



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	
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

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- 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

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[Health](#)
[HS Eligibility](#)
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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

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

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- 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: Discharge Date Reason: ▼ Note:

Service Profiles PIR

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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 OK Cancel

Recruitment Information

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

Intake Information

Enrolled: PIR
 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: PIR
 Reason: PIR
 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

Select	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: PIR

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

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

Photo: Child Photo
 Choose File

Languages

Spoken at Home: PIR
 Other Language: PIR

School-Age Information

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

Referral/Enrollment History PIR Add Referral/Enrollment

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

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- 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

- Select the child's record and open up the Main tab

The screenshot shows the 'Child: Child Test ()' form. The 'Main' tab is selected and highlighted with a red circle. The form displays fields for Child Due (\$0.00), Family Due (\$0.00), Deposit Required (\$0.00), and Deposit On File (\$0.00). Below these are tabs for Main, Relationships, Services, Financial, Health, HS Eligibility, Admin, Events & Case Notes, Documents, and Logs. The 'Main' tab contains fields for First Name (Child), MI, Last Name (Test), Suffix, Sex (F), SSN, DOB (11/06/2012), Age (4 years, 7 months), and a Photo upload area labeled 'Child Photo'.

- 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

The screenshot shows the 'Child: Child Test ()' form with the 'Main' tab selected. The 'Referral/Enrollment History' section is visible at the bottom, showing a table with columns: Referred, Enrolled, Discharged, Reason, Entered, and By. The 'Discharged' column is highlighted with a red circle, and the 'Add Referral/Enrollment' button is highlighted with a red arrow.

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

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: 01/01/17

By: [dropdown] PIR

Reason Requesting Care: [dropdown]

First Staff Contact: [dropdown]

Status: [dropdown]

Intake Information

Enrolled: [text box]

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: [dropdown] PIR

Reason Requesting Care: [dropdown]

First Staff Contact: [dropdown]

Status: [dropdown menu open]

Intake Information

Enrolled: [text box]

Site: [dropdown]

Alliance: [dropdown]

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: [dropdown] PIR

Reason Requesting Care: [dropdown]

First Staff Contact: [dropdown]

Status: Pending

Intake Information

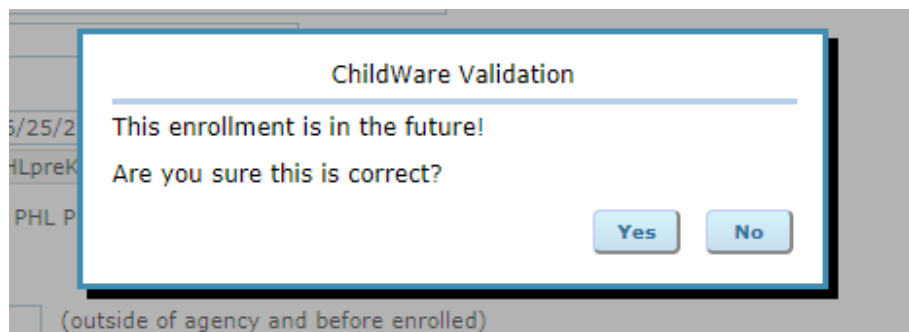
Enrolled: [text box]

Site: PHLpreK

Alliance: ☒ PHL PreK

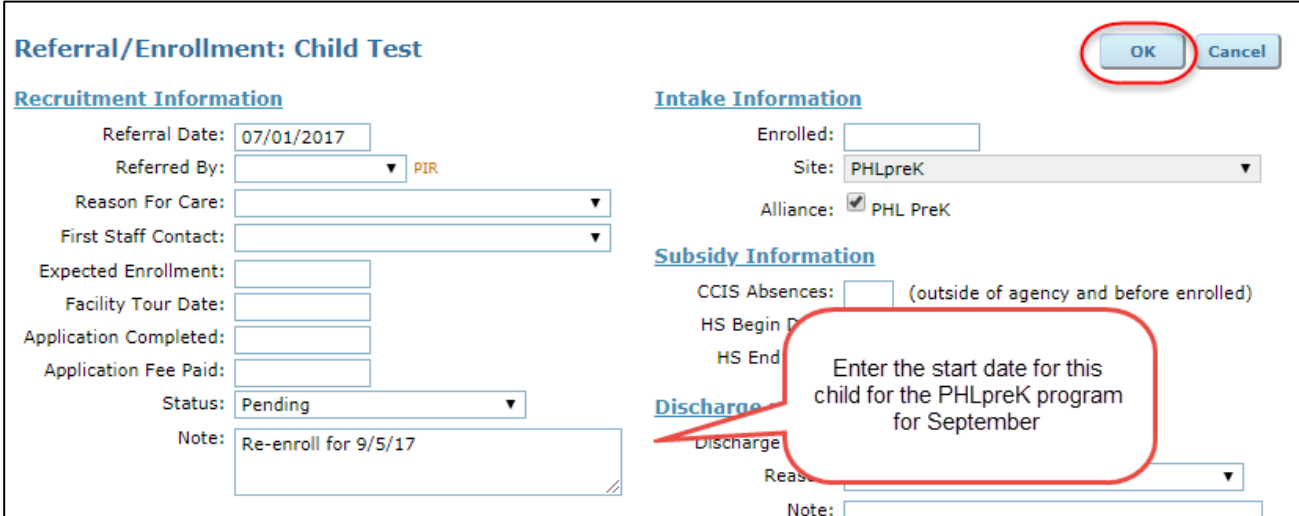
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15. ChildWare will ask you to confirm because the referral date is in the future. Check your dates and click **Yes**.



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.

A screenshot of the 'Referral/Enrollment: Child Test' form. The form is divided into several sections: 'Recruitment Information' on the left and 'Intake Information', 'Subsidy Information', and 'Discharge' on the right. The 'Recruitment Information' section includes fields for 'Referral Date' (07/01/2017), 'Referred By' (with a dropdown arrow and 'PIR' next to it), 'Reason For Care' (with a dropdown arrow), 'First Staff Contact' (with a dropdown arrow), 'Expected Enrollment', 'Facility Tour Date', 'Application Completed', 'Application Fee Paid', 'Status' (Pending), and a 'Note' field containing 'Re-enroll for 9/5/17'. The 'Intake Information' section includes 'Enrolled' (with a dropdown arrow), 'Site' (PHLpreK), and 'Alliance' (checked box next to 'PHL PreK'). The 'Subsidy Information' section includes 'CCIS Absences' (with a dropdown arrow and '(outside of agency and before enrolled)' next to it), 'HS Begin D', and 'HS End'. The 'Discharge' section includes 'Discharge' (with a dropdown arrow), 'Reason' (with a dropdown arrow), and 'Note'. At the top right of the form, there are 'OK' and 'Cancel' buttons. A red circle highlights the 'OK' button. A red callout box points to the 'Note' field in the 'Discharge' section, containing 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 pending status for September

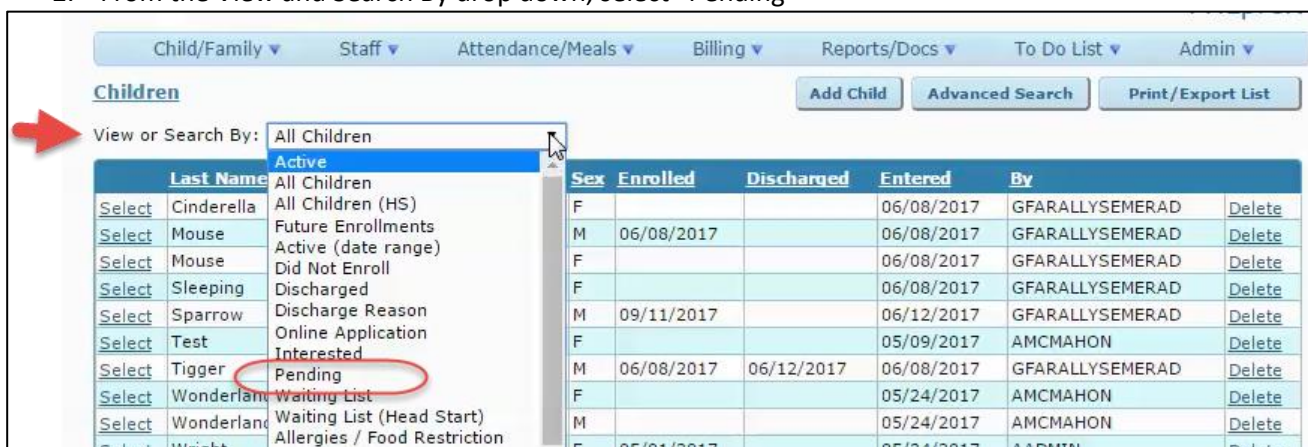
Once you have completed the last step above and clicked the OK button to save the information; you can then confirm that child(ren) has been properly marked as a pending.

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



The screenshot shows the top navigation bar of the ChildWare system with tabs: Child/Family, Staff, Attendance/Meals, Billing, Reports/Docs, To Do List, and Admin. The 'Child/Family' tab is active, and its dropdown menu is open, showing options: Child Data (highlighted with a red circle), Contact Data, Bulk Service Updates, Batch Record Updates, Notification Emails, and PIN Maintenance. Below the menu, there are fields for Family Due (\$0.00), Deposit Required (\$0.00), and Deposit On File (\$0.00). There are also buttons for OK and Cancel.

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



The screenshot shows the 'Children' section of the ChildWare interface. The 'View or Search By' dropdown menu is open, showing options: All Children, Active, All Children (HS), Future Enrollments, Active (date range), Did Not Enroll, Discharged, Discharge Reason, Online Application, Interested, Pending (highlighted with a red circle), Waiting List, Waiting List (Head Start), and Allergies / Food Restriction. Below the menu, there is a table of children with columns: Last Name, First Name, DOB, Age, Sex, Referral, Entered, By, and Delete. The table lists several children, including Cinderella, Mouse, Sleeping, Sparrow, Test, Tigger, Wonderland, and Wright.

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



The screenshot shows the 'Children' section of the ChildWare interface. The 'View or Search By' dropdown menu is set to 'Pending'. Below the menu, there is a table of children with columns: Last Name, First Name, DOB, Age, Sex, Referral, Entered, By, and Delete. The table lists several children, including Sleeping, Test, Wonderland, Cinderella, and Mouse. The 'Test' child is highlighted with a red circle.

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.

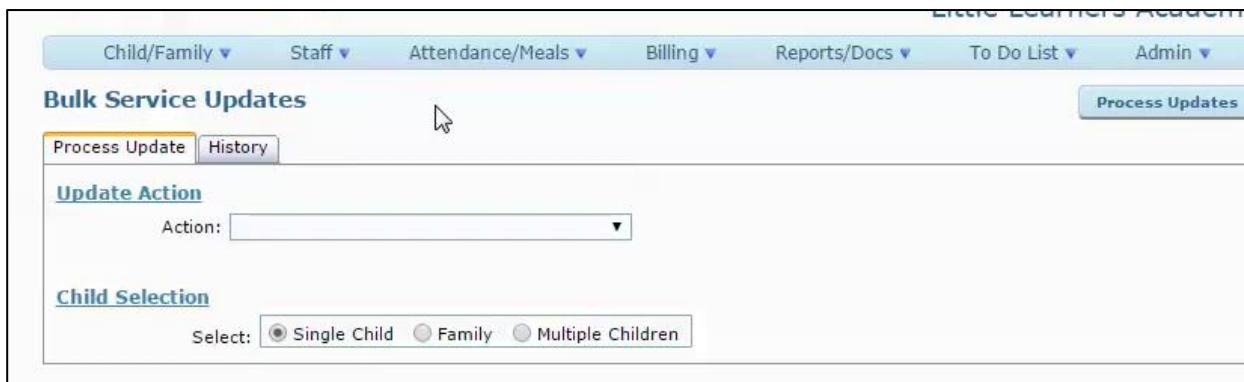
Discharging Multiple Children Using Bulk Service Updates – End of Summer Program

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.



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



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



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

The screenshot shows the 'Bulk Service Updates' form. The 'Update Action' is set to 'Discharge Active Children'. Under 'Discharge Information', the 'Discharge Date' field is highlighted with a red arrow. A calendar for June 2017 is open, showing dates from 28 to 30. The 'Child Selection' section shows 'Single Child' selected.

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.

The screenshot shows the 'Bulk Service Updates' form. The 'Update Action' is set to 'Discharge Active Children'. Under 'Discharge Information', the 'Discharge Date' is set to '06/16/2017'. The 'Reason' dropdown is open, showing 'Completed program' and 'Temporarily inactive'. A red arrow points to the 'Reason' field.

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

The screenshot shows the 'Bulk Service Updates' form. The 'Update Action' is set to 'Discharge Active Children'. Under 'Discharge Information', the 'Discharge Date' is set to '06/16/2017' and the 'Reason' is set to 'Completed program'. Under 'Child Selection', the 'Multiple Children' radio button is selected, highlighted with a red arrow. The 'Born Between' section shows 'All Room Groups' selected.

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

Include	Child's Name	DOB	Room	Enrolled	Discharged
<input 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: 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

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

Update Action

Action: Discharge Active Children

Discharge Information

Discharge Date: 06/16/2017

Reason: Completed program

Note:

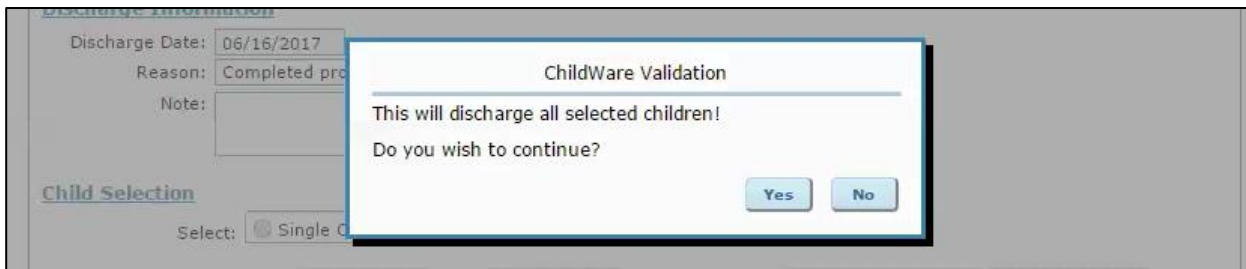
Child Selection

Select: ☐ Single Child ☐ Family ☒ Multiple Children

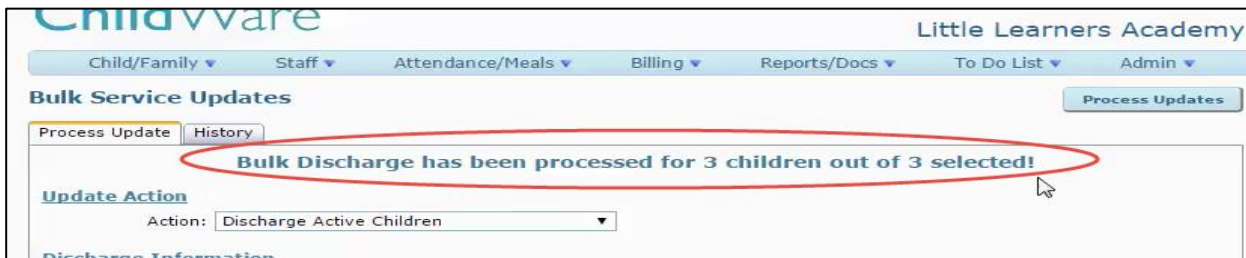
Born Between: and

Include Care Type All Care Types

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.

