Creating Parents/ Guardians and Children

Parent, Guardians and Children records can be created within the Software.

This tip sheet will walk you through:

- Creating Parents/ Guardians
- Creating children
- Children's Flags
- Linking a Parent and Child
  - Option 1 Linking through the Parent record
  - Option 2 Linking through the Child record
- Troubleshooting

Summary

Creating Parents/Guardians

1. Click on Childcare menu
2. Select parents/ Guardians
3. Click Create
4. Complete the Parent/ Guardian details (minimum * mandatory fields)
5. Click Save
6. Complete other tabs where required (e.g. partner, contacts)
7. Click Save

Creating Children

1. Click on Childcare menu
2. Select Children
3. Click Create
4. Complete the child details (minimum * mandatory fields)
5. Click Save
6. Complete other tabs where required (e.g. needs, medical)
7. Click Save

Summary cont.

Linking a Parent and Child

Option 1 – Link through the Parent record

1. Click on the childcare menu
2. Select parent/guardians
3. Find the parent using the search options
4. Click edit to go into the Parent record
5. Click on the children tab
6. Click assign a child
7. Select child
8. Click save

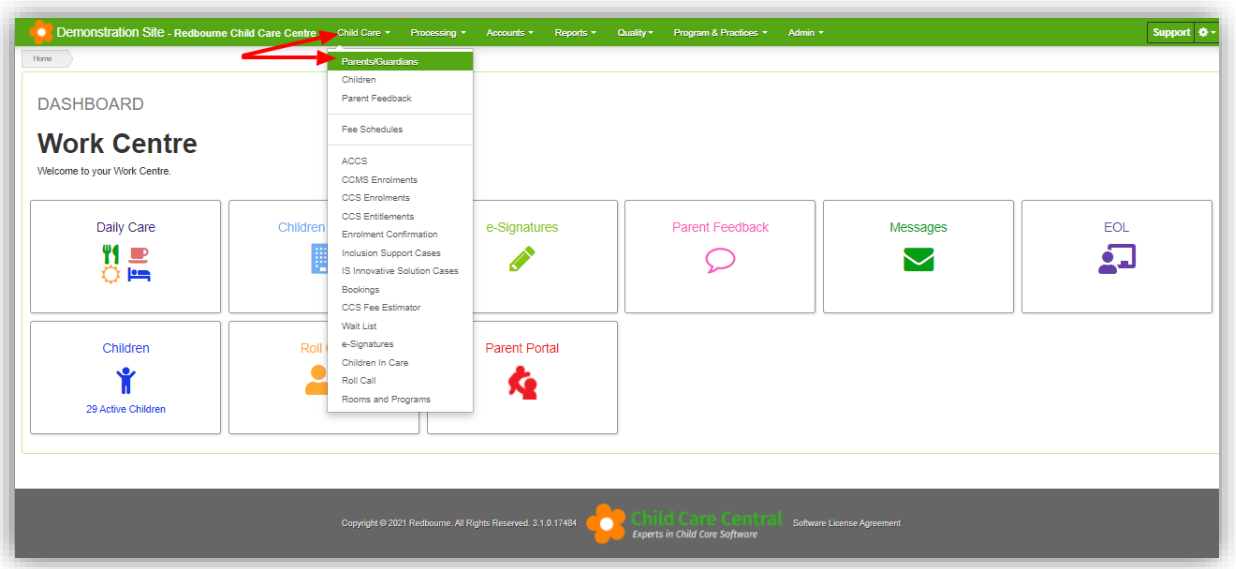
Option 2 – Link through the Child record

1. Click on the childcare menu
2. Select children
3. Find the child using the search options
4. Click edit to go into their record
5. Click on the guardian tab
6. Click assign a guardian
7. Select parent/guardian
8. Click save

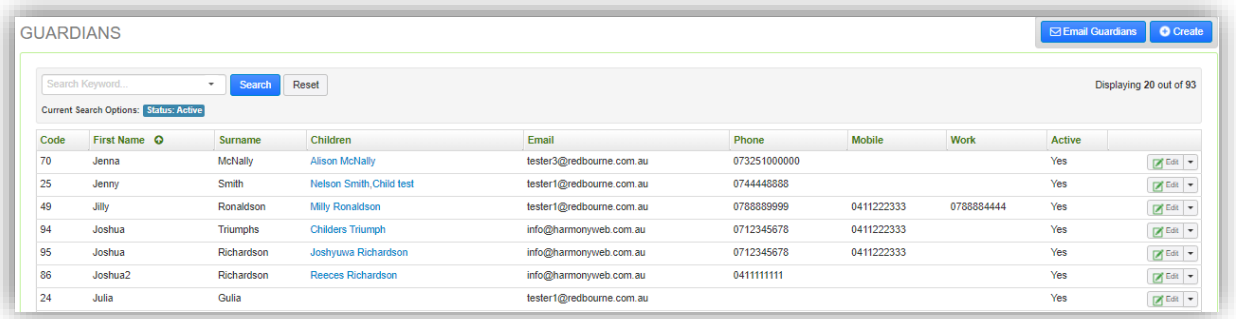
Detailed

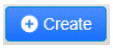
Creating Parents/Guardians

To access Parents/ Guardians and to create new Parents/ Guardians, you will need to navigate to the **Child Care** menu and select **Parents/ Guardians**:



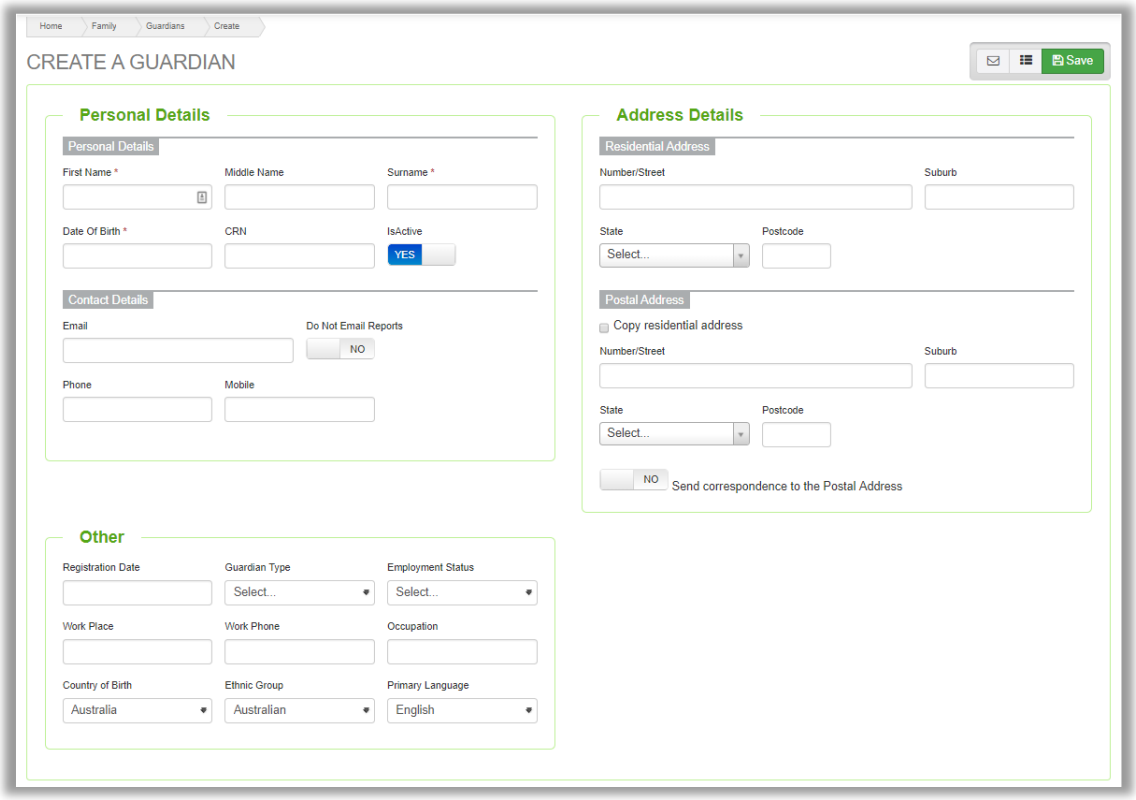
The following window will appear:



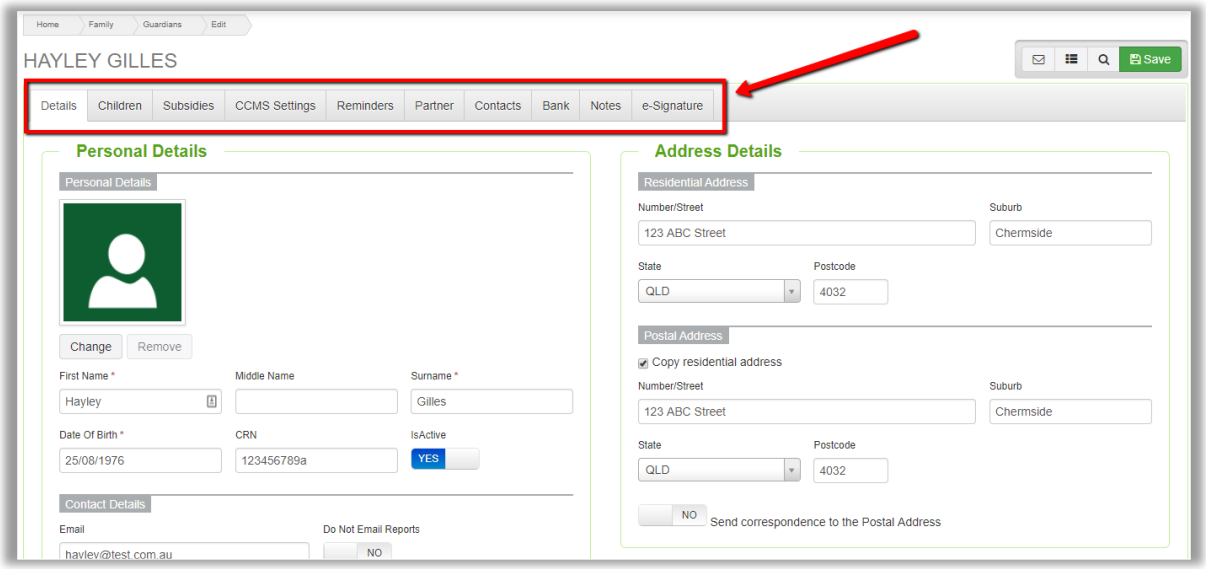
To begin creating a new Parent/Guardian record, you will need to click the 

button.

This will open the Create a Parent/Guardian window, where you may enter the Parent/Guardians general details:



This will give you access to additional tabs within the record which you may use to record further details.



Children: Will display the active children linked to the parent. If you click on the child's name this will take you to view the child's record

Subsidies: This will automatically update with the CCSS entitlements information after you submit your first lot of session reports

CCMS Settings: This field is no longer required under CCSS

Reminders: Enter any reminders that you wish to be reminded about on this tab e.g court orders. You will not receive a notification however it will appear on reports

Partner: Enter in the Partner details

Contacts: Enter any contacts that are authorised to either speak to in emergency situations or collect the child if you cannot contact the parent.

Bank: Only entered for b-pay clients in certain situations. Contact our support line if you require more information.

Notes: Any notes you wish to enter about the family.

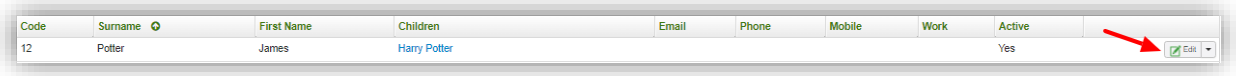
e-Signature: This is where you can generate a pin for the main parent if you have e-Signatures activated.

Once a Parent/Guardian has been successfully created, their record will appear on the main Parent/Guardians Page.

If you wish to go into the parents record to make changes or add additional information at any stage then you will first search for the parent via the search keyword

option.

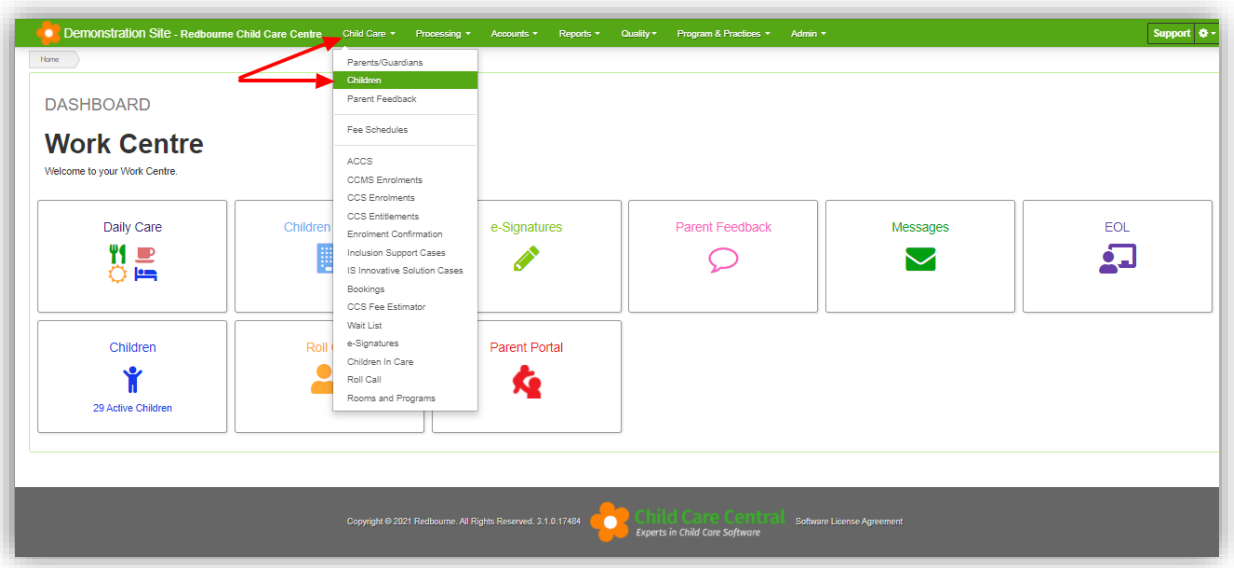
Once you have found the parent click **Edit**

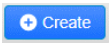


Make updates as necessary and click **Save**

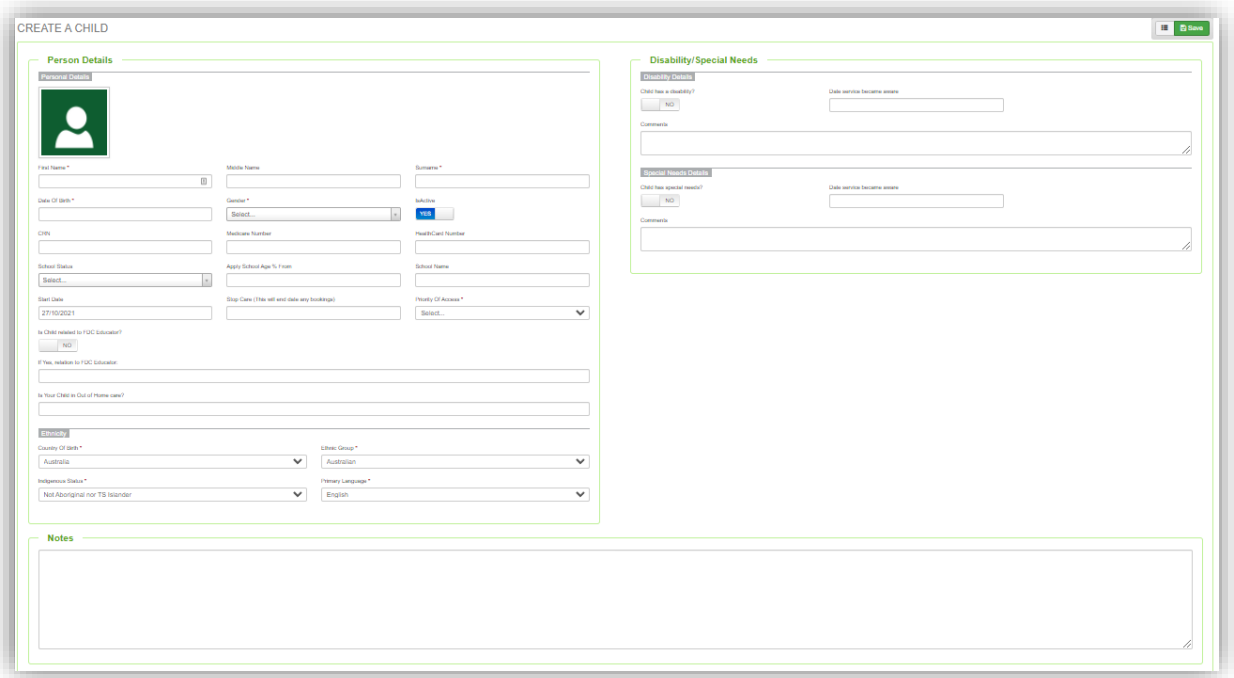
Creating Children

To access Child records and to create new Children, you will need to navigate to the **Child Care** menu and select **Children**:



To begin creating a new Child record, you will need to click the  button.

This will open the following window where you may enter the Child's general details:

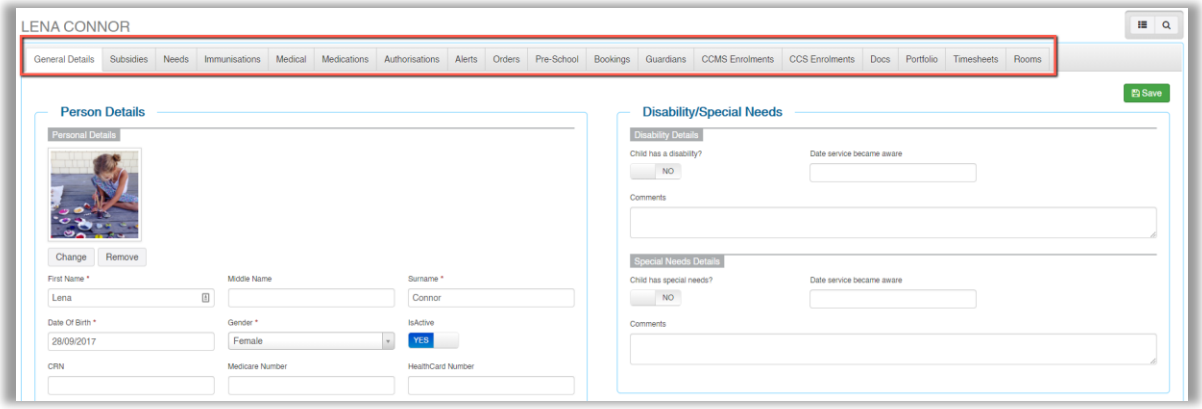


This page will let you record the Child's personal details, ethnicity and disability/special need details. You may also record notes if required.

All mandatory fields are indicated with a red asterisk *.

Once you have entered the required fields, you will need to click the Save button.

This will give you access to additional tabs within the record which you may use to record further details:



Subsidies: No longer required under CCSS

Needs: Any extra needs the child requires e.g physical, intellectual.

Immunisations: Record the child's immunisation history here

Medical: Doctor, dentist information along with recording medical conditions like: asthma, diabetes, anaphylaxis etc.

Medications: If the child is on any medications this can be recorded

Authorisations: Record if the parent allows or denies specific authorisation questions e.g. allowing photographs to be taken.

Alerts: Allergy, Behaviour Access/Other options to record any alerts. This won't create an alert in your system.

Orders: Record if the parent has any court or parenting orders along with parenting plans.

Pre-School: Can be used to record where and when the child attends preschool. However also needs to be marked on the booking. Please see the tip sheet called **Preschool**

Bookings: Where you can create, edit or view the child's booking. For more information please see the tip sheet called **Bookings**

Guardians: Will display the active parents linked to the child. If you click on the parent's name this will take you to view the parents record

CCMS Enrolments: No longer required under CCSS

CCS Enrolments: Where you can create, update and view CCSS enrolments. For more information please see the tip sheet called **Creating a CCS enrolment.**

Docs: This is where you can store any documents that relate to the child. i.e. Enrolment forms

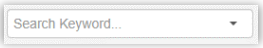
Portfolio: Observations made through programming and practices module will feed into this tab

Timesheets: Will display a complete history of session reports submitted to CCSS

Rooms: No information is required on this tab

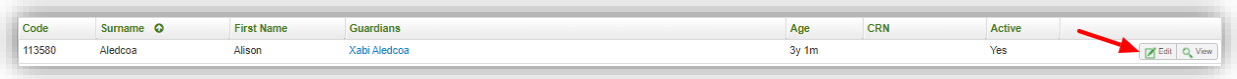
Once a child has been successfully created, their record will appear on the main child's page.

If the family has multiple children, repeat this step for each additional child.

If you wish to go into the child's record, if you need to make changes or add additional information at any stage then you will first search for the child via the search keyword 

option

Once you have found the child click **Edit**



Make updates as necessary and click **Save**

Children's Flags

Children's flags will generate the Children's tile.

There are two icons:

- ! Safety
- Medical

The Safety Flag is linked to any details recorded in the Child's Order tab.

The Medical Flag is linked to the Child's General Details and Medical tab.

Linking a Parent and Child

Once you have created the parent/guardian and child, you can link them together.

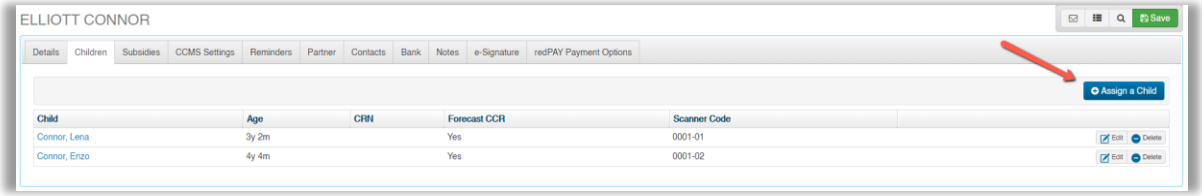
There are 2 different ways to link a parent and child together:

1. Link through the parent record
2. Link through the child record

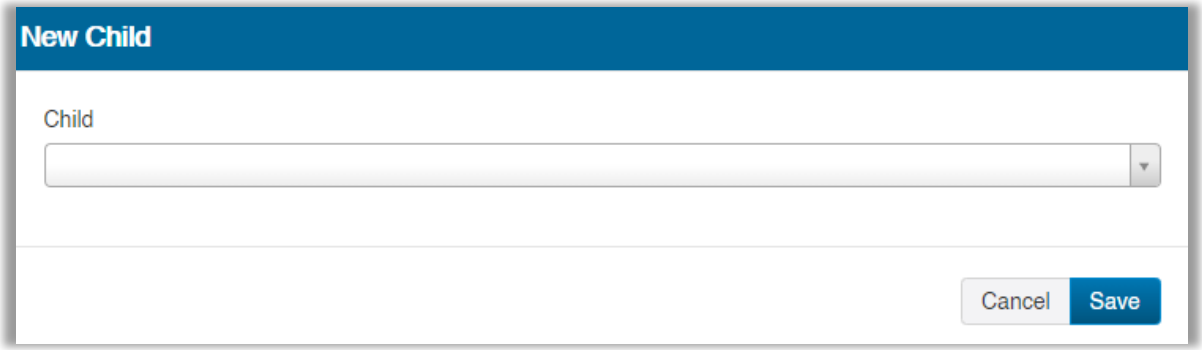
Option 1 – Link through the Parent record

While in the parent record navigate to the **Children** tab

Click **Assign a child**



The following will appear:



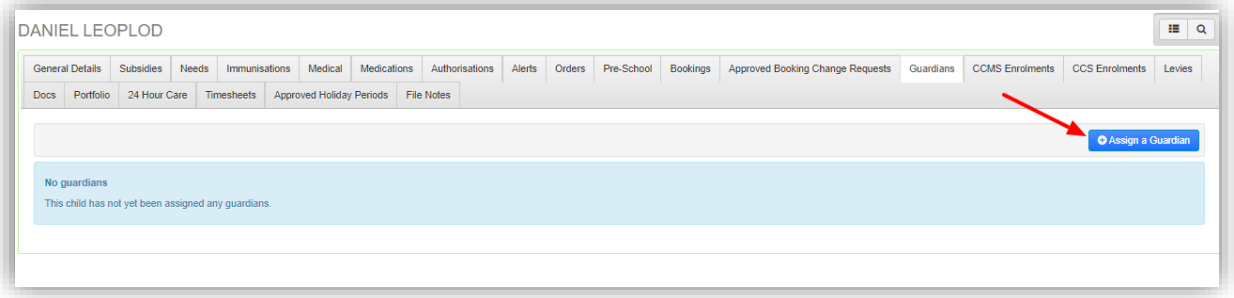
Select the child from the drop-down menu and click **Save**. The parent and child will now be linked.

NOTE: You may assign multiple children by following the same process.

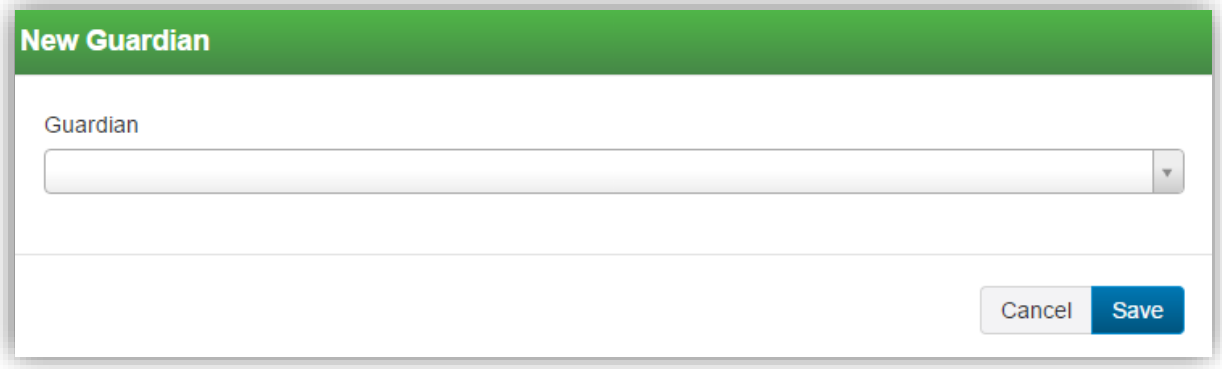
Option 2 – Link through the Child record

While in the child record navigate to the **Guardians** tab.

Click **Assign a Guardian**



The following window will appear:



Select the parent from the drop-down menu and click **Save**. The parent and child will now be linked.

NOTE: You may assign multiple guardians to a child who is registered for care at your service.

CREATING PARENTS AND CHILDREN

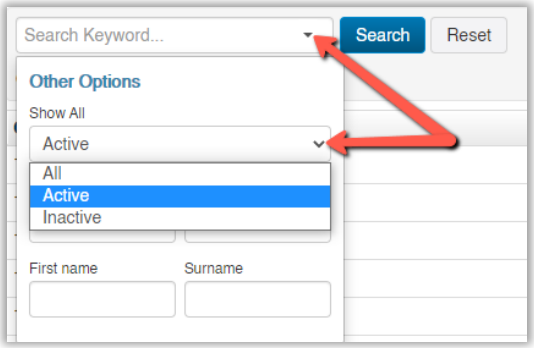
Troubleshooting

Issue: I cannot find the parent when trying to link to the child / I cannot find the child when trying to link to the parent.

Why? This means that the record either hasn't been created or is inactive.

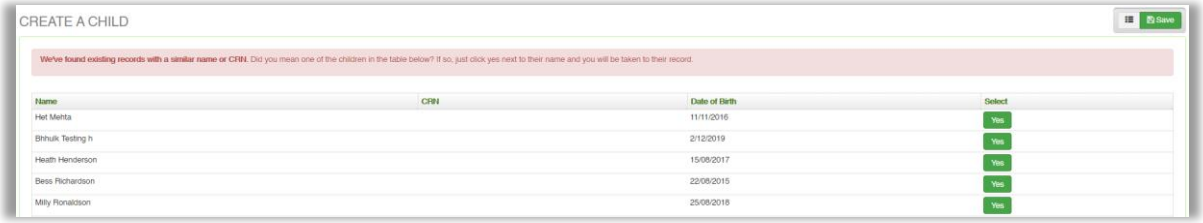
Resolution:

- If the record has not been created, please follow the steps within this tip sheet to create the parent and/or child record first.
- If the record is inactive you will need to make it active before you can create the link. Follow the steps below to make it active again:
  1. If the parent is inactive, go to childcare – parents
     If the child is inactive, go to childcare – children
  2. In the search keyword box:
     a. Type in the child's first or last name
     b. Drop down the menu box, change show all to **Inactive**
     c. Click Search



  3. Click Edit
  4. On the general details tab turn the **IsActive** button to YES and save.
  5. The record is now active, and you will now be able to link the parent/child record together.

Issue: I am creating a child and it's saying the record already exists

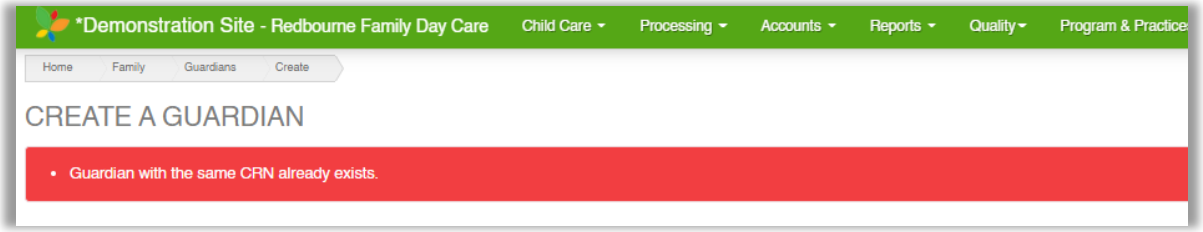


Why? When creating a child, the software will check the Date of Birth and CRN numbers against active and inactive records already in your site. If there is a match we will display a list of existing records with the same/similar information

Resolution:

- If it is the same child select yes, and you will be taken to the exiting child record
- If it is not the same child just click on save, and it will create a new child record.

Issue: I am creating a parent and it's saying there is a Guardian with the same CRN



Why? When creating a parent, the software will check the CRN numbers against active and inactive records already in your site. If there is a match, the error above will display.

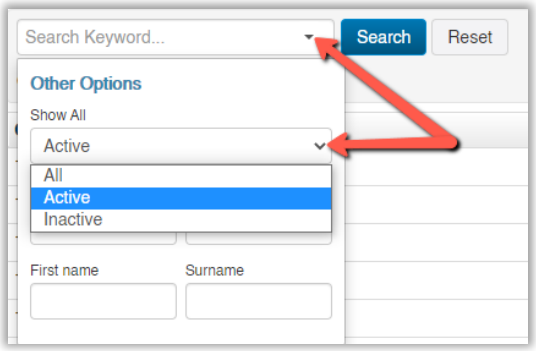
Resolution: Each CRN is unique and therefore you do already have a parent with this CRN in the system. This either means that the parent has attended your service before or, the parent has given you the wrong CRN number.

If the family/parent has been with you before, you can search your existing records and make the parent active again. Therefore you do not need to create a new record.

Follow the steps below to make it active again:

1. If the parent is inactive, go to childcare – parents
2. In the search keyword box:

d. Type in the child's first or last name
e. Drop down the menu box, change show all to **Inactive**
f. Click Search



3. Click Edit
4. On the general details tab turn the **IsActive** button to YES and save.
5. The record is now active and you will now be able to link the parent/child record together.