



For Licensed/Subscribed ChildWare Users with PHLpreK Slots (CW System of Record Locations)

PHLpreK Guidelines for Transition to Summer Programming

Discharging Children – End of PHLpreK Program Year.....	pg 1-4
Discharging Multiple Children using Bulk Service Updates.....	pg 4-8
Creating a Summer Enrollment Record for Subsidy or Private Pay	pg 8-10
Preparing a record for PHLpreK program Approval for September	pg 11-14

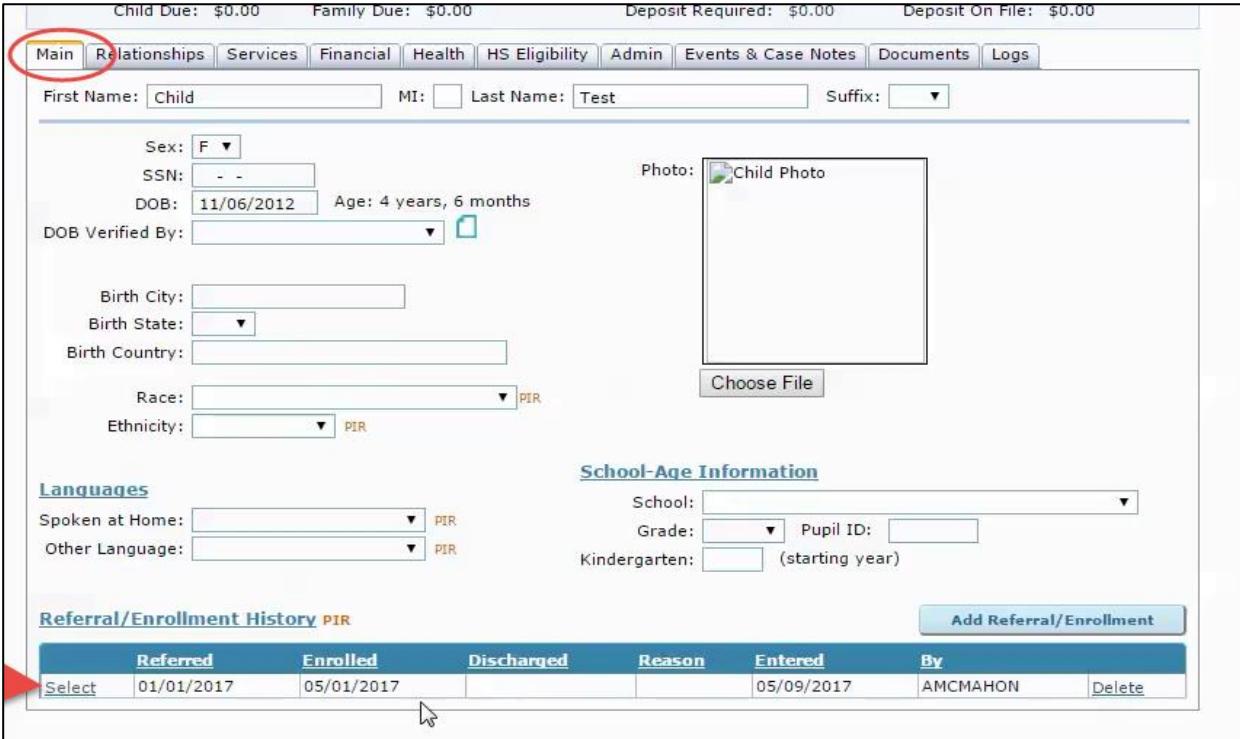
Discharging Individual Children – End of Program Year

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

Last Name	First Name	DOB	Sex	Enrolled	Discharged	Entered	By	Action	
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

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

NOTE – if you see a duplicated or 2nd open enrollment record (there are two enrollment records without discharge dates) – please contact the help desk before proceeding.



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

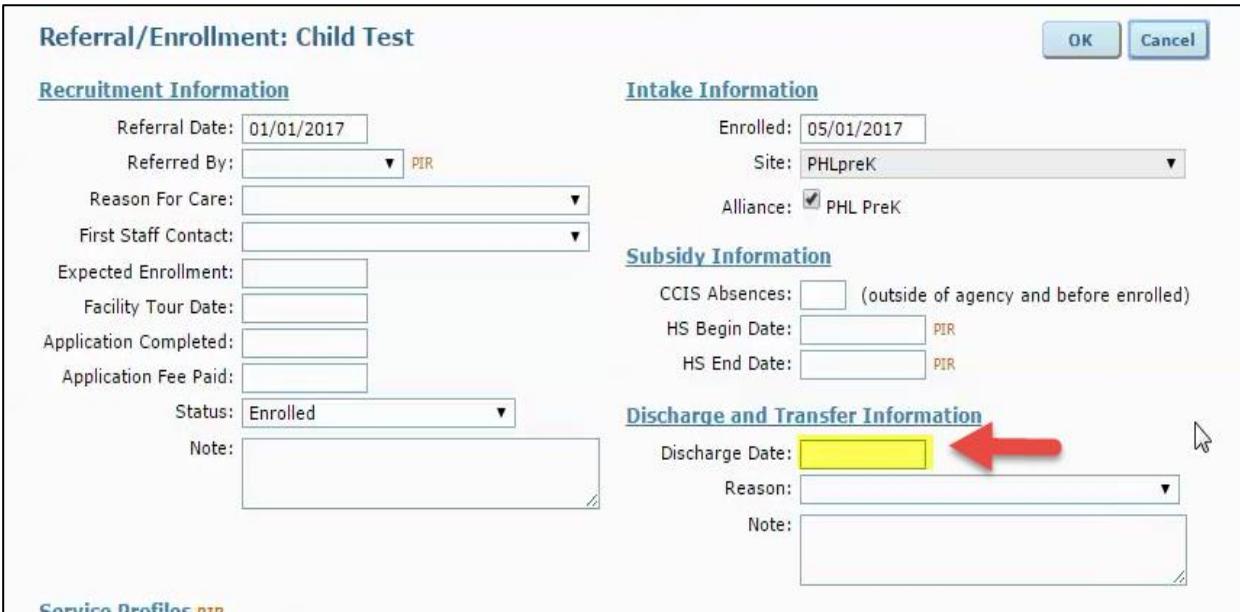
School-Age Information
School: ▾ Grade: ▾ Pupil ID: Kindergarten: (starting year)

Referral/Enrollment History PIR Add Referral/Enrollment

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

Home About ChildWare Need Help?

3. Enter a Discharge Date under the Discharge and Transfer Information section. Children can be discharged in advance so that date can be in the future with no impact on system billing.



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

4. Review Discharge Reasons

Referral/Enrollment: Child A Test

Recruitment Information		Intake Information													
Referral Date: <input type="text" value="09/01/2016"/>	Enrolled: <input type="text"/>	Referred By: <input type="text"/> PIR	Site: <input type="text" value="Happy Children Early Childcare Center"/>												
Reason For Care: <input type="text"/>	Alliance: <input type="text"/>	First Staff Contact: <input type="text"/>	CCIS Absences: <input type="text"/>												
Expected Enrollment: <input type="text"/>	HS Begin Date: <input type="text"/> PIR	Facility Tour Date: <input type="text"/>	HS End Date: <input type="text"/> PIR												
Application Completed: <input type="text"/>	Subsidy Information														
Application Fee Paid: <input type="text"/>	CCIS Absences: <input type="text"/> (outside of agency and before enrolled)	HS Begin Date: <input type="text"/> PIR	HS End Date: <input type="text"/> PIR												
Status: <input type="text" value="Did Not Enroll"/>	Reason: <input type="text"/>	Note: <input type="text"/>	Reason: <input type="text"/>												
Service Profiles PIR <table border="1"> <thead> <tr> <th>Care Level</th> <th>Care Type</th> <th>Days</th> <th>Begin</th> <th>End</th> <th>Subsidies</th> </tr> </thead> <tbody> <tr> <td>Select</td> <td>Preschool - 3-4</td> <td>Full Day</td> <td>5</td> <td>09/01/2016</td> <td>Private Pay</td> </tr> </tbody> </table>				Care Level	Care Type	Days	Begin	End	Subsidies	Select	Preschool - 3-4	Full Day	5	09/01/2016	Private Pay
Care Level	Care Type	Days	Begin	End	Subsidies										
Select	Preschool - 3-4	Full Day	5	09/01/2016	Private Pay										
Home About ChildWare Need Help ChildWare is a product of Public Health Management Corporation															

5. Choose Specific Discharge Reason and **write a brief explanation in the note section**. Then click **OK**. The system will change the child's status for you.

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

Notify your PHLpreK representative of this change.

Referral/Enrollment: Child Test

Recruitment Information		Intake Information	
Referral Date: <input type="text" value="01/01/2017"/>	Enrolled: <input type="text"/>	Referred By: <input type="text"/> PIR	Site: <input type="text"/>
Reason For Care: <input type="text"/>	Alliance: <input type="text"/>	First Staff Contact: <input type="text"/>	CCIS Absences: <input type="text"/>
Expected Enrollment: <input type="text"/>	HS Begin Date: <input type="text"/>	Facility Tour Date: <input type="text"/>	HS End Date: <input type="text"/>
Application Completed: <input type="text"/>	Subsidy Information		
Application Fee Paid: <input type="text"/>	CCIS Absences: <input type="text"/> (outside of agency and before enrolled)	HS Begin Date: <input type="text"/> PIR	HS End Date: <input type="text"/> PIR
Status: <input type="text" value="Enrolled"/>	Reason: <input type="text"/>	Note: <input type="text"/>	Reason: <input type="text"/>
Discharge and Transfer Information			
Discharge Date: <input type="text"/> Reason: <input type="text"/>			

6. 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:

Photo: Choose File

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

School-Age Information

Languages

Spoken at Home: Other Language:

School: Grade: Pupil ID: Kindergarten: (starting year)

Referral/Enrollment History PIR

Referred	Enrolled	Discharged	Reason	Entered	By
Select	01/01/2017	05/01/2017	06/16/2017	Temporarily inactive	05/09/2017 AMCMAHON <input type="button" value="Delete"/>

[Add Referral/Enrollment](#)

Home About ChildWare Need Help?

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

1. 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 Data **Contact Data** **Bulk Service Updates**

Add Child **Advanced Search** **Print/Export List**

Bulk Service Updates

Batch Record Updates	Name	DOB	Sex	Enrolled	Discharged	Entered	By
Select	Notification Emails	03/15/2012	F	05/08/2013		07/06/2012	FPARKES <input type="button" value="Delete"/>
Select	PIN Maintenance	02/01/2009	M	09/01/2010		06/22/2011	FPARKES <input type="button" value="Delete"/>
Select	Allen	12/01/2009	M	07/12/2011		04/18/2011	ALPHATEST <input type="button" value="Delete"/>
Select	Allen	04/23/2006	F	04/01/2011		04/18/2011	ALPHATEST <input type="button" value="Delete"/>

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



Bulk Service Updates

Process Update **History**

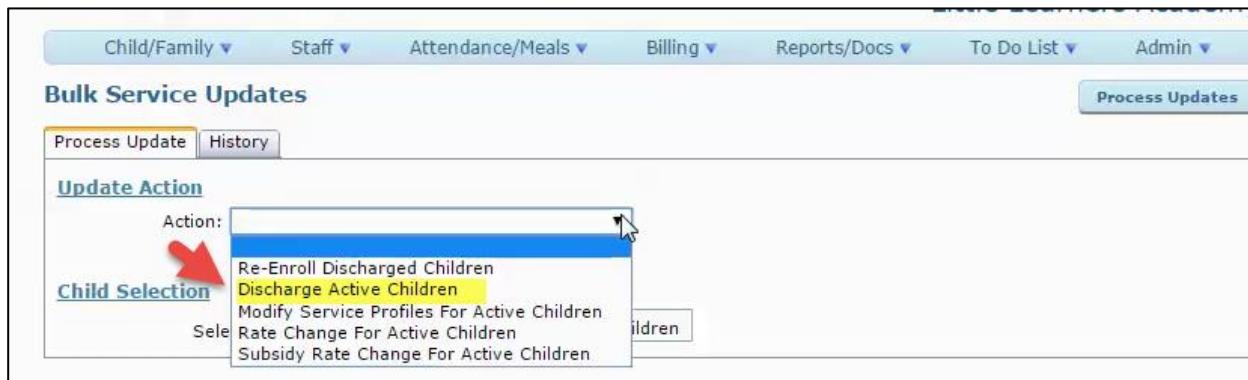
Update Action

Action:

Child Selection

Select: Single Child Family Multiple Children

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



Bulk Service Updates

Process Update **History**

Update Action

Action:

Child Selection

Re-Enroll Discharged Children
Discharge Active Children
Modify Service Profiles For Active Children
Rate Change For Active Children
Subsidy Rate Change For Active Children

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



Bulk Service Updates

Process Update **History**

Update Action

Action:

Discharge Information

Discharge Date: 

Reason:

Note:

Child Selection

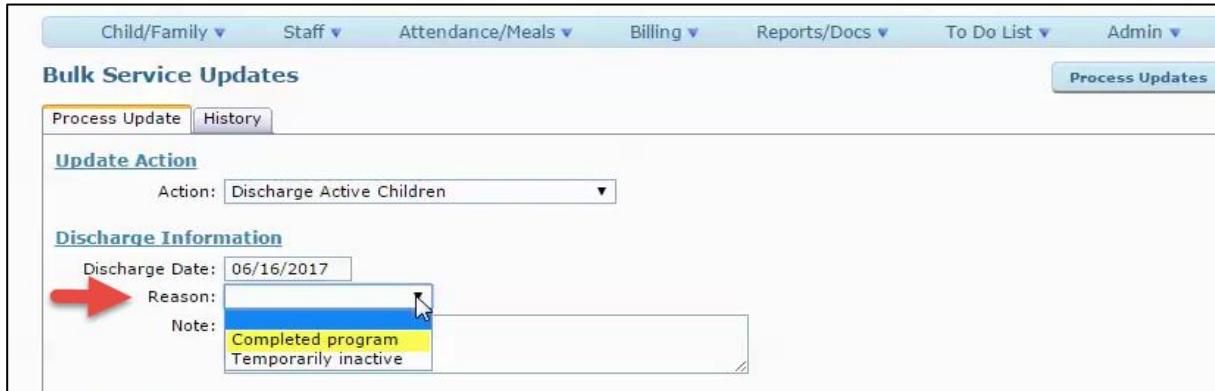
Select: Single Child Family Multiple Children

June, 2017

Su	Mo	Tu	We	Th	Fr	Sa
28	29	30	31	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	1
2	3	4	5	6	7	8

5. For Discharge Reason:

- For children that are ending services and will not be returning to your site in September – select **Completed Program**.
- For children that will be returning in September – select **Temporarily Inactive**.



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

Bulk Service Updates Process Updates

[Process Update](#) [History](#)

Update Action

Action: Discharge Active Children ▾

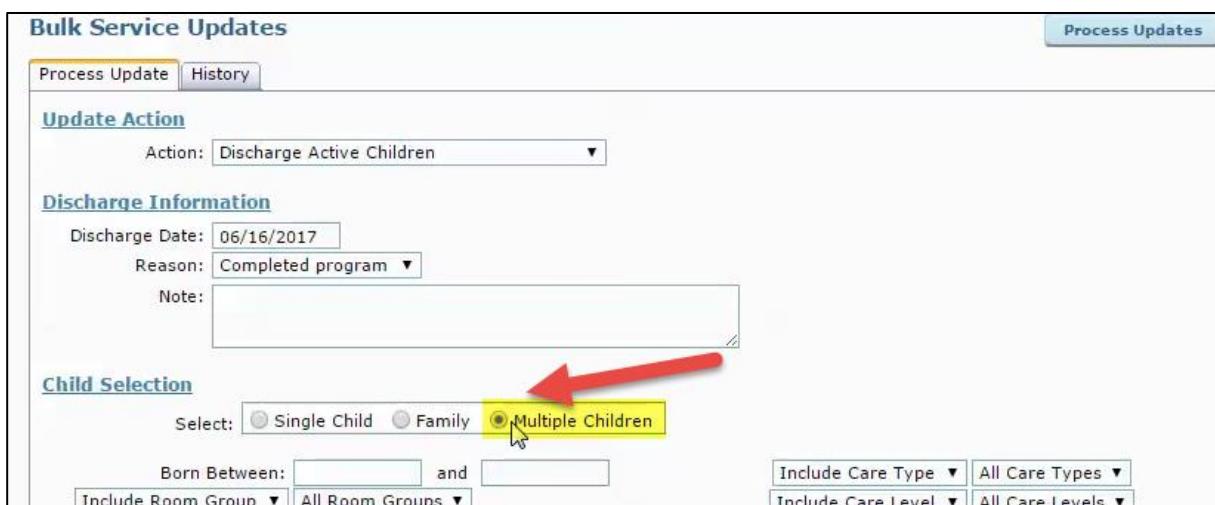
Discharge Information

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 Care Type ▾ All Care Types ▾

You will end up with a list of children actively enrolled in your 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.



Note:

Child Selection

Select: Single Child Family Multiple Children

Born Between: and Include Care Type ▾ All Care Types ▾

[Apply Filter](#) [Reset Filter](#) [Print Proposed](#)

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

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: <input type="text"/> and <input type="text"/>		Include Care Type <input type="button"/> All Care Types <input type="button"/> Include Care Level <input type="button"/> All Care Levels <input type="button"/> Include Subsidy <input type="button"/> All Subsidies <input type="button"/>			
Include Room Group <input type="button"/>	All Room Groups <input type="button"/>	Include Room <input type="button"/>	All Rooms <input type="button"/>		
				Apply Filter <input type="button"/> Reset Filter <input type="button"/> Print Proposed <input type="button"/>	
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	

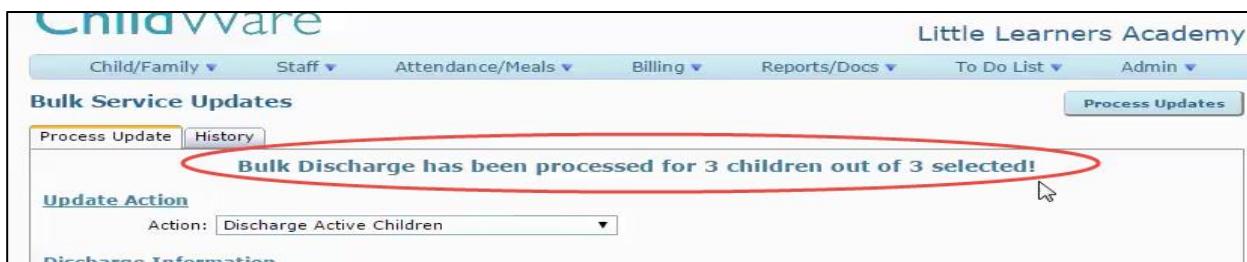
8. Confirm that you have the correct Discharge Date and Discharge reason for the selected children. Then click the Process Updates button.

Child/Family <input type="button"/>	Staff <input type="button"/>	Attendance/Meals <input type="button"/>	Billing <input type="button"/>	Reports/Docs <input type="button"/>	To Do List <input type="button"/>	Admin <input type="button"/>																								
Bulk Service Updates						Process Updates <input type="button"/>																								
<table border="1"> <tr> <td>Process Update</td> <td>History</td> </tr> <tr> <td colspan="2">Update Action</td> </tr> <tr> <td colspan="2">Action: <input type="button"/> Discharge Active Children</td> </tr> <tr> <td colspan="2">Discharge Information</td> </tr> <tr> <td>Discharge Date:</td> <td><input type="text"/> 06/16/2017</td> </tr> <tr> <td>Reason:</td> <td><input type="button"/> Completed program</td> </tr> <tr> <td colspan="2">Note:</td> </tr> </table>							Process Update	History	Update Action		Action: <input type="button"/> Discharge Active Children		Discharge Information		Discharge Date:	<input type="text"/> 06/16/2017	Reason:	<input type="button"/> Completed program	Note:											
Process Update	History																													
Update Action																														
Action: <input type="button"/> Discharge Active Children																														
Discharge Information																														
Discharge Date:	<input type="text"/> 06/16/2017																													
Reason:	<input type="button"/> Completed program																													
Note:																														
<table border="1"> <tr> <td>Child Selection</td> </tr> <tr> <td>Select: <input type="radio"/> Single Child <input type="radio"/> Family <input checked="" type="radio"/> Multiple Children</td> </tr> <tr> <td colspan="2">Born Between: <input type="text"/> and <input type="text"/></td> </tr> <tr> <td colspan="2">Include Room Group <input type="button"/> All Room Groups <input type="button"/></td> </tr> <tr> <td colspan="2">Include Room <input type="button"/> All Rooms <input type="button"/></td> </tr> <tr> <td colspan="2">Include Care Type <input type="button"/> All Care Types <input type="button"/> Include Care Level <input type="button"/> All Care Levels <input type="button"/> Include Subsidy <input type="button"/> All Subsidies <input type="button"/></td> </tr> <tr> <td colspan="2">Apply Filter <input type="button"/> Reset Filter <input type="button"/> Print Proposed <input type="button"/></td> </tr> <tr> <th>Include</th> <th>Child's Name</th> <th>DOB</th> <th>Room</th> <th>Enrolled</th> <th>Discharged</th> </tr> <tr> <td><input type="checkbox"/></td> <td>Aikens, Angelica</td> <td>03/15/2012</td> <td>Big Tots - Older Toddlers Room</td> <td>5/8/2013</td> <td></td> </tr> </table>							Child Selection	Select: <input type="radio"/> Single Child <input type="radio"/> Family <input checked="" type="radio"/> Multiple Children	Born Between: <input type="text"/> and <input type="text"/>		Include Room Group <input type="button"/> All Room Groups <input type="button"/>		Include Room <input type="button"/> All Rooms <input type="button"/>		Include Care Type <input type="button"/> All Care Types <input type="button"/> Include Care Level <input type="button"/> All Care Levels <input type="button"/> Include Subsidy <input type="button"/> All Subsidies <input type="button"/>		Apply Filter <input type="button"/> Reset Filter <input type="button"/> Print Proposed <input type="button"/>		Include	Child's Name	DOB	Room	Enrolled	Discharged	<input type="checkbox"/>	Aikens, Angelica	03/15/2012	Big Tots - Older Toddlers Room	5/8/2013	
Child Selection																														
Select: <input type="radio"/> Single Child <input type="radio"/> Family <input checked="" type="radio"/> Multiple Children																														
Born Between: <input type="text"/> and <input type="text"/>																														
Include Room Group <input type="button"/> All Room Groups <input type="button"/>																														
Include Room <input type="button"/> All Rooms <input type="button"/>																														
Include Care Type <input type="button"/> All Care Types <input type="button"/> Include Care Level <input type="button"/> All Care Levels <input type="button"/> Include Subsidy <input type="button"/> All Subsidies <input type="button"/>																														
Apply Filter <input type="button"/> Reset Filter <input type="button"/> Print Proposed <input type="button"/>																														
Include	Child's Name	DOB	Room	Enrolled	Discharged																									
<input type="checkbox"/>	Aikens, Angelica	03/15/2012	Big Tots - Older Toddlers Room	5/8/2013																										

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

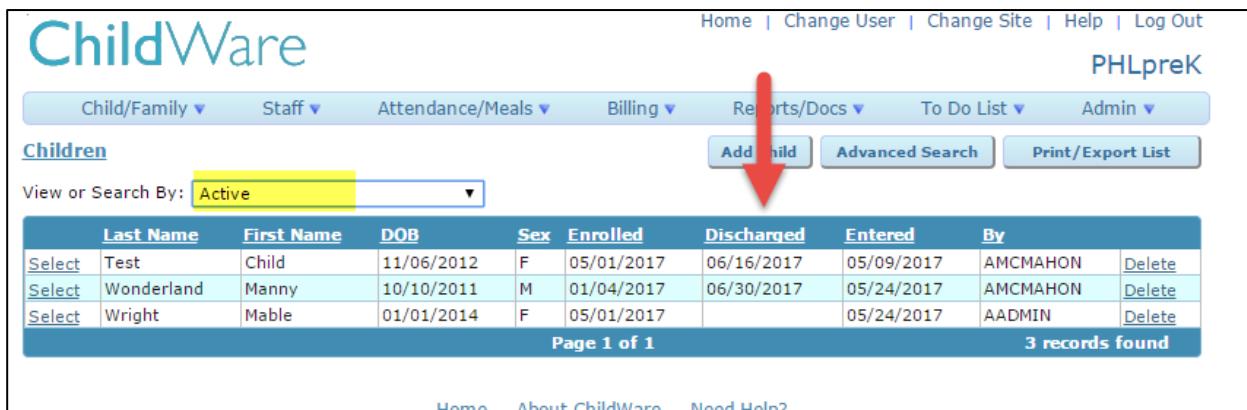
Discharge Date: <input type="text"/> 06/16/2017	Reason: <input type="text"/> Completed program	Note: <input type="text"/>	<div style="border: 1px solid black; padding: 10px; text-align: center;"> ChildWare Validation This will discharge all selected children! Do you wish to continue? <input type="button"/> Yes <input type="button"/> No </div>	
Child Selection		Select: <input type="radio"/> Single C		

10. ChildWare will confirm that the updates have been completed



The screenshot shows the 'Bulk Service Updates' section of the ChildWare interface. A red oval highlights the message 'Bulk Discharge has been processed for 3 children out of 3 selected!' in a blue box. Below this, there is an 'Update Action' section with a dropdown menu 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' data screen. A red arrow points to the 'Discharged' column in the table, which contains the date '06/16/2017' for the first child. The table also includes columns for Last Name, First Name, DOB, Sex, Enrolled, Entered, and By.

	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
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

Creating a Summer Enrollment Record for Subsidy or Private Pay

The following steps can be done after you have completed the above discharge process for the child from the PHLpreK program. You can create a summer enrollment using the steps below for both children that have been temporarily discharged and children that have completed the PHLpreK program but will continue to receive services over the summer until the transition to kindergarten.

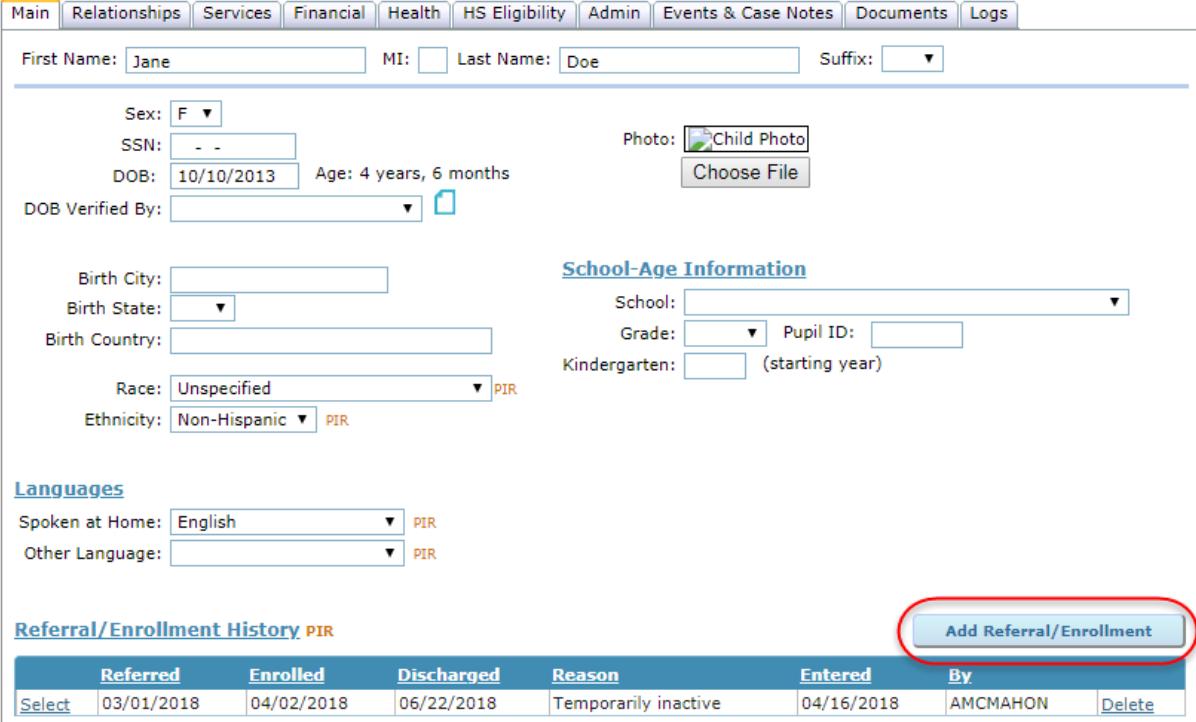
1. Under the Child/Family Section, select **Child Data** and then select **Active** enrollments if it is prior to the end of your PHLpreK program year. Select the child you want to enroll in the summer program.



The screenshot shows the 'Children' data screen. A red arrow points to the 'Discharged' column in the table, which contains the date '06/30/2017' for the second child. The table also includes columns for Last Name, First Name, DOB, Sex, Enrolled, Entered, and By.

	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

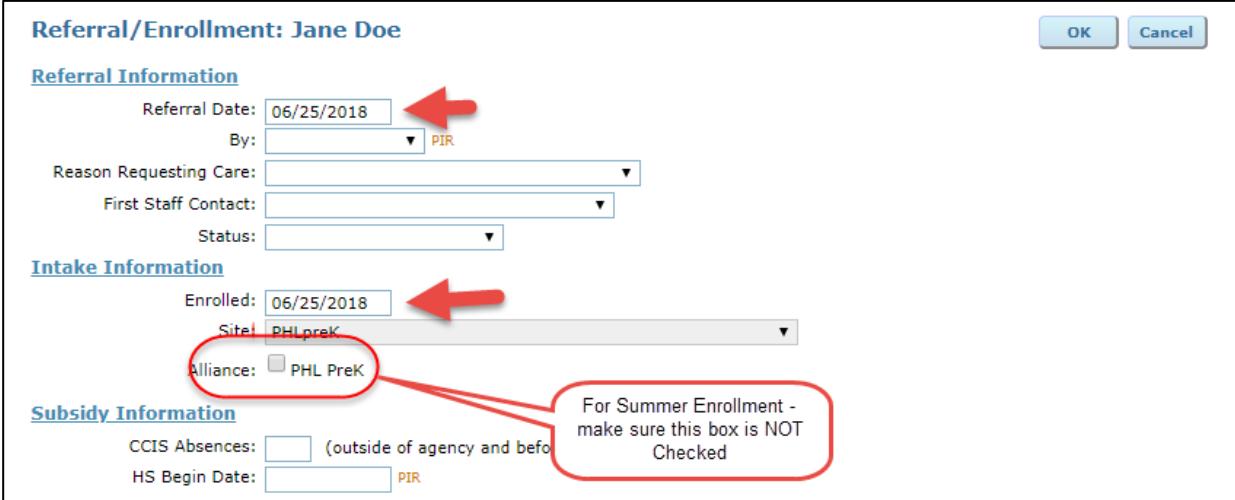
2. Scroll to the bottom of the child's Main tab. Click on the **Add Referral/Enrollment** button.



The screenshot shows the 'Main' tab of a child's profile. The top navigation bar includes tabs for Main, Relationships, Services, Financial, Health, HS Eligibility, Admin, Events & Case Notes, Documents, and Logs. The 'First Name' is Jane and 'Last Name' is Doe. Below this, there are fields for Sex (F), SSN, DOB (10/10/2013, Age: 4 years, 6 months), DOB Verified By, Birth City, Birth State, Birth Country, Race (Unspecified), Ethnicity (Non-Hispanic), and a Photo section. To the right, there is a 'School-Age Information' section with fields for School, Grade, Pupil ID, and Kindergarten (starting year). Below these are sections for Languages (Spoken at Home: English, Other Language: None), and a 'Referral/Enrollment History' table. The table has columns for Referred (03/01/2018), Enrolled (04/02/2018), Discharged (06/22/2018), Reason (Temporarily inactive), Entered (04/16/2018), and By (AMCMAHON). The 'Add Referral/Enrollment' button is highlighted with a red circle.

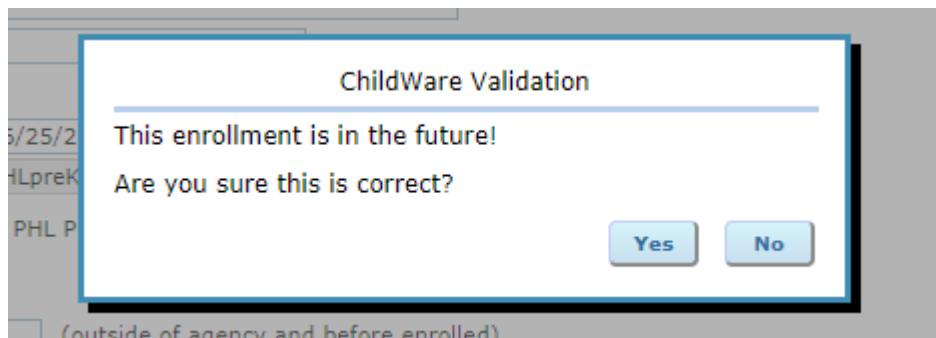
3. Enter a new **Referral date** – this date must be after the discharge date for the PHLpreK program. Complete any relevant referral information for your agency.

4. Under intake information enter the **Enrollment Date** that the child will start in the summer program. This date must be after the discharge date for the PHLpreK program but it can be the same date that was used for the referral date. **DO NOT CHECK THE PHLpreK Alliance box.**



The screenshot shows the 'Referral/Enrollment' dialog box for Jane Doe. It has tabs for Referral Information, Intake Information, and Subsidy Information. In the Referral Information tab, the 'Referral Date' is 06/25/2018. In the Intake Information tab, the 'Enrolled' date is 06/25/2018, and the 'Site' is PHL preK. The 'Alliance' checkbox is checked, and the label 'PHL PreK' is next to it. A red arrow points from this checkbox to a callout bubble containing the text: 'For Summer Enrollment - make sure this box is NOT Checked'.

5. Click **OK**. ChildWare will ask you to confirm because the referral date is in the future. Check your dates and click **Yes**.



6. ChildWare will open the **new enrollment record** for this child. You will see **a new service profile** with the new begin date. Some subsidies may have carried over into the new Service Profile. You may select this new service profile and make any necessary adjustments to subsidies, classrooms and fee structures.

Referral/Enrollment: Jane Doe **OK** **Cancel**

Recruitment Information		Intake Information																			
Referral Date:	06/25/2018	Enrolled:	06/25/2018																		
Referred By:	PIR	Site:	PHLpreK																		
Reason For Care:		Alliance:	PHL PreK																		
First Staff Contact:																					
Expected Enrollment:		Subsidy Information																			
Facility Tour Date:		CCIS Absences:	(outside of agency and before enrolled)																		
Application Completed:		HS Begin Date:	PIR																		
Application Fee Paid:		HS End Date:	PIR																		
Status:	Enrolled	Discharge and Transfer Information																			
Note:	Discharge Date: Reason: Note:																				
Service Profiles PIR																					
<table border="1"> <thead> <tr> <th>Care Level</th> <th>Care Type</th> <th>Days</th> <th>Begin</th> <th>End</th> <th>Subsidies</th> <th>Entered</th> <th>By</th> <th></th> </tr> </thead> <tbody> <tr> <td>Select</td> <td>Preschool</td> <td>Full Day</td> <td>5</td> <td>06/25/2018</td> <td>PHLPREK</td> <td>04/16/2018</td> <td>AMCMAHON</td> <td>Delete</td> </tr> </tbody> </table>				Care Level	Care Type	Days	Begin	End	Subsidies	Entered	By		Select	Preschool	Full Day	5	06/25/2018	PHLPREK	04/16/2018	AMCMAHON	Delete
Care Level	Care Type	Days	Begin	End	Subsidies	Entered	By														
Select	Preschool	Full Day	5	06/25/2018	PHLPREK	04/16/2018	AMCMAHON	Delete													

On the child's **Main tab**, there will now be **two referral/enrollment records** – one will have a discharge date and the other will have a future enrollment date.

Referral/Enrollment History PIR **Add Referral/Enrollment**

Referred	Enrolled	Discharged	Reason	Entered	By	
06/25/2018	06/25/2018			04/16/2018	AMCMAHON	Delete
03/01/2018	04/02/2018	06/22/2018	Temporarily inactive	04/16/2018	AMCMAHON	Delete

The child will continue to show up on the active child list. Billing will not change until you reach the date of the change in the enrollment/referral record. If there is a break between the end of your PHLpreK year and the start of your summer program, the child will display during that break on your discharged list and on the future enrollments list.

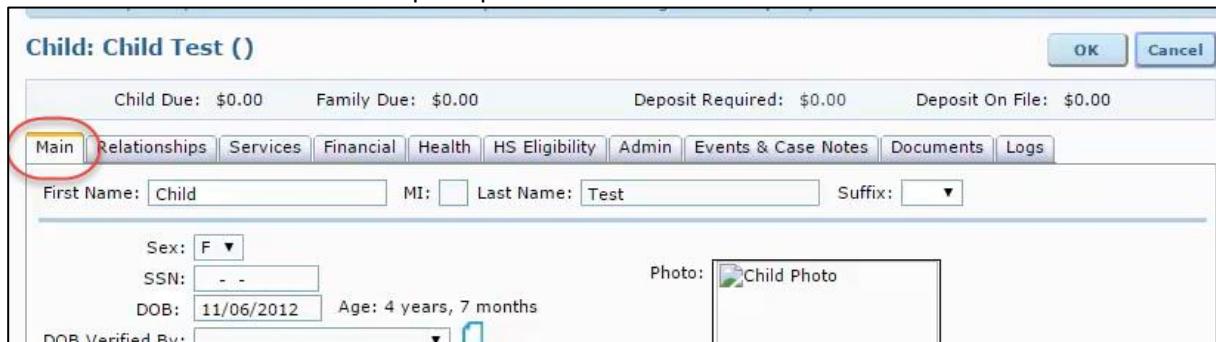
Preparing a child in your Summer Program for Approval in the PHLpreK Program for September

During the summer program, you can start the process to transition children into the PHLpreK program.

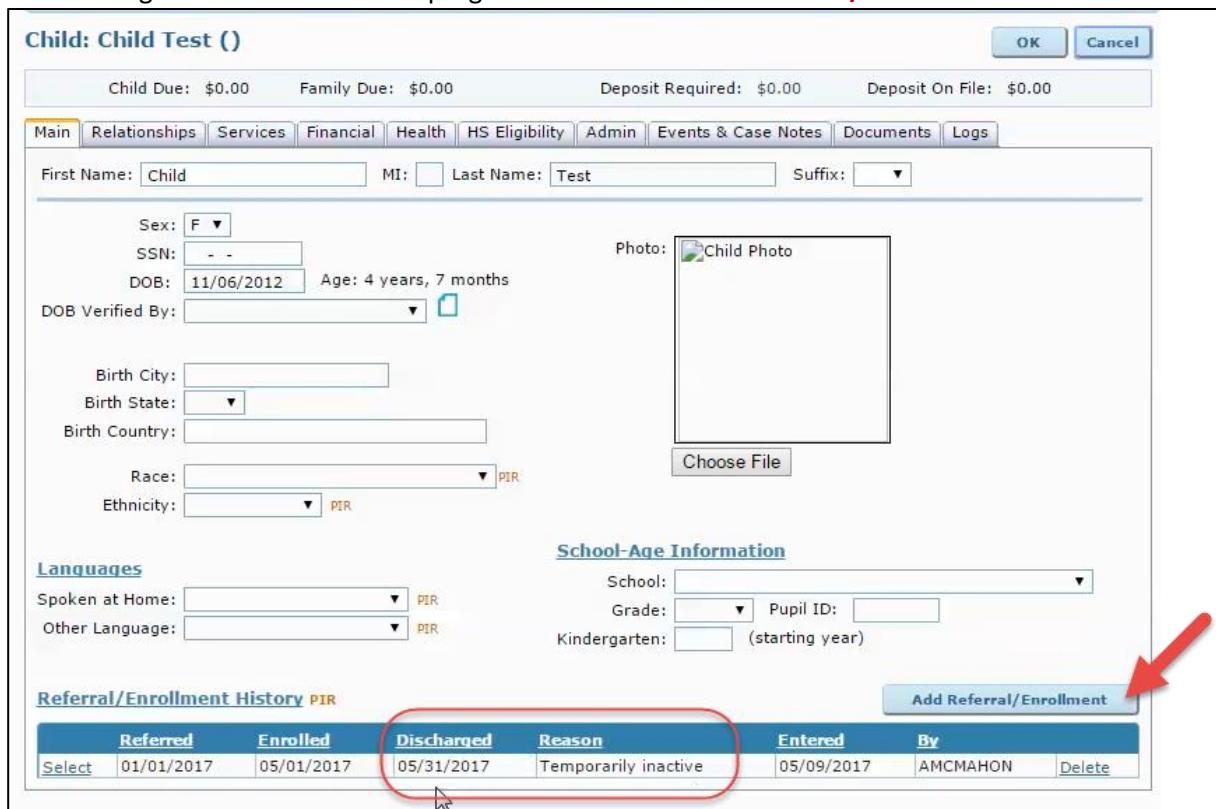
1. Identify the children currently enrolled in your summer program who will be transitioning into the PHLpreK program in September. **Repeat the steps on pages 1 – 4 to discharge the child from the summer enrollment.** You can also use the bulk discharge feature.
2. Once the children have been marked as discharged from the summer program you can create a new pending referral for the PHLpreK program.

Assigning a child Pending status for PHLpreK program Approval for September

3. Select the child's record and open up the Main tab

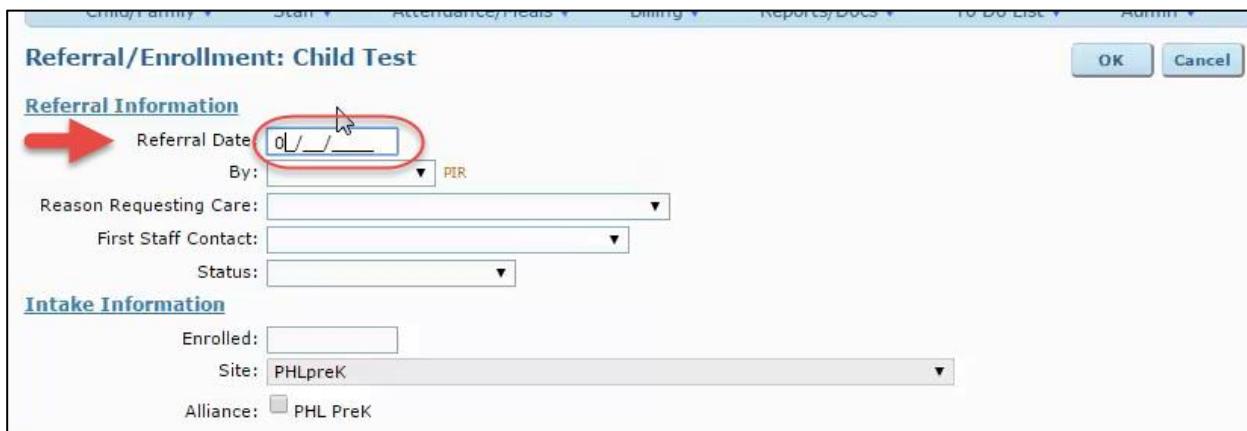


4. At the bottom of the screen, review the Referral/Enrollment history. The child should have the correct discharge date for the summer program. Click on the **Add Referral/Enrollment** button



Referred	Enrolled	Discharged	Reason	Entered	By
Select	01/01/2017	05/01/2017	05/31/2017	Temporarily inactive	05/09/2017
				AMCMAHON	Delete

5. In the Referral/Enrollment screen, **enter a new Referral date**. This date must be after the discharge date for the summer program.



Referral/Enrollment: Child Test

Referral Information

Referral Date: By: PIR

Reason Requesting Care:

First Staff Contact:

Status:

Intake Information

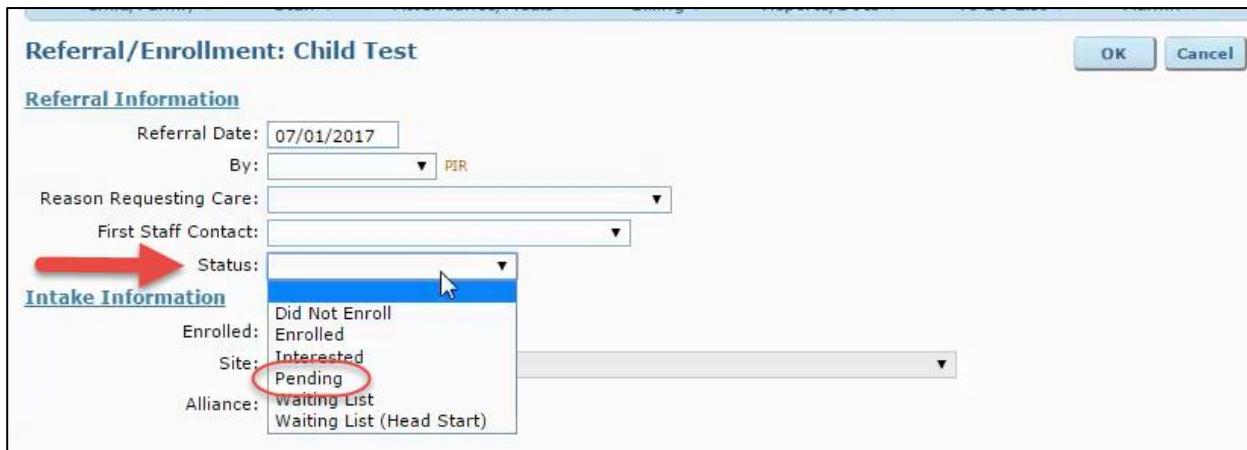
Enrolled:

Site: PHLpreK

Alliance: PHL PreK

OK Cancel

6. Move to the **Status drop down** and select **Pending**.



Referral/Enrollment: Child Test

Referral Information

Referral Date: 07/01/2017 By: PIR

Reason Requesting Care:

First Staff Contact:

Status:

Intake Information

Enrolled:

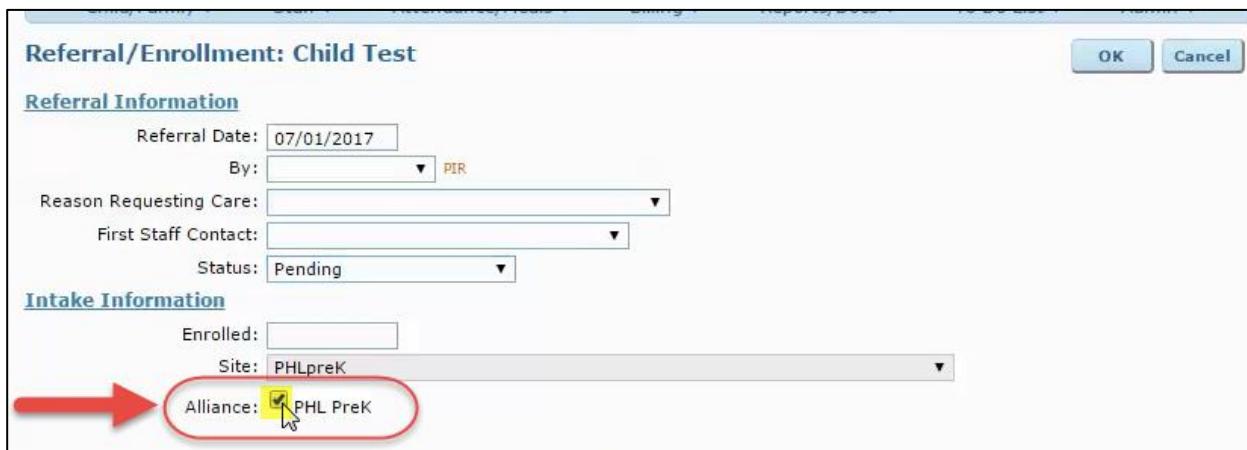
Site: PHLpreK

Alliance: Waiting List
 Waiting List (Head Start)

OK Cancel

7. Then click the **PHLpreK Alliance Check Box** – this is an important step because the summer enrollment record did not have this box checked. **DO NOT enter a date in the Enrolled field**.

8. Click OK to save this information.



Referral/Enrollment: Child Test

Referral Information

Referral Date: 07/01/2017 By: PIR

Reason Requesting Care:

First Staff Contact:

Status: Pending

Intake Information

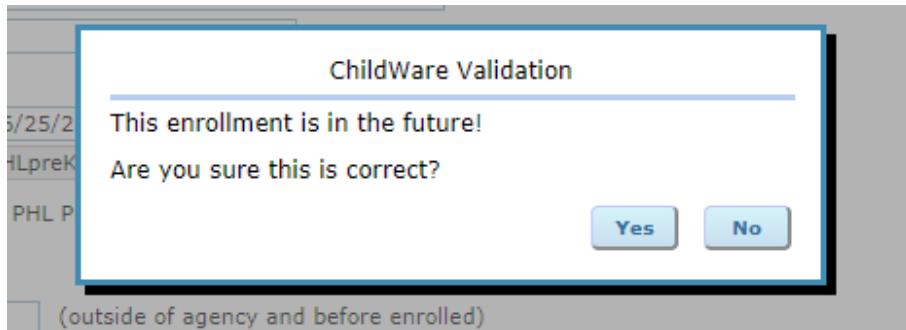
Enrolled:

Site: PHLpreK

Alliance: PHL PreK

OK Cancel

9. ChildWare will ask you to confirm because the referral date is in the future. Check your dates and click **Yes**.



10. A new referral screen will open. In the **Notes section**, enter the child's **start date for September**. This is required in the notes field because it will assist in the approval process at PHMC. **Do not enter any other information.**

11. Click **OK** to save the information.

Referral/Enrollment: Child Test

Recruitment Information

Referral Date: 07/01/2017
Referred By: PIR
Reason For Care:
First Staff Contact:
Expected Enrollment:
Facility Tour Date:
Application Completed:
Application Fee Paid:
Status: Pending
Note: Re-enroll for 9/5/17

Intake Information

Enrolled:
Site: PHLpreK
Alliance: PHL PreK

Subsidy Information

CCIS Absences: (outside of agency and before enrolled)
HS Begin D
HS End
Discharge
Discharge Reason:
Note:

A red circle highlights the 'OK' button. A red callout bubble points to the 'Discharge Reason' field with the text: 'Enter the start date for this child for the PHLpreK program for September'.

Follow the PHLpreK policy for notifying PHLpreK of a pending enrollment.

Note that this process creates a new service profile for the child. Do not make any changes to the service profile until after the child has been approved. If you make changes prior to the approval and formal enrollment by the PHLpreK staff you could create a duplicate service profile. Duplicate service profiles result in issues with attendance tracking, billing and reporting.

Checking a child's status for re-enrollment in September

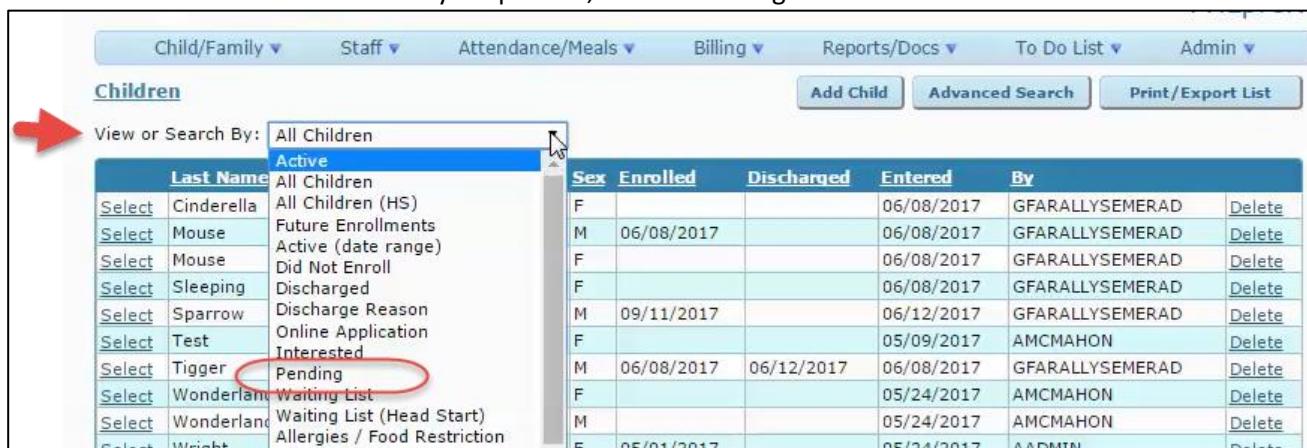
Once you have completed the last step above and clicked the OK button to save the information; you can then confirm that child(ren) has been properly marked as a pending enrollment.

1. Click on the Child/Family section and select Child Data from the list



The screenshot shows the PHLpreK software interface. The top navigation bar includes 'Child/Family', 'Staff', 'Attendance/Meals', 'Billing', 'Reports/Docs', 'To Do List', and 'Admin'. A red arrow points to the 'Child Data' option in the 'Child/Family' dropdown menu. The main content area displays financial information: 'Family Due: \$0.00', 'Deposit Required: \$0.00', and 'Deposit On File: \$0.00'. Below this are tabs for 'Financial', 'Health', 'HS Eligibility', 'Events & Case Notes', 'Documents', and 'Logs'. A search bar at the bottom includes fields for 'MI', 'Last Name' (set to 'Test'), and 'Suffix'.

2. From the View and Search By drop down, select "Pending"



The screenshot shows the 'Children' list in the PHLpreK software. A red arrow points to the 'View or Search By' dropdown menu, which is open and shows a list of options. The 'Pending' option is highlighted with a red circle. The main table lists children with columns for 'Sex', 'Enrolled', 'Discharged', 'Entered', and 'By'. The 'Entered' column shows dates ranging from 05/01/2017 to 06/12/2017.

3. Confirm that that the correct child(ren) are on the pending list for re-enrollment for September



The screenshot shows the 'Children' list in the PHLpreK software with 'Pending' selected in the 'View or Search By' dropdown. Two specific rows are circled in red: the first row for 'Sleeping' and the second row for 'Test'. The table columns are 'Last Name', 'First Name', 'DOB', 'Age', 'Sex', 'Referral', 'Entered', and 'By'. The 'Entered' column shows dates ranging from 06/06/2017 to 07/04/2017.

4. As children are approved for enrollment, PHMC staff will update the enrollment record with the enrollment date from the Notes field (that is why it's important to enter the correct date in the Notes field). The child will then be enrolled for September.
5. Once the enrollment has been approved and the child's status has been changed, the service profile can be updated to reflect new subsidies and classroom assignments.

Need assistance? Contact the PHMC ChildWare Helpdesk at **215-985-2599, option 1** or helpdesk@phmc.org.