



PHLpreK Guidelines for Discharging Children

Discharging Individual Children –Throughout the Program Year

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Sites that are licensing ChildWare independently should refer to the notes at the end of this document.

Discharging an Individual Child – Throughout the Program Year

- Under the **Child/Family Section**, select **Child Data** and then **select Active** enrollments. **Select the child** you want to discharge

The screenshot shows the ChildWare PHLpreK interface. At the top, there are navigation tabs: Child/Family, Staff, Attendance/Meals, Billing, Reports/Docs, To Do List, and Admin. Below these, the 'Children' section is active. A search filter 'View or Search By: Active' is selected. Below the filter is a table with 3 records. The table has columns: Last Name, First Name, DOB, Sex, Enrolled, Discharged, Entered, and By. Each row has a 'Select' link on the left and a 'Delete' link on the right. The footer of the table indicates 'Page 1 of 1' and '3 records found'.

	Last Name	First Name	DOB	Sex	Enrolled	Discharged	Entered	By
Select	Test	Child	11/06/2012	F	05/01/2017		05/09/2017	AMCMAHON
Select	Wonderland	Manny	10/10/2011	M	01/04/2017	06/30/2017	05/24/2017	AMCMAHON
Select	Wright	Mable	01/01/2014	F	05/01/2017		05/24/2017	AADMIN

Page 1 of 1 3 records found

Continued on next page

2. In the **Child's record on the Main tab**, scroll to the bottom of the screen and **select the current Referral/Enrollment History**.

Child Due: \$0.00 Family Due: \$0.00 Deposit Required: \$0.00 Deposit On File: \$0.00

Main Relationships Services Financial Health HS Eligibility Admin Events & Case Notes Documents Logs

First Name: Child MI: Last Name: Test Suffix:

Sex: F SSN: DOB: 11/06/2012 Age: 4 years, 6 months

DOB Verified By:

Birth City: Birth State: Birth Country: Race: Ethnicity:

Photo: Choose File

Languages
Spoken at Home: Other Language:

School-Age Information
School: Grade: Pupil ID: Kindergarten: (starting year)

Referral/Enrollment History

Select	Referred	Enrolled	Discharged	Reason	Entered	By
	01/01/2017	05/01/2017			05/09/2017	AMCMAHON

Home About ChildWare Need Help?

Next, depending on the reason for the child's discharge, see either **Section A (Child Did Not Show)** or **Section B (Child Attended at least (1) Day but Left Program)**

SECTION A – CHILD DID NOT SHOW

1. Click on the **Status down arrow** and scroll to and choose **"Did Not Enroll."**
 - **Notify your PHLpreK representative of this change.**

ChildWare Home | Change User | Change Site | Help | Log Out

Happy Children Early Childcare Center

Child/Family Staff Attendance/Meals Billing Reports/Docs To Do List Admin

Referral/Enrollment: Ciara Abbott

Recruitment Information
Referral Date: 09/01/2016 Referred By: DHS Reason For Care: First Staff Contact: Expected Enrollment: Facility Tour Date: Application Completed: Application Fee Paid: Status: **Did Not Enroll** Note:

Intake Information
Enrolled: Site: Happy Children Early Childcare Center Alliance: PHSP Test

Subsidy Information
CCIS Absences: (outside of agency and before enrolled) HS Begin Date: HS End Date:

Discharge and Transfer Information
Discharge Date: Reason: Note:

Service Profiles

Care Level	Care Type	Days	Begin	End	Subsidies	Entered	By
Select	Preschool - 4-5	Full Day	5	07/07/2017	CCIS	06/28/2017	GARALLYSEMERAD-BULK

2. **Click OK.** The child will no longer appear in your Active Child list.

Continued on next page

SECTION B – CHILD ATTENDED AT LEAST (1) DAY AND LEFT THE PROGRAM

1. Enter a Discharge Date under the Discharge and Transfer Information section

Child/Family ▾ Staff ▾ Attendance/Meals ▾ Billing ▾ Reports/Docs ▾ To Do List ▾ Admin ▾

Referral/Enrollment: Child Test OK Cancel

Recruitment Information

Referral Date: 01/01/2017
Referred By: ▾ PIR
Reason For Care: ▾
First Staff Contact: ▾
Expected Enrollment:
Facility Tour Date:
Application Completed:
Application Fee Paid:
Status: Enrolled ▾
Note:

Intake Information

Enrolled: 05/01/2017
Site: PHLpreK ▾
Alliance: ☒ PHL PreK

Subsidy Information

CCIS Absences: (outside of agency and before enrolled)
HS Begin Date: PIR
HS End Date: PIR

Discharge and Transfer Information

Discharge Date:
Reason: ▾
Note:

[Service Profiles](#) PIR

2. Review Discharge Reasons

ChildWare

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Happy Children Early Childcare Center

Child/Family ▾ Staff ▾ Attendance/Meals ▾ Billing ▾ Reports/Docs ▾ To Do List ▾ Admin ▾

Referral/Enrollment: Child A Test OK Cancel

Recruitment Information

Referral Date: 09/01/2016
Referred By: ▾ PIR
Reason For Care: ▾
First Staff Contact: ▾
Expected Enrollment:
Facility Tour Date:
Application Completed:
Application Fee Paid:
Status: Did Not Enroll ▾
Note:

Intake Information

Enrolled:
Site: Happy Children Early Childcare Center ▾
Alliance: ☐ PHSP Test

Subsidy Information

CCIS Absences: (outside of agency and before enrolled)
HS Begin Date: PIR
HS End Date: PIR

Discharge and Transfer Information

Discharge Date:
Reason: ▾
Note:

[Service Profiles](#) PIR

Care Level	Care Type	Days	Begin	End	Subsidies
Select	Preschool - 3-4	Full Day	5	09/01/2016	Private Pay

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- Behavioral problems
- Caregiver won't complete eligibility forms
- Completed program
- Contract terminated
- Family situation
- Lost subsidy funding
- Medical reasons
- Moved away
- Non payment of fee
- Not satisfied / parent concerns
- Other
- Outside activity participation
- Poor attendance
- Temporarily inactive
- Transferred outside agency
- Transferred within agency
- Transferred within alliance
- Unknown

Continued on next page

- Choose Specific Discharge Reason and **write a brief explanation in the note section**. Then click **OK**. You do not need to make any change to the Status in this instance.

■ **Notify your PHLpreK representative of this change.**

ChildWare Home | Change User | Change Site | Help | Log Out
Happy Children Early Childcare Center

Child/Family ▼ Staff ▼ Attendance/Meals ▼ Billing ▼ Reports/Docs ▼ To Do List ▼ Admin ▼

Referral/Enrollment: Ciara Abbott OK Cancel

Recruitment Information

Referral Date: 09/01/2016
Referred By: DHS PIR
Reason For Care:
First Staff Contact:
Expected Enrollment:
Facility Tour Date:
Application Completed:
Application Fee Paid:
Status: Enrolled
Note:

Intake Information

Enrolled: 08/29/2017
Site: Happy Children Early Childcare Center
Alliance: ☐ PHSP Test

Subsidy Information

CCIS Absences: (outside of agency and before enrolled)
HS Begin Date: PIR
HS End Date: PIR

Discharge/Transfer Information

Discharge Date:
Reason:
Note: Behavioral problems
Caregiver won't complete eligibility forms
Completed program
Contract terminated
Family situation
Lost subsidy funding
Medical reasons
Moved away
Non payment of fee
Not satisfied / parent concerns
Other
Outside activity participation
Poor attendance
Temporarily inactive
Transferred outside agency
Transferred within agency
Transferred within alliance
Unknown

Service Profiles PIR

	Care Level	Care Type	Days	Begin	End	Subsidies	En
Select	Preschool - 4-5	Full Day	5	07/07/2017	07/06/2017	CCIS	06/
Select	Preschool - 4-5	Full Day	5	07/03/2017	07/02/2017	CCIS	06/
Select	Preschool - 4-5	Full Day	5	07/01/2017	07/02/2017	CCIS	06/
Select	Preschool - 4-5	Full Day	2	06/09/2017	06/30/2017	Private Pay	06/
Select	Preschool - 4-5	Half Day	5	05/03/2017	06/08/2017	CCIS	05/
Select	Preschool - 4-5	Half Day	5	01/16/2017	05/02/2017	CCIS	03/
Select	Preschool - 4-5	Full Day	5	09/01/2016	01/15/2017	CCIS	02/

Discharging Individual Children – End of Program Year

- Under the Child/Family Section, select Child Data and then select Active enrollments. Select the child you want to discharge

ChildWare PHLpreK

Child/Family ▼ Staff ▼ Attendance/Meals ▼ Billing ▼ Reports/Docs ▼ To Do List ▼ Admin ▼

Children Add Child Advanced Search Print/Export List

View or Search By: Active ▼

	Last Name	First Name	DOB	Sex	Enrolled	Discharged	Entered	By	
Select	Test	Child	11/06/2012	F	05/01/2017		05/09/2017	AMCMAHON	Delete
Select	Wonderland	Manny	10/10/2011	M	01/04/2017	06/30/2017	05/24/2017	AMCMAHON	Delete
Select	Wright	Mable	01/01/2014	F	05/01/2017		05/24/2017	AADMIN	Delete

Page 1 of 1 3 records found

Continued on next page

2. In the Child's record on the Main tab, scroll to the bottom of the screen and select the current Referral/Enrollment History.

Child Due: \$0.00 Family Due: \$0.00 Deposit Required: \$0.00 Deposit On File: \$0.00

Main Relationships Services Financial Health HS Eligibility Admin Events & Case Notes Documents Logs

First Name: Child MI: Last Name: Test Suffix: ▼

Sex: F ▼ SSN: - - DOB: 11/06/2012 Age: 4 years, 6 months DOB Verified By: ▼

Photo: Child Photo Choose File

Birth City: Birth State: ▼ Birth Country: Race: ▼ PIR Ethnicity: ▼ PIR

Languages
Spoken at Home: ▼ PIR Other Language: ▼ PIR

School-Age Information
School: ▼ Grade: ▼ Pupil ID: Kindergarten: (starting year)

Referral/Enrollment History PIR Add Referral/Enrollment

Select	Referred	Enrolled	Discharged	Reason	Entered	By	
	01/01/2017	05/01/2017			05/09/2017	AMCMAHON	Delete

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3. Enter a Discharge Date under the Discharge and Transfer Information section

Child/Family ▼ Staff ▼ Attendance/Meals ▼ Billing ▼ Reports/Docs ▼ To Do List ▼ Admin ▼

Referral/Enrollment: Child Test OK Cancel

Recruitment Information
Referral Date: 01/01/2017 Referred By: ▼ PIR Reason For Care: ▼ First Staff Contact: ▼ Expected Enrollment: Facility Tour Date: Application Completed: Application Fee Paid: Status: Enrolled ▼ Note:

Intake Information
Enrolled: 05/01/2017 Site: PHLpreK ▼ Alliance: ☒ PHL PreK

Subsidy Information
CCIS Absences: (outside of agency and before enrolled) HS Begin Date: PIR HS End Date: PIR

Discharge and Transfer Information
Discharge Date: Reason: ▼ Note:

Service Profiles PIR

Continued on next page

4. Review Discharge Reasons

ChildWare Home | Change User | Change Site | Help | Log Out
Happy Children Early Childcare Center

Child/Family ▾ Staff ▾ Attendance/Meals ▾ Billing ▾ Reports/Docs ▾ To Do List ▾ Admin ▾

Referral/Enrollment: Child A Test OK Cancel

Recruitment Information

Referral Date: 09/01/2016
 Referred By: ▾ PIR
 Reason For Care: ▾
 First Staff Contact: ▾
 Expected Enrollment:
 Facility Tour Date:
 Application Completed:
 Application Fee Paid:
 Status: Did Not Enroll ▾
 Note:

Intake Information

Enrolled:
 Site: Happy Children Early Childcare Center ▾
 Alliance: ☐ PHSP Test

Subsidy Information

CCIS Absences: (outside of agency and before enrolled)
 HS Begin Date: PIR
 HS End Date: PIR

Discharge and Transfer Information

Discharge Date:
 Reason: ▾
 Note:

Service Profiles PIR

Select	Care Level	Care Type	Days	Begin	End	Subsidies
<input type="checkbox"/>	Preschool - 3-4	Full Day	5	09/01/2016		Private Pay

Home About ChildWare Need Help
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Reason dropdown options:
 Behavioral problems
 Caregiver won't complete eligibility forms
 Completed program
 Contract terminated
 Family situation
 Lost subsidy funding
 Medical reasons
 Moved away
 Non payment of fee
 Not satisfied / parent concerns
 Other
 Outside activity participation
 Poor attendance
 Temporarily inactive
 Transferred outside agency
 Transferred within agency
 Transferred within alliance
 Unknown

5. Choose Specific Discharge Reason and **write a brief explanation in the note section**. Then click **OK**. You do not need to make any change to the Status in this instance.

a. For children that are “**ending services and will not be returning to your site in September**” – select **Completed Program**. Then click **OK**.

b. For children that will be “**returning in September**” – select **Temporarily Inactive**. Then click **OK**.

Notify your PHLpreK representative of this change.

ChildWare Home | Change User | Change Site | Help | Log Out
Happy Children Early Childcare Center

Child/Family ▾ Staff ▾ Attendance/Meals ▾ Billing ▾ Reports/Docs ▾ To Do List ▾ Admin ▾

Referral/Enrollment: Child Test

Recruitment Information

Referral Date: 01/01/2017
 Referred By: ▾ PIR
 Reason For Care: ▾
 First Staff Contact: ▾
 Expected Enrollment:
 Facility Tour Date:
 Application Completed:
 Application Fee Paid:
 Status: Enrolled ▾
 Note:

Intake Information

Enrolled:
 Site:
 Alliance:

Subsidy Information

CCIS Absences:
 HS Begin Date:
 HS End Date:

Discharge and Transfer Information

Discharge Date:
 Reason: ▾
 Note:

Reason dropdown options:
 Behavioral problems
 Caregiver won't complete eligibility forms
 Completed program
 Contract terminated
 Family situation
 Lost subsidy funding
 Medical reasons
 Moved away
 Non payment of fee
 Not satisfied / parent concerns
 Other
 Outside activity participation
 Poor attendance
 Temporarily inactive
 Transferred outside agency
 Transferred within agency
 Transferred within alliance
 Unknown

Continued on next page

- The child will now have a Discharge Date entered into their Referral/Enrollment History.

Child Due: \$0.00 Family Due: \$0.00 Deposit Required: \$0.00 Deposit On File: \$0.00

Main Relationships Services Financial Health HS Eligibility Admin Events & Case Notes Documents Logs

First Name: Child MI: Last Name: Test Suffix: ▼

Sex: F ▼ SSN: - - DOB: 11/06/2012 Age: 4 years, 6 months DOB Verified By: ▼

Birth City: Birth State: ▼ Birth Country: Race: ▼ PIR Ethnicity: ▼ PIR

Photo: Child Photo Choose File

Languages
Spoken at Home: ▼ PIR Other Language: ▼ PIR

School-Age Information
School: ▼ Grade: ▼ Pupil ID: Kindergarten: (starting year)

Referral/Enrollment History PIR Add Referral/Enrollment

	Referred	Enrolled	Discharged	Reason	Entered	By	
Select	01/01/2017	05/01/2017	06/16/2017	Temporarily inactive	05/09/2017	AMCMAHON	Delete

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Discharging Multiple Children Using Bulk Service Updates – End of Program Year

- Under the Child/Family section of ChildWare, select the Bulk Service Updates from the drop down menu. If you do not have this option available in the menu, please email ChildWare@phmc.org to request a change to your user profile.

ChildWare Little Learners Academy

Child/Family ▼ Staff ▼ Attendance/Meals ▼ Billing ▼ Reports/Docs ▼ To Do List ▼ Admin ▼

Child: Child Data Contact Data Bulk Service Updates Batch Record Updates

Add Child Advanced Search Print/Export List

	Name	DOB	Sex	Enrolled	Discharged	Entered	By	
Select	Notification Emails	03/15/2012	F	05/08/2013		07/06/2012	FPARKES	Delete
Select	PIN Maintenance	02/01/2009	M	09/01/2010		06/22/2011	FPARKES	Delete
Select	Allen Andrew	12/01/2009	M	07/12/2011		04/18/2011	ALPHATEST	Delete
Select	Allen Anna	04/23/2006	F	04/01/2011		04/18/2011	ALPHATEST	Delete

Continued on next page

2. Once selected, you will open the **Process Update Screen**.

The screenshot shows the 'Bulk Service Updates' screen with the 'Process Update' tab selected. The 'Update Action' section has a dropdown menu for 'Action:'. The 'Child Selection' section has radio buttons for 'Single Child', 'Family', and 'Multiple Children'.

3. Under **Update Action**, use the drop down to select **Discharge Active Children**.

The screenshot shows the 'Bulk Service Updates' screen with the 'Process Update' tab selected. The 'Update Action' section has a dropdown menu for 'Action:'. The dropdown menu is open, showing options: 'Re-Enroll Discharged Children', 'Discharge Active Children' (highlighted), 'Modify Service Profiles For Active Children', 'Rate Change For Active Children', and 'Subsidy Rate Change For Active Children'. A red arrow points to the 'Discharge Active Children' option.

4. **Enter the date for the last day of service** in the PHLpreK program year.

The screenshot shows the 'Bulk Service Updates' screen with the 'Process Update' tab selected. The 'Update Action' section has a dropdown menu for 'Action:'. The 'Discharge Information' section has a 'Discharge Date:' field with a calendar icon. A red arrow points to the 'Discharge Date:' field. The calendar is open, showing the month of June, 2017. The 'Child Selection' section has radio buttons for 'Single Child', 'Family', and 'Multiple Children'.

Continued on next page

5. For Discharge Reason:
 7. For children that are ending services and will not be returning to your site in September – **select Completed Program.**
 8. For children that will be returning in September – **select Temporarily Inactive.**

Bulk Service Updates Process Updates

Process Update | History

Update Action
Action: Discharge Active Children ▼

Discharge Information
Discharge Date: 06/16/2017
Reason: Completed program
Temporarily inactive
Note:

6. Click on the radial button for **Multiple Children.**

Bulk Service Updates Process Updates

Process Update | History

Update Action
Action: Discharge Active Children ▼

Discharge Information
Discharge Date: 06/16/2017
Reason: Completed program ▼
Note:

Child Selection
Select: ☐ Single Child ☐ Family ☒ Multiple Children

Born Between: and
 Include Room Group ▼ All Room Groups ▼
 Include Care Type ▼ All Care Types ▼
 Include Care Level ▼ All Care Levels ▼

You will end up with a list of children actively enrolled in you center. If you have a large number of children enrolled, you can use the filter options to narrow down the selection of children by their birthday, room and other options.

Child Selection
Select: ☐ Single Child ☐ Family ☒ Multiple Children

Born Between: and
 Include Room Group ▼ All Room Groups ▼
 Include Room ▼ All Rooms ▼
 Include Care Type ▼ All Care Types ▼
 Include Care Level ▼ All Care Levels ▼
 Include Subsidy ▼ All Subsidies ▼

Apply Filter | Reset Filter | Print Proposed

Include	Child's Name	DOB	Room	Enrolled	Discharged
<input type="checkbox"/>	Aikens, Angelica	03/15/2012	Big Tots - Older Toddlers Room	5/8/2013	

Continued on next page

7. Select the children that you will be discharging. Remember that you should only select those children whose discharge date and reason all match.

Born Between: and

Include Room Group All Room Groups

Include Room All Rooms

Include Care Type All Care Types

Include Care Level All Care Levels

Include Subsidy All Subsidies

Apply Filter Reset Filter Print Proposed

Include	Child's Name	DOB	Room	Enrolled	Discharged
<input type="checkbox"/>	Aikens, Angelica	03/15/2012	Big Tots - Older Toddlers Room	5/8/2013	
<input type="checkbox"/>	Alexander, Jason	02/01/2009	Little Learners - Preschool Room	9/1/2010	
<input type="checkbox"/>	Allen, Andrew	12/01/2009	Big Tots - Older Toddlers Room	7/12/2011	
<input checked="" type="checkbox"/>	Allen, Anna	04/23/2006	Little Learners - Preschool Room	4/1/2011	
<input type="checkbox"/>	Balances, Bernard	06/22/2012		2/1/2016	
<input checked="" type="checkbox"/>	Balances, Bradley	01/01/2012	Little Learners - Preschool Room	1/1/2015	
<input checked="" type="checkbox"/>	Banks, Christina	12/24/2009	Little Learners - Preschool Room	11/15/2011	
<input type="checkbox"/>	Banks, Robert	03/06/2009	Big Tots - Older Toddlers Room	11/15/2011	
<input type="checkbox"/>	Borschanski, April	12/31/2010	Little Learners - Preschool Room	3/1/2011	

8. Confirm that you have the correct Discharge Date and Discharge reason for the selected children. Then click the Process Updates button.

Child/Family Staff Attendance/Meals Billing Reports/Docs To Do List Admin

Bulk Service Updates

Process Update History

Update Action

Action: Discharge Active Children

Discharge Information

Discharge Date: 06/16/2017

Reason: Completed program

Note:

Child Selection

Select: ☐ Single Child ☐ Family ☒ Multiple Children

Born Between: and

Include Room Group All Room Groups

Include Room All Rooms

Include Care Type All Care Types

Include Care Level All Care Levels

Include Subsidy All Subsidies

Apply Filter Reset Filter Print Proposed

Include	Child's Name	DOB	Room	Enrolled	Discharged
<input type="checkbox"/>	Aikens, Angelica	03/15/2012	Big Tots - Older Toddlers Room	5/8/2013	

Continued on next page

9. **ChildWare will alert you** that you are making a change to the selected records. **If you're information is correct, click the Yes button.**

The screenshot shows the 'Discharge Information' screen in ChildWare. A modal dialog box titled 'ChildWare Validation' is centered on the screen. The dialog contains the text: 'This will discharge all selected children! Do you wish to continue?'. There are 'Yes' and 'No' buttons at the bottom of the dialog. In the background, the 'Discharge Information' form is visible, showing fields for 'Discharge Date' (06/16/2017), 'Reason' (Completed pro...), and 'Note'. Below the dialog is the 'Child Selection' section with a 'Select' dropdown set to 'Single C' and 'Born Between' date pickers.

10. ChildWare will confirm that the updates have been completed

The screenshot shows the 'Bulk Service Updates' screen in ChildWare. A red oval highlights a green confirmation message: 'Bulk Discharge has been processed for 3 children out of 3 selected!'. Above the message are tabs for 'Process Update' and 'History', and a 'Process Updates' button. Below the message is an 'Update Action' section with a dropdown menu currently set to 'Discharge Active Children'.

After completing either the Individual Child or Bulk Child Discharge process, the Discharge Date will now appear on in the "Discharged" column on the Child Data screen.

The screenshot shows the 'Children' screen in ChildWare. A red arrow points to the 'Discharged' column in the table. The table has columns: Last Name, First Name, DOB, Sex, Enrolled, Discharged, Entered, and By. There are three rows of data. The 'View or Search By' dropdown is set to 'Active'. The footer shows 'Page 1 of 1' and '3 records found'.

	Last Name	First Name	DOB	Sex	Enrolled	Discharged	Entered	By	
Select	Test	Child	11/06/2012	F	05/01/2017	06/16/2017	05/09/2017	AMCMAHON	Delete
Select	Wonderland	Manny	10/10/2011	M	01/04/2017	06/30/2017	05/24/2017	AMCMAHON	Delete
Select	Wright	Mable	01/01/2014	F	05/01/2017		05/24/2017	AADMIN	Delete

For PHLpreK sites that license ChildWare independently and use it for tracking other children and services, these instructions may need to be adjusted to accommodate summer service plans in ChildWare. Please contact the ChildWare Team (childware@phmc.org) to discuss your program and plans and to address any specific questions you may have for this process in ChildWare.

Need assistance? Contact the PHMC ChildWare Helpdesk at **215-985-2599, option 1** or **helpdesk@phmc.org**. (And please leave a voice mail message so that we can return your call!)