

# Inactivating Parents, Guardians and Children

When a child has left care and will not be returning, please follow the steps below to:

- [Inactivate Children](#)
- [Inactivate Parents/Guardians](#)
- [Troubleshooting](#)

## Summary

### *Inactivate Children*

1. Click childcare menu
2. Select children
3. Search for the child and click edit
4. Click on CCS enrolment tab,
  - a. Click on down arrow and select update
  - b. Enter end date
  - c. Enter date of event
  - d. Click on sessions tab
  - e. Click on submit
5. Click on general tab
  - a. Enter stop care date
  - b. Click on save
  - c. Change IsActive button to NO
  - d. Click on save

### *Inactivate Parent/Guardian*

1. Click childcare menu
2. Select parent/guardians
3. Search for the child and click edit
4. Change IsActive button to NO
5. Click on save

# Inactivating Parents, Guardians and Children



## Detailed

### Inactivating Children

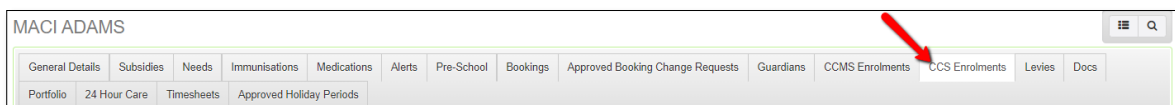
Click **Child Care** menu and select **Children**:




Search for the child via the search keyword **Search Keyword** option. Once you have found the child click **Edit**:

| Full Name   | Guardians  | Age   | CRN        | Active |   |
|-------------|------------|-------|------------|--------|---|
| Agnes Burgs | Lita Burgs | 3y 7m | 270000222J | Yes    |   |

When inactivating a child, the first thing to do is end date the enrolment. So, while in the child record click on the **CCS enrolments** tab and all enrolments for the child will display:



**NOTE:** *CCS may have already ended the enrolment so in this case you won't need to do this step.*

| Child       | Guardian             | Child | Guardian CRN | Type          | Arrangement                   | Status | Enrolment Id | Approval         | Start Date | End Date  | Actions   |
|-------------|----------------------|-------|--------------|---------------|-------------------------------|--------|--------------|------------------|------------|-----------|---|
| Bass, Child | Bass-2751, Frederick |       | 308360812T   | 200D - Update | Complying Written Arrangement | Ceased | E8000081082  | 190016362L (FDC) | 5/11/2018  | 3/02/2019 |  |

If the enrolment has not been ended then click on the **drop-down arrow** and select **update**:

| Child       | Guardian       | Child | Guardian CRN | Type          | Arrangement                   | Status   | Enrolment Id | Approval         | Start Date | End Date | Actions                               |
|-------------|----------------|-------|--------------|---------------|-------------------------------|----------|--------------|------------------|------------|----------|---------------------------------------|
| Adams, Maci | Adams, William |       |              | 200A - Create | Complying Written Arrangement | Received | E8000082984  | 190016362L (FDC) | 1/04/2019  | -        | View                                  |
| Adams, Maci | Lane, Lavender |       |              | 200A - Create | Complying Written Arrangement | Received | E8000082939  | 190016362L (FDC) | 1/04/2019  | -        | Update<br>Query<br>Withdraw<br>Delete |

On the **enrolment** tab select a **date of event** and **end date** from the calendar

**Enrolment**

Enrolment Id: E8000082984

Notice Type: 200D - Update

Arrangement: Complying Written /

Start Date: 01/04/2019 (Mon)

**Date Of Event**

Late Submission Reason

End Date

Occurrence No.: 1

Next, click on the **sessions** tab just for this data to load through, then **submit**.

Enrolment Sessions

Next move onto the child's **General Details** Tab and Enter in a **Stop Care Date**

**First Name \***: Maci

**Surname \***: Adams

**IsActive**: YES

**Date Of Birth \***: 22/08/2015

**Gender \***: Female

**CRN**

**Medicare Number**

**School Status**: Select...

**Apply School Age % From**

**School Name**

**Start Date**: 02/04/2019

**Stop Care (This will end date any bookings)**

**Priority Of Access \***: Working / Studying


Then **Save**.

*NOTE: Entering a stop care date will also end date any active booking, therefore you won't need to do this process separately.*

Now slide the active button to inactive and save again.

### Person Details

Personal Details



First Name \*

Surname \*

Date Of Birth \*

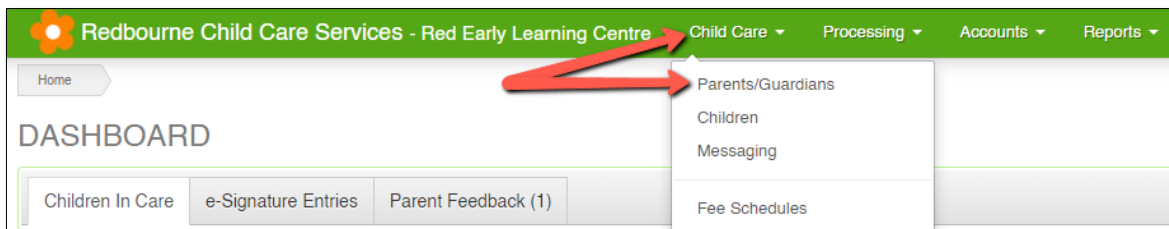
Gender \*

IsActive

### Inactivating Parents/Guardians

Now the child is inactive you can make the parent inactive

Click Child Care and select Parents/Guardians



Search for the parent via the search keyword  option


Once you have found the parent click Edit.

| Full Name  | Children   | Email                  | Phone  | Mobile | Work | Active |   |
|------------|--|------------------------|--------|--------|------|--------|---|
| Lita Burgs | Agnes Burgs,Duncan Schieler,Mandy Smith,Milo Burgs | info@harmonyweb.com.au | 123456 |        |      | Yes    | <input checked="" type="checkbox"/> Edit View |

Slide the active button to inactive and save.

### Personal Details

Personal Details



|   |                      |                                     |
|---|----------------------|-------------------------------------|
| First Name *                            | Middle Name          | Surname *                           |
| <input type="text" value="William"/>    | <input type="text"/> | <input type="text" value="Adams"/>  |
| Date Of Birth *                         | CRN                  | IsActive                            |
| <input type="text" value="05/08/1956"/> | <input type="text"/> | <input checked="" type="checkbox"/> |

# Inactivating Parents, Guardians and Children

## Troubleshooting

**Issue:** We are trying to inactivate the parent and getting the below error:

- A Parent/Guardian's account balance must be zero before the Parent/Guardian can be inactivated.

**Why?** When trying to inactivate, the parent cannot have an outstanding balance, which means that their account will need to be cleared and at a \$0 balance prior to making the parent inactive.

**Resolution:** This depends on whether the parent is in credit or debit.

If the parent is in *credit* and you have given the money back to the parent, create a refund.

1. Accounts
2. Refund
3. Create New Refund
4. Select Parent
5. Select Date
6. Select Amount
7. Submit

If the parent owes you money therefore is in **debit**.

If the parent *has* paid you then create a receipt.

1. Accounts
2. Receipts
3. Create New Receipt
4. Select Parent
5. Enter amount
6. Click Select
7. Select Receipt Method
8. Save

If the parent *hasn't* paid you, and you want to write off the amount, create a **bad debt**.

1. Accounts
2. Bad debts
3. Create New Bad Debt
4. Select Parent
5. Click on Select
6. Change the date (if needed)
7. Enter Comments
8. Tick invoices you want to apply the bad debt to
9. Click Save

**Issue:** We are trying to inactivate the **child** and getting the below error:

Unable to inactivate the child:  
- There are active enrolments.  
Please resolve this before inactivating the child.

**Resolution:** To fix this error go back to the CCS enrolments tab. Here you will check the end date on the enrolment. If there is no end date on the enrolment go back to page 2 for further steps.

If the enrolment has been ended look at the date. Make sure your stop care date within the general tab is not before the enrolment end date.

**Issue:** We are trying to inactivate the **child** and getting the below error:

Unable to inactivate the child:  
- There are active bookings.  
Please resolve this before inactivating the child.

**Resolution:** There are a couple of different reasons for this error:

1. There is an active booking. In this case you need to follow the below process:
  - a. Enter the stop care date (the stop care date will also stop any active bookings for the child)
  - b. Click Save
  - c. Turn isactive button to NO
  - d. Click save again.
2. The stop care date (on the child's record) is BEFORE the booking end date e.g:

Stop Care (This will end date any bookings)

| Sessions | Guardians      | Active / Inactive | Date Range              | Default Program | Status   | Approval Date | Approval By       |                               |
|----------|----------------|-------------------|-------------------------|-----------------|----------|---------------|-------------------|-------------------------------|
| 6        | Sharron Dillon | Active            | 12/07/2021 - 12/12/2021 |                 | Approved | 20/09/2021    | RBSAdmin RBSAdmin | <input type="checkbox"/> Edit |