Wait List

Children may be placed into your service's Wait List and booked into care as childcare places become available.

If you have purchased the online enrolment module, any online enrolments you receive, a wait list record will be automatically created for the parent and child/ren. For more information on this module please view the tip sheet or view a previously recorded webinar called Online Enrolments.

The tip sheet will walk you through:

- **Create Wait List Priorities**
- **Adding Families to the Waitlist**
- **Wait List Actions**
- **Booking children into care**
- **Inactivating Children**
- **Search options**
- **Troubleshooting**

Summary

Adding Existing Family to Waitlist

1. Click on Child Care and then Waitlist
2. Click +Create New

Step 1 – Parent/Guardian Details

3. Enter the Parent/Guardian details (asterisks fields are required)
4. Click Check Existing Parents/Guardians
5. Click Select on the Existing file
   a. The parent's details will pull through. Make changes as required
   b. Click on Next

Step 2 – Child Details

6. Existing children will then show. If its an existing child select the child and Continue with Selected *OR*
7. Continue with New Child (if new)

a. Complete Child Details Tab (asterisks fields are required)
b. Complete Booking Requirements Tab
8. *Click "Add new child" if required.*
9. Once finished, click Save

Adding New Families to Waitlist

1. Click on Child Care and then Waitlist
2. Click +Create New

Step 1 – Parent/Guardian Details

3. Enter the Parent/Guardian details (asterisks fields are required)
4. Click Check Existing Parents/Guardians and Click on continue as New Parent/Guardian
   a. Fill in any other information for the parent
   b. Click Next and move to step 2

Step 2 – Child Details

5. Complete Child Details Tab (asterisks fields are required)
6. Complete Booking Requirements Tab
7. *Click "Add new child" if required.*
8. Once finished, click Save

Booking Children Into Care

1. Locate child in waitlist
2. Edit using the pencil icon
3. Open Actions Tab
4. Click on Book Child
5. Complete popup screen and required fields
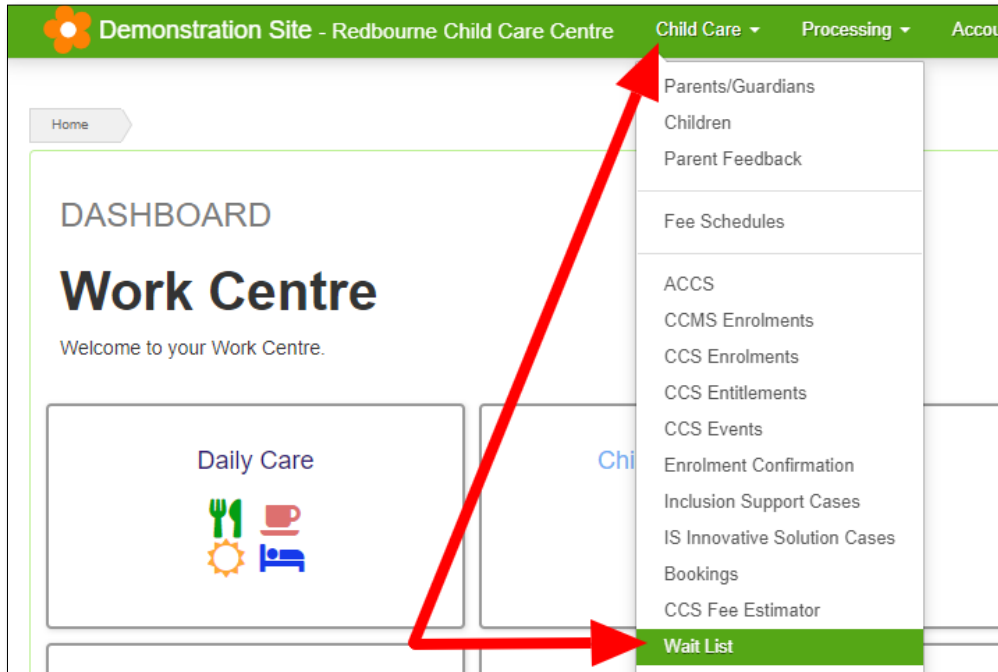6. Click Save

Inactivating Children from the waitlist

1- Locate child in waitlist
2- Edit using the pencil icon
3- Open Actions Tab
4- Click the Inactivate Waitlist Record
5- Click Proceed

NOTE: Inactive waitlist entries may not be edited
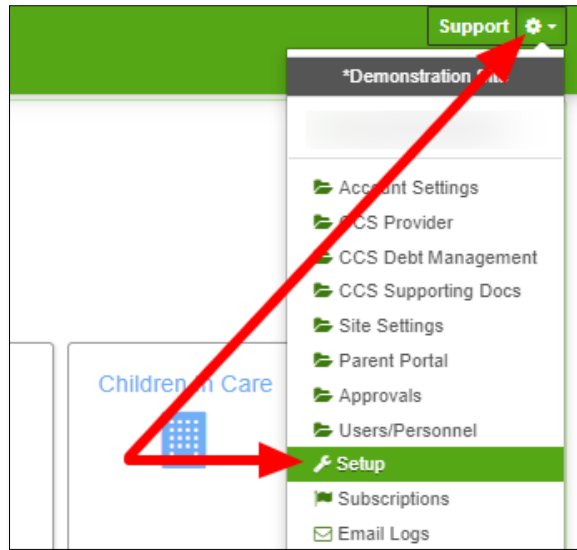
Wait List

Detailed

To access your Wait List, open the **Child Care** menu and select **Wait List**:
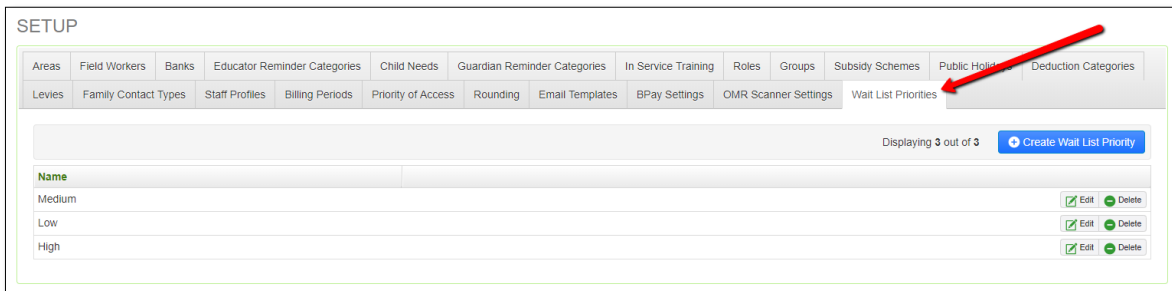

Wait List Priorities

A **Wait List Priority** is required for each child added onto your Wait List. This may then be used to determine the priority order for selecting which child to book when a place is available.
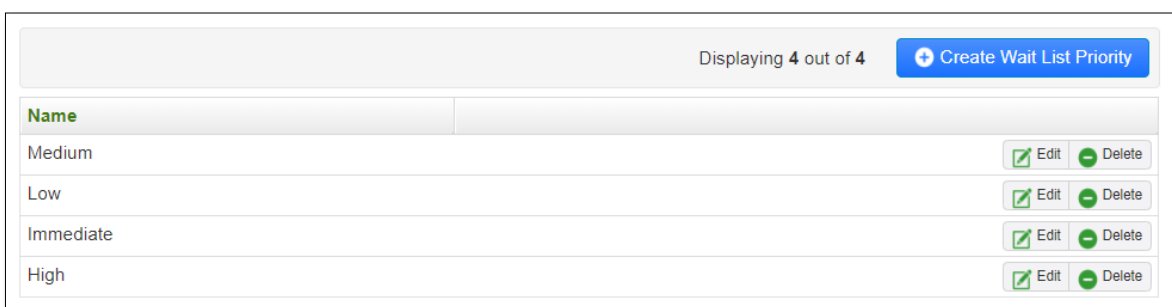
To add Wait List Priorities, open the **settings** menu and select **Setup**:
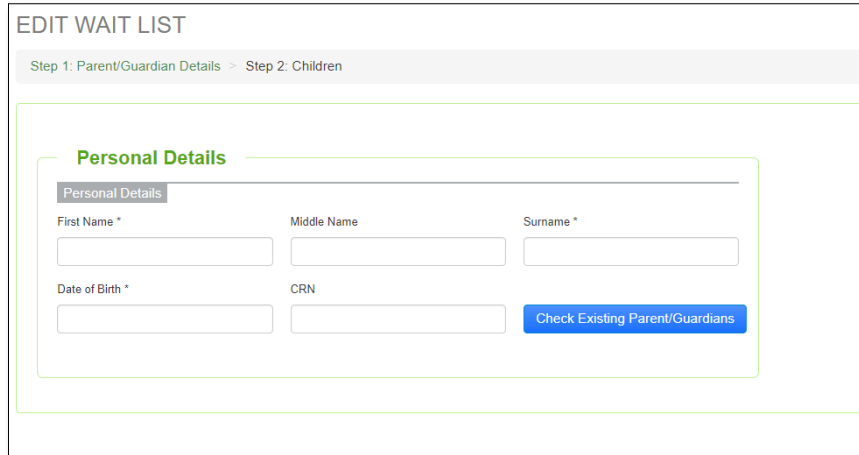
Next, open the **Wait List Priorities** tab:

To add a new priority, click the **+Create Wait List Piority** button. Enter the priority and then click the **Save** button. The Wait List Priorities you create will be displayed in the table:

From this table, you will be able to edit and delete priorities as required.

Adding Families to the Wait List

To add a new family to the Wait List, you will need to click the **+Create New** button on the Wait List page. This will open **Step 1: Parent/Guardian Details**:

EDIT WAIT LIST

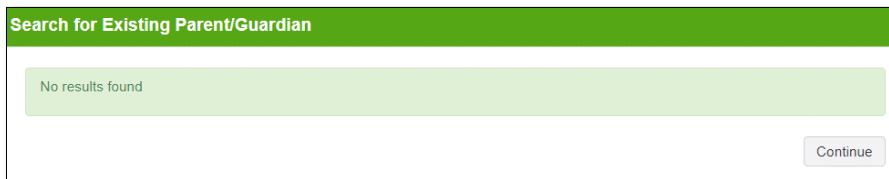Step 1: Parent/Guardian Details > Step 2: Children

Personal Details

Personal Details

First Name *   Middle Name   Surname *

Date of Birth *   CRN

[Check Existing Parent/Guardians]

You will then need to enter the Parent/Guardian details and click **Check Existing Parent/Guardians** button. This will check if the Parent/Guardian already exists within your Parent/Guardians or on the Wait List.

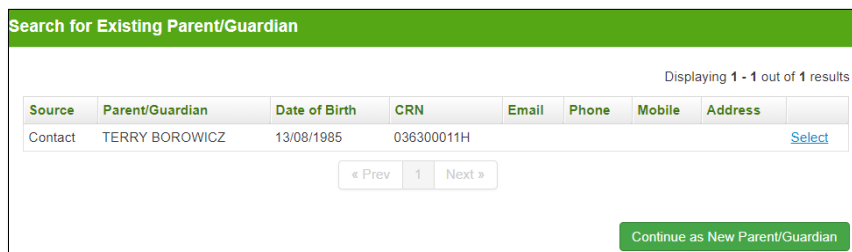If no results are found, the following pop up window will display:

Search for Existing Parent/Guardian

No results found

[Continue]

You may then click the **Continue** button to proceed with adding a new Parent/Guardian. This will open additional fields within the window (eg Contact, Address etc).

If a parent/s matching the fields you have completed is found to already exist within your software (either as a Parent/Guardian or another Wait List entry), their name will display in the Search for Existing Parent/Guardian window:

Search for Existing Parent/Guardian

Displaying **1 - 1** out of **1** results

Source	Parent/Guardian	Date of Birth	CRN	Email	Phone	Mobile	Address	
Contact	TERRY BOROWICZ	13/08/1985	036300011H					Select

« Prev 1 Next »

[Continue as New Parent/Guardian]

If none of the results are relevant, click **Continue as New Parent/Guardian** to continue adding the new parent/guardian.
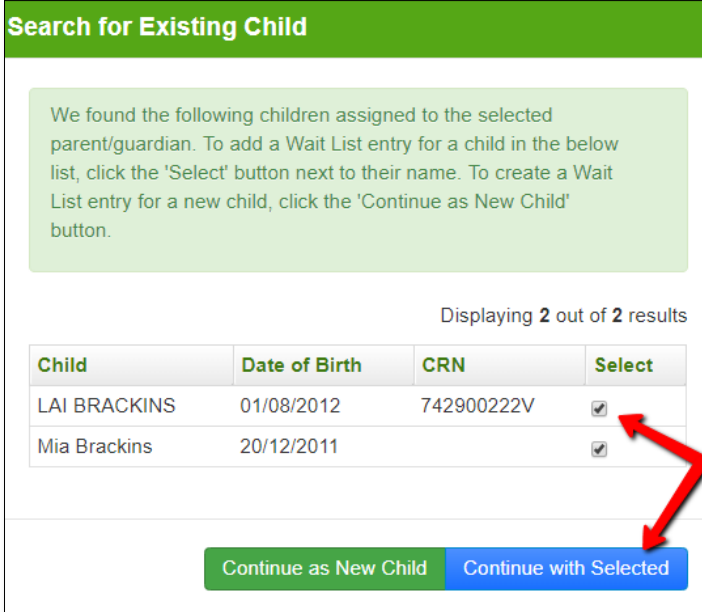
Alternatively, if the parent already exists, you will be able to select their name from the pop up window by clicking _Select_ next to their name.

Selecting this parent will automatically prefill the remaining Wait List fields with the details you have already captured on the selected record. You may update these fields for the Wait List entry you are creating, but it will not update the existing record.

The mandatory fields are indicated with an *. These fields, along with at least one contact entry (email, phone or mobile), are the minimum amount of data which may be captured before moving to step 2.

Once all relevant details have been recorded, click the **Next** button to move to **Step 2: Children**.

If you have selected an existing parent, a list of any children currently assigned to the guardian will appear. If you would like to Wait List any of these children, you will be able to check the box next to their name/s and then click **Continue with Selected**.

This will redirect you to the **Step 2: Children** page and insert the child details you have already captured for the selected children.

You will also be able to add new children if required.

Alternatively, if you do not wish to copy the details of existing children, click **Continue as New Child** button. This will open a new child within the 'Step 2: Children' page.

You will need to add the child's details into the first tab 'Child Details':

In this tab, record the child's information eg Name, Date of Birth etc. You will also need to capture an estimated or requested start date, a Wait List priority and priority of access:

Once all mandatory fields (indicated by an *) have been entered, you may move across to the **Booking Requirements** tab:
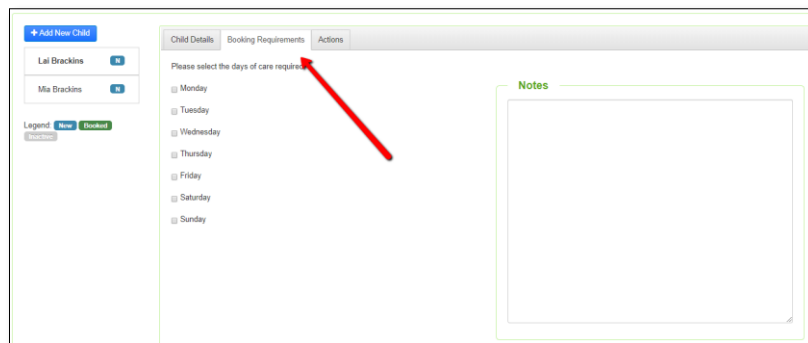

Within this tab, you may tick the box next to any days the child requires care on.

To add a new child, click the **+Add New Child** button. You may add as many children as required by repeating this process.

All children will be listed down the left-hand side of the page. You may add as many children as required by repeating this process.

When adding or editing records in the **Children** tab, click on a child's name to open their record. The child record you currently have open will be bold:
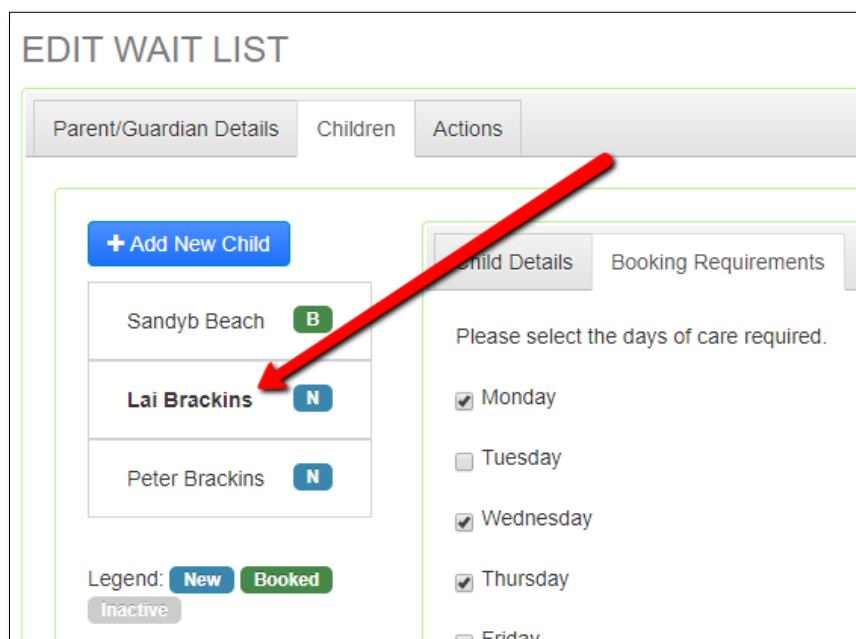

Once you have finished, click the **Save** button to save the family's details onto your Wait List.

If you utilise our online enrolments and currently do not have any of the children's details, you can skip entering any child in and click **Save**.

Wait List Actions

When you navigate to the Action tab you will have options that can be selected depending on what you would like to do with the record:
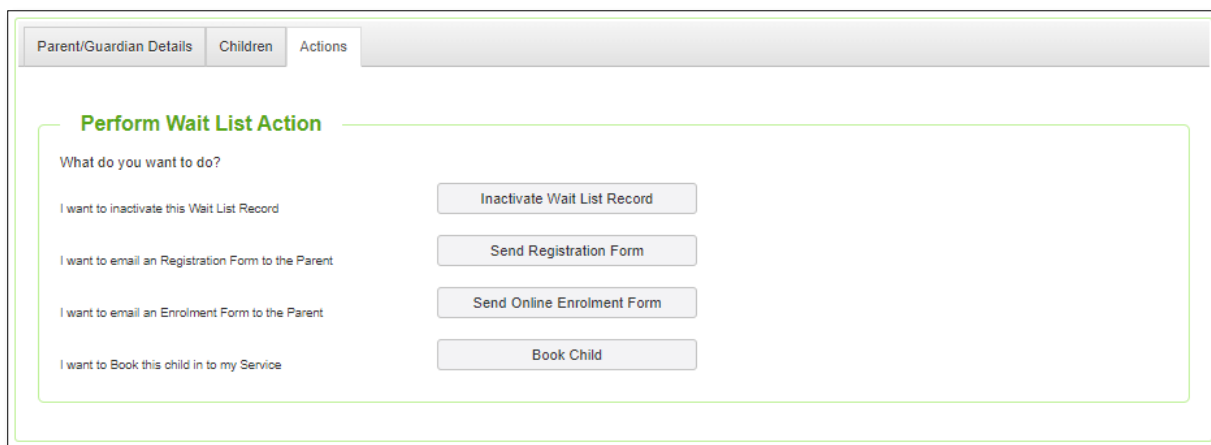
NOTE: These options may not be available if you are not using our Online Registration and Enrolment Forms.

Inactivate Wait List Record – Select this if you wish to no longer have this record on your wait list.

Send Registration Form – Click this if you would like to send the family a link to your Online Registration Form to complete
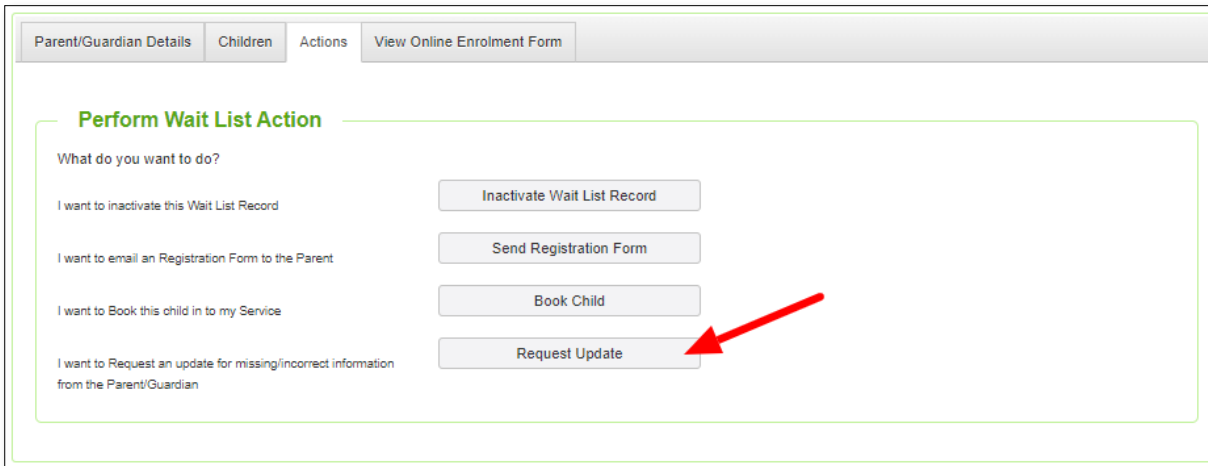
Send Online Enrolment Form – Click this if you would like to send the Online Enrolment Form link to the family to complete

Book Child – Select this if you wish to enrol the child into your service

If you are using online Registration and Enrolment forms once they are receive these options will change.

Upon checking the received forms, you may request an update on missing/ incorrect details by sending the forms back to the family.

You can request an update by clicking on the **Request Update** button.
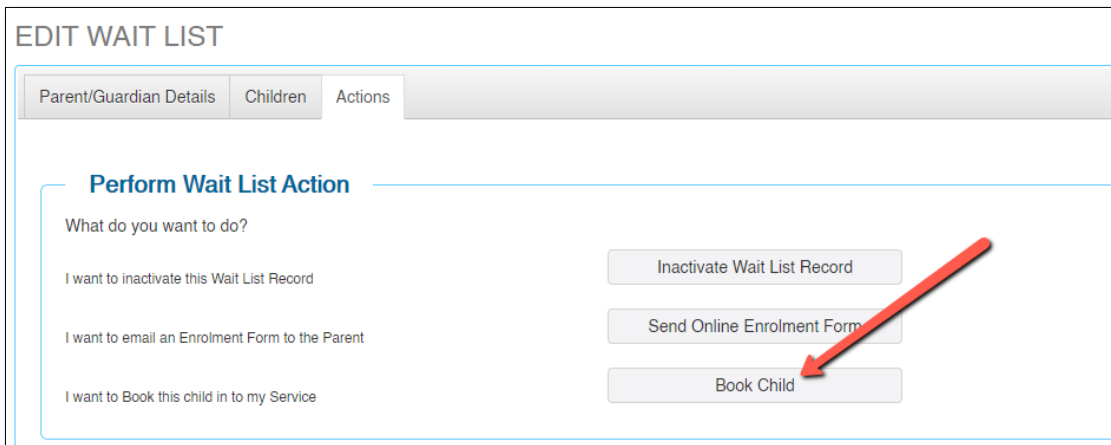

A similar page to below will appear:

Select the form you would like an update for and enter a comment before sending to the family to update.

Booking Children into Care

To book a wait listed child into care, you will need to first locate the child in your Wait List and then click the ✏️ button. This will allow you to open the record for editing.

NOTE: only children in the status of 'NEW' may be booked into care from the Wait List.

Open the actions tab and click the **Book Child** button.

You will then **select the child** from the drop down menu and click **next**:

Next, you will be asked:

No matter your answer the following screen will appear where you will need to record further details for the booking:
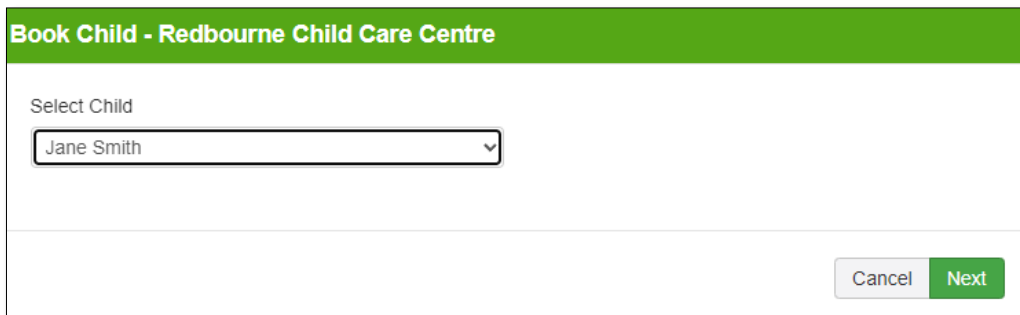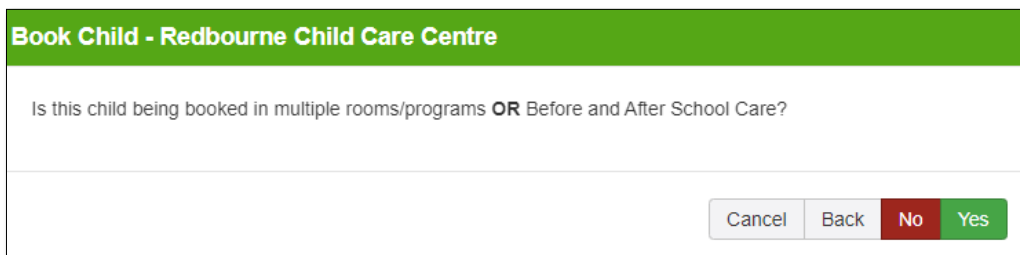
Book Child - Redbourne Child Care Centre

Guardian/Parent Name
John Smith

Child Name
Jane Smith

Room
-- Select --

Start Date
03/01/2022

When you click Save the following actions will take place:

- A guardian record will be created if the guardian does not exist
- A child record will be created if the child does not exist
- You will be taken to the new Booking Template record to complete the booking details

Cancel   Back   Save

You will need to select the **Room**, **Subsidy Scheme** and **Fee Schedule** from the drop down menus. Next, enter the **booking start date**. This must be a future date. The date will pull through from the child's details but may be updated if required.

Once you have made your selection, click the **Save** button.

This will perform the following actions:

Create the parent/guardian if they do not already exist.

Create the child record if they do not already exist.

Assign the child to the guardian.

Create a booking using the details from the 'Booking Requirements' tab and using the details you have just selected from the dropdown menus.

Note: if the parent/guardian and/or child already existed within your software but their status was inactive, their record will now have been made active.

Once a child has been booked, their status will be updated to 'booked' and their Wait List entry will no longer be editable:

Once the booking process is complete, you will be redirected to the booking. As the booking will be future dated, it will appear in the status of inactive. The booking status will become active once the start date has come to pass.

Inactivating Children

Children may be inactivated from the Wait List via their 'Actions' tab:

To inactivate a wait list entry, click the button. This will prompt you to confirm the inactivation:

You will then **select the child** from the drop down menu and click **next**:

Then confirm by clicking on **Proceed**:

Inactive Wait List entries will appear in the status of 'Inactive':

Inactive entries may not be edited.

Searching for Children/Care

On the main Wait List page, the search function may be used to locate children requiring care who meet specific criteria.

Created From and To: Allows you to enter a date range and locate Wait List entries created within a specific date range.

 : Click on a day/s to search for children requiring care on specific days.

Priority: Each child entered into your Wait List will have been assigned a Wait List priority. Use this dropdown menu to search for children assigned particular priorities.

Show Closed: Tick this box to search for children who have been booked/inactivated from your Wait List.

Once you have made your selection from the search criteria, click the **Search** button. Your search results will be returned in the Wait List table:

You may sort by a column by clicking on the column header:

To remove your filtered search, click the **Reset** button. The default view of data on this page is wait listed children in the status of **New**.

The number beside a parent's name indicates the number of active wait listed children they currently have:

WAIT LIST

Created From: dd/mm/yyyy	Created To: dd/mm/yyyy		Mon Tue Wed Thu Fri Sat

Parent	⌄	Child	⌄	Date Created	⌄	StartDate ▾
TERRY BOROWICZ (3)		Mia Brackins		09/05/2019		23/05/2019
TERRY BOROWICZ (3)		LAI BRACKINS		09/05/2019		21/05/2019
TERRY BOROWICZ (3)		Peter Brackins		09/05/2019		13/05/2019
Jessica Smith (2)		Lachlan Smith		07/05/2019		13/05/2019
Jessica Smith (2)		George Smith		07/05/2019		13/05/2019

Wait List

Troubleshooting

Below are some common issues you may see regarding the wait list and how to resolve them.

Issue: I have inactivated a child how can I bring them back?

Resolution: Unfortunately, you can't. In this case you will need to create the child within the wait list again.

Issue: I'm trying to save/book child in and I'm getting the error below:

- Wait List Priority is required
- Priority of Access is required

Resolution: When booking a child in, the Waitlist Priority & Priority of Access is required. If there are multiple children on the form, you will need to select the Waitlist Priority and Priority of Access for ALL children listed prior to saving and booking in any children.

Issue: I'm trying to book child in and I'm getting the error below:

- The start date for this template is the same as the start date for another template..

Resolution: This error occurs when the child has been linked to another child, typically their sibling. Please contact our Support Desk who can break this link allowing you to successfully continue and book the child in.