





# 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:

- <u>Create Wait List Priorities</u>
- 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:

Areas	Field Workers E	Banks	Educator Rer	minder Categories	Child Needs	Guardian Rem	inder Categories	In Service Training	Roles	Groups	Subsidy Schemes	Public Holid	Deduction Categories
evies	Family Contact Ty	pes	Staff Profiles	Billing Periods	Priority of Access	Rounding	Email Templates	BPay Settings	OMR Sca	nner Settings	Wait List Prioriti	es	
											_		
											Displayin	g 3 out of 3	Create Wait List Priority
lame													
l <mark>ame</mark> 1ediun	n												📝 Edit 🕒 Dele
lame Aediun .ow	n												Edit Dele

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:

	Displaying <b>4</b> out of <b>4</b>	Create Wait List Priority
Name		
Medium		Edit Oelete
Low		Edit Oelete
Immediate		Edit Oelete
High		Edit Delete

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**:







IT WAIT LIST		
p 1: Parent/Guardian Deta	ils > Step 2: Children	
Personal Detai	ls	
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:

arch for Existing Parent/Guardian	
No results found	
	Continu

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:

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

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 <u>Select</u> 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**.

parent/guardian. To add a Wait List entry for a child in the below list, click the 'Select' button next to their name. To create a Wait List entry for a new child, click the 'Continue as New Child' button.				
		Displaying <b>2</b> o	out of 2 results	
Child	Date of Birth	CRN	Select	
LAI BRACKINS	01/08/2012	742900222V		
Mia Brackins	20/12/2011			

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





EDIT WAIT LIST				
Step 1: Parent/Guardian Details > Ste	ep 2: Children			
+ Add New Child	Child Details	Booking Requirements		
	Perso	onal Details		
Mia Brackins N	Personal Details			
	First Name *		Surname *	
Legend: New Booked	LAI		BRACKINS	
Inactive	Date of Birth *		Gender *	
	01/08/201	2	Male •	
	CRN		Medicare Number	
	74290022	2V		
	School Status	3	Apply School Age % From	
	Non-Scho	ool 🔹		
	School Name			

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':

Personal Detail	ls	Disability/Special No	eds
Personal Details		Disability Details	
First Name *	Surname *	Child has a disability?	Date service became aware
Date of Birth *	Gender *	Comments	
	Select	•	
CRN	Medicare Number		
		Special Needs Details	
School Status	Apply School Age % From	Child has a special needs?	Date service became aware
Select	•		
School Name		Comments	
School Name		Comments	

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:

Priority of Access *
Work Related/Studying







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:

EDIT WAIT LIST	
Parent/Guardian Details Children	Actions
+ Add New Child	niid Details Booking Requirements
Sandyb Beach	Please select the days of care required.
Peter Brackins N	Tuesday
	✓ Wednesday
Legend: New Booked	Thursday
пасиче	Friday

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**.

Home Wait List			
CREATE WAIT LIST		Cancel K Back	Save 🖺
Step 1: Parent/Guardian Details > Step 2	: Children		
+ Add New Child Legend: New Booked Inactive	There are no Children on this record. To add a Child, click the 'Add New Child' button, otherwise click the 'Save' button to save the record with no Children.		

## 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:

Parent/Guardian Details Children Actions		
Perform Wait List Action		
What do you want to do?		
I want to inactivate this Wait List Record	Inactivate Wait List Record	
I want to email an Registration Form to the Parent	Send Registration Form	
I want to email an Enrolment Form to the Parent	Send Online Enrolment Form	
I want to Book this child in to my Service	Book Child	

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.

arent/Guardian Details Children Actions View On	ne Enrolment Form
Perform Wait List Action	
What do you want to do?	
I want to inactivate this Wait List Record	Inactivate Wait List Record
I want to email an Registration Form to the Parent	Send Registration Form
I want to Book this child in to my Service	Book Child
I want to Request an update for missing/incorrect information from the Parent/Guardian	Request Update

A similar page to below will appear:

	sing/incorrect information
Request update for -	
Registration Form	
O Enrolment Form	
Please provide the Parent/Guardi.	ian with a comment detailing the field/s you are requesting be updated.

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.

EDIT WAIT LIST	
Parent/Guardian Details Children Actions	
Perform Wait List Action	
What do you want to do?	
I want to inactivate this Wait List Record	Inactivate Wait List Record
I want to email an Enrolment Form to the Parent	Send Online Enrolment Form
I want to Book this child in to my Service	Book Child

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

Book Child - Redbourne Child Care Centre	
Select Child Jane Smith	
	Cancel Next

Next, you will be asked:

Book Child - Redbourne Child Care Centre	
Is this child being booked in multiple rooms/programs <b>OR</b> Before and After S	School Care?
	Cancel Back No Yes

No matter your answer the following screen will appear where you will need to record further details for the booking:





Guardian/Parent Name		Child Name
John Smith		Jane Smith
Room		Start Date
Select	~	03/01/2022
<ul> <li>When you click Save the following action</li> <li>A guardian record will be created if</li> <li>A child record will be created if the</li> <li>You will be taken to the new Booking</li> </ul>	ons will take place: the guardian does child does not exis g Template record	; not exist ;t I to complete the booking details

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:





EDIT WAIT LIST				
Parent/Guardian Details	Children			
+ Add New Child		Child Details	Booking Requirements	Actions
LAI BRACKINS	N	Perso	onal Details	
Mia Brackins	N	Personal [	Details	
Peter Brackins	в 🕌	First Name *		Surname * BRACKINS
Logond: New Pasked	Inactive	Date of Birth	ź	Gender *
Legend. New Booked	mactive	01/08/201	2	Male
T		CRN		Medicare Number
		74290022	2V	
•		School Status		Apply School Age

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:

Perform Wait List Action What do you want to do? want to inactivate this Wait List Record Inactivate Wait List Record want to email an Registration Form to the Parent want to Book this child in to my Service Want to Request an update for missing/incorrect information Request Update	nt/Guardian Details	Children	Actions	View Onlin	ne Enrolment Form
What do you want to do?         I want to inactivate this Wait List Record         I want to inactivate this Wait List Record         I want to email an Registration Form to the Parent         I want to Book this child in to my Service         I want to Request an update for missing/incorrect information	<ul> <li>Perform Wait</li> </ul>	t List Act	tion —		
I want to inactivate this Wait List Record I want to email an Registration Form to the Parent I want to Book this child in to my Service I want to Request an update for missing/incorrect information Request Update	What do you want to do	o?			
I want to email an Registration Form to the Parent I want to Book this child in to my Service I want to Book this child in to my Service I want to Request an update for missing/incorrect information Request Update	I want to inactivate this Wai	it List Record			Inactivate Wai
I want to Book this child in to my Service I want to Request an update for missing/incorrect information Request Update	I want to email an Registrat	tion Form to th	e Parent	[	Send Registr
I want to Request an update for missing/incorrect information Request Update	I want to Book this child in t	to my Service		[	Book
	I want to Request an updat	e for missing/ir	ncorrect inform	nation	Request
from the Parent/Guardian	from the Parent/Guardian				

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**:







ose Wait List Record		
Guardian	Select Child	
Elizabeth Knight	Elliott Knight	
	Select	
	Elliott Knight	

Then confirm by clicking on **Proceed**:

Close Wait List Record		×
Are you sure you wish to close this Wait List List.	record? Closed records will no longer appea	ar in the Wait List Record
Guardian	Selected Child	
Elizabeth Knight	Elliott Knight	~
Elizabeth Knight	Elliott Knight	~
		Deele Dressed
	Cic	DSE BACK Proceed

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

EDIT WAIT LIST		
Parent/Guardian Details Children		
+ Add New Child	Child Details Booking Requirements Actions	
	Personal Details	
Mia Brackins 🔲 🕊	Personal Details	
	First Name *	Surname *
Peter Brackins B	LAI	BRACKIN
	Date of Birth *	Gender *
Legend: New Booked Inactive	01/08/2012	Male
I T	CRN	Medicare Nu
	742900222V	
	School Status	Apply School
	Non-School 🔹	

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.

eated From: dd/mm/yyyy	Created To: dd	mm/yyyy	Mon Tue	Wed	Thu Fri Sat Sun	Priority	/	Show Closed	+ Create New Reset Sear
arent	~ Child	~ Date Created		~	StartDate	v	Days	<ul> <li>✓ Status</li> </ul>	~ <b>3</b> 8
ERRY BOROWICZ (3)	LAI BRACKINS	09/05/2019			21/05/2019		Mon, Tue, Wed	New	Q /
ERRY BOROWICZ (3)	Mia Brackins	09/05/2019			23/05/2019		Mon, Tue, Wed	New	Q /
ERRY BOROWICZ (3)	Peter Brackins	09/05/2019			13/05/2019		Mon, Tue, Wed	New	۹ /
ssica Smith (2)	Lachlan Smith	07/05/2019			13/05/2019		Mon, Tue	New	٩ /
ssica Smith (2)	George Smith	07/05/2019			13/05/2019		Mon, Tue	New	Q /
ax Jones (2)	Jamie Jones	02/05/2019			06/05/2019		Mon, Wed, Fri	New	Q /
ex Jones (2)	Tim Jones	02/05/2019			06/05/2019		Mon, Wed, Fri	New	۹ /
									1 - 7 of 7 iter

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

Mon Tue Wed Thu Fri Sat Sun : 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:

eated From: dd/mm/yyyy		Created To:	dd/mm/yyyy		Mon	Tue	Wed	Thu	Fri	Sat	Sun	Priority		• 🗈 Sho	w Closed	+ Create New R	eset	Sean
Parent	~ Child		~	Date Created			~	StartDat	te			v	Days	Ý	Status	`		3 8
ERRY BOROWICZ (3)	LAI BR/	CKINS		09/05/2019				21/05/2019					Mon, Tue, Wed		New		Q	1
ERRY BOROWICZ (3)	Mia Bra	ckins		09/05/2019				23/05/2019					Mon, Tue, Wed		New		a	1
ERRY BOROWICZ (3)	Peter Br	ackins		09/05/2019				13/05/2019					Mon, Tue, Wed		New		a	1
assica Smith (2)	Lachlan	Smith		07/05/2019				13/05/2019					Mon, Tue		New		Q	1
essica Smith (2)	George	Smith		07/05/2019				13/05/2019					Mon, Tue		New		Q	1
lex Jones (2)	Jamie J	ones		02/05/2019				06/05/2019					Mon, Wed, Fri		New		Q	1
lex Jones (2)	Tim Jon	es		02/05/2019				06/05/2019					Mon, Wed, Fri		New		Q	1
																	1 - 7 of 7	item

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:







W	AIT LIST										
	Created From: dd/mm/yyyy	Cre	Created To:			Mon Tue		Wed	Thu	Fri	Sat
	Parent	Child		~	Date Created			~	StartDa	te ▼	
	TERRY BOROWICZ (3)	Mia Brackins			09/05/2019				23/05/2019	9	
	TERRY BOROWICZ (3)	LAI BRACKINS			09/05/2019				21/05/2019	9	
	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	Ð	





# 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:



· 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.