



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

PHLpreK Guidelines for Transition from Summer Programming to PHLpreK

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 for September.

1. The transition into the PHLpreK program is completed in ChildWare by creating a new referral and pending record. The process is different than the typical service profile changes made as children go from summer to fall enrollment.
2. In order to create the new referral and pending record, **you must first discharge the child from summer enrollment.** (Note: You can also use the bulk discharge feature – instructions are provided at the end of this document). **This process, when done correctly, does not adversely affect billing or other data management activities.**
3. Identify the children currently enrolled in your summer program who will be transitioning into the PHLpreK program in September. 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

Need assistance? Contact the PHMC ChildWare Helpdesk at helpdesk@phmc.org

4. 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: 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

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5. **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: 05/01/2017
Reason: ▾
Note:

Service Profiles PIR

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

Referral/Enrollment: Child A Test

Recruitment Information

Referral Date: 09/01/2016
Referred By:
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:
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
Select	Preschool - 3-4	Full Day	5	09/01/2016	Private Pay

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7. 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: 

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

Languages

Spoken at Home:
Other Language:

School-Age Information

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?](#)

8. 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

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

Child: Child Test ()

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, 7 months

DOB Verified By: Photo: Child Photo

OK Cancel

10. 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

Child: Child Test ()

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, 7 months

DOB Verified By: Photo: Child Photo

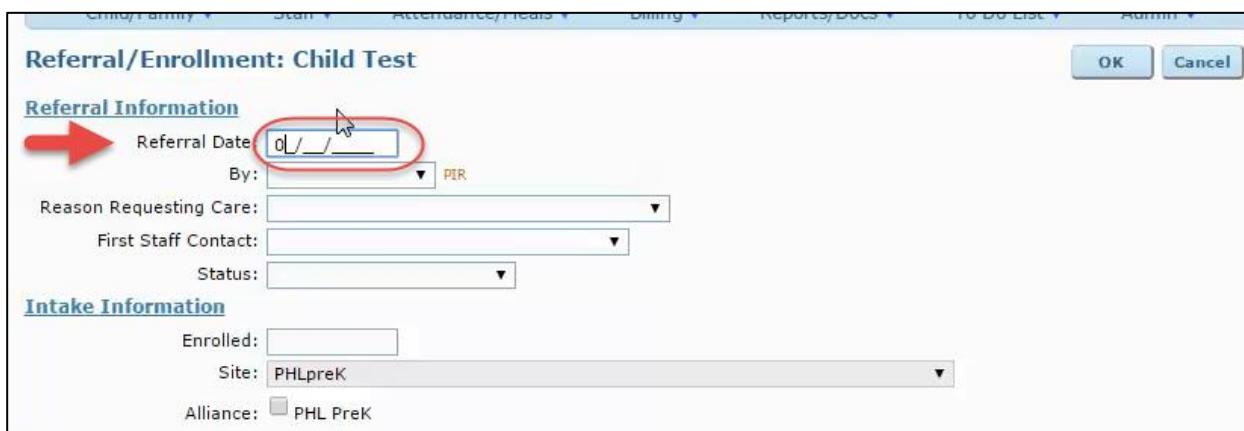
Choose File

Referral/Enrollment History PIR

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

Add Referral/Enrollment

11. 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:

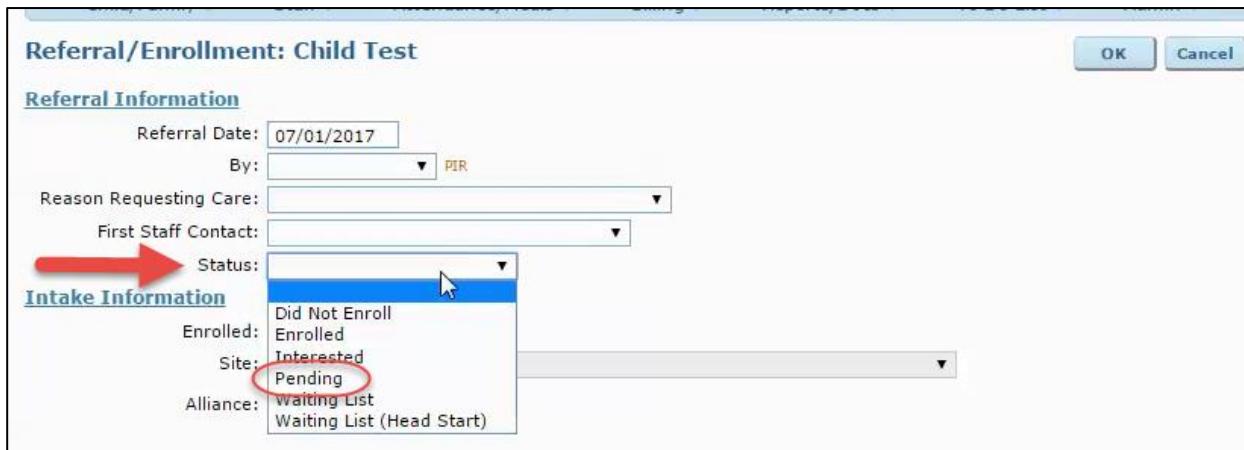
Intake Information

Enrolled:

Site: PHLpreK

Alliance: PHL PreK

12. Move to the **Status drop down** and select **Pending**. Because PHLpreK requires approval prior to enrollment, the pending status is used.



Referral/Enrollment: Child Test

Referral Information

Referral Date: 07/01/2017 By: PIR

Reason Requesting Care:

First Staff Contact:

Status:

Intake Information

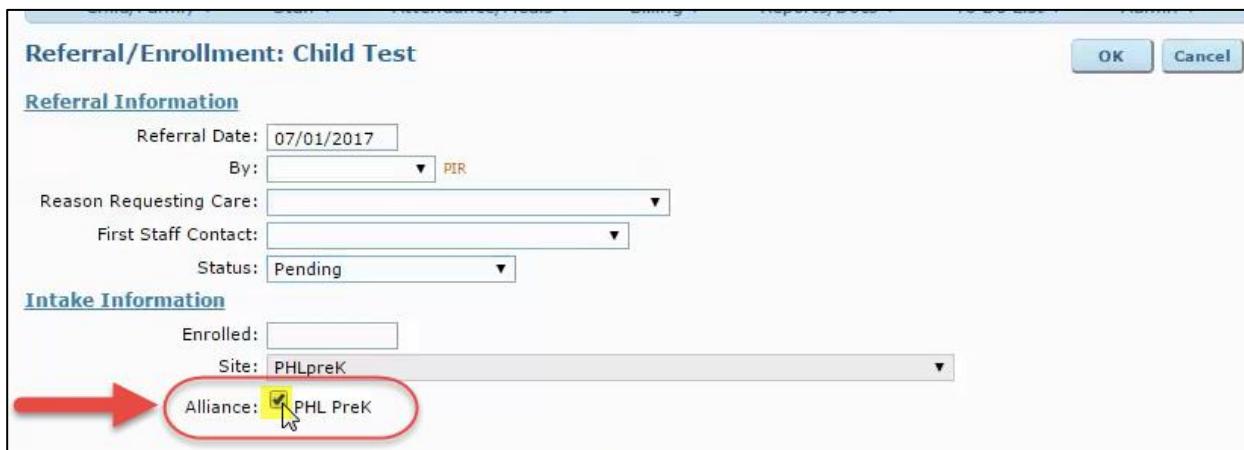
Enrolled:

Site: PHLpreK

Alliance: Pending
 Waiting List
 Waiting List (Head Start)

13. 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**.

14. 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

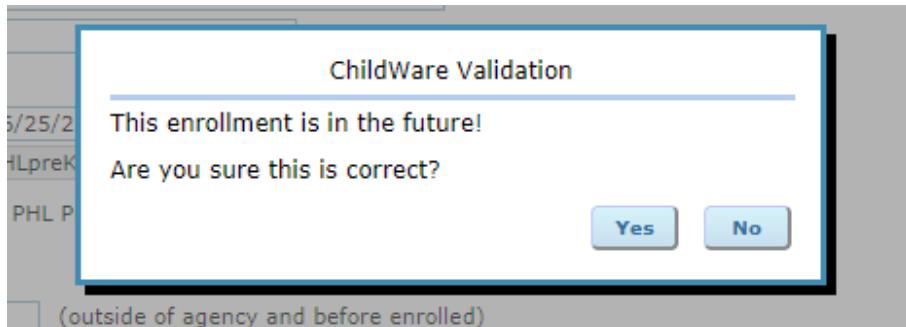
Intake Information

Enrolled:

Site: PHLpreK

Alliance: PHL PreK

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



16. 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.**

17. 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:

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 pending status for September

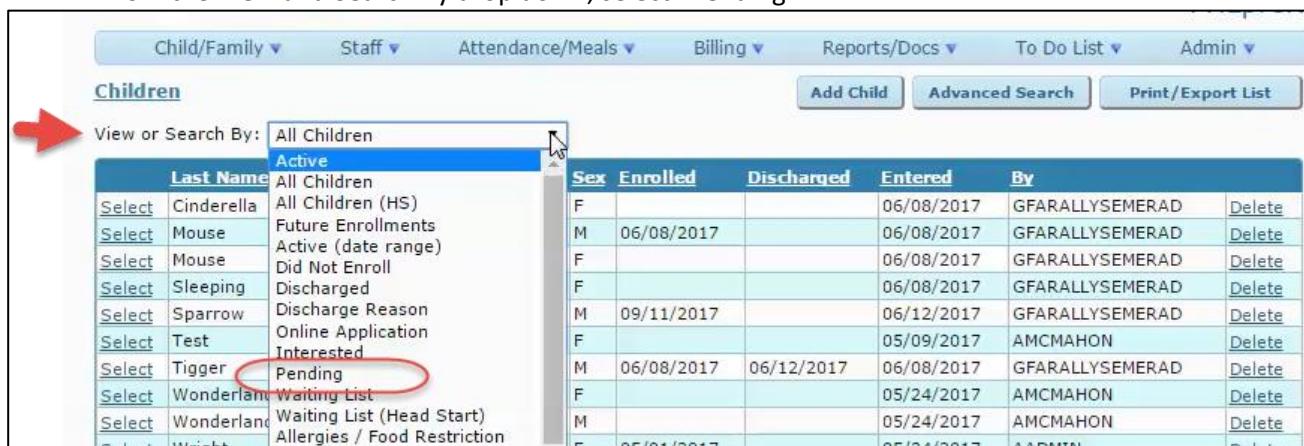
Once you have completed the last step above and clicked the OK button to save the information; you can then confirm that child(ren) has been properly marked as a pending.

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'. The 'Child/Family' dropdown is open, showing 'Child Data' (which is circled in red), 'Contact Data', 'Bulk Service Updates', and 'Batch Record Updates'. Below this, under 'Main', are 'Notification Emails', 'PIN Maintenance', and search fields for 'MI' (MI), 'Last Name' (Test), and 'Suffix'. Buttons for 'OK' and 'Cancel' are at the top right.

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



The screenshot shows the 'Children' list in the PHLpreK software. The top navigation bar is the same as the previous screenshot. The 'View or Search By' dropdown is highlighted with a red arrow and shows 'Pending' (which is circled in red) as the selected option. 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. The 'By' column shows names like GFARALLYSEMERAD, AMCMAHON, and ADMIN. Buttons for 'Add Child', 'Advanced Search', and 'Print/Export List' are at the top right.

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



The screenshot shows the 'Children' list in the PHLpreK software. The 'View or Search By' dropdown is set to 'Pending'. The table lists children with columns for 'Last Name', 'First Name', 'DOB', 'Age', 'Sex', 'Referral', 'Entered', and 'By'. Two specific rows are circled in red: the first row for 'Sleeping' (First Name 'Beauty') and the second row for 'Test' (First Name 'Child'). The 'Entered' column for 'Sleeping' shows '06/06/2017' and '06/08/2017'. The 'Entered' column for 'Test' shows '07/01/2017' and '05/09/2017'. The 'By' column for 'Sleeping' shows 'GFARALLYSEMERAD' and 'Delete'. The 'By' column for 'Test' shows 'AMCMAHON' and 'Delete'. Buttons for 'Add Child', 'Advanced Search', and 'Print/Export List' are at the top right.

4. As children are approved for enrollment, **PHMC staff will update the 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.**

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

If you have multiple children that will be transitioning to the PHLpreK program, you can save some time using ChildWare's bulk service update feature to process the discharge for multiple children at one time.

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.



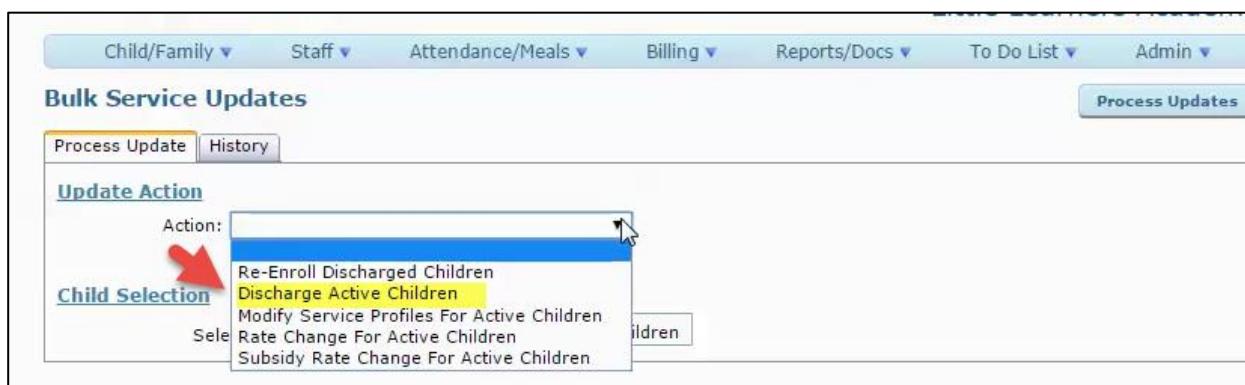
The screenshot shows the ChildWare application interface. At the top, there is a navigation bar with tabs: Child/Family, Staff, Attendance/Meals, Billing, Reports/Docs, To Do List, and Admin. The Child/Family tab is currently selected. Below the navigation bar, there is a sub-menu for 'Child Data' which includes 'Contact Data' and 'Bulk Service Updates'. The 'Bulk Service Updates' option is highlighted with a red circle. To the right of the sub-menu, there are buttons for 'Add Child', 'Advanced Search', and 'Print/Export List'. Below the sub-menu, there is a table titled 'Batch Record Updates' with columns: Name, DOB, Sex, Enrolled, Discharged, Entered, and By. The table contains several rows of data for children named Andrew, Anna, and others, with various dates and names listed under the other columns.

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



The screenshot shows the 'Process Update Screen' for 'Bulk Service Updates'. The top navigation bar is identical to the previous screenshot. Below it, there is a sub-menu for 'Bulk Service Updates' with 'Process Update' and 'History' tabs. The 'Process Update' tab is selected. Under the 'Update Action' section, there is a dropdown menu labeled 'Action:'. Below that, there is a 'Child Selection' section with a radio button group labeled 'Select: Single Child, Family, Multiple Children'. A red arrow points to the 'Single Child' radio button.

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



The screenshot shows the 'Process Update Screen' again, but now the 'Update Action' dropdown menu is open. The menu contains several options: 'Re-Enroll Discharged Children', 'Discharge Active Children' (which is highlighted with a yellow box and a red arrow pointing to it), 'Modify Service Profiles For Active Children', 'Rate Change For Active Children', and 'Subsidy Rate Change For Active Children'. The 'Discharge Active Children' option is the one selected.

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

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: (highlighted in yellow)

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

Children

5. For Discharge Reason: choosing temporarily inactive will allow you to identify the children more quickly for the process of creating their pending status for the fall.

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: (highlighted in yellow)

Note:

Completed program
Temporarily inactive

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

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 Care Type ▾ All Care Types ▾

Include Room Group ▾ All Room Groups ▾

Include Care Level ▾ All Care Levels ▾

You will end up with a list of children actively enrolled in your center. 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 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"/>					

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:
Reason: Completed program ▾

Note:

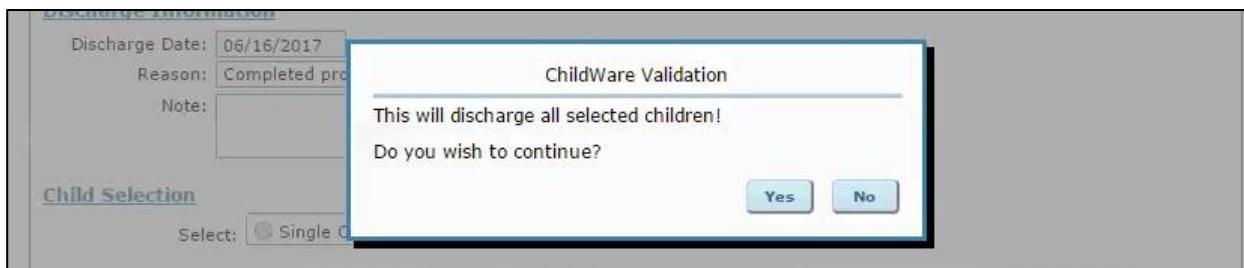
Child Selection

Select: Single Child Family Multiple Children

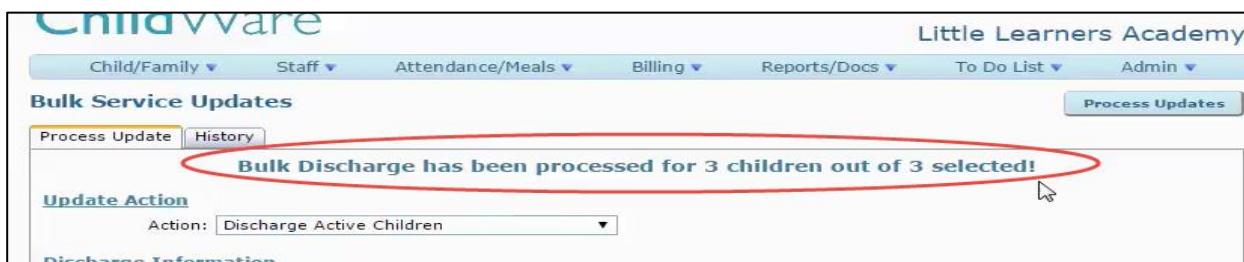
Born Between: and
 Include Care Type ▾ All Care Types ▾

Process Updates

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



10. ChildWare will confirm that the updates have been completed



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.

