



Guidance for Data Entry

Required Data for all *PHLpreK enrollments*:

Child Information

- First Name, Last Name (legal name)
- DOB
- Sex
- Race
- Ethnicity

Primary Contact Information

- First Name, Last Name
- Address
- A phone number
- Relationship

Intake Information

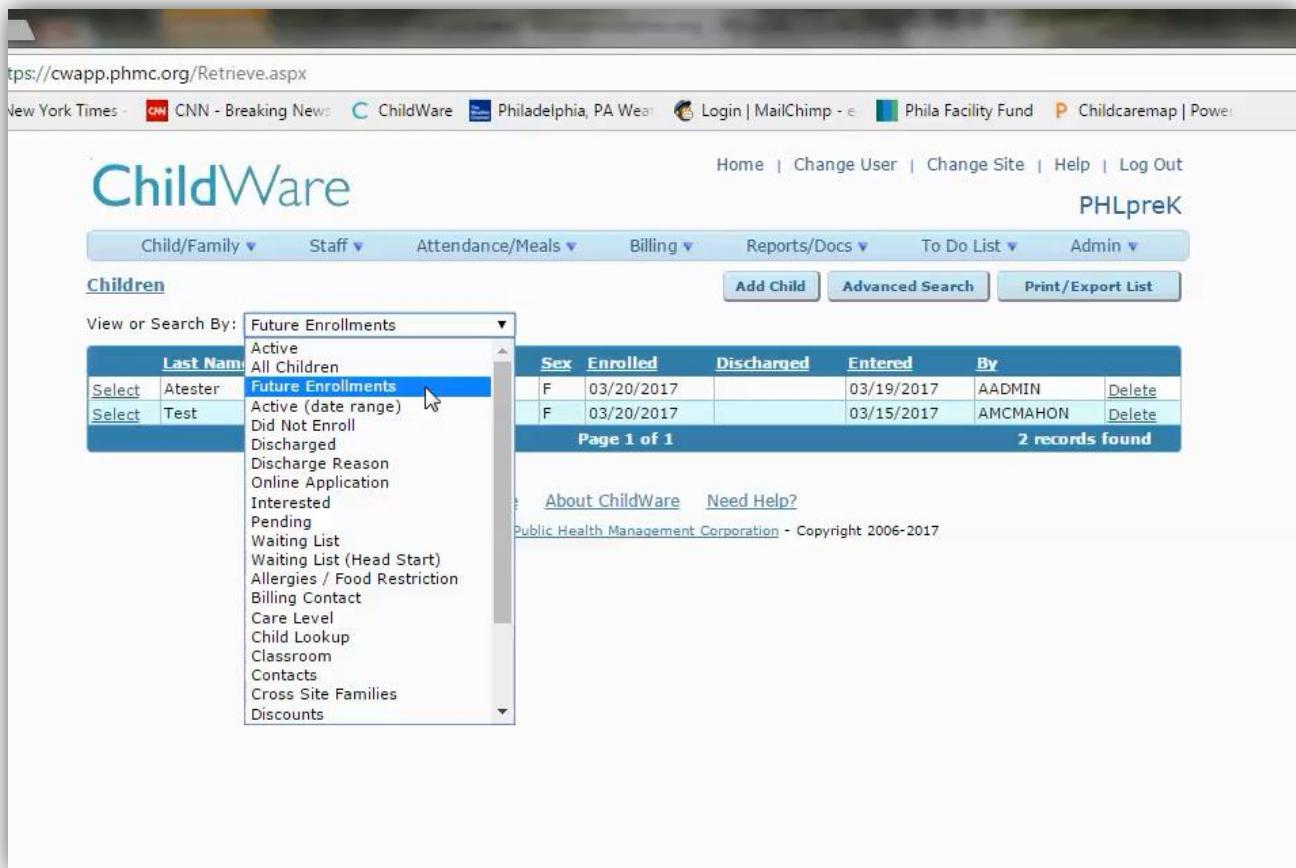
- Enrollment Status
- Family Size
- Family Annual Income
- Language Spoken at Home

PHLpreK designation

- Designate PHLpreK child
- Add PHLpreK subsidy to child's account

Instructions to ensure that all required fields are complete when entering a new child.

Start with your site's Child Data List. Make sure to check your list of "All Children" prior to entering a new child. This helps to avoid creating duplicates.



https://cwapp.phmc.org/Retrieve.aspx

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PHLpreK

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Children

Add Child Advanced Search Print/Export List

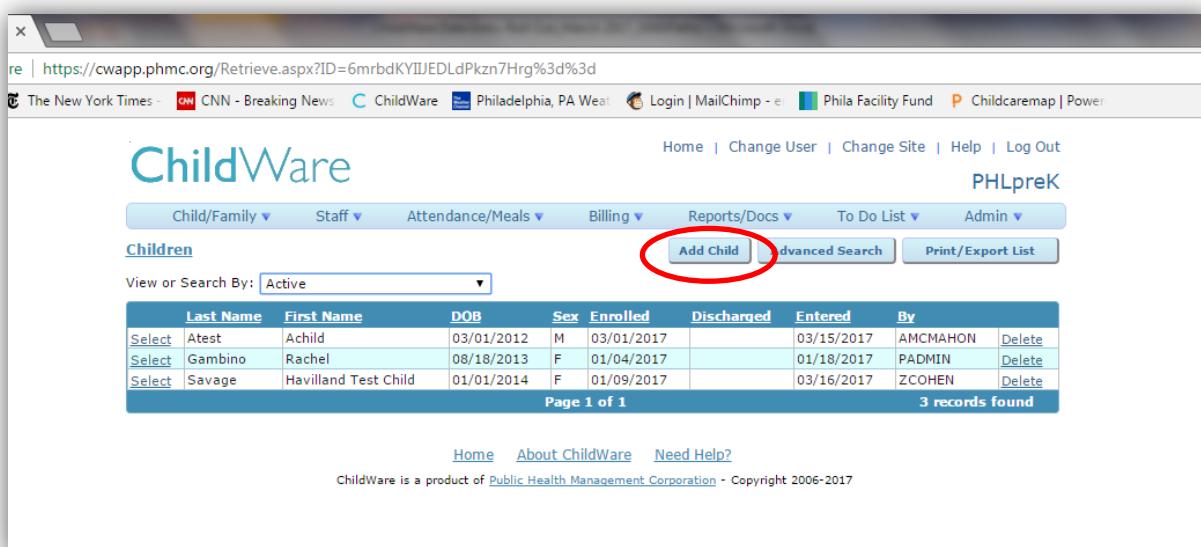
View or Search By: Future Enrollments

Last Name	First Name	DOB	Sex	Enrolled	Discharged	Entered	By
Select	Atest	03/01/2012	M	03/01/2017		03/19/2017	AADMIN
Select	Test	03/20/2017	F	01/04/2017		03/15/2017	AMCMAHON

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Once you have confirmed that the child is not already in ChildWare, click the "Add Child" button.



https://cwapp.phmc.org/Retrieve.aspx?ID=6mrbdKYIIJEDLdPkzn7Hrg%3d%3d

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Children

Add Child Advanced Search Print/Export List

View or Search By: Active

Last Name	First Name	DOB	Sex	Enrolled	Discharged	Entered	By
Select	Atest	03/01/2012	M	03/01/2017		03/15/2017	AMCMAHON
Select	Gambino	08/18/2013	F	01/04/2017		01/18/2017	PADMIN
Select	Savage	01/01/2014	F	01/09/2017		03/16/2017	ZCOHEN

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This will open a blank child record. In this document, the PHLpreK required fields on the page have been highlighted to show much of the required data. The fields are not highlighted in ChildWare. Please provide a copy of this handout to the person who is entering the data into ChildWare for your site.

The screenshot shows the ChildWare software interface for entering a child record. The 'Child' tab is selected. The 'Child Information' section contains fields for First Name, Last Name, DOB, Sex, and a radio button for 'New Family'. The 'Primary Contact Information' section includes fields for First Name, Last Name, Home Phone, School/Work Phone, Cell, Relationship, Father figure (with 'PIR' checked), and Education. The 'Referral Information' section has fields for Referral Date, Referred By, Reason For Care, First Staff Contact, Facility Tour Date, Application Completed, Application Fee Paid, and Note. The 'Expected Enrollment' section contains fields for Expected Enrollment Date, Expected Schedule (with days Monday through Sunday), and Drop In Only. The 'Intake Information' section includes Enrollment Status, Date Enrolled in Center, Site, Alliance (with 'PHL PreK' checked), Classroom, Family Size, Annual Income, Care Level, and Rate. The 'Subsidy Information' section has a field for HS Begin Date. At the bottom, there are links for Home, About ChildWare, and Need Help?, and a note that ChildWare is a product of Public Health Management Corporation © Copyright 2006-2017.

Additional data can be entered if it will assist in your program management activities.

Once all required fields have been entered, click **OK** to save the data.

The screenshot shows the ChildWare software interface with data entered into the fields. The 'Child' tab is selected. The 'Child Information' section shows 'Child' as the First Name, 'Atester' as the Last Name, '01/01/2012' as the DOB, and '5 years, 2 months' as the Age. The 'Primary Contact Information' section shows 'Parent' as the First Name, 'Atester' as the Last Name, '215 555-5555' as the Cell phone number, and 'Father' as the Relationship. The 'Referral Information' section shows '03/01/2017' as the Referral Date, 'PIR' as the Referred By, and 'Enrolled' as the Enrollment Status. The 'Expected Enrollment' section shows '03/20/2017' as the Expected Enrollment Date and 'Full Day' for all days. The 'Intake Information' section shows '03/20/2017' as the Date Enrolled in Center, 'PHLpreK' as the Site, 'PHL PreK' as the Alliance, 'Busy Bees (PreK 1)' as the Classroom, '3' as the Family Size, '\$25000' as the Annual Income, 'Preschool' as the Care Level, and 'Full Day / 5 days (\$0.00 weekly)' as the Rate. The 'Subsidy Information' section has a field for HS Begin Date. The 'OK' button is circled in red at the top right of the form.

This will take you to the Child Record's Main tab where you can continue to enter required data. At this point, the data review and update process is the same for as it would be for a child already entered into ChildWare. Please refer to the following pages for additional instructions.

Relationship Tab Information:

Click on the **Relationships tab** and **Select the Primary contact** (first on list).

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Child: Ciara Abbott (Ducklings) OK Cancel

Child Due: \$147.00	Family Due: \$147.00	Deposit Required: \$0.00	Deposit On File: \$0.00																													
Main Relationships Services Financial Health HS Eligibility Admin Events & Case Notes Documents Logs																																
Contacts PIR Add Contact																																
View or Search By: Contact Information																																
<table border="1"> <thead> <tr> <th>Last Name</th> <th>First Name</th> <th>Relationship</th> <th>Pickup</th> <th>Language</th> <th>Home Phone</th> <th>Cell Phone</th> <th>Work Phone</th> </tr> </thead> <tbody> <tr> <td>Select</td> <td>Gibbons</td> <td>Angela</td> <td>Mother</td> <td>Any time</td> <td>English</td> <td>610-555-8199</td> <td>215-555-5721</td> <td>Delete</td> </tr> <tr> <td>Select</td> <td>Abbott</td> <td>Jason</td> <td>Father</td> <td>Any time</td> <td>English</td> <td>610-555-8199</td> <td>610-555-8710</td> <td>Delete</td> </tr> </tbody> </table> Primary Contact: Abbott, Jason PIR Secondary Contact: Abbott, Jason PIR				Last Name	First Name	Relationship	Pickup	Language	Home Phone	Cell Phone	Work Phone	Select	Gibbons	Angela	Mother	Any time	English	610-555-8199	215-555-5721	Delete	Select	Abbott	Jason	Father	Any time	English	610-555-8199	610-555-8710	Delete			
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Click on the **Main Tab** and make sure the ***name, race, language, address, and phone information is filled out.***
PHLpreK requires this information to approve enrollment.

Contact: Angela Gibbons, Child: Ciara Abbott OK Cancel

Main Children Employer/School Information Public Assistance Family Partnership Events Log

Demographics

First Name: <input type="text" value="Angela"/>	MI: <input type="text"/>
Last Name: <input type="text" value="Gibbons"/>	Suffix: <input type="text"/>
Nickname: <input type="text"/>	
Sex: <input type="text" value="F"/>	
DOB: <input type="text" value="07/21/1989"/>	
SSN: <input type="text" value=" - -"/>	
Race: <input type="text" value="Black or African American"/>	
Language: <input type="text" value="English"/>	

Status

At Least 16? <input checked="" type="checkbox"/>
Student? <input checked="" type="checkbox"/>
Education: <input type="text" value="GED"/>
Residency: <input type="text"/>
Verified: <input type="text"/>
Residency Note: <input type="text"/>
Income Verified: <input type="text"/>
Income Note: <input type="text"/>
Photo: <input type="text" value="Contact Photo"/>
Browse...

Home Contact Information

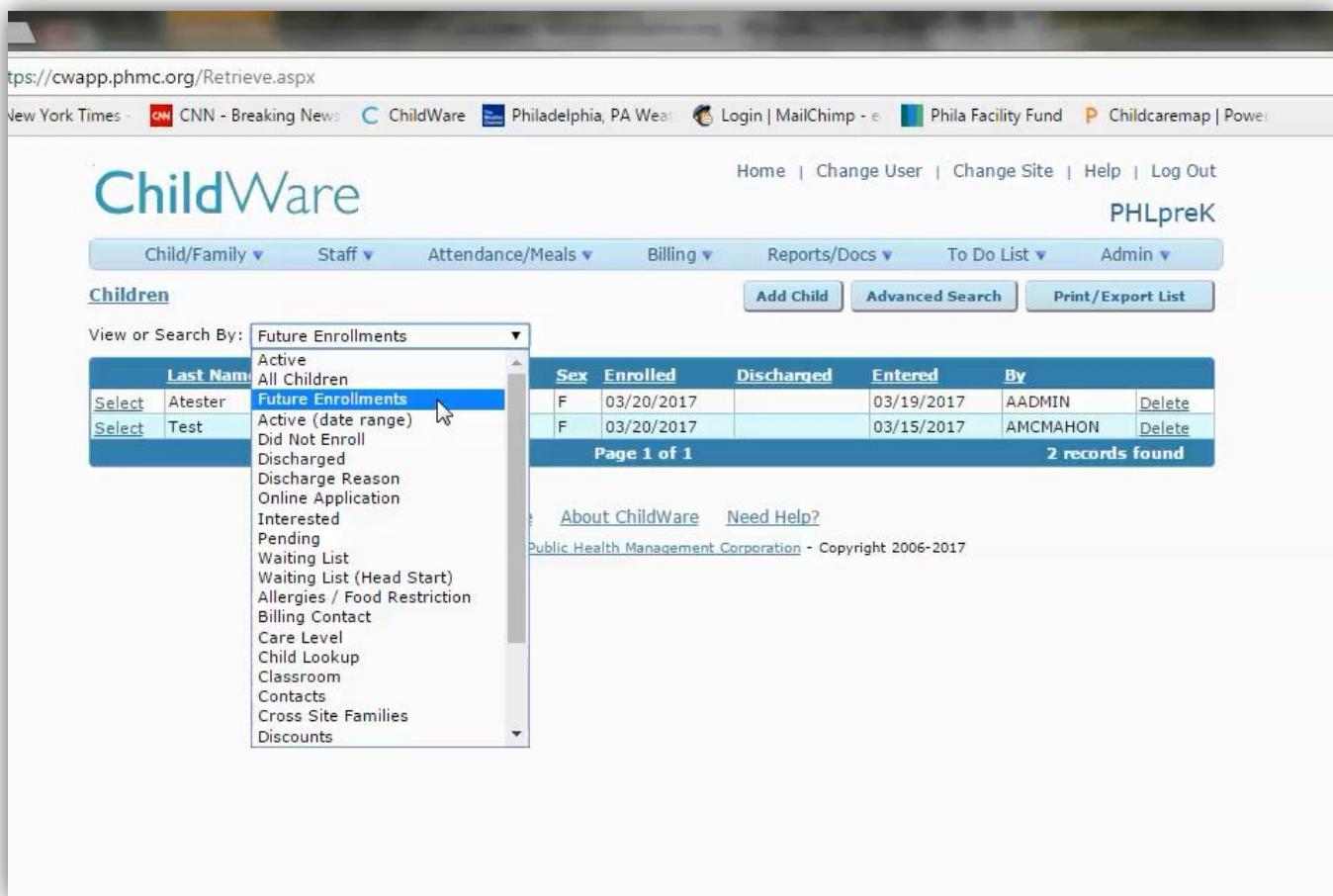
Address 1: <input type="text" value="2115 West Bridge Ave"/>	
Address 2: <input type="text"/>	
City: <input type="text" value="Philadelphia"/>	
State: <input type="text" value="PA"/>	Zip: <input type="text" value="19092"/>
County: <input type="text"/>	
Home Phone: <input type="text" value="610 555-8199"/>	
Cell: <input type="text" value="215 555-5721"/>	
Email: <input type="text" value="agibbons@gmail.com"/>	
Rest Time To: <input type="text"/>	

Instructions to ensure that all required fields are complete for a child already entered into ChildWare.

Start with your site's Child Data List. The best choice is to use the "All Children" selection when searching for a child. You can also choose other options from the drop down list:

- All children – all children associated in any way with your site
- Active children – currently enrolled as of the date you are searching ChildWare
- Future enrollments – any children that have been given an Enrolled status for a future date
- Pending – used for children that are ready to enroll, but have not yet been approved by PHMC
- Waitlist – children waiting for an opening in your program

If you are not sure of the child's status, the easiest choice is to select All Children



tps://cwapp.phmc.org/Retrieve.aspx

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PHLpreK

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[Add Child](#) [Advanced Search](#) [Print/Export List](#)

Children

View or Search By: Future Enrollments

Last Name	First Name	Sex	Enrolled	Discharged	Entered	By
Atester	Atester	F	03/20/2017		03/19/2017	AADMIN
Test	Test	F	03/20/2017		03/15/2017	AMCMAHON

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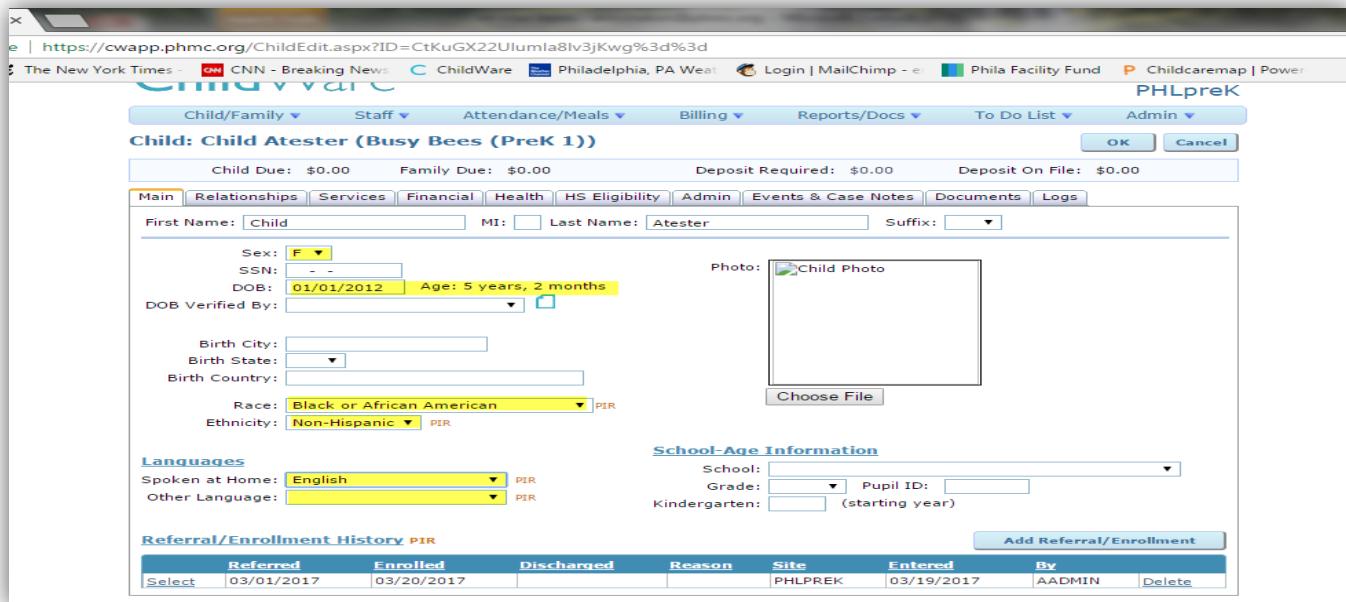
Select Atester
Select Test

Future Enrollments
Active
All Children
Active (date range)
Did Not Enroll
Discharged
Discharge Reason
Online Application
Interested
Pending
Waiting List
Waiting List (Head Start)
Allergies / Food Restriction
Billing Contact
Care Level
Child Lookup
Classroom
Contacts
Cross Site Families
Discounts

From your Child Data list, **select the child for whom you are going to update the information**. Once selected, you will be directed to the child's **Main tab**. If not, then select the Main tab.

Review the record to ensure that all required items are completed. On this copy, the **required fields on this page for PHLpreK** are highlighted. They are not highlighted in ChildWare, so please keep this handout on hand for reference.

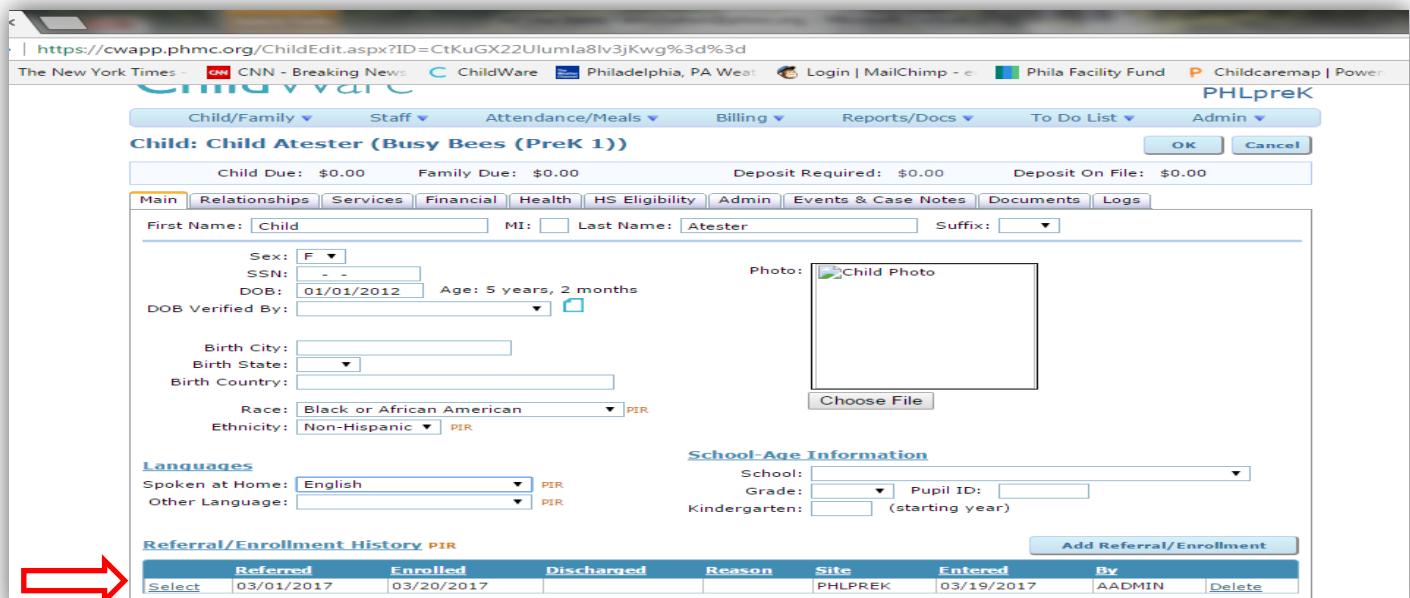
Check that the date of birth has been entered correctly and that the child's age aligns with the PHLpreK age requirements.



Referred	Enrolled	Discharged	Reason	Site	Entered	By
Select	03/01/2017	03/20/2017		PHLpreK	03/19/2017	AADMIN

Once you've ensured that all required data is entered, move to the bottom of the screen to: Referral/Enrollment History

Select the record (for most children, there will be only one item in the list. If there is more than one – choose the one with the correct enrollment date).

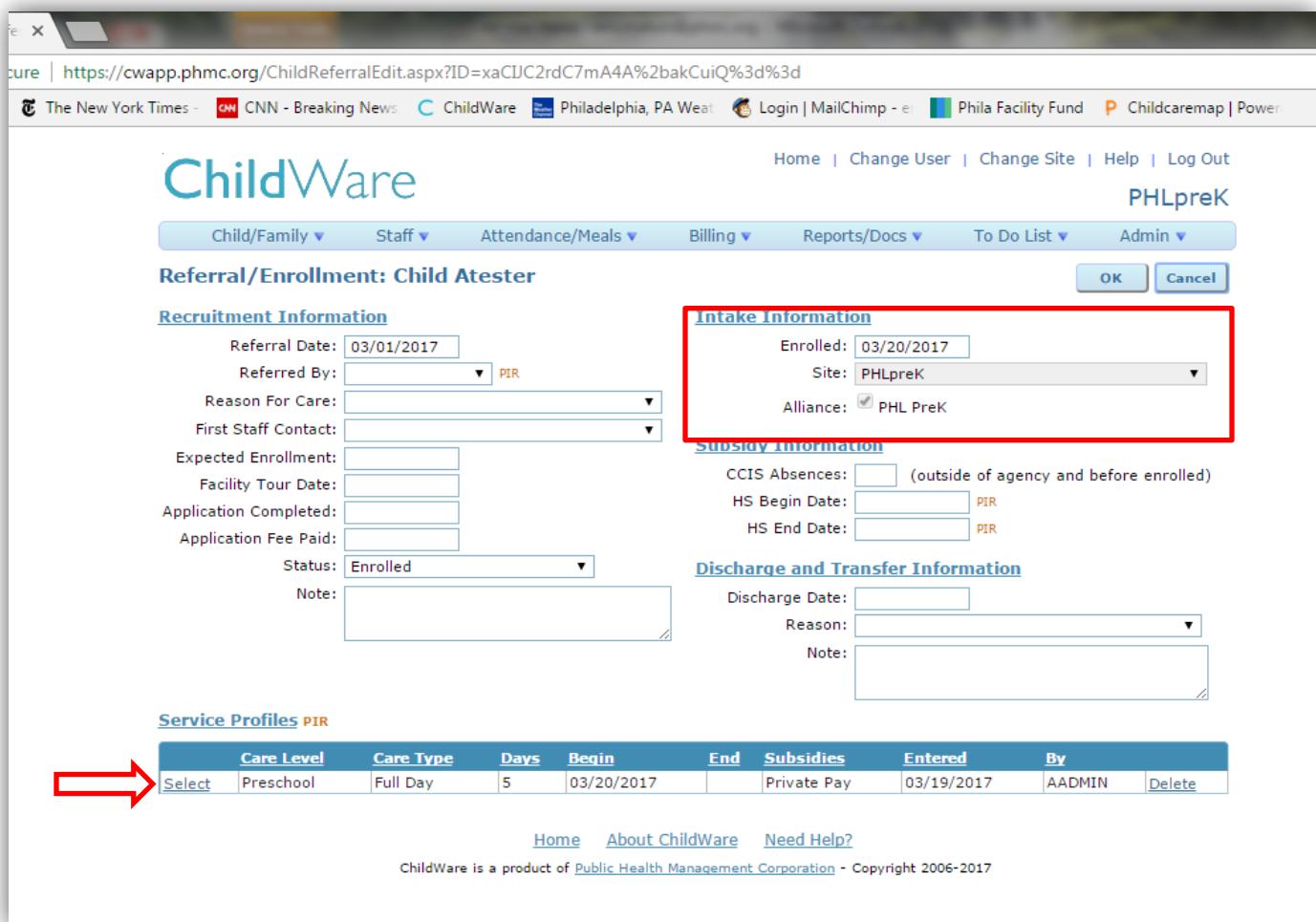


Referred	Enrolled	Discharged	Reason	Site	Entered	By
Select	03/01/2017	03/20/2017		PHLpreK	03/19/2017	AADMIN

Once on the Referral/Enrollment page, review the record to ensure that required data has been entered under Intake Information:

- Ensure that the enrollment date is correct and that the PHLPreK box is checked.

Scroll to the bottom of the page to Service Profiles and select the current service profile.



The screenshot shows the ChildWare Referral/Enrollment page. The 'Intake Information' section is highlighted with a red box. A red arrow points to the 'Select' button in the 'Service Profiles' table.

Referral/Enrollment: Child Atester

Recruitment Information

- Referral Date: 03/01/2017
- 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: 03/20/2017
- 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

Care Level	Care Type	Days	Begin	End	Subsidies	Entered	By	Actions
Select	Preschool	Full Day	5	03/20/2017	Private Pay	03/19/2017	AADMIN	Delete

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Once on the **Service Profile page**, review that all the required information is completed.

- **Add or correct Family Financial information here:** Family Size and Annual Income. If you have a CACFP program, consider using the data collected during the CACFP application process.
- **For providers that are new to ChildWare and have the PHLpreK set-up, please use Full Day as the Care Type.** This was the default used for child imports and for PHLpreK.
- **Check that classroom assignment is correct.**

Continued on next page

Once you've reviewed the record and updated the required fields, click the "Add Subsidy/Scholarship" button

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

Service Profile: Child Atester OK Cancel

Services

Care

	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
Care Type:	Full Day	Full Day	Full Day	Full Day	Full Day		
Time In:							
Time Out:							
Drop In Only:	<input type="checkbox"/>						
Classroom:	Busy Bees (PreK 1)						
Care Level:	Preschool (37 - 71 months)						

Child's DOB: 1/1/2012 (5 years, 2 months old)

Family Financial

Family Size: 3 Annual Income: 25000 Meal Subsidy: Free

Subsidies / Scholarships

PIR Add Subsidy / Scholarship

Costs / Payments

Services / Rates

Tuition: Full Day / 5 days (\$0.00 weekly) - Effective: 01/01/2010

Weekly Cost Summary

Tuition/Care: \$0.00
Total Costs: \$0.00

Effective From: 03/20/2017 To:
Note:

Weekly Payments / Source

Tuition/Care (parent): \$0.00

Weekly Payment Summary

Payments from all Sources: \$0.00
Discounts/Credits: \$0.00

Parent Payment Summary

Due From Parent: \$0.00 Weekly
Parent Payment: \$0.00 Weekly

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PHLpreK

Subsidy / Scholarship: Child Atester OK Cancel

Subsidy: ▼

Subsidy Care Level: ▼ PHL PreK ▼

Subsidy Rate: ▼

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Once you select the PHLpreK subsidy, the rest of the information is filled in from default set-ups in the system. Click OK.



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Subsidy / Scholarship: Child Atester

Subsidy: PHL PreK ▾

Subsidy Care Level: PreSchool ▾

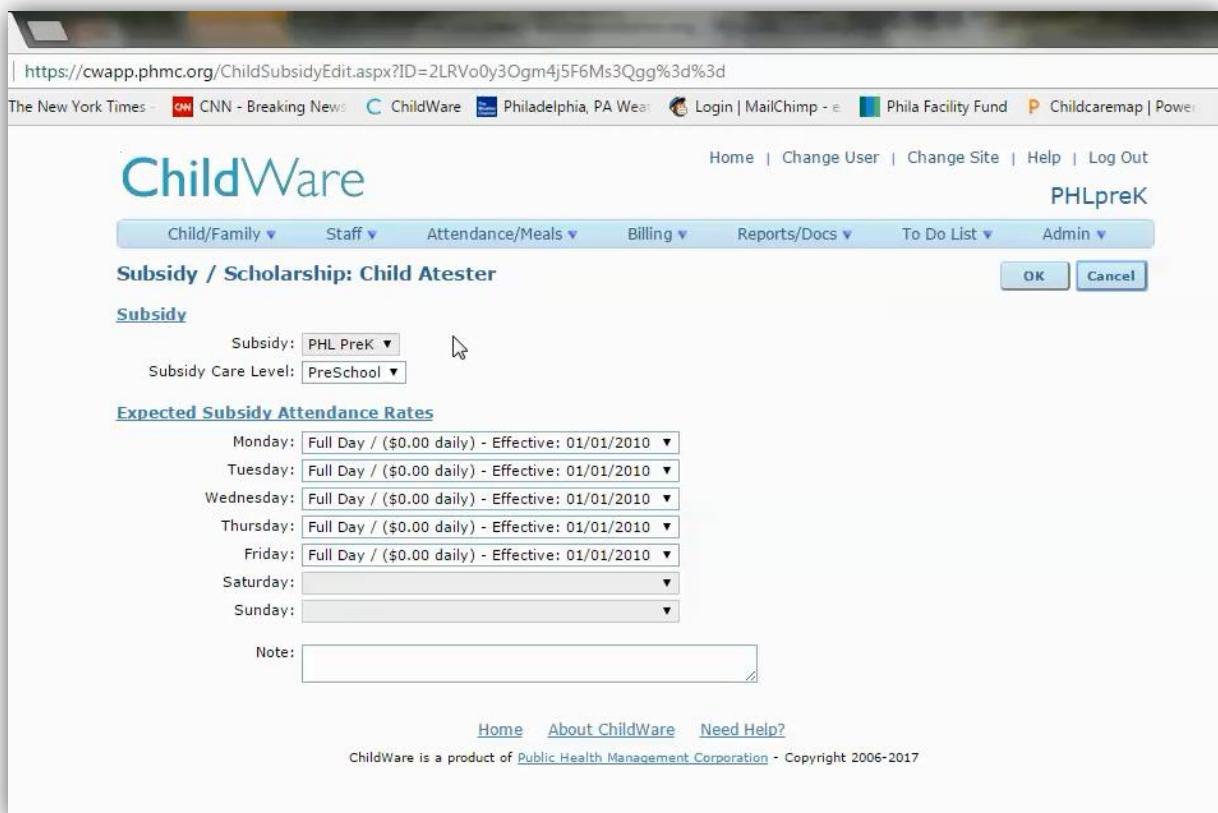
Subsidy Rate: Full Day / (\$0.00 daily) - Effective: 01/01/2010 ▾

OK Cancel

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Once you click OK, you will move to another page where defaults have also been set-up. These defaults should be fine – as noted, we are using **Full Day** for most providers (unless you had a prior ChildWare account). Click OK.



https://cwapp.phmc.org/ChildSubsidyEdit.aspx?ID=2LRVo0y3Ogm4j5F6Ms3Qgg%3d%3d

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

Subsidy / Scholarship: Child Atester

Subsidy

Subsidy: PHL PreK ▾

Subsidy Care Level: PreSchool ▾

Expected Subsidy Attendance Rates

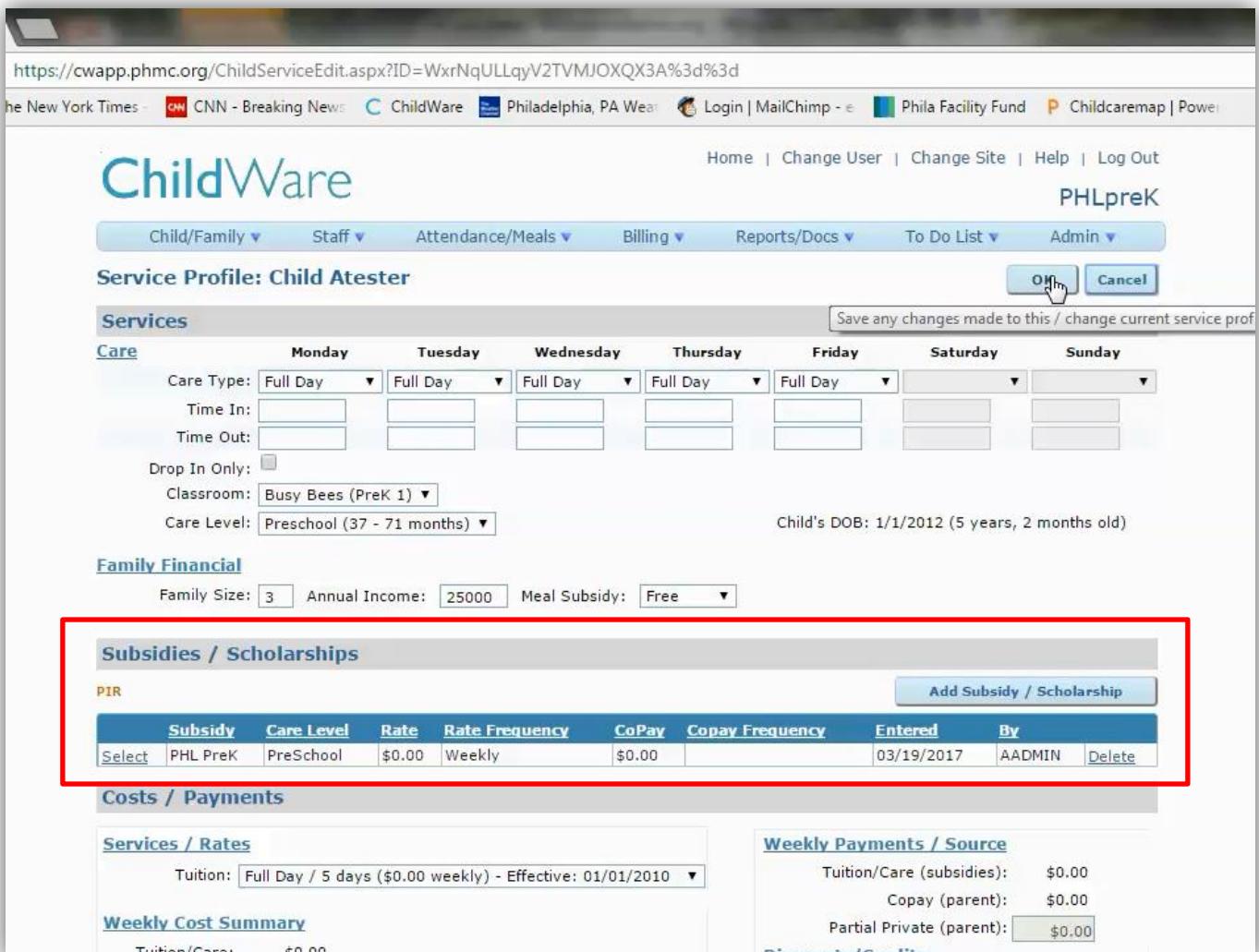
Monday:	Full Day / (\$0.00 daily) - Effective: 01/01/2010 ▾
Tuesday:	Full Day / (\$0.00 daily) - Effective: 01/01/2010 ▾
Wednesday:	Full Day / (\$0.00 daily) - Effective: 01/01/2010 ▾
Thursday:	Full Day / (\$0.00 daily) - Effective: 01/01/2010 ▾
Friday:	Full Day / (\$0.00 daily) - Effective: 01/01/2010 ▾
Saturday:	
Sunday:	

Note:

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You will be returned to the Service Profile page. You will now see that the subsidy has been added to the child's record.



The screenshot shows the ChildWare Service Profile page for a child named "Child Atester". The "Services" section is displayed, showing care details for Monday through Sunday. The "Family Financial" section shows a family of 3 with an annual income of \$25000 and a meal subsidy of "Free". The "Subsidies / Scholarships" section is highlighted with a red box and contains a table with one row:

Subsidy	Care Level	Rate	Rate Frequency	CoPay	Copay Frequency	Entered	By
Select	PHL PreK	PreSchool	\$0.00	Weekly	\$0.00	03/19/2017	AADMIN

The "Costs / Payments" section is also visible. The "Services / Rates" table shows tuition for "Full Day / 5 days (\$0.00 weekly) - Effective: 01/01/2010". The "Weekly Cost Summary" table shows tuition/care at \$0.00. The "Weekly Payments / Source" table shows tuition/care at \$0.00, copay at \$0.00, and partial private at \$0.00. The "Discounts/Credits" section is also present.

At this point, continue to click OK until you return to the child's main page. You are finished updating this child's record and can move on to the next child.

Need assistance? Contact the 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!)

