



# Kindergarten Transition: Case Notes and Document Upload

Exploring adding Kindergarten Transition for PHLpreK providers

## Objectives:

*After reviewing this document, you will: understand the steps required to input Kindergarten transition notes for individual children that are aging out of the PHLpreK subsidy. Additionally, you will be able to successfully upload the Kindergarten Transition Plan document in accordance with compliance monitoring protocol.*

Need ChildWare technical assistance?  
Email: [helpdesk@phmc.org](mailto:helpdesk@phmc.org)  
OR click the bug icon to submit a ticket



To add Kindergarten Transition Event Note, navigate to the **Health** tab on the child's profile, select the **Notes/Events** subtab and click **Add Kindergarten**

The screenshot shows the ChildWare interface for a child named Andrew Windsor (4yo) with ID# 53088. The 'Health' tab is selected, and the 'Note/Events' subtab is also selected. The 'Add Kindergarten' button is highlighted with a yellow box. Below the tabs, there is a table with columns: CCW Record No+, MCI, Date Created, Eligible, Office, Subsidy End Date, Reason, CCW Notified of Start, CCW Notified of End, Created By, and Action. The 'Add CCW' and 'Add Kindergarten' buttons are also visible.

The screenshot shows the 'Enter Kindergarten Transition Details' form. The form includes fields for Date Of Event\*, Completed By (Select Completed By), Caregiver 1\* (Select Caregiver), Caregiver 2 (Select Caregiver), Date Registered, Name Of School, Kindergarten Transition Note Type\* (Select Kindergarten Note Type), and Notes. The 'Select Kindergarten Note Type' dropdown menu is open, showing options: Transition Plan, Transition Meeting, K Registration, and Other K Transition. The 'Add' and 'Cancel' buttons are at the bottom right.

#### Kindergarten Transition Note Types:

- ❖ Transition Plan \*\*\*
- ❖ Transition Meeting
- ❖ K Registration
- ❖ Other K Transition

Each note type must be input at different times throughout the year. Please refer to PHLpreK policy for timeline.

\*\*\* Transition Plan is the only note type that requires a document

The screenshot shows the 'Enter Kindergarten Transition Details' form with the 'Transition Plan' note type selected. The 'Upload Document' button is highlighted with a yellow box. The form includes fields for Date Of Event\*, Completed By (Select Completed By), Caregiver 1\* (Select Caregiver), Caregiver 2 (Select Caregiver), Date Registered, Name Of School, Kindergarten Transition Note Type\* (Transition Plan), and Notes. The 'Add' and 'Cancel' buttons are at the bottom right.

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