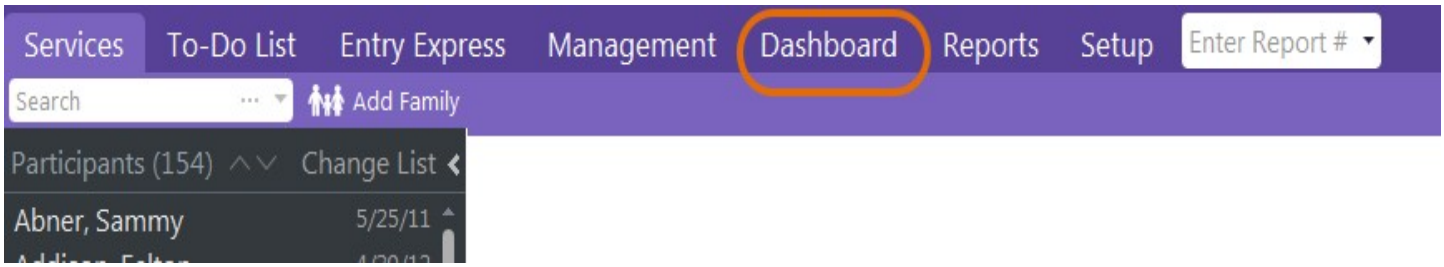
Management

Click **Management** to access the different management modules in ChildPlus. Management modules include: **Personnel, Community Resources, In-Kind, PIR, Internal Monitoring, Fees, CLASS®** and **Professional Development**.



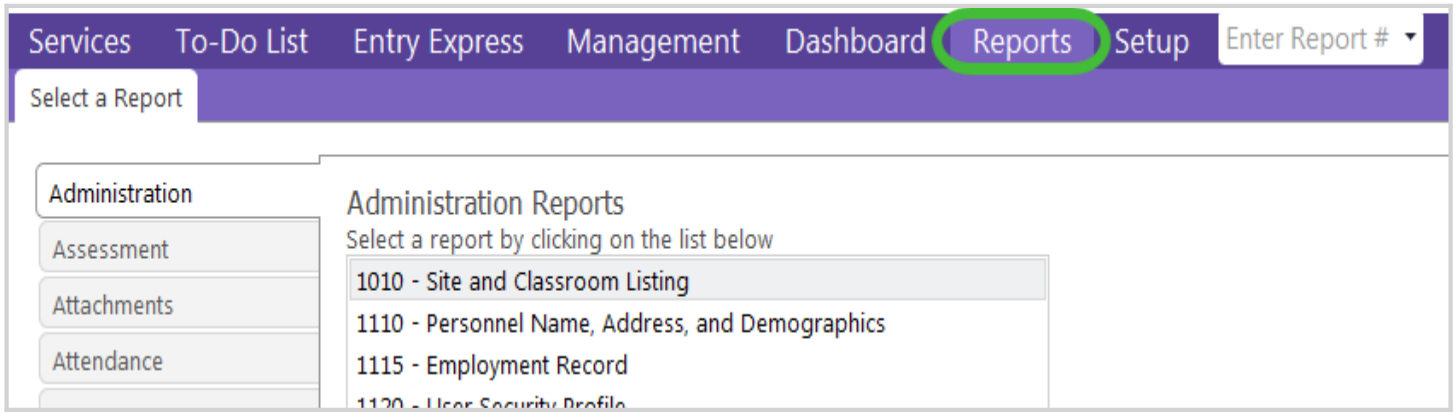
Dashboard

Click **Dashboard** to access the Dashboard in ChildPlus.



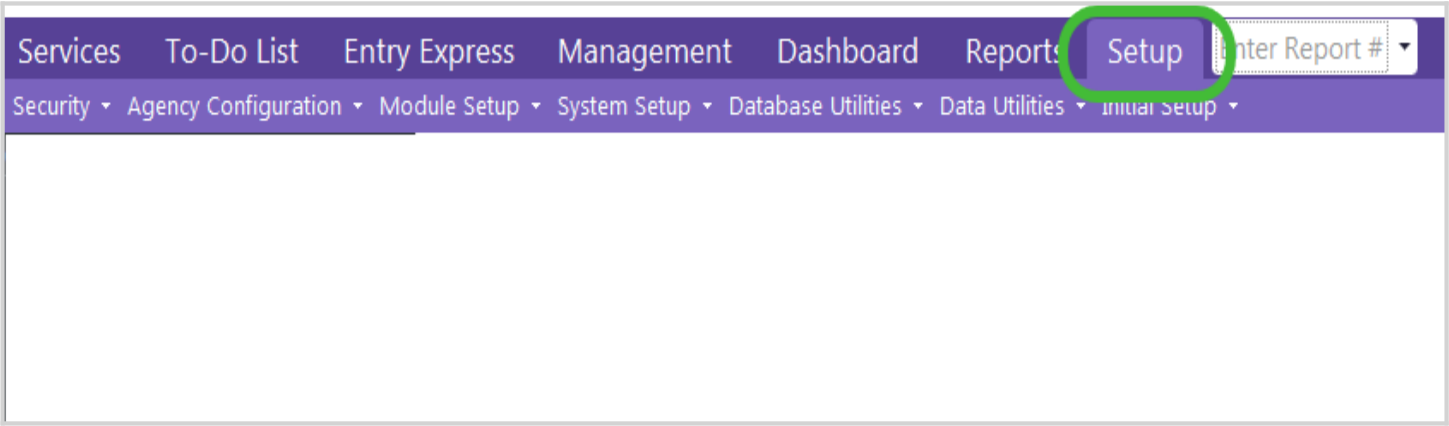
Reports

Click **Reports** to access the different **reports** that are available in ChildPlus.



Setup

Click **Setup** to access the different configuration and set up options available in ChildPlus. Setup areas include: **Security, Agency Configuration, Module Setup, System Setup, Database Utilities, Data Utilities**, and **Initial Setup**.



And More

Also located on the **Main Menu** are the **Enter Report #** feature, **Community** menu, **Help** menu, **Print** button and **Gear**. You can click on each to learn more about what they do:

Enter Report #
Community
Help
Print
Gear

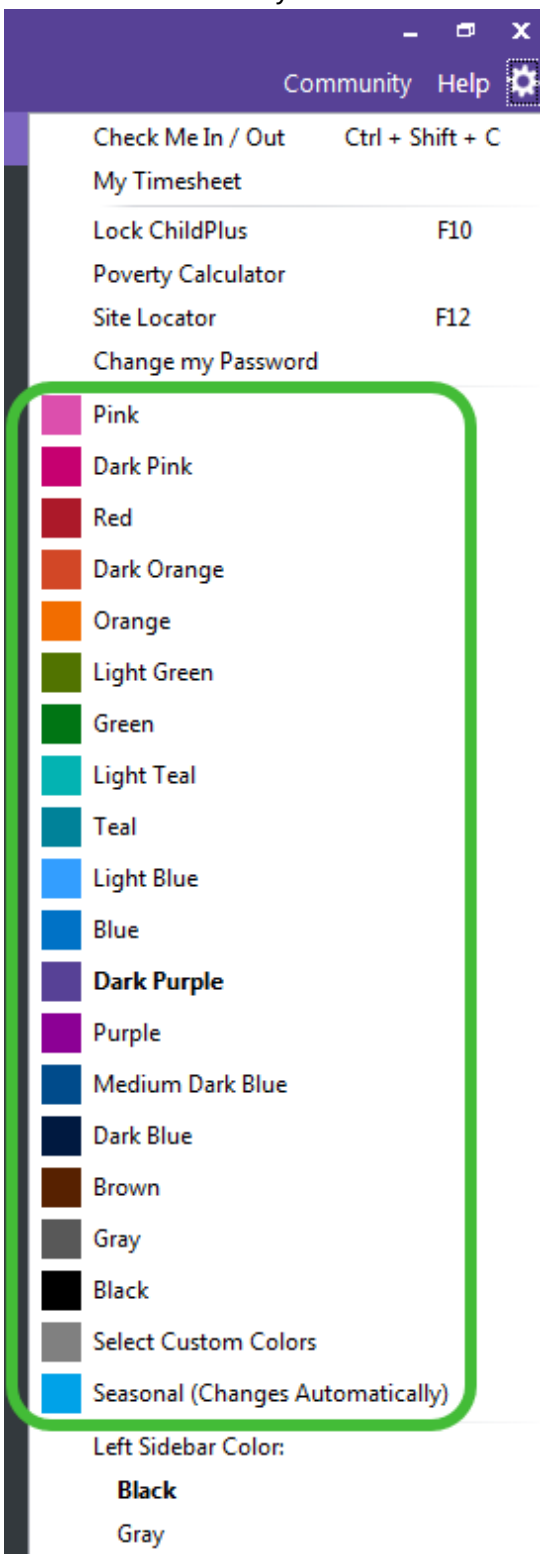
Customizing Your Screen Color in ChildPlus

Freshen up your day by choosing your favorite color! You can control how your ChildPlus screen looks with colors. We've built in 19 different color themes that you can use to customize the look and feel of ChildPlus. You can also choose the color of the **Participants List** in ChildPlus.

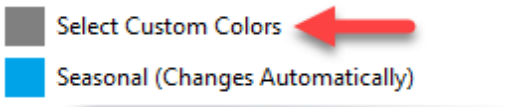
Customizing Your Screen Color

Follow these steps to customize the color of your ChildPlus screen:

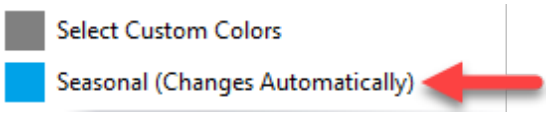
1. Click on the **Gear**.
2. Select the color that you want to use.



Click **Select Custom Colors** if you want to define the exact color of your top and bottom menu in ChildPlus.



Click **Seasonal Changes** if you want to use our seasonal theme that automatically changes based on the season.

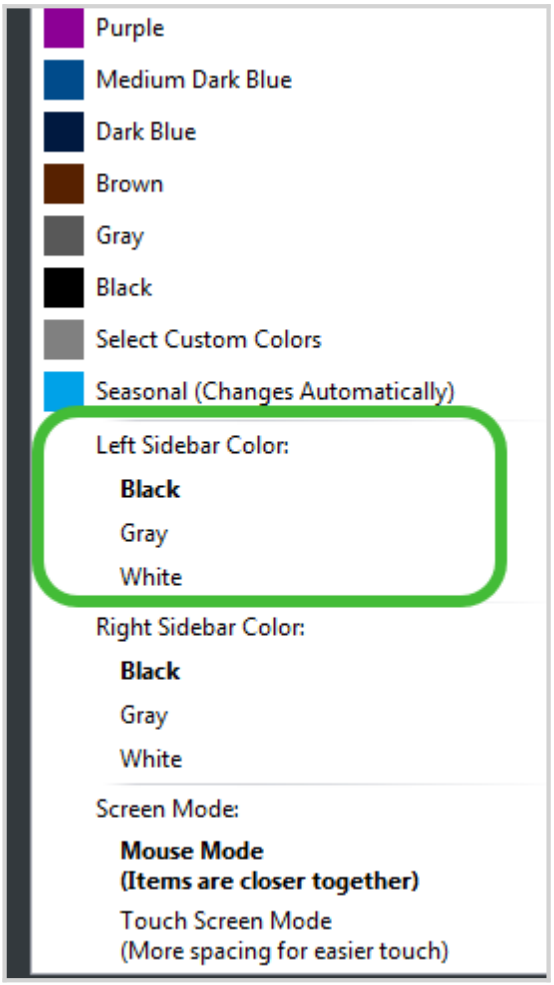


Customizing the Color of Your Participants List

Follow these steps to customize the color of your **Participants List** (left sidebar):

1. Click on the **Gear**.

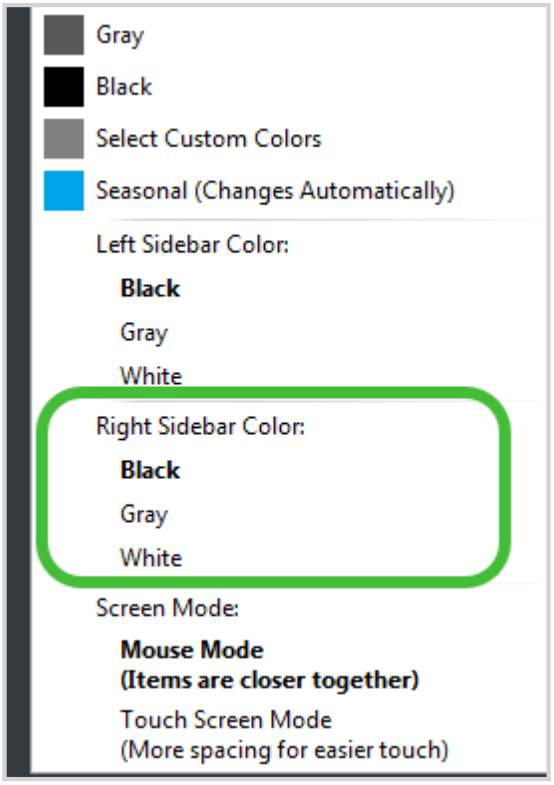
2. Choose a **Left Sidebar Color** of either *Black*, *Gray* or *White*.



Customizing the Color of Your Right Sidebar

Do you think your screen is too bright? Try adjusting the color of your right sidebar. Setting it to black or gray will help decrease the brightness on your screen.

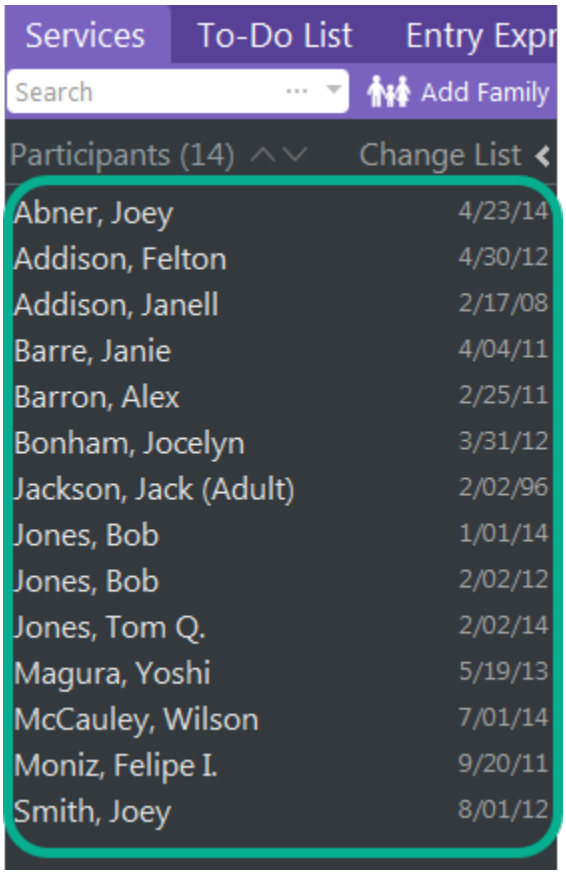
1. Click on the **Gear**.
2. Choose a **Left Sidebar Color** of either *Black*, *Gray* or *White*.



Using the Participants List

The **Participants List** is a customizable list of participants who are available for you to work with in ChildPlus. Using this list, you can quickly select the participant whose record you want to work with. You can customize this list to display all the participants in your program or just the participants that you work with on a regular basis. For example, if you only work with one or two classrooms then you can customize this list to only display participants associated with your classrooms.

The **Participants List** pane docks to the left side of your screen and is the optimal method for navigating the records of participants in ChildPlus.



You can use the ^ and v buttons to move through the different participants in the list. These buttons work just like the **Previous** and **Next** buttons in previous versions of ChildPlus.

You can also use the ***Alt+Up Arrow*** and ***Alt + Down Arrow*** keys on your computer's keyboard to move through the different participants in the list.

Customizing the Participants List

To customize the list of participants that displays in the **Participants List**:

1. Click **Change List**.
2. Change your selection criteria.
3. Click **Find** to update your **Participants List**.

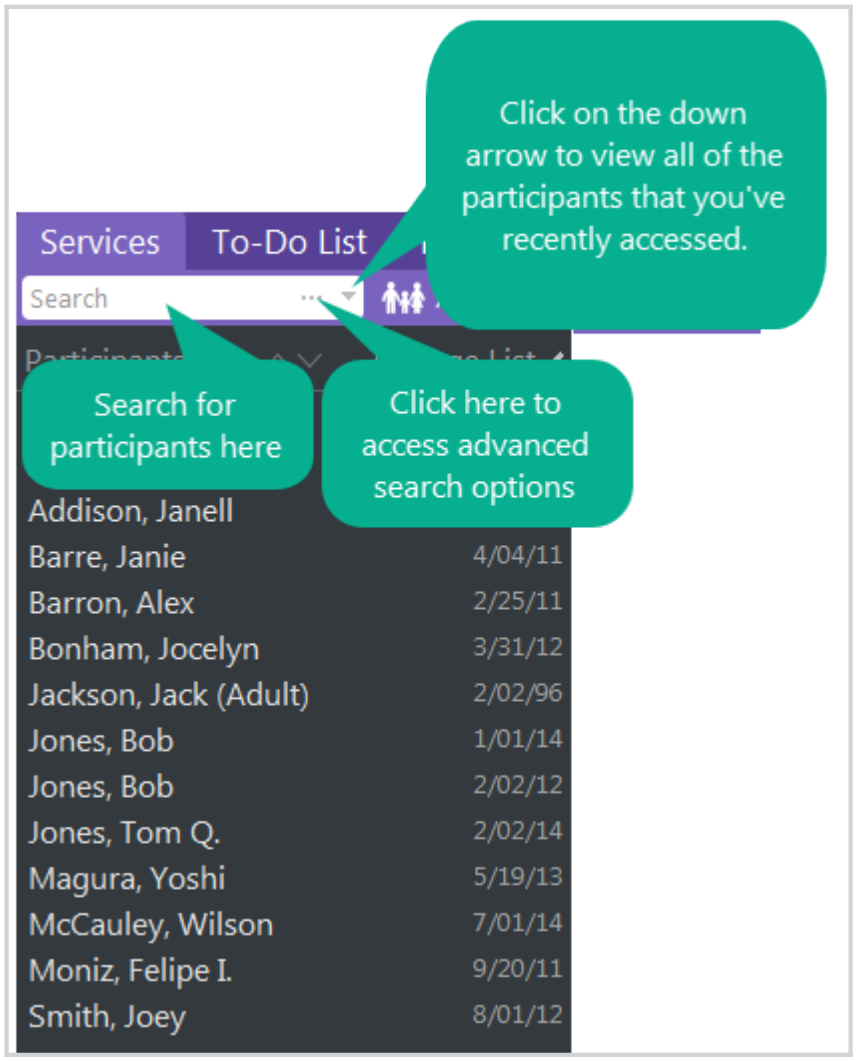
Searching for Family Members

You can use the **Search** feature above the **Participants List** to quickly **search** for participants based on criteria such as their name (first, middle, last, or preferred), social security number, birthday, phone number, email address, application number. You can quickly access this system feature using the *Alt+R* **hotkey**[1].

[1]Hotkeys are keyboard combinations that let you open modules and perform certain tasks using your computer's keyboard instead of the mouse. Hotkeys can save you a lot of time when performing data entry tasks.

The types of searches you can perform using this feature range from basic (for example, any family member with the last name of 'smith) to advanced (for example, any family member whose name starts with the letters 'x', 'y' or 'z').

See Searching Tips and Tricks to learn more about searching for family members in ChildPlus.



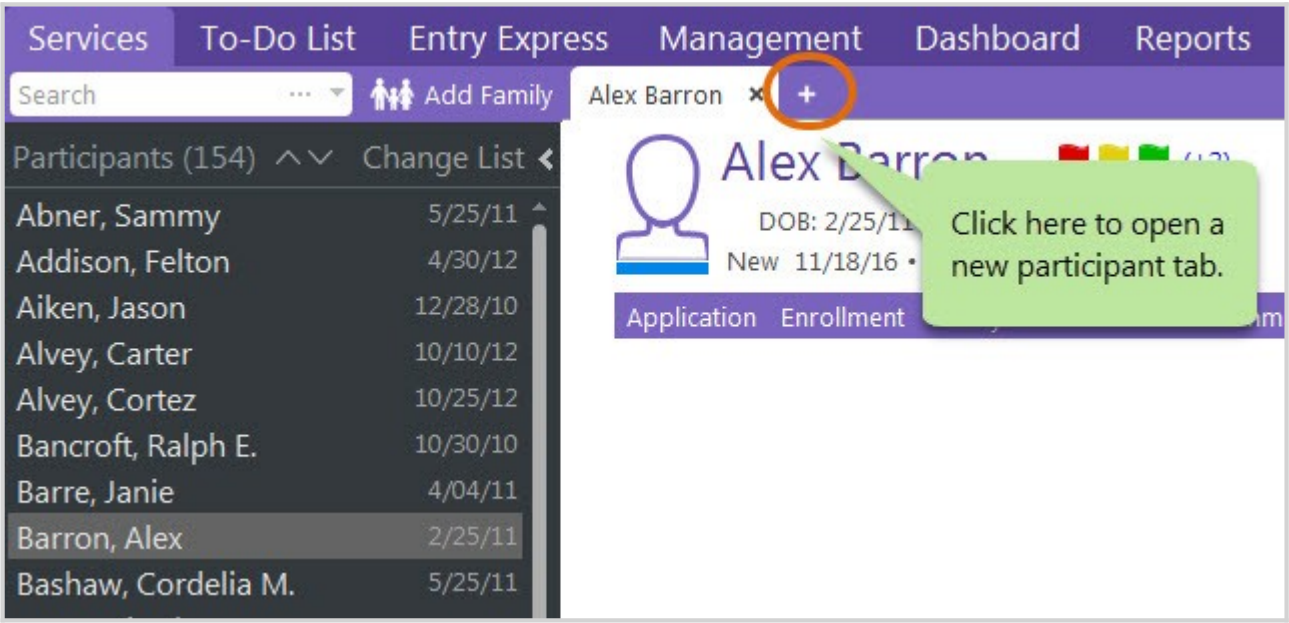
Tip: You can search for family members by either pressing the *Enter* key or clicking . You can access **Advanced Search** options by clicking .

Working with Multiple Participant Tabs

You can open multiple participants at once in ChildPlus. You can open a participant in a new tab by clicking on the **+** button or right clicking on a name in the **Participants List**.

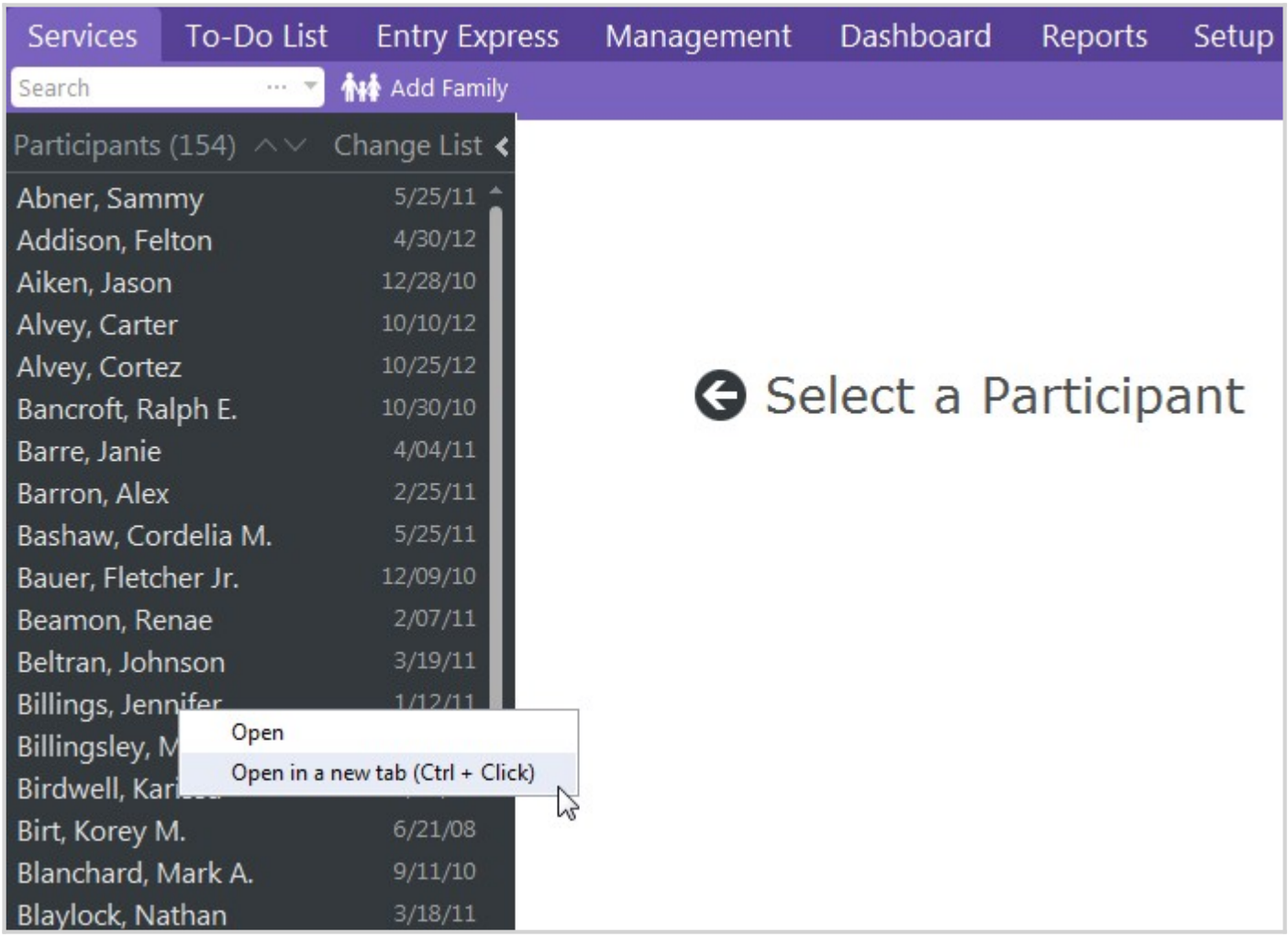
Opening a New Tab by Clicking +

You can open a participant in a new tab by clicking on the **+** button and then selecting the name of the person you want to view from the **Participants** list.



Opening a New Tab by Right Clicking

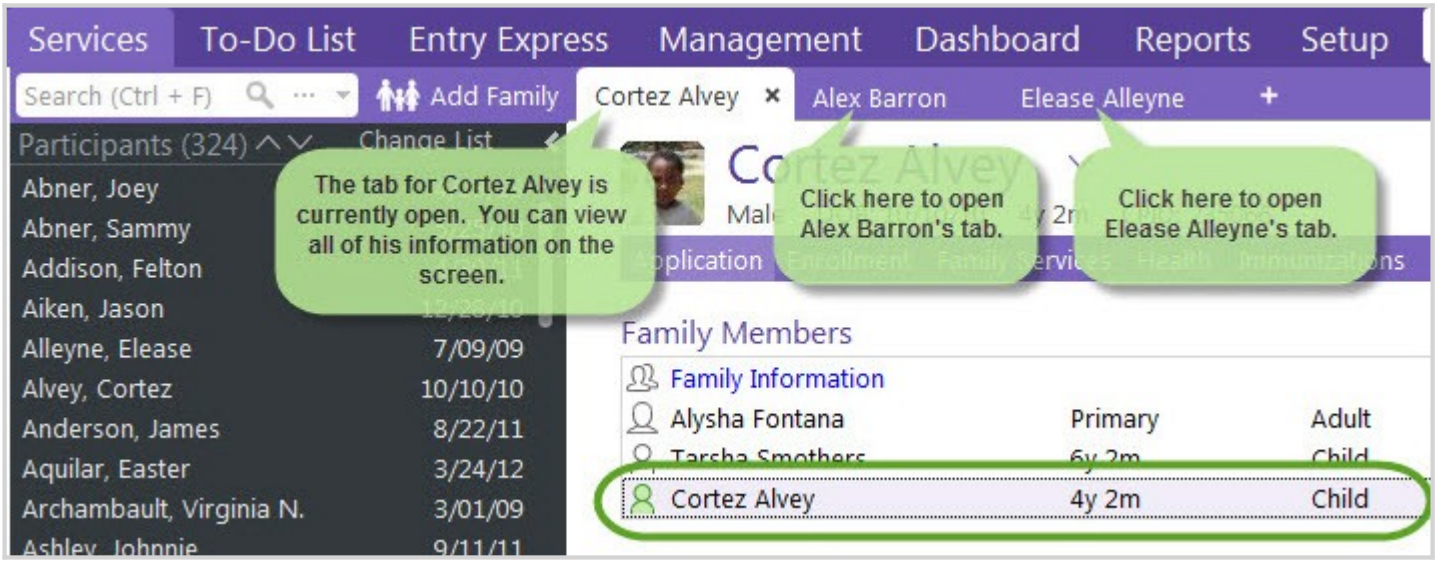
You can open a participant in a new tab by right clicking on their name in the **Participants List** and choosing **Open in a new tab**.



Tip: Make sure you select **Open in a new tab** and not **Open**. If you click **Open**, ChildPlus will display the selected participant's information in the tab that you currently have open rather than in new one.

Switching Between Different Tabs

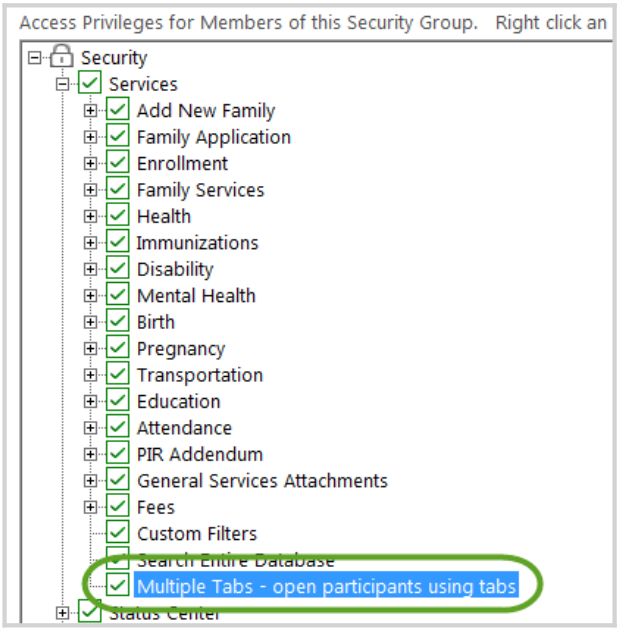
Once you have multiple tabs open, you can quickly switch from one participant to another.



Multiple tabs are available for ChildPlus's **Service Area** modules and for **Reports**.

Turning Access to Multiple Tabs Off

ChildPlus Administrators: If you don't want all users to have access to multiple participant tabs, you can configure which **Security Groups** have access to this feature via ***Setup*** > ***Security*** > ***User Security Groups***.



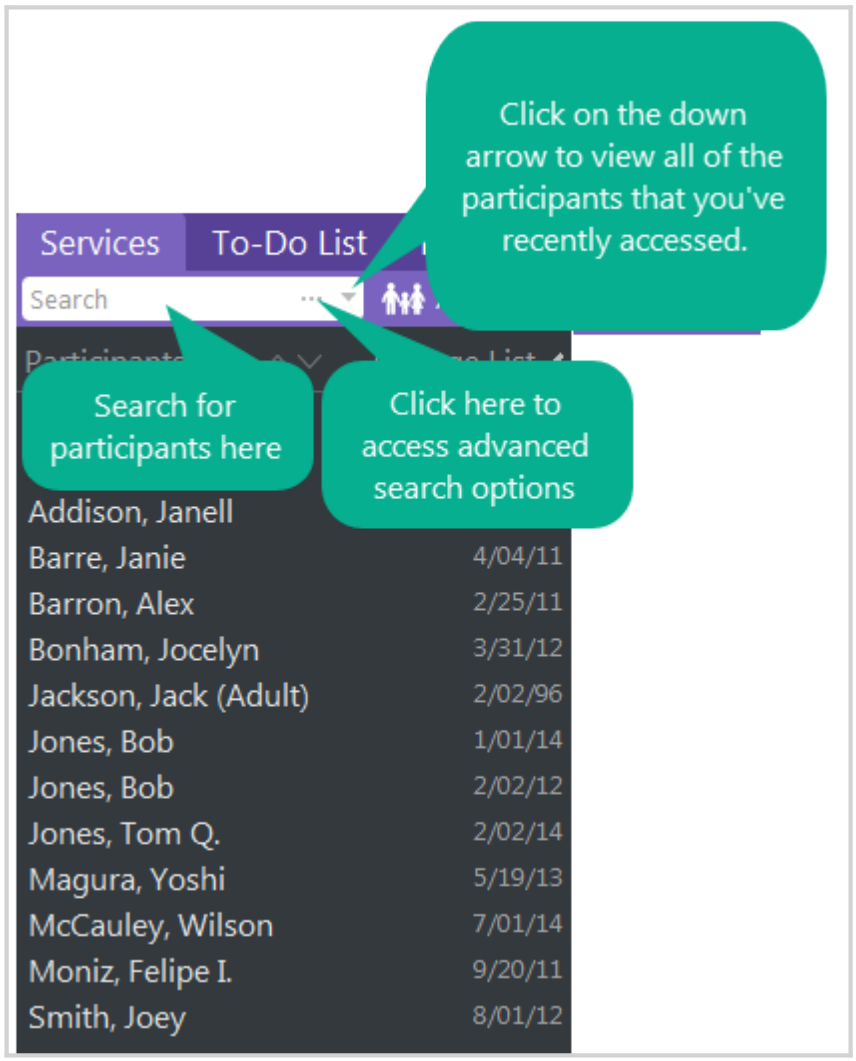
Searching for Family Members

You can quickly **search** for participants based on criteria such as their **First Name**, **Middle Name**, **Last Name**, **Preferred Name**, **SSN**, **Birthday**, **Phone Number**, **ChildPlus ID**, **ChildPlus Family ID**, **Altern-**

ate ID, or **Application Number**. To search for family members, you can enter your criteria directly into the **Search** box or by clicking ··· to access **Advanced Search Options**.

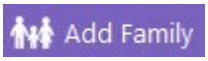
You can quickly access **Search for Family Members** by typing ***Ctrl+ F.***

Tip: You can search for family members by either pressing the *Enter* key or clicking . You can access **Advanced Search** options by clicking ··· . Click the arrow to view all of the participants that you've recently accessed in ChildPlus.



Adding a New Family to ChildPlus

You can use **Application Express** to quickly add new families to ChildPlus. Follow these steps to add a new family:

1. Click 

.
2. Complete each of the fields for the applicant. What if I want to add a family member who is not an applicant first? *You can change the type of family member you want to add by making a different selection in the **Adult or Child** and/or **Applicant** fields.*
3. To add another family member, click the **Add Member** drop-down and choose the type of family member you want to add.

   To speed up the initial application process, you can just enter the primary adult and applicant. You can always go back and add additional family members at a later time.
4. Complete the **Family Information** section of the screen. You'll provide details about the family's address, phone number(s), parental status, and their primary language at home in this section of the **Add New Family** screen.
5. Complete the **Family Income** section of the screen. In this section, you'll provide details about each of the family's income sources.

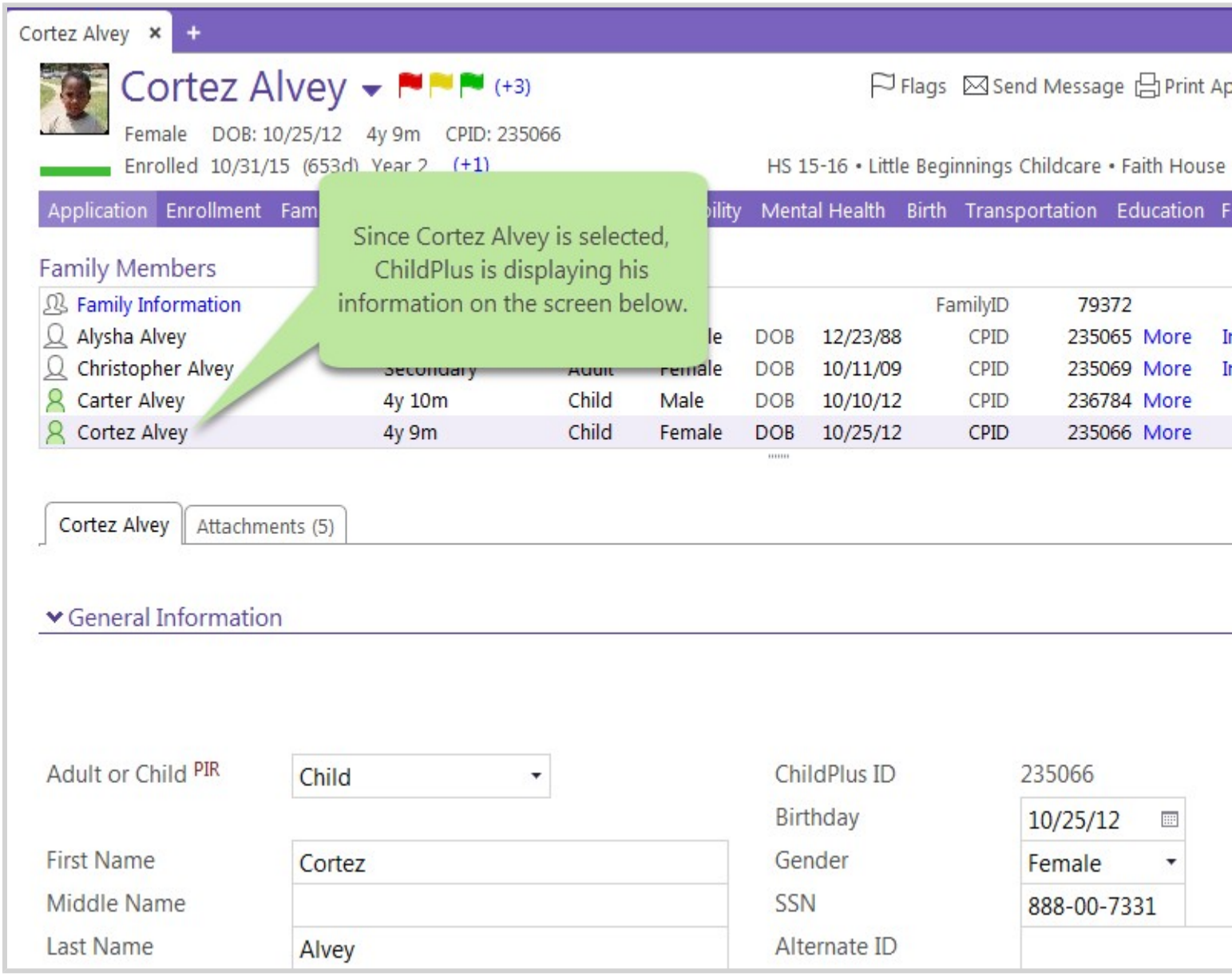
   If you still want to record income for the entire family, instead of by family member, simply leave the family member field blank.
6. Type the name of the first emergency contact for the family in the **Add Emergency Contact** box and complete their information. Repeat this step for each of the family's emergency contacts.
7. Use the **Enrollment** section of the screen to create a participation record for the participant.

   If you don't want to enter this information on the **Add New Family** screen, you can add it via the **Enrollment** module or **Entry Express - Enrollment** at a later time.
8. Use the **Immunizations** section of the screen to add the participant's immunizations information.

   If you don't want to enter this information on the **Add New Family** screen, you can add it via the **Immunizations** module at a later time.
9. Click either **Save and Add Another** to save the current application and add another one or **Save and Close** to save the family's application.

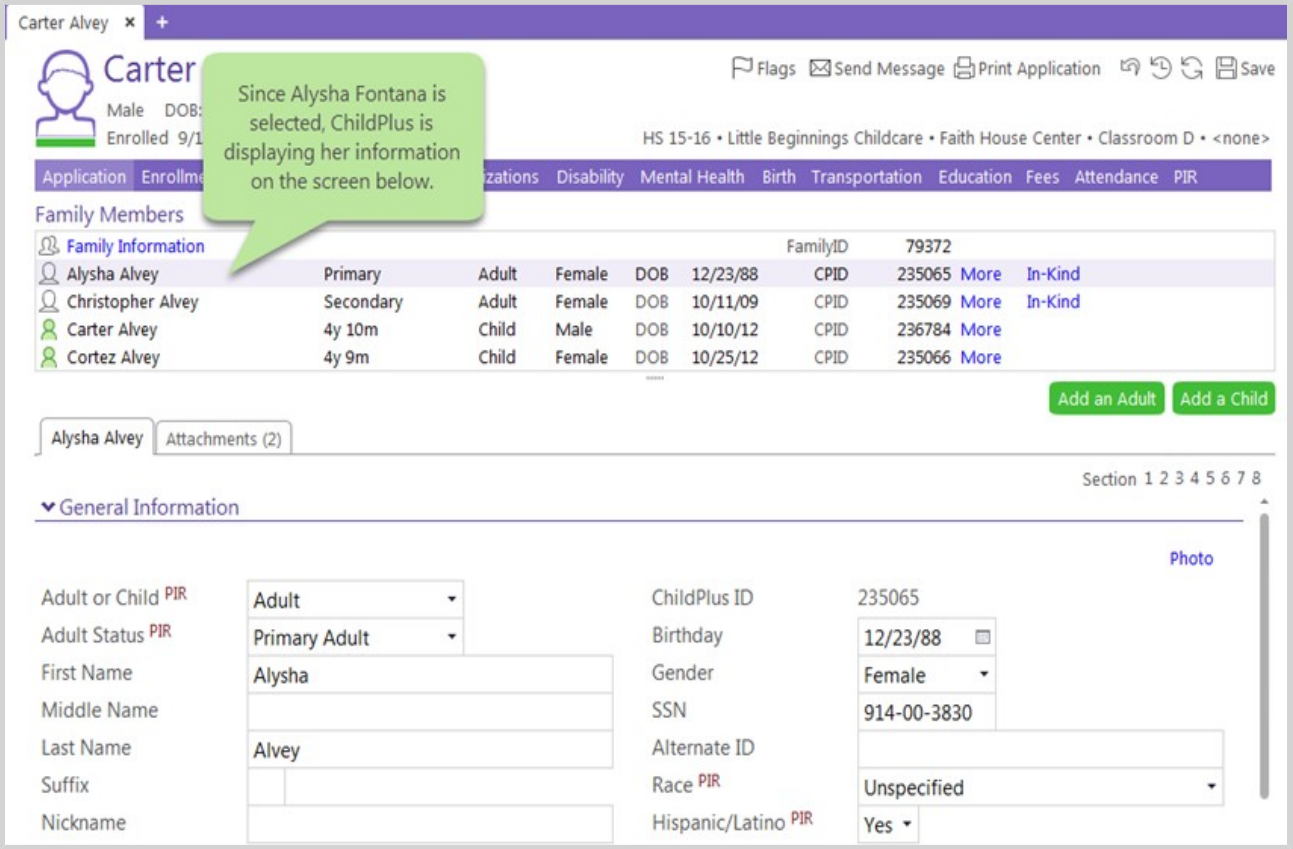
Working with Family Members

Once you open a participant in a tab, you will also be able to see each member of their family. When you select the name of the a member of the family, you'll be able to see their information in the different sections of the family's **Application**.



Viewing Information for a Different Family Member

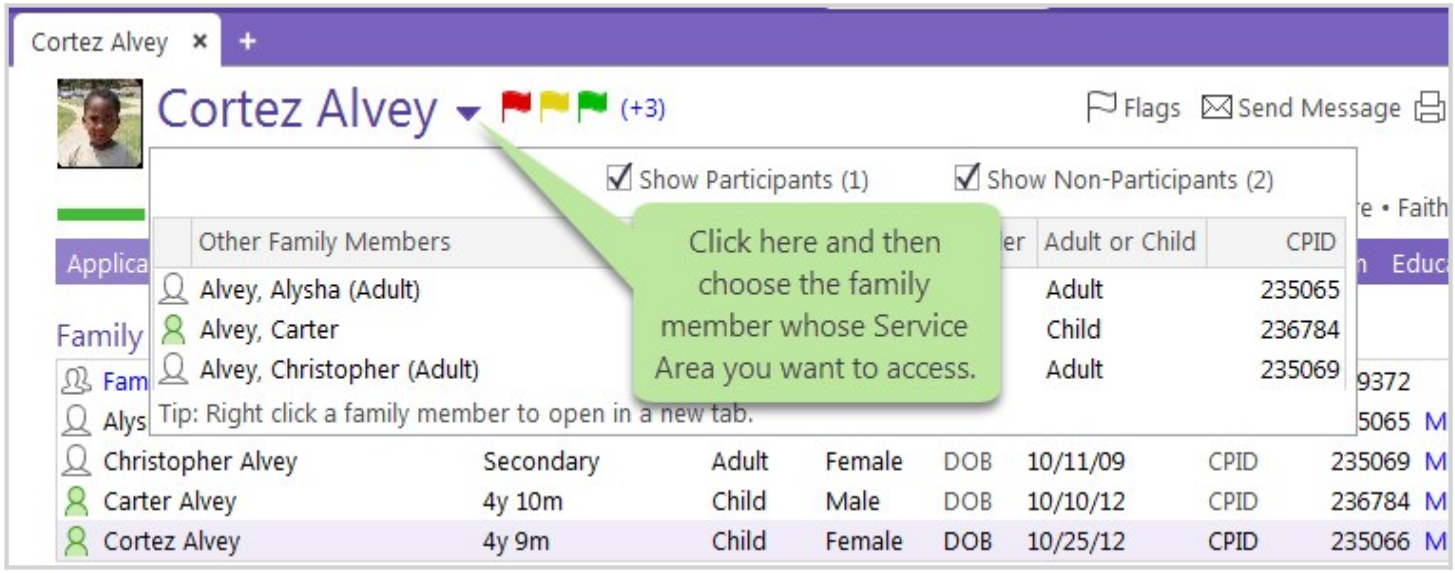
If you want to view basic application information for another family member, simply select their name in the **Family Members** list.



Selecting the family member's name only works for viewing information about the family member in the **Application** module. If you want to view the family member in another module, you'll need to either open the family member in separate tab or click down arrow next to the participant's name.

Accessing Other Modules for Family Members

If you want to see their information in another module, simply click the down arrow next to the participant's name and choose the family member whose information you want to view.



If a family member is not a participant, they'll only have access to the **Application** and **Family Services** modules in the system. To view their information in another module, you'll need to make them a participant.

Hotkeys

The following list displays some frequently used **hotkeys**[1] in ChildPlus.

Use this Hotkey	To perform this task in ChildPlus...
Alt + S	Save the changes you have made on a screen
Alt + U	Undo any changes you have made on a screen
Ctrl + F	Search for a family member or a participant
Alt + W	Change the list of participants displayed in the **Participants List**
Alt + N	Add a new family
Alt + M	Expand and collapse the **Participants List**
Alt + ↑ or Alt + ←	View the previous participant
Alt + ↓ or Alt + →	View the next participant
Alt + H or F1	Access Help
Alt + V	Open **Services**
Alt + T	Open the **To-Do List**
Alt + X	Open the **Entry Express**
Alt + G	Open the **Management**
Alt + D	Open the **Dashboard**

Use this Hotkey	To perform this task in ChildPlus...
Alt + O	Open the **Reports**
Alt + Y	Open the **Data History Log**
Alt + P	Print information on a screen
F5	Refresh the screen
Ctrl + Alt + P	Print current screen
Ctrl + P	Print dialog box screen (only applies to Print buttons on dialog boxes in Service Area Modules)
Ctrl + S	Save (only applies to dialog boxes on dialog boxes in Service Area Modules)
Esc	Cancel (only applies to dialog boxes on dialog boxes in Service Area Modules)

[1]Hotkeys are keyboard combinations that let you open modules and perform certain tasks using your computer's keyboard instead of the mouse. Hotkeys can save you a lot of time when performing data entry tasks.

Services (Alt +V)

The following list displays the hotkeys you can use to open **Service Area** modules in ChildPlus (Alt +V).

Use this Hotkey	To open...
Ctrl + G	Family Application
Ctrl + E	Enrollment
Ctrl + S	Family Services
Ctrl + H	Health
Ctrl + I	Immunizations
Ctrl + D	Disability
Ctrl + M	Mental Health
Ctrl + B	Birth
Ctrl + R	Pregnancy
Ctrl + T	Transportation
Ctrl + U	Education
Ctrl + P	PIR module in Services

To-Do List (Alt + T)

Entry Express (Alt + X)

Use this Hotkey	To open...
Ctrl + L	Attendance
Ctrl + M	Summary Attendance
Ctrl + E	Enrollment

Use this Hotkey	To open...
Ctrl + F	Family Services - Family Service Events
Ctrl + G	Family Services - Log a Communication
Ctrl + H	Health
Ctrl + K	In-Kind
Ctrl + S	Assessment

Management (Alt + G)

Use this Hotkey	To open...
Ctrl + P	Personnel
Ctrl + D	Professional Development
Ctrl + T	Trainings
Ctrl + E	Trainees
Ctrl + M	Community Resources
Ctrl + K	In-Kind
Ctrl + P	PIR
Ctrl + I	Internal Monitoring

Dashboard (Alt + D)

Reports (Alt + O)

Use this Hotkey	To open...
Ctrl + N	Administration
Ctrl + S	Assessment
Ctrl + J	Attendance
Ctrl + Y	Community Resources
Ctrl + D	Disability
Ctrl + U	Education
Ctrl + E	Enrollment
Ctrl + F	Family
Ctrl + K	In-Kind
Ctrl + B	Labels
Ctrl + I	LiveReport
Ctrl + M	Mapping
Ctrl + L	Mental Health
Ctrl + P	PIR
Ctrl + R	Pregnancy and Birth

Use this Hotkey	To open...
Ctrl + O	Professional Development
Ctrl + T	Transportation

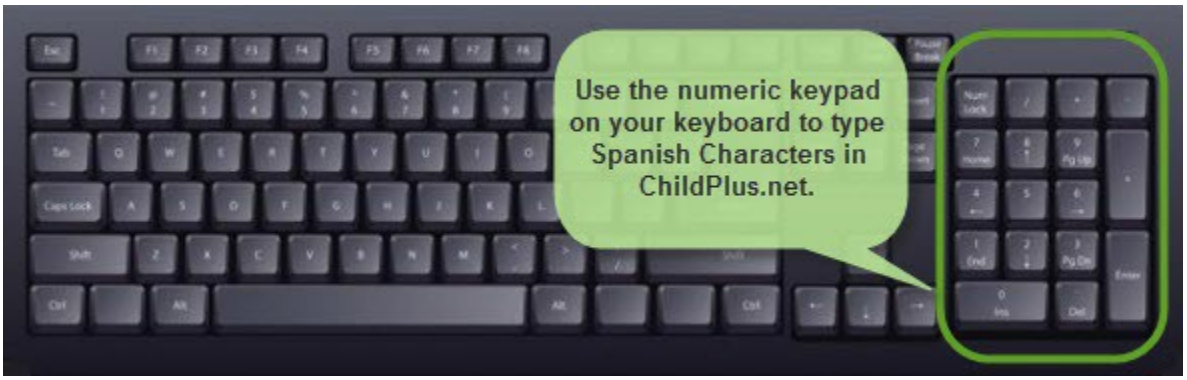
Setup

Use this Hotkey	To open...
Ctrl + S	Security
Ctrl + E	Agency Configuration
Ctrl + M	Module Setup
Ctrl + T	System Setup
Ctrl + U	Database Utilities
Ctrl + D	Data Utilities
Ctrl + I	Initial Setup

Tip: See page 26 to learn how to type Spanish Characters in ChildPlus.

Spanish Characters

To type Spanish characters in ChildPlus, use the following hotkey combinations with your keyboard's numeric keypad. Click here to learn how to compose a message in a language other than English or Spanish.

To type this character...	Use this hotkey combination...
á	*Alt* + 160
é	*Alt* + 130
í	*Alt* + 161
ó	*Alt* + 162
ú	*Alt* + 163
Á	*Alt* + 0193
É	*Alt* + 144
Í	*Alt* + 0205
Ó	*Alt* + 0211
Ú	*Alt* + 0218
ñ	*Alt* + 164
Ñ	*Alt* + 165
¿	*Alt* + 168
¡	*Alt* + 173

Tip: Make sure you use the numeric keypad on your computer's keyboard to type hotkey combinations for Spanish Characters.