ChildPlus Software

Data Management with ChildPlus

Presented by: Jose Martinez

www.childplus.com 800.888.6674

SESSION TOPICS

1

DASHBOARD

Agency statistics in one place or emailed on a regular basis to make informed decisions.

Goals

How to use the Dashboard
View agency statistics and create your own
Configure the email scheduler

2

MODULE DESIGNER

Create modules to track everything in a single database.

Goals

Install modules from the gallery
Create custom modules directly in ChildPlus

3

QUESTIONS & ANSWERS

DASHBOARD

BENEFITS:

- **Create** an *unlimited* number of Dashboards for management team and staff allowing them to make informed decisions
- **Customizable** with agency-specific thresholds for each indicator shown on the Dashboard
- **Interactive** allowing staff to click on something to go directly to the data entry screen and make corrections
- **Dig deeper** into your data
- **Schedule** to receive via email on a regular basis
- **Compatible** with Microsoft Excel

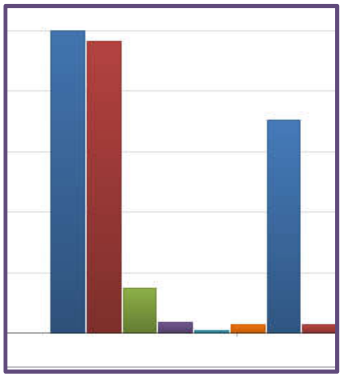
Note: *If you do not have access to the Dashboard, talk to your ChildPlus System Administrator about giving you access or turning it on.*

For more information and video tutorials, visit us online
www.childplus.com/dashboard

DASHBOARD LAYOUT

Configure how you want to layout the various sections for each of your Dashboards

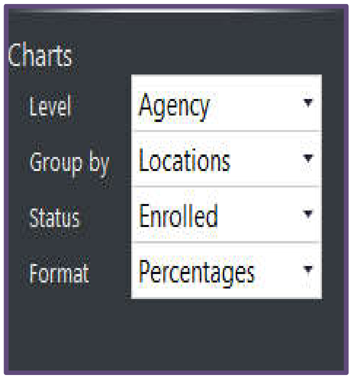
Charts



See your pre-selected data in a chart format and compare your agency to your agency's goals or thresholds.

Note: See screen image below regarding the setup of your agency goals and thresholds.

Chart Options

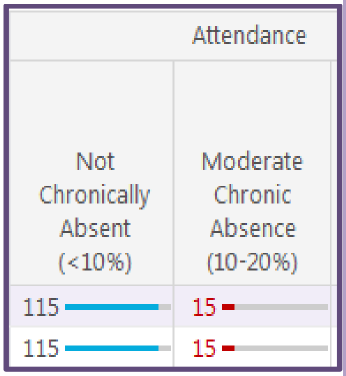


Changing these options will change how the chart appears.

Determine what and how you want to see:

- Level of data
- Grouping
- Enrollment Status
- Format

Grids

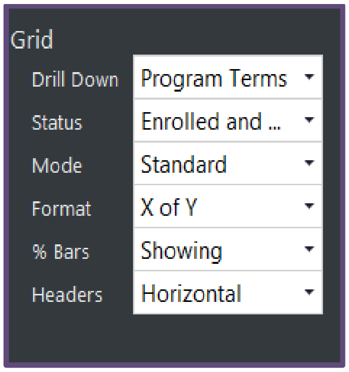


View statistics that you pre-selected in a grid format and drill down to underlying data. The grid is interactive and color coded to easily identify areas needing improvement.

Blue = data is above your threshold

Red = data needs your attention or needs improvement.

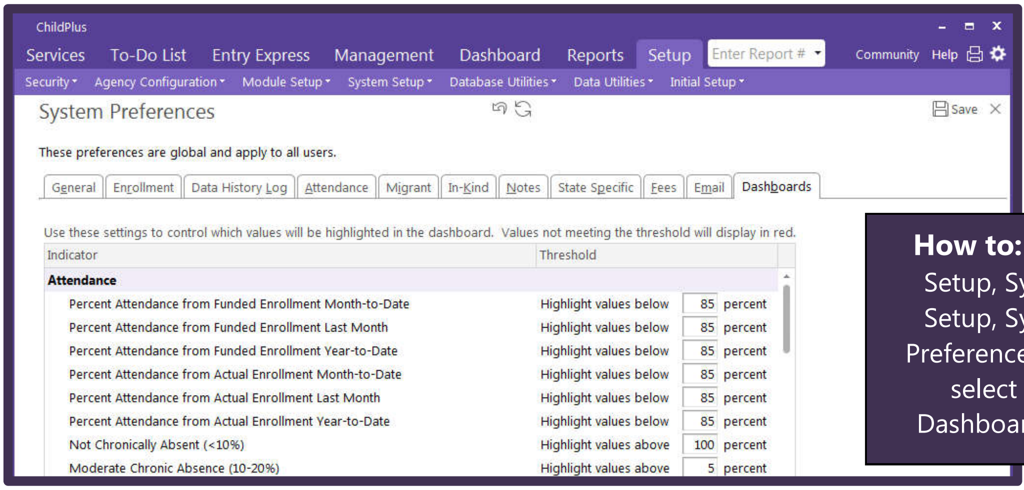
Grid Options



Changing these options will change how the grid appears.

Determine what and how you want to see:

- Drill down to the type of data
- Enrollment Status
- Mode
- Format
- % bars
- Headers



How to: Select Setup, System Setup, System Preferences, then select the Dashboard tab.

DASHBOARD SETTINGS

Configure what and how you want to see on each of your various Dashboards

1

General Tab

- Name the Dashboard
- Select the school year
- Select the programs
- Select the agencies
- Select the sites
- Select the classrooms

Determine if you want to see the Dashboard when you sign in

2

Chart Settings

- Determine if you want to see charts
- What indicators do you want to see on the chart?

★ **There are 118 indicator options** ★

3

Grid Settings

- Determine if you want to see grids
- What indicators do you want to see on the grid?

★ **There are 118 indicator options** ★

4

Email Scheduler

- Determine if you want to be able to email the Dashboard
- How often do you want to email the Dashboard and to whom?
- If no data is found, what should be done?
- For the charts and grids, should any settings be changed for the email version?

5

Sharing

- Determine if the Dashboard should be shared and With which security groups?

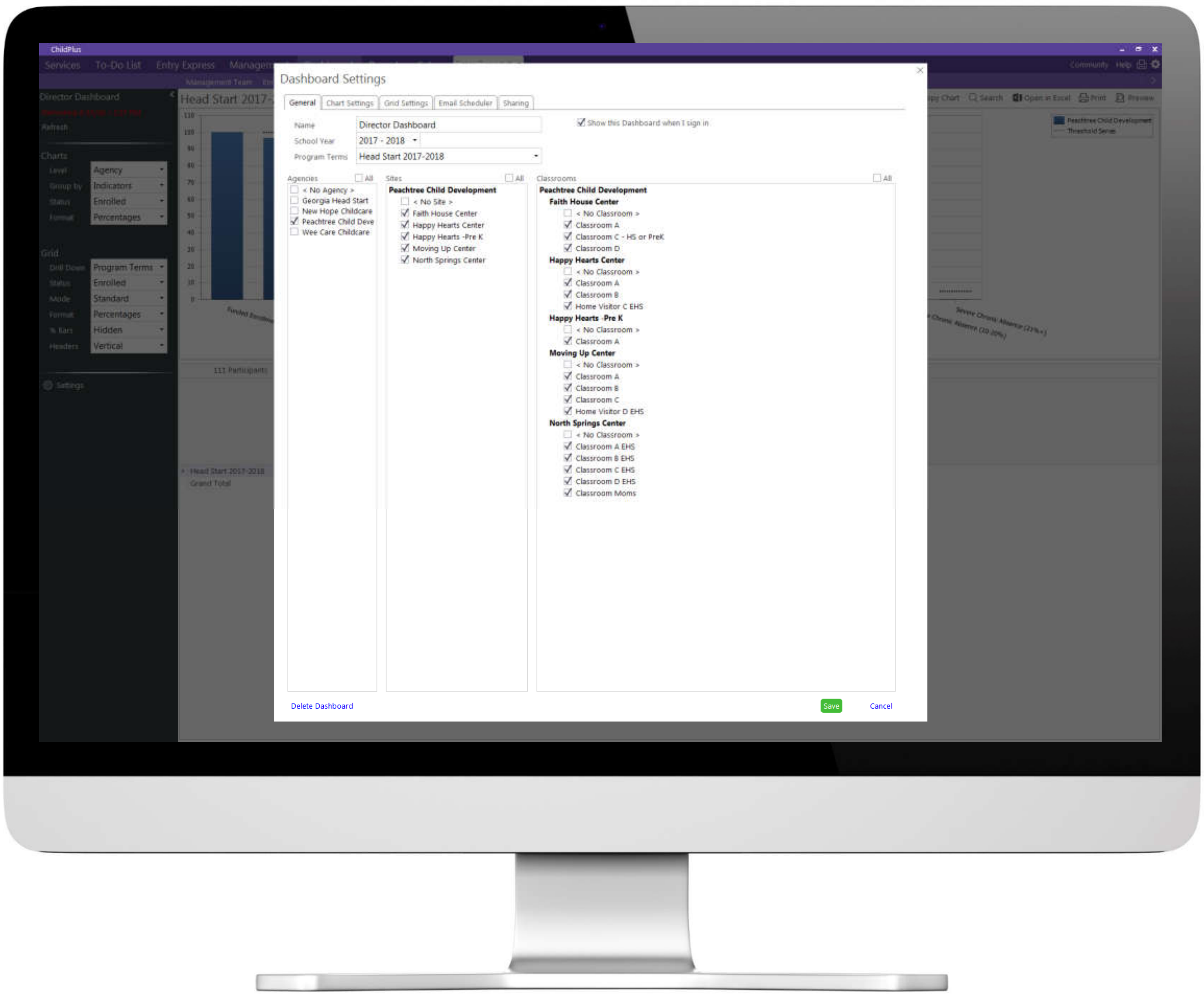
Tip: If you share a Dashboard with a staff member, they will not be able to make changes to your Dashboard.

CREATING NEW DASHBOARDS

Start with a blank Dashboard or start with a copy of one already created

General Tab

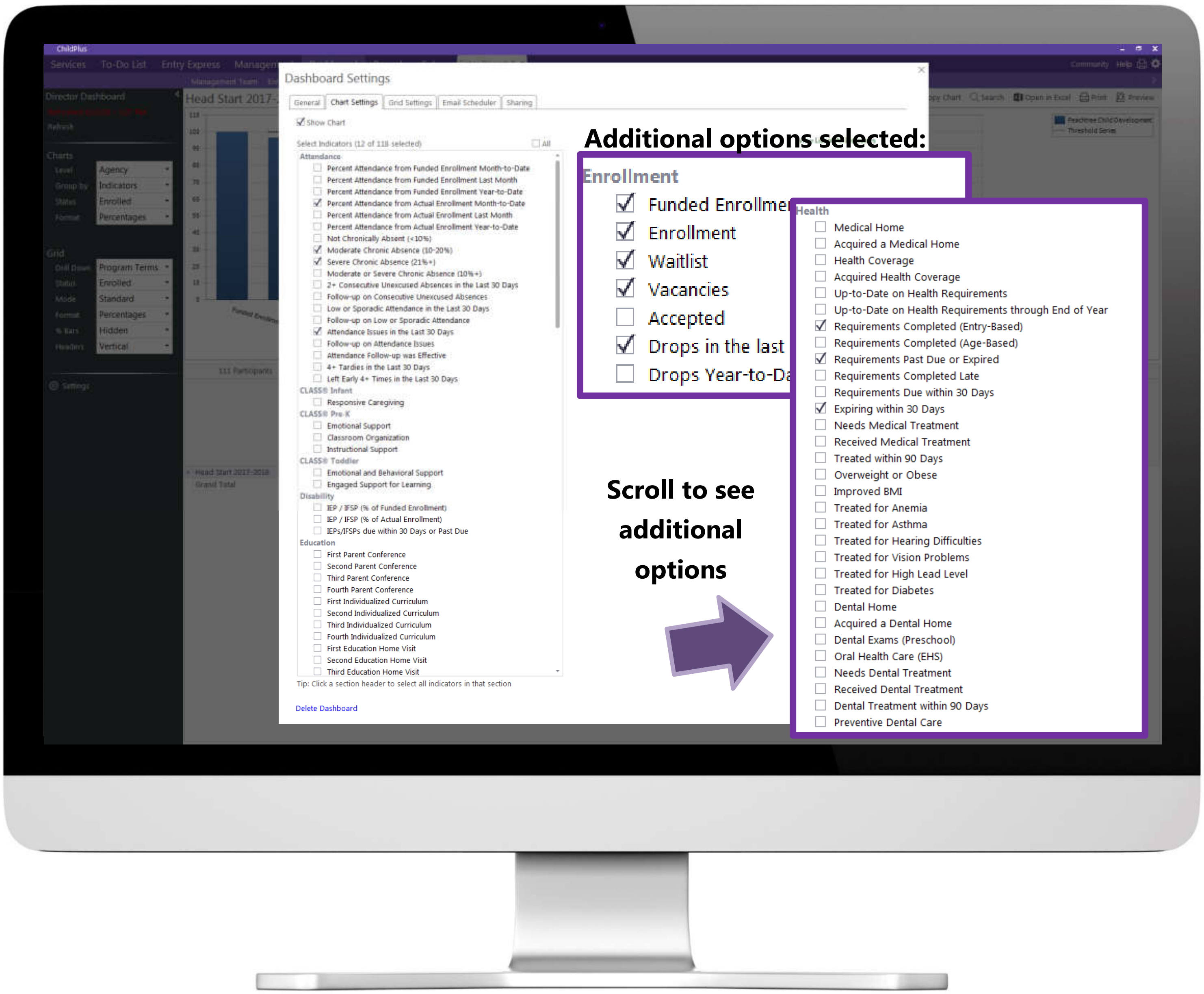
Name each dashboard, determine the school year you want to see, the program term (type of program), agency, site, and classrooms.



CREATING NEW DASHBOARDS

Chart & Grid Settings Tabs

Select the indicators (type of information) you want to see on the chart & grid sections on the Dashboard. There are over 118 types of data to include on the Dashboard and over 100,000 different Dashboard combinations.

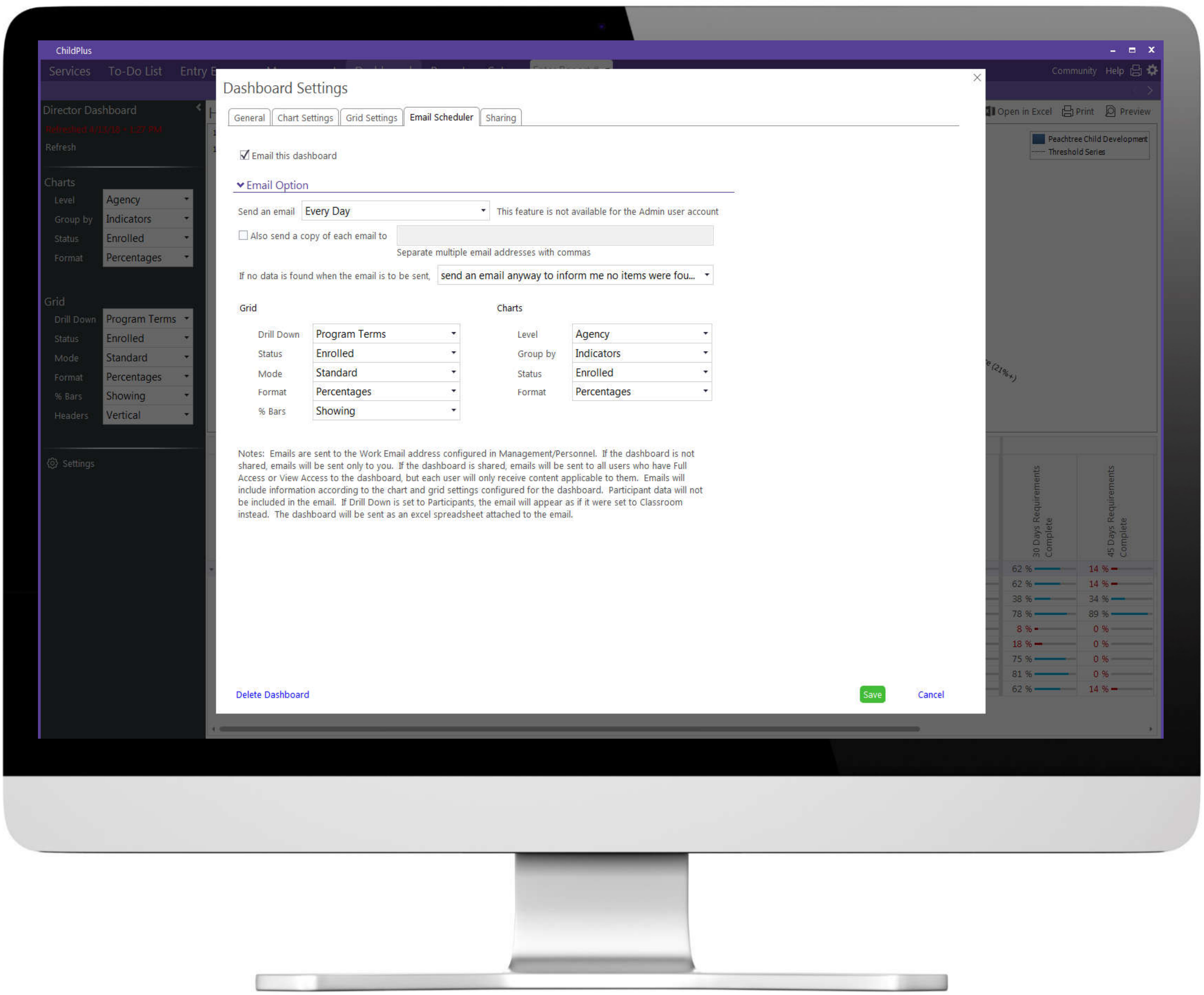


CREATING NEW DASHBOARDS

Email Scheduler Tab

Check the *Email this Dashboard* **checkbox** if you want to receive the Dashboard via email on a regular basis, determine how often you want it to be emailed (daily, every Monday, 1st of the month, etc.), who it should be emailed to, what to do if no data was found, and how to setup the grid and charts for this email version of the Dashboard.

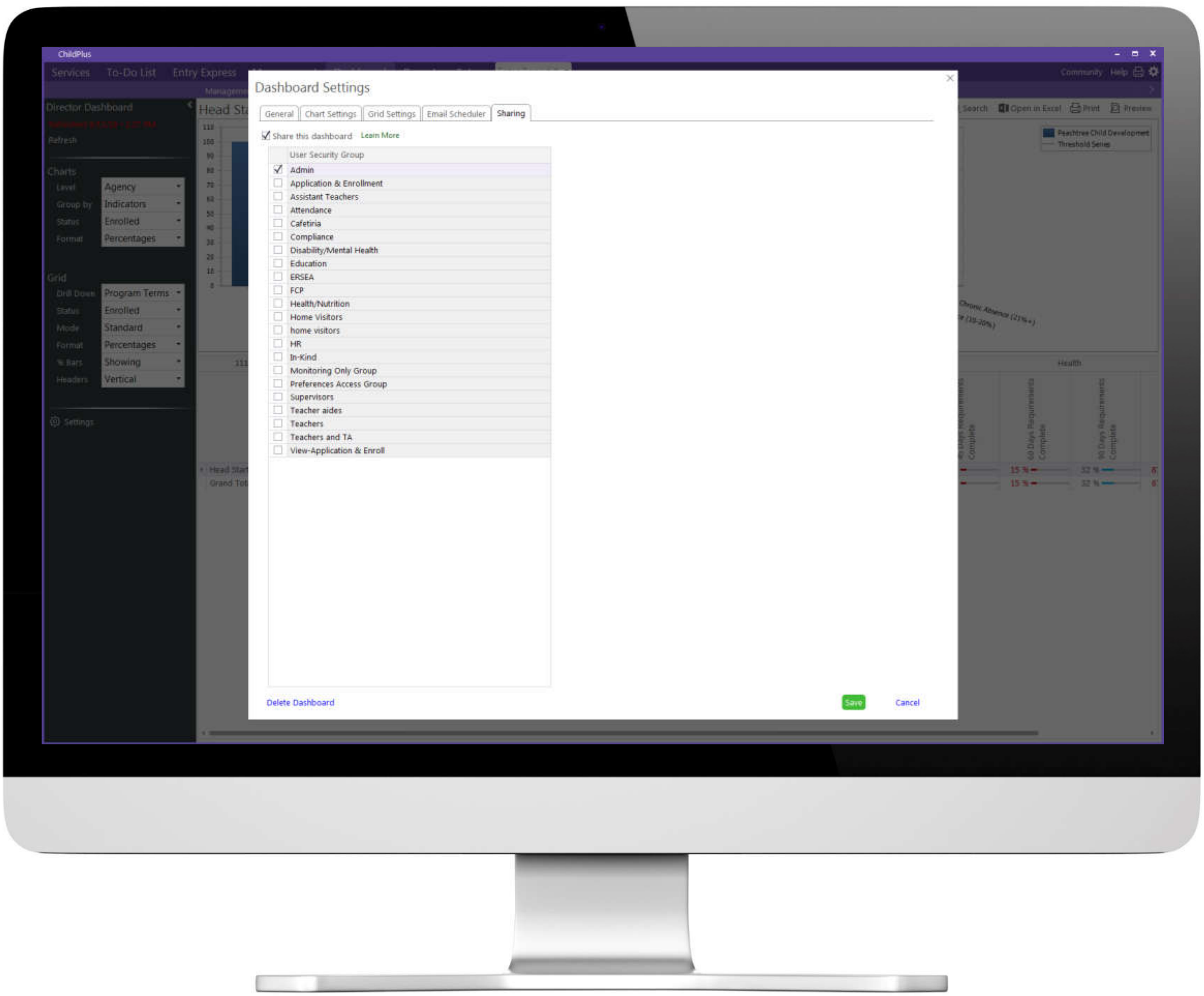
z



CREATING NEW DASHBOARDS

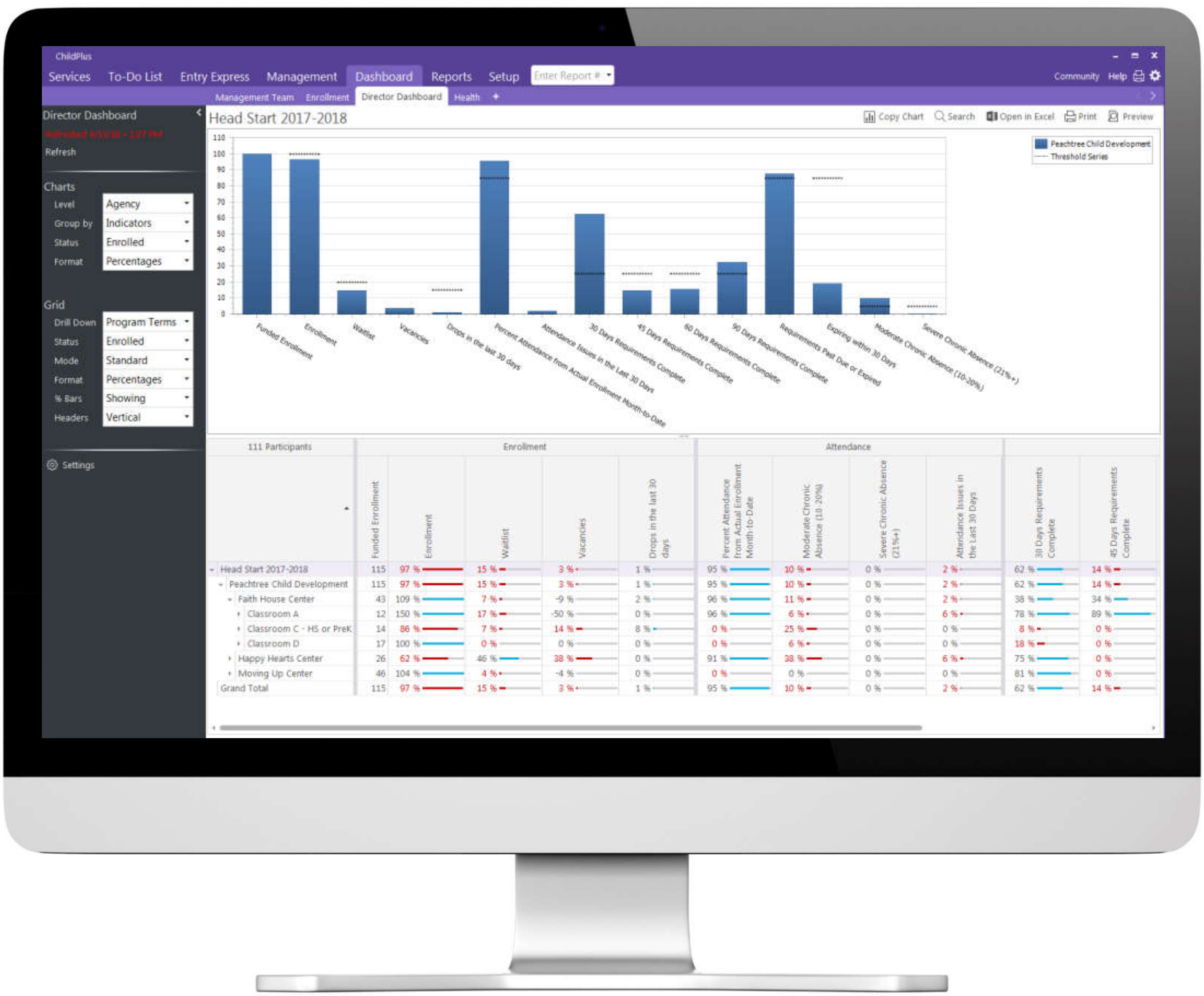
Sharing Tab

Determine if this Dashboard should be shared with security groups or shared at all.



CREATING NEW DASHBOARDS

The Finished Dashboard



Once the Dashboard has been setup, the features on the top right allow you to:

Copy Chart Search Open in Excel Print Preview

MODULE DESIGNER

BENEFITS:

- **Create** an *unlimited* number of screens/modules for data tracking & create *unlimited* number of reports for each
- **Download** modules from the gallery – use them as is or modify them to meet your exact needs
- **Track** data being tracked in other databases – everything is in one database

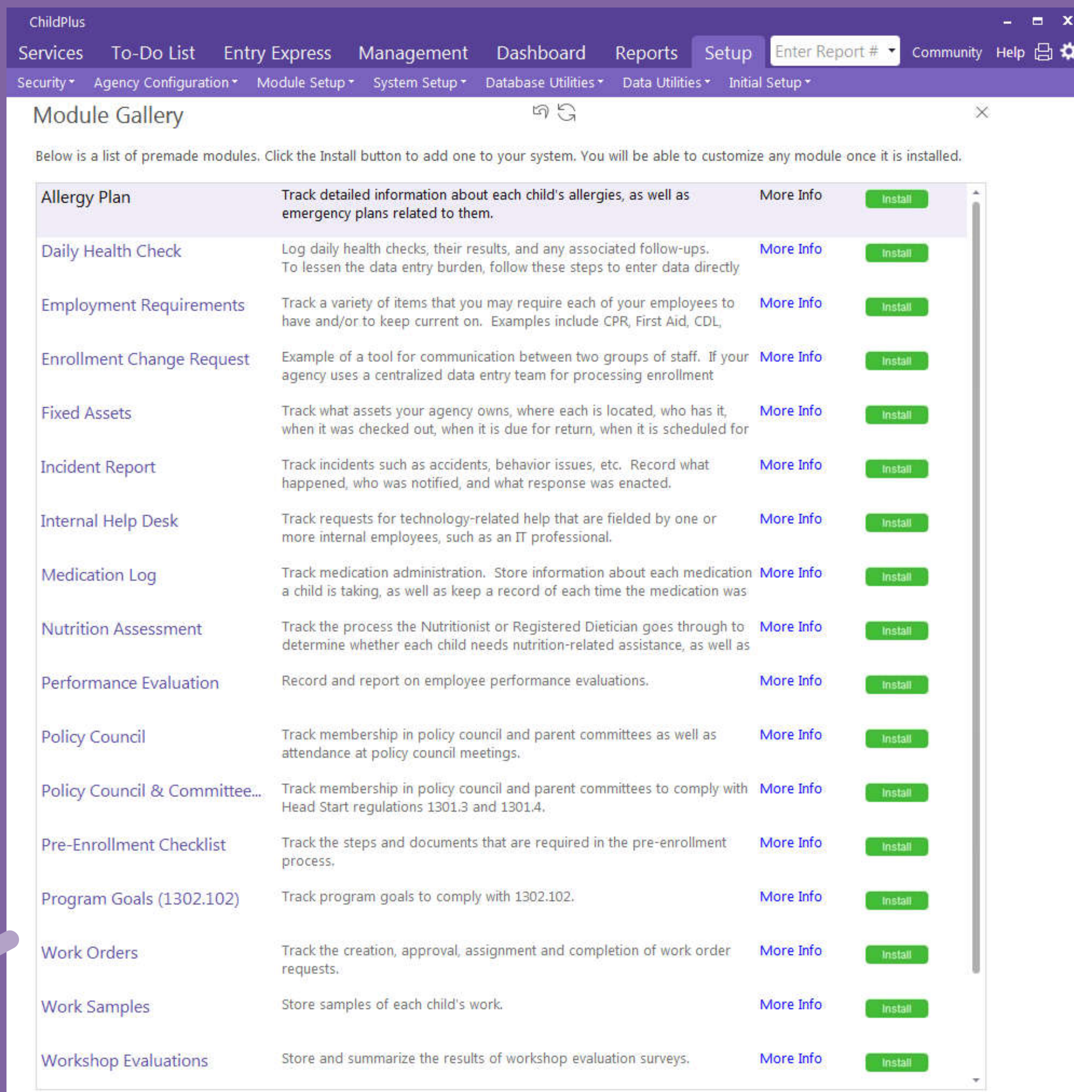
Note: *If you do not have access to the Module Designer, talk to your ChildPlus System Administrator about giving you access or turning it on.*

For more information and video tutorials, visit us online

www.childplus.com/moduledesigner

MODULE GALLERY

ChildPlus has several module templates in the Module Gallery

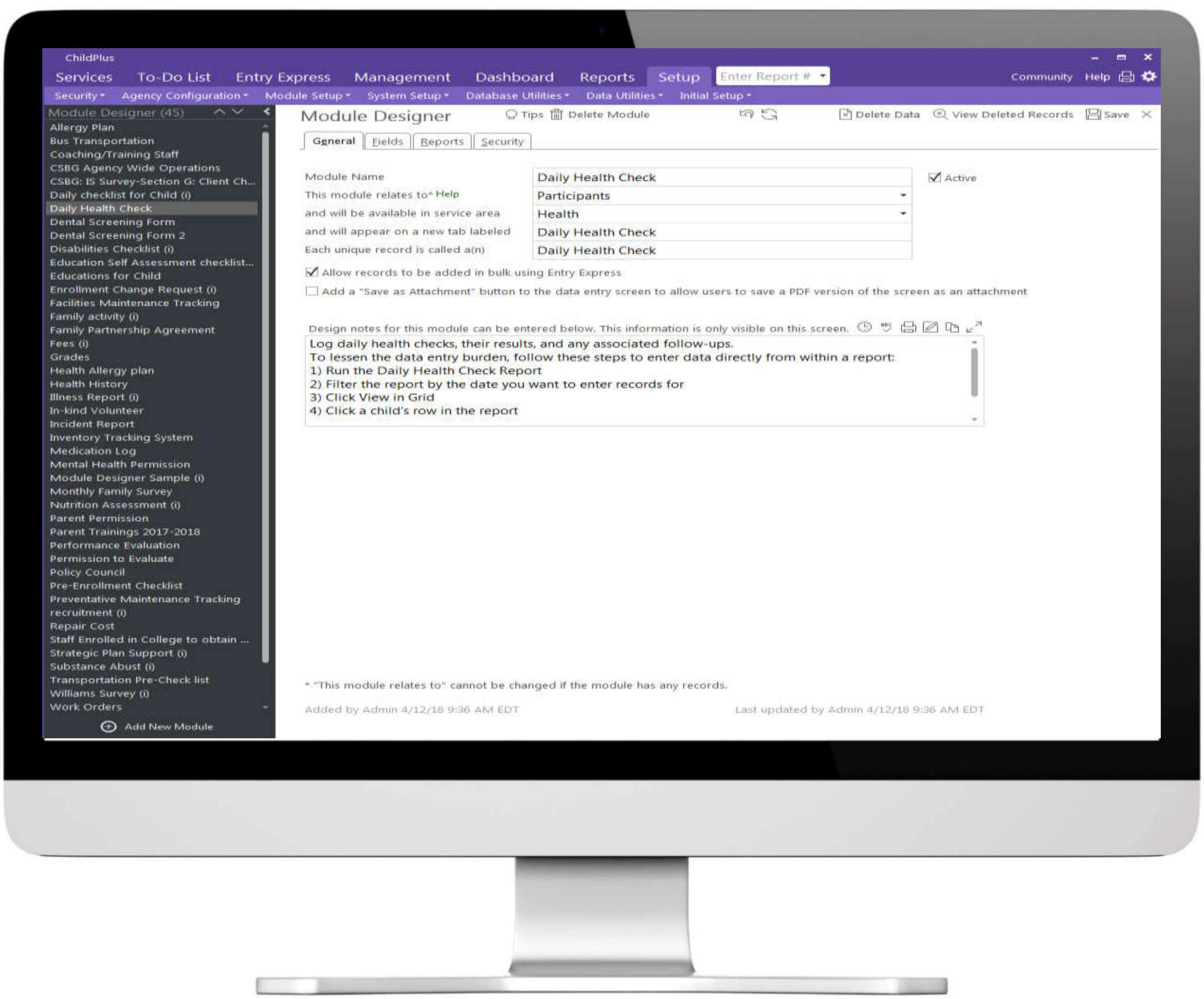


How To: To get to the gallery, select Setup, Module Setup, Module Designer, then install template modules from the gallery.

INSTALLING & CUSTOMIZING THE MODULE

General Tab

- Make changes to the module name, what it relates to, where the module is available, and what each unique record will be called
- Determine if records need to be added in bulk using **Entry Express**, if the data entry screen can be saved as an attachment, and enter notes about why/how the modules were created



MODULE DESIGNER

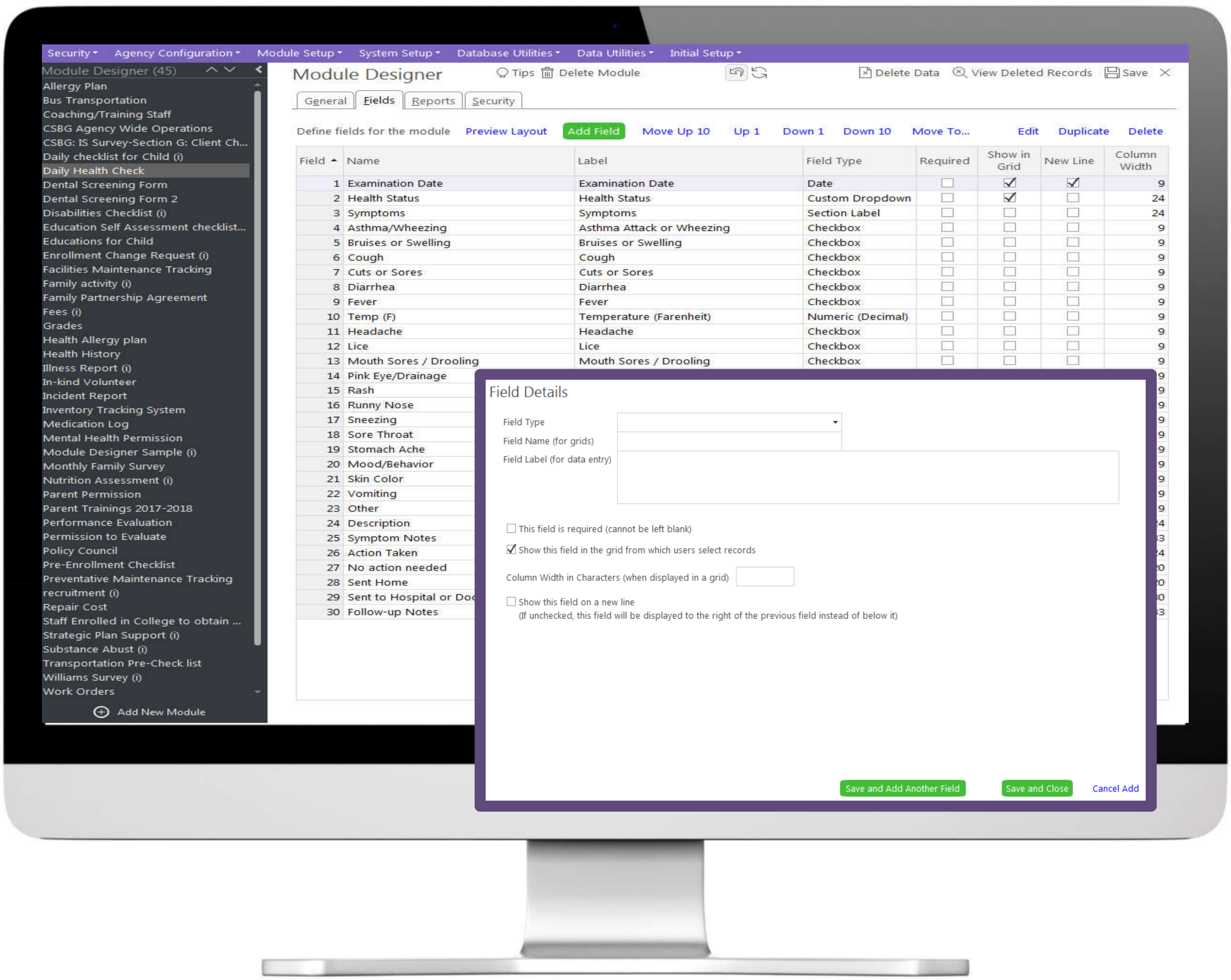
Use this table to help determine where your module relates in ChildPlus

Service Areas	Module Relates To...					
	Families	Family Service Events	Health/ Education Events	Management	Participants	Personnel
Application	X				X	
Attendance					X	
Birth					X	
Disability					X	
Education					X	
Enrollment					X	
Family Services	X				X	
Family Services Events		X				
Fees					X	
Health					X	
Health Education/Events			X			
Immunizations					X	
Management				X		
Mental Health					X	
Personnel						X
PIR					X	
Pregnancy					X	
Transportation					X	

INSTALLING & CUSTOMIZING THE MODULE

Fields Tab

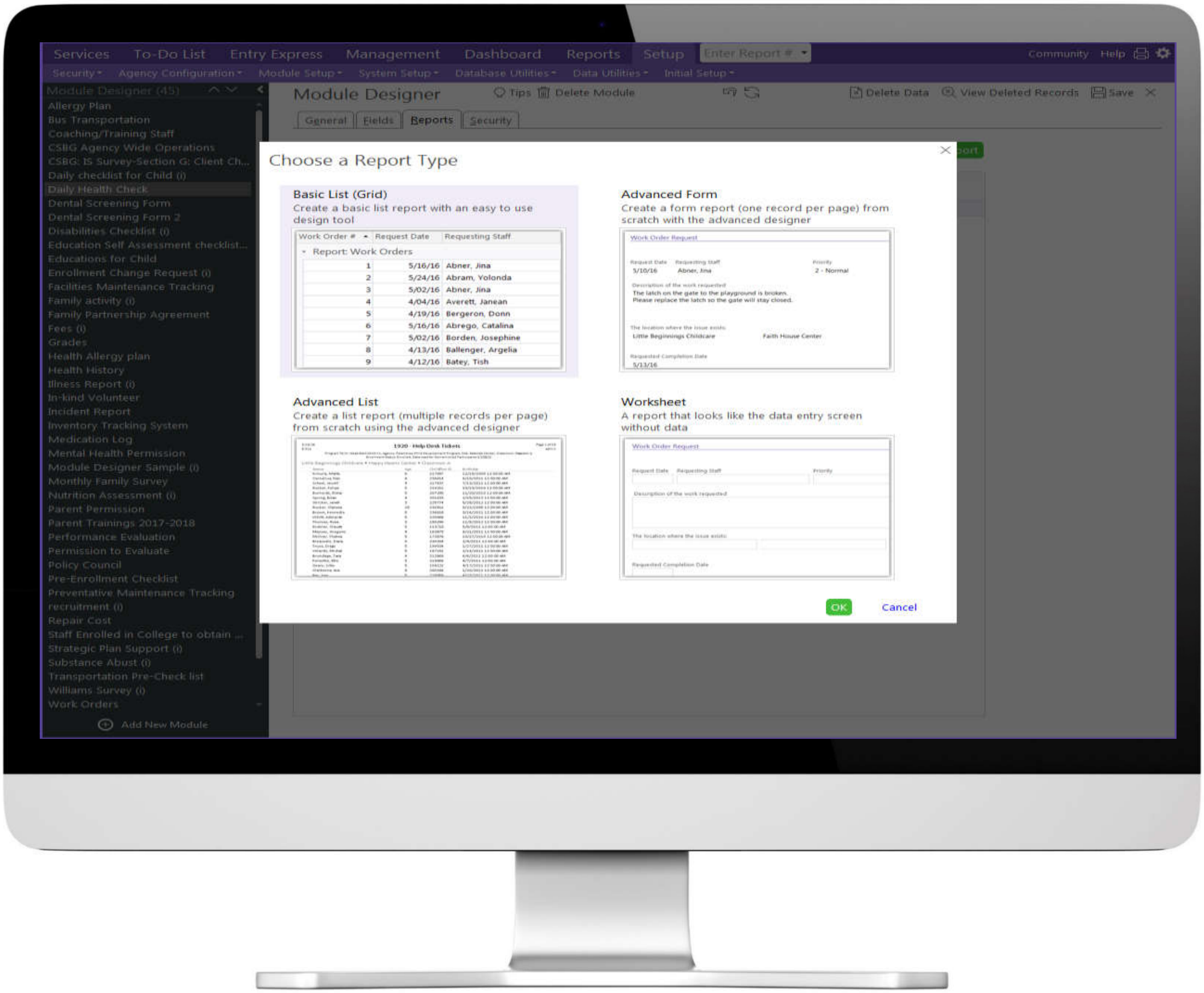
Select the fields you would like to add to your module and adjust the order that they appear on the data entry screen. The different field type options available are listed below:



INSTALLING & CUSTOMIZING THE MODULE

Reports Tab

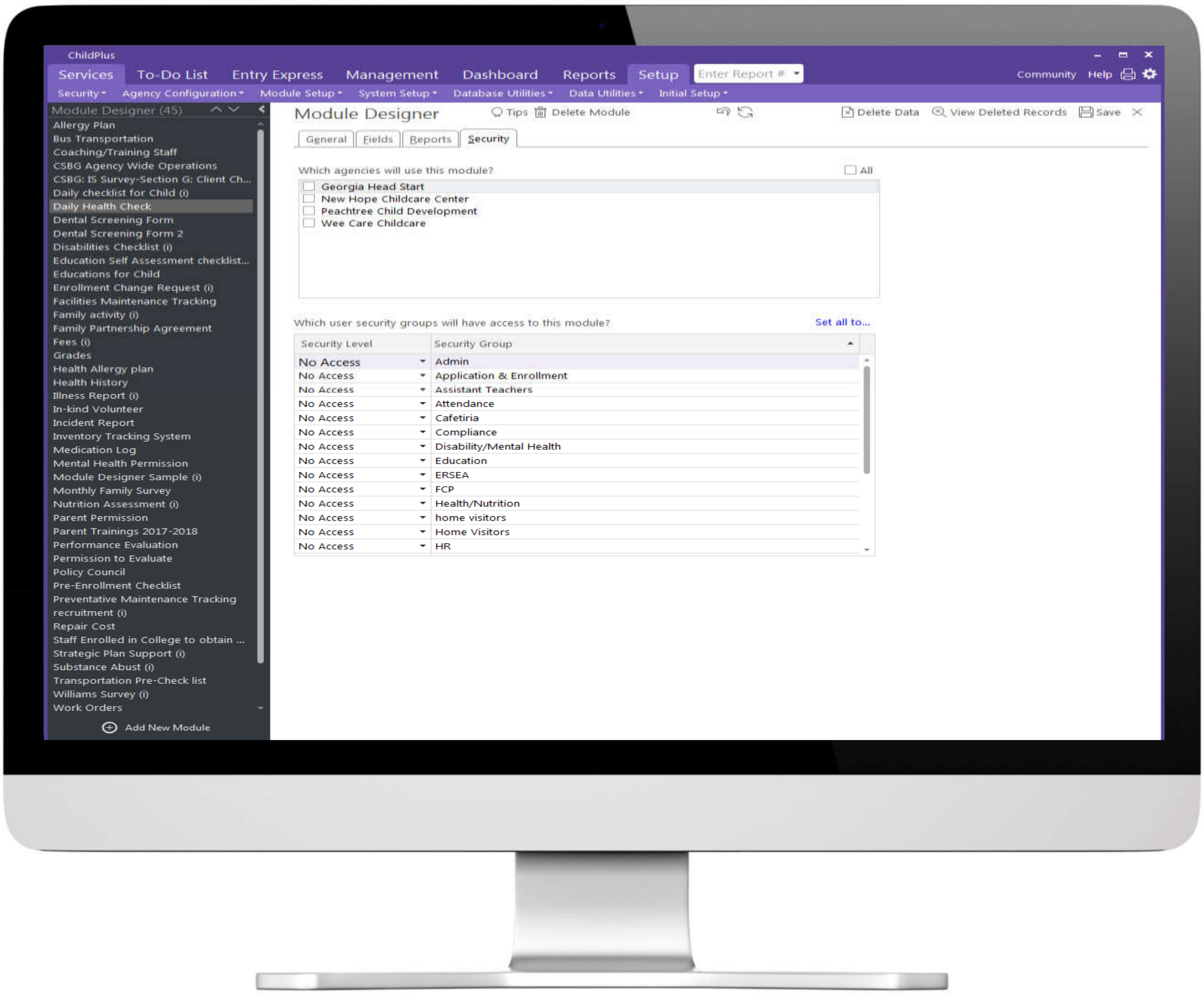
Create an unlimited number of custom reports (lists, forms, & worksheets) for your modules, allowing you to get the data into a useful format for making informed decisions.



INSTALLING & CUSTOMIZING THE MODULE

Security Tab

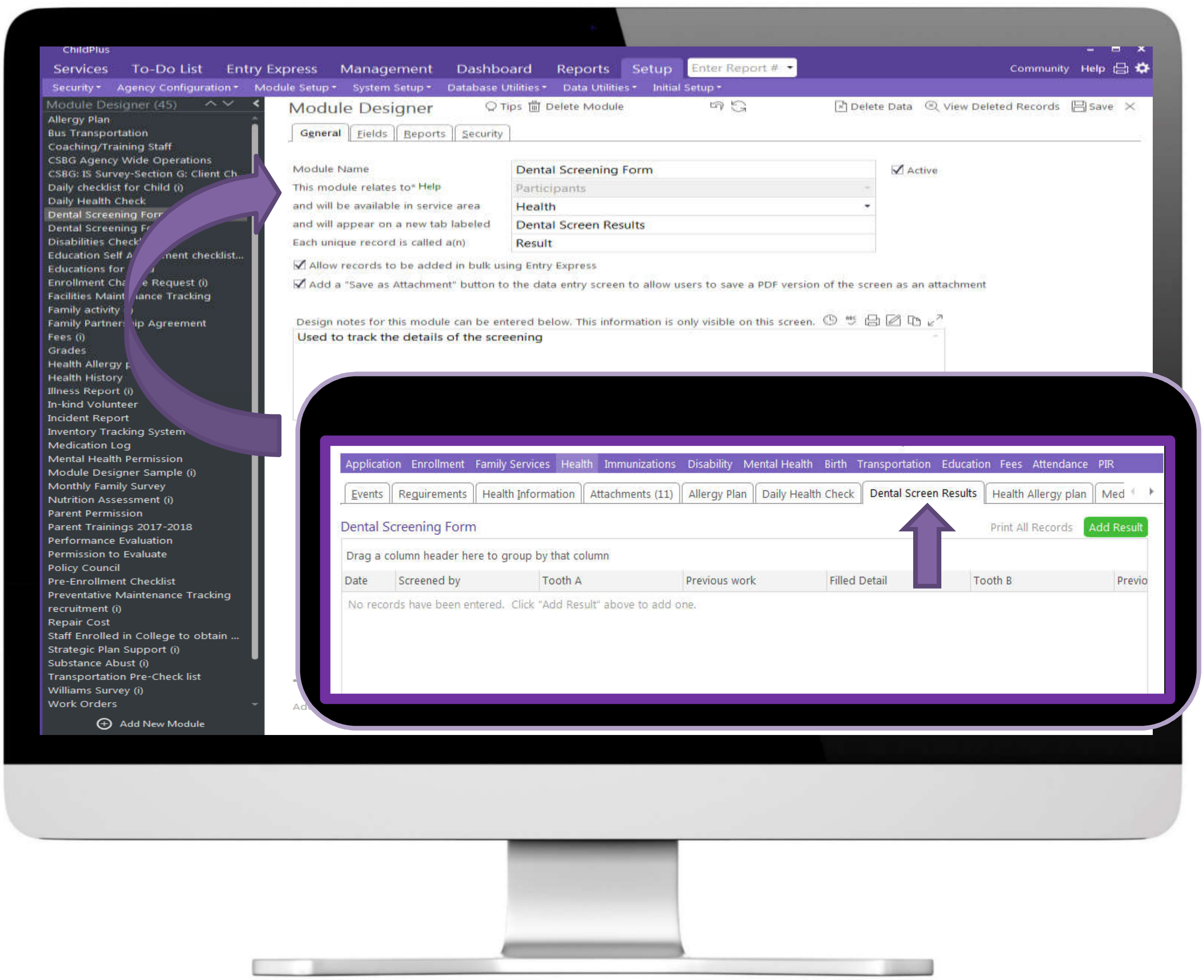
Select the access level for your module (full access, view access or no access) and for each security group.



HOW CHANGES IMPACT THE MODULE

Field example: Changing the "This module relates to" field and the "will be available in service area"

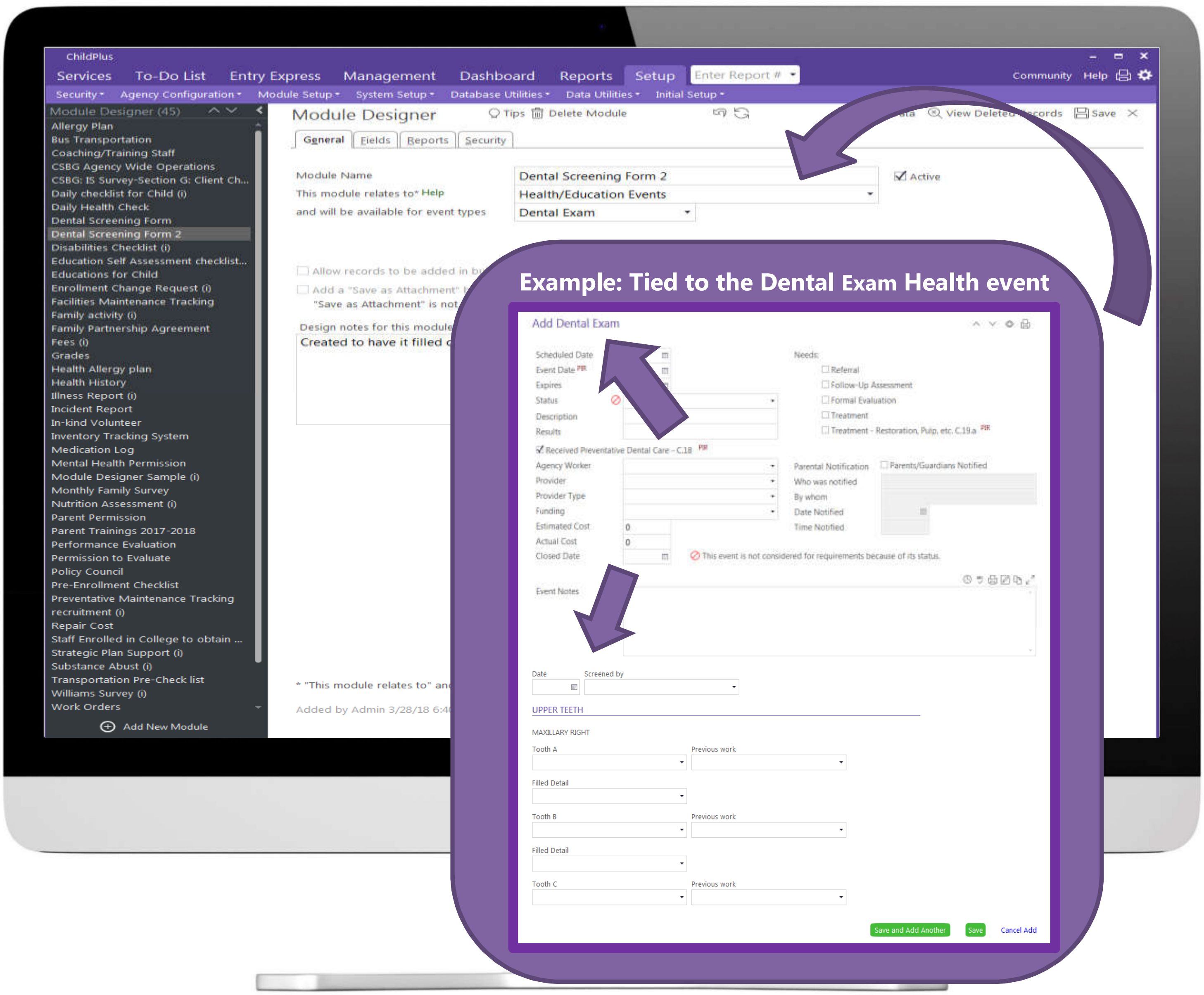
` In the "*This module relates to*" field, select **Participants** from the drop-down menu. Then in the "*will be available in service area*", select **Health** from the drop-down menu. Making this type of selection will add a new tab to the Health module.



HOW CHANGES IMPACT THE MODULE

Field example: Changing the "This module relates to" field

In the "*This module relates to*" field, select **Health/Education Events** from the drop-down menu. Making this type of selection will add a new tab to the Health module.



CREATE A NEW MODULE

Based on this **Permission to Observe Child** document used by our *pretend agency* – Peachtree Child Development Program

Peachtree Child
Development Program

Central Office:
303 Perimeter Center North
Atlanta, GA 30346
404.252.6674
Fax: 404.252.7337
www.peachtreeheadstart.org

PEACHTREE CHILD DEVELOPMENT PROGRAM
PERMISSION TO OBSERVE CHILD

In order to complete an individual plan to serve your child, we would like your permission for the Head Start Mental Health Consultant to observe your child in the Head Start classroom.

The Mental Health Consultant will share the observations with the Head Start teaching staff and give input to assist in classroom planning/intervention. The Mental Health Consultant will be available to meet with you at a home visit or conference, along with the Head Start teacher, to discuss the observation and recommendations.

I give my permission to the Head Start Mental Health Consultant, ____________________, to observe my child in the Head Start classroom.

Child Name: ____________________________ Date: ________________

Signed: ______________________________ Date: ________________
(Parent Guardian)

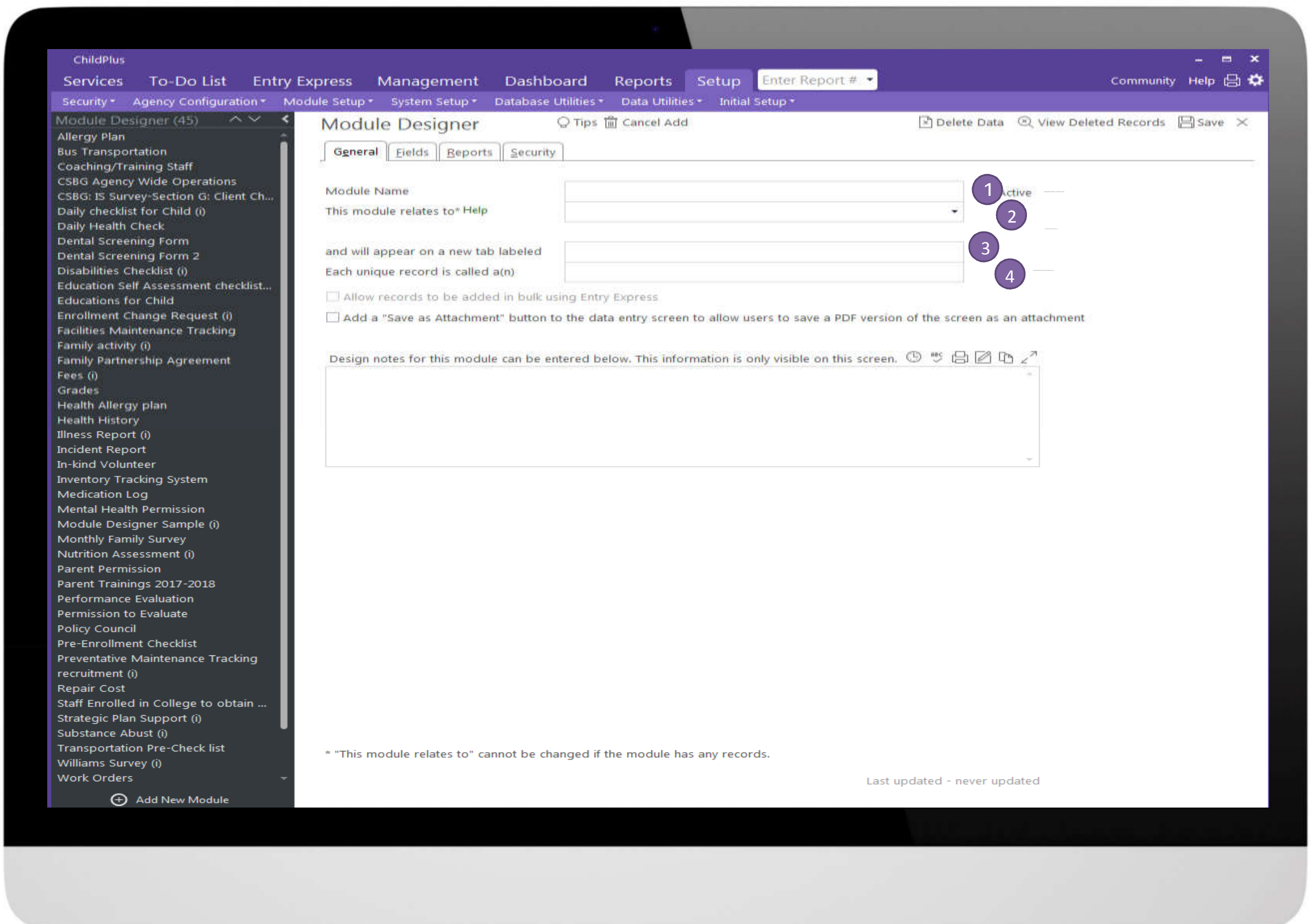
Revised: 03/2018 CHG

Serving Children and Families in Cobb, Coweta, Dekalb, Fayette, Fulton and Gwinnett counties

CREATE A NEW MODULE

General Tab

Fill out the appropriate fields for the General tab based on the **Permission to Observe Child** document.



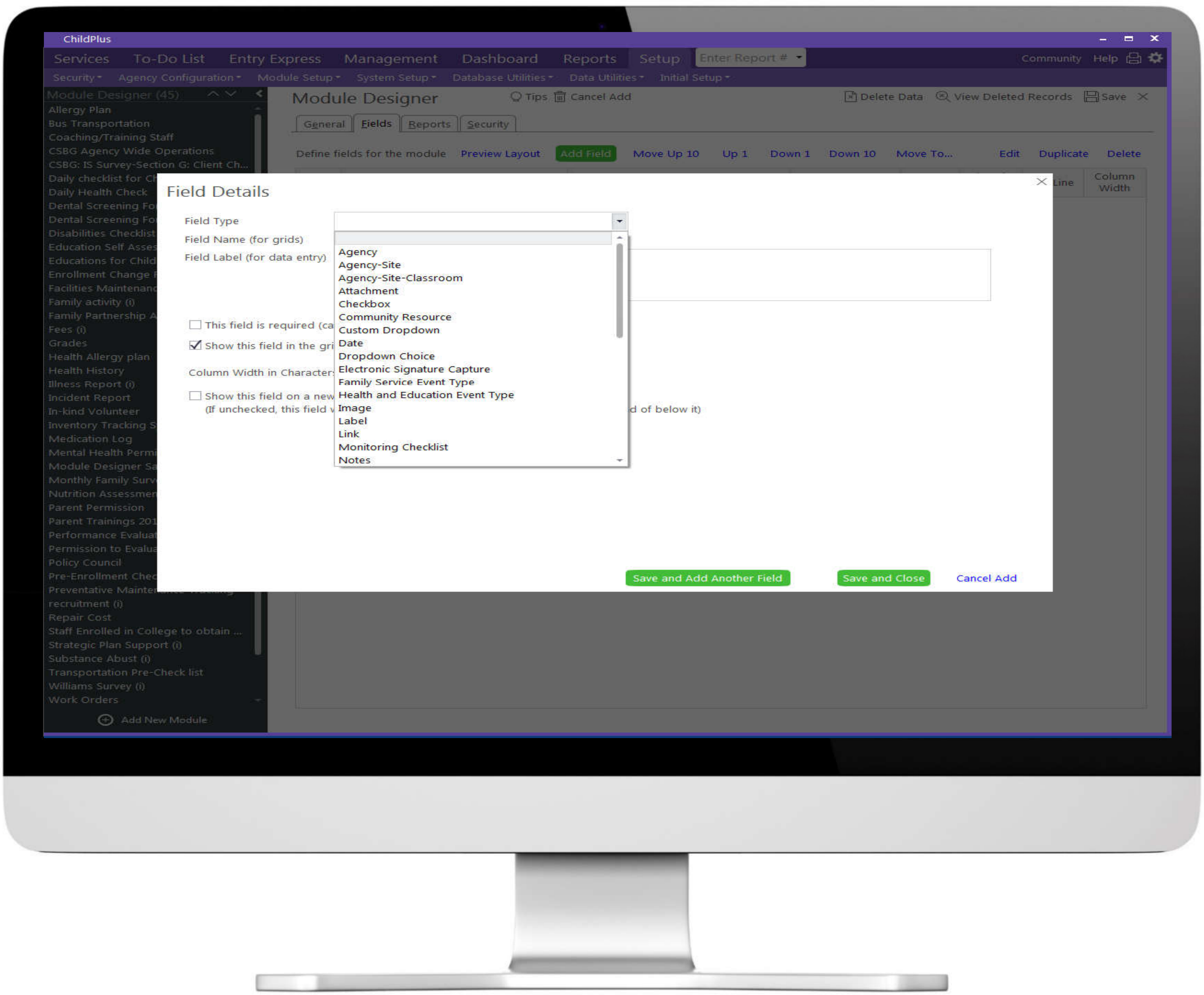
How To: To add a new module, select Setup, Module Setup, Module Designer, then Design or edit your own custom modules.

Answer key: 1. Mental Health Permission 2. Participants 3. Mental Health 4.Mental Health Permission

CREATE A NEW MODULE

Fields Tab

Add fields based on the **Permission to Observe Child** document. Refer to the charts on the next several pages to select your field types.



FIELD TYPE & OPTIONS CHART

Use this table to help determine the field type and options

Field Type	How the Field Type functions?	Option to make field required	Available in Grid	Start on new line option	Comments
Agency	Drop-down list of agencies in your database	✓	✓	✓	
Agency-Site	Two drop-down lists, one of agencies and the second of sites in your database	✓	✓	✓	
Agency-Site-Classroom	Three drop-down lists, one of agencies, the second of sites, and the third of classrooms in your database	✓	✓	✓	
Attachment	"Insert Attachment" options field (Add, View, Delete)	✓	✓	✓	
Checkbox	Standard Checkbox		✓	✓	
Community Resources	Drop-down list of "Community Resources" in your database	✓	✓	✓	Select the "Community Resource Types" you want to appear
Custom Dropdown	Insert a customized drop-down list	✓	✓	✓	Add the choices you want to appear. The choices will appear in the order added
Date		✓	✓	✓	Option to default to current date
Dropdown Choice	List of drop-down "Choice Types" of configured in your database	✓	✓	✓	Select the drop-down "Choice Type" to appear in this list
Electronic Signature	Adds the option for individuals to sign the document via an electronic signature	✓	✓	✓	
Family Service Event Type	Drop-down list of "Family Service Events" in your database	✓	✓	✓	

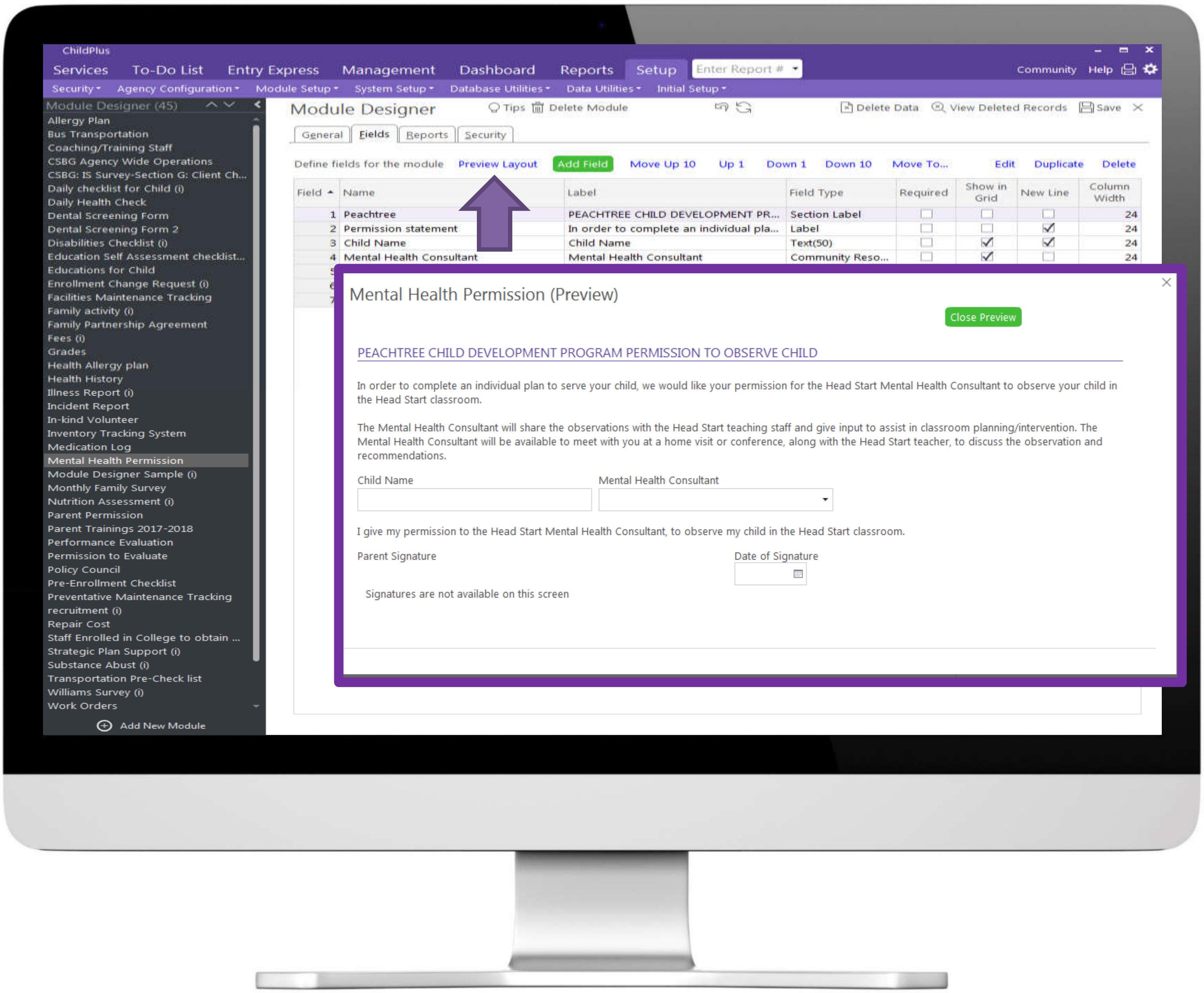
Field Type	How the Field Type functions?	Option to make field required	Available in Grid	Start on new line option	Comments
Health and Education Event Type	Drop-down list of “Health and Education Events” in your database	✓	✓	✓	
Image	“Insert Image” options field (Add, Delete)	✓	✓	✓	
Label	Create a label for a field			✓	Displays on record only. Does not display in the Grid or on “Reports”
Link	Insert a hyperlink to a website or file path			✓	
Monitoring Checklist	Drop-down list of “Monitoring Checklists” in your database	✓	✓	✓	
Notes	Insert an unlimited “Notes” field	✓	✓		“Notes” fields always display on their own line
Notes (Append-only)		✓	✓		
Numeric (Integer)	Add a numeric field that accepts numbers	✓	✓	✓	
Numeric (Decimal)	Add a numeric field with decimal points	✓	✓	✓	
Personnel Selector	Drop-down list of “Personnel” in your database	✓	✓	✓	Select the “Personnel” position types to appear in this list
PIR	Drop-down list of PIR in your database from your Management PIR module	✓	✓	✓	
Program Term	Drop-down list of “Program Terms” in your database	✓	✓	✓	
Record ID	Assigns a numerical value to each record added		✓		Use to identify unique records not distinguished by date

Field Type	How the Field Type functions?	Option to make field required	Available in Grid	Start on new line option	Comments
School Year	Drop-down list of school years in your database	✓	✓	✓	
Section Label	Create a section divider for grouped information		✓		Displays on record only. Does not display in the Grid or on "Reports"
Text (10)	Text field with 10 characters data input	✓	✓	✓	
Text (50)	Text field with 50 characters data input	✓	✓	✓	
Yes/No	"Yes" or "No" Option		✓	✓	
Yes/No/Blank	"Yes", "No" or "Blank" Option	✓	✓	✓	
Formula Fields	Checkbox, Dates, Notes, Numeric, Text, Yes/No	✓	✓	✓	

CREATE A NEW MODULE

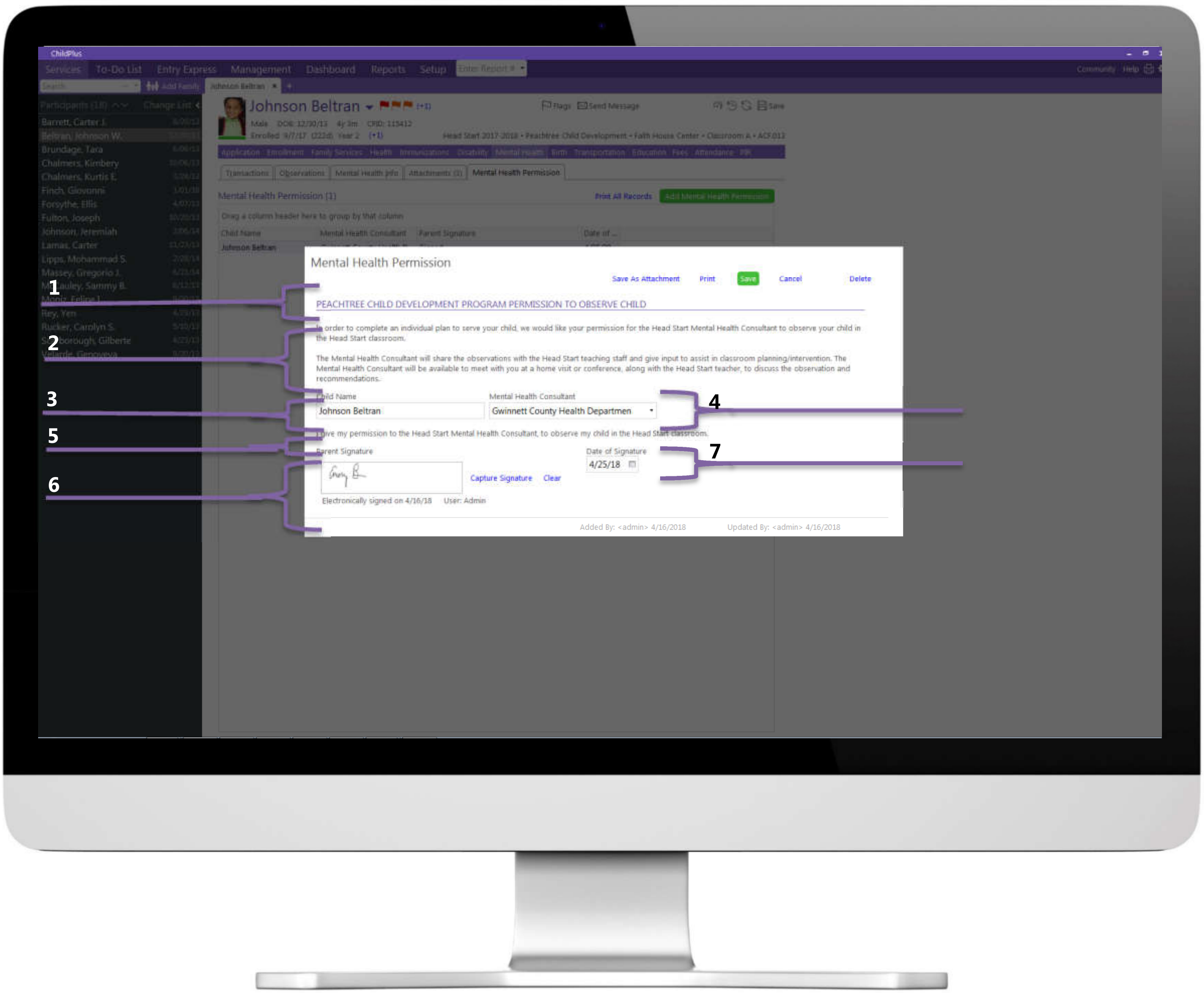
Fields Tab

Now that we have added all of our fields, let's preview our new module.



ADD DATA TO A MODULE

Now you can track our **Permission to Observe Child** information for any child in our agency directly in ChildPlus and have the ability to create reports and worksheets based on this information.



Answer key: 1. Section Label 2. Label 3. Text 4. Community Resource Drop-Down 5. Label 6. Electronic Signature Capture 7. Date

TRAINING & CONSULTING OPTIONS

OnSite Training

OnSite Training is a great opportunity to learn ChildPlus, experience hands-on exercises, review relevant reports and get questions answered.

Workshops

ChildPlus users of all levels will benefit from workshops at our training facility in Atlanta, GA. They will have the opportunity to network with other agencies while participating in interactive activities to better understand the software.

WebBased Training

We know how busy you are, so we have created several WebBased options for learning our software. This type of training offers the convenience of learning ChildPlus right at your desk-all you need is an internet connection!

Consulting Services

ChildPlus Consultants have a deep level of expertise with ChildPlus as well with Performance Standards, Protocols and PIR. Collaborating with a ChildPlus Consultant will change the way ChildPlus works for you!

Las Vegas Training Scramble!!

October 22-25, 2018

Atlanta Training Scramble!!

December 10-13, 2018

The Training Scramble!! is a four day, session-packed, low cost conference held in Las Vegas, NV and Atlanta, GA. Suitable for every level of ChildPlus user and designed for optimal adult learning.

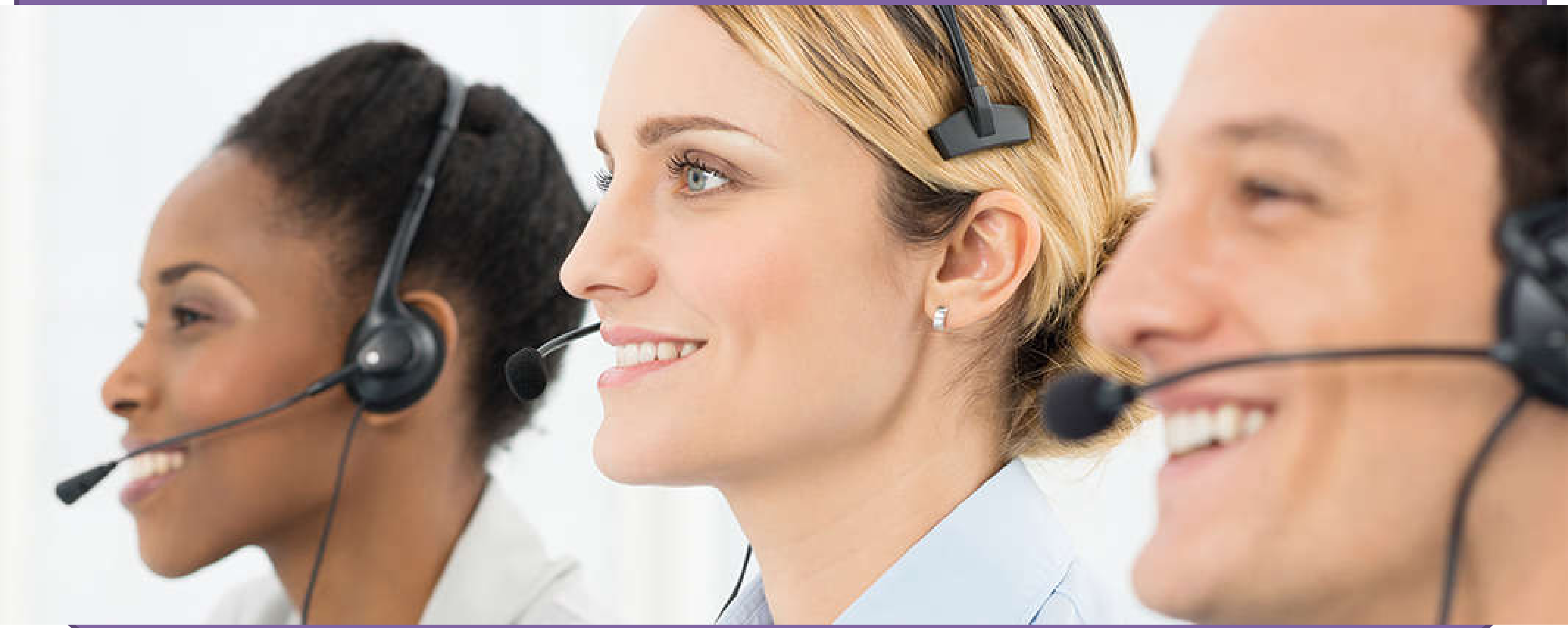
800.888.6674

www.childplus.com/training

NEED HELP WITH CHILDPLUS?

Contact our fast, friendly, dependable support team for assistance.

- ✓ ChildPlus users enjoy the fastest response time among all the Head Start management software providers. We're here to help, and we don't keep you waiting.
- ✓ Unlimited support is included in every ChildPlus subscription. Our in-house support is available in English and Spanish.



★★★★★★★★★★★★★★★★★

The ChildPlus Support team's passion is to help you. We're here to answer any question, big or small. Every question receives prompt, full attention. When you use ChildPlus, you're part of the family, and you come first. We can't wait to exceed your expectations!

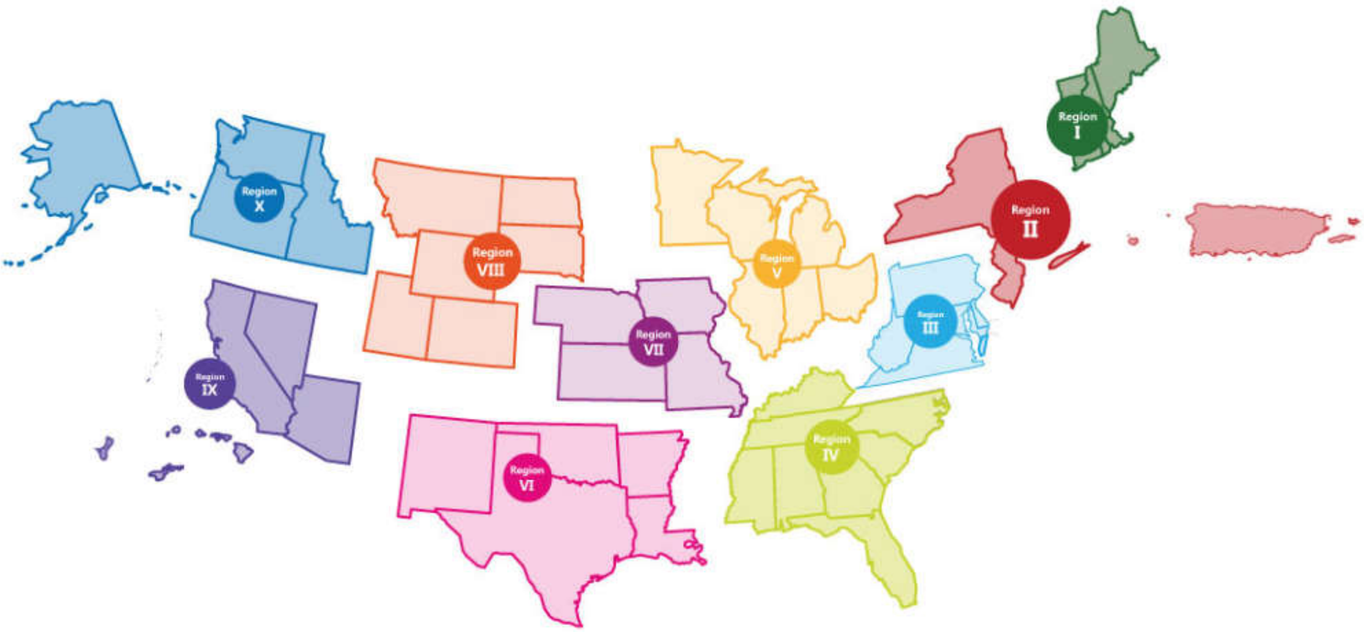
- Cheryl Hooks, Director of Technical Support

★★★★★★★★★★★★★★★★★

800.888.6674

REGIONAL MEETINGS

You don't have to be a ChildPlus user to attend these meetings; however, they are geared around ChildPlus. Learn how to use ChildPlus, tips 'n tricks, and network with other Head Start staff using ChildPlus in your area.



Here's what attendees had to say about past meetings:

"Great facilitator! Well organized! Super helpful! I loved the hands on training and small group setting!"

"I really liked the user participation because they gave me lots of ideas."

"I enjoyed learning about best practices and how to move to a paperless environment."

"My confidence has grown significantly in terms of creating custom reports."

Visit our website to learn more!
www.childplus.com/usergroups

TEAM MEMBERS

Contact any of these Account Executives for assistance

Jose Martinez
Account Executive
800.888.6674 ext. 251
Cell: 770.241.0539
jose.martinez@childplus.com

Learn how ChildPlus can help your agency. Contact us today!