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.

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.

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**.

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.

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

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

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

11. In the Referral/Enrollment screen, **enter a new Referral date**. This date must be after the discharge date for the summer program.
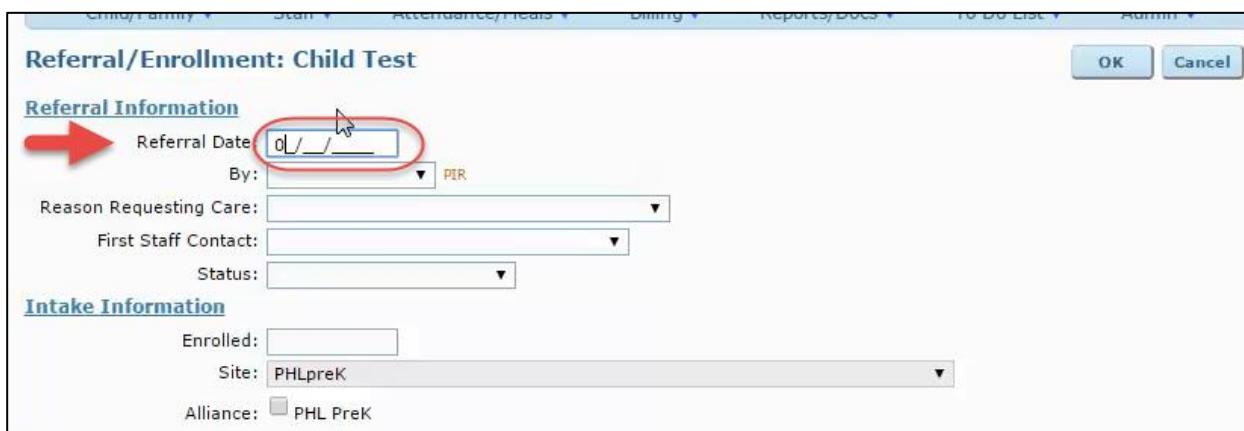
12. Move to the **Status drop down and select Pending.** Because PHLpreK requires approval prior to enrollment, the pending status is used.
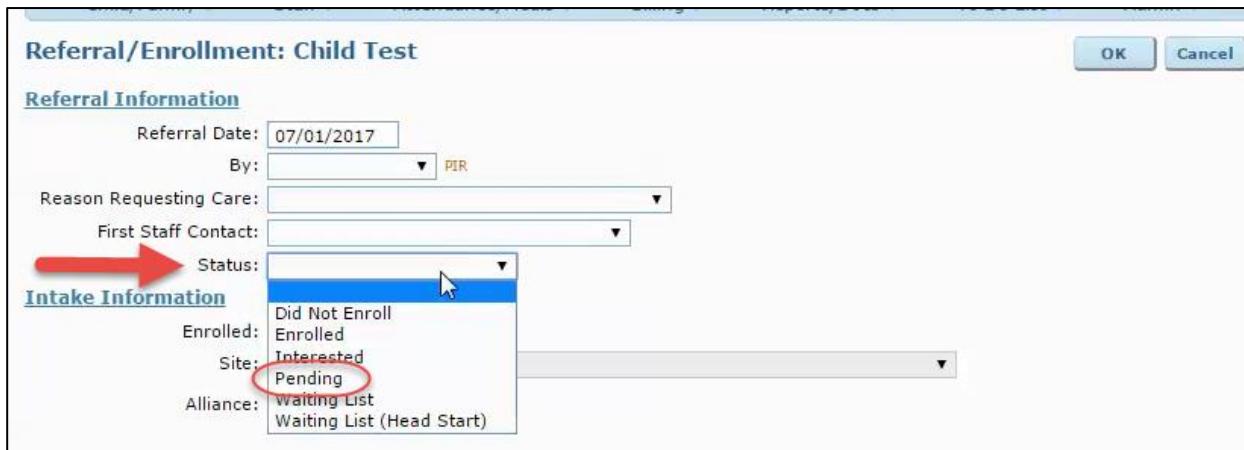
13. **Then click the PHLpreK Alliance Check Box** – this is an important step because the summer enrollment record did not have this box checked. **DO NOT enter a date in the Enrolled field**.

14. Click OK to save this information.
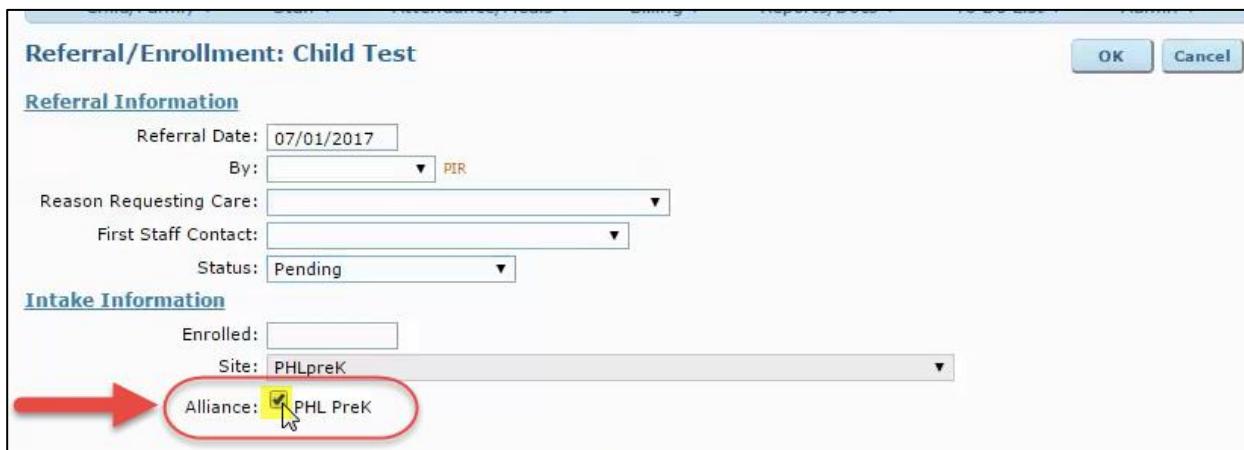
15. ChildWare will ask you to confirm because the referral date is in the future. Check your dates and click Yes.
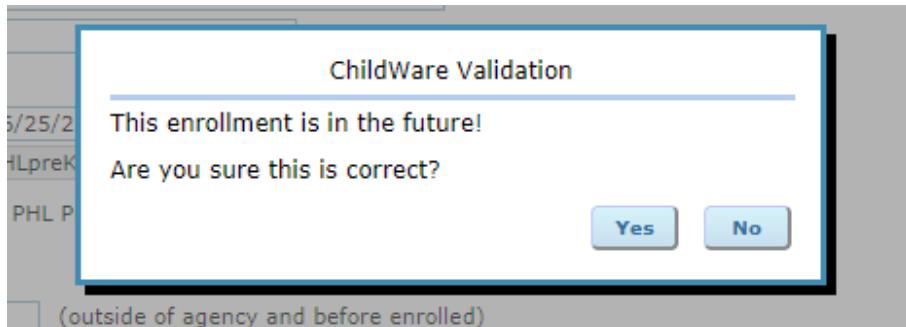
16. **A** new referral screen will open. In the **Notes section, enter the child's start date for September**. This is required in the notes field because it will assist in the approval process at PHMC. **Do not enter any other information.**
17. Click **OK** to save the information.

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

2. From the View and Search By drop down, select "Pending"
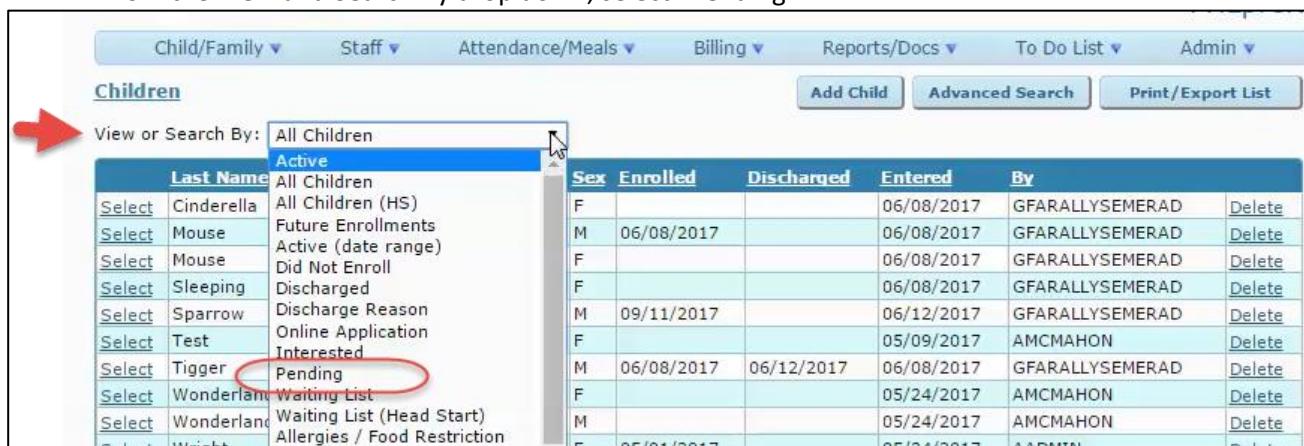
3. Confirm that that the correct child(ren) are on the pending list for September

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**.

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

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.

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

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.

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

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

9. **ChildWare will alert you** that you are making a change to the selected records. **If your information is correct**, **click the Yes button**.
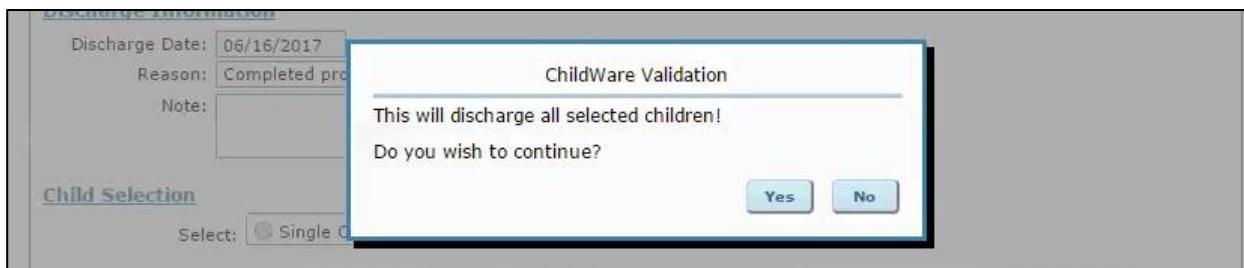
10. ChildWare will confirm that the updates have been completed
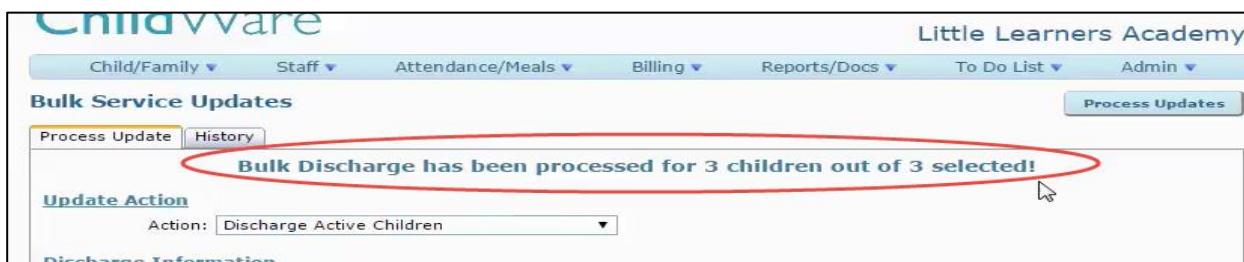
After completing either the Individual Child or Bulk Child Discharge process, the Discharge Date will now appear on in the "Discharged" column on the Child Data screen.