Navigation Guide
Through the Services module, users can search for participants and family members in ChildPlus.

Change List - provides filter options to expand or narrow the Participant List.
For the Services participant menu, Search is located at the top of the Participants List.

Search results with easy to read details and filter options.

Multiple search options are available with Advanced Search.
Recall Most Recent Search Results displays the latest search you performed.

Click these arrows to move through the Participants List. ▲ = previous ▼ = next

Click ▲ to collapse the Participants List and keep it locked and out of the way.

Hover to reveal the hidden Participants List, then click ▼ to display it again.
Context Tooltips - basic participant information in the Participants List without having to select a module. The Tooltip gives summary information based on the type of list.

Select a Participant

Jason Hayward
Male  DOB: 1/18/12  4y  8m  CPID: 235671
√ Diagnosed Disability: Speech

Head Start 2016-2017 • Enrolled 8/13/2016
Little Beginnings Childcare • Faith House Center • Classroom A

After School 2016-2017 • Enrolled 8/11/2016
Little Beginnings Childcare • Faith House Center • After School

Head Start 2015-2016 • Completed 8/1/2016
Little Beginnings Childcare • Faith House Center • Classroom A.
what?

Through the Services module, users can access all the service modules for the individual participant.

All of the Services are available for easy navigation and viewing.

1. Selected participant:
   - picture
   - name
   - Participant Flag (if applicable)
   - gender
   - birthday
   - age as of today
   - ChildPlus ID predominantly displayed

2. Services menu located below the participant information

Change the Participant Menu by clicking another Participant.
Click the + sign on an open tab and select a Participant.

<table>
<thead>
<tr>
<th>Service</th>
<th>To-Dlist</th>
<th>Entity Express</th>
<th>Management</th>
<th>Dashboard</th>
<th>Reports</th>
<th>Setup</th>
<th>Webvision</th>
<th>Help</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

You can continue opening tabs and adding Participants by clicking the + sign. If you reach the end of the width of your screen capacity, ChildPlus tells you there are more tabs open.

<table>
<thead>
<tr>
<th>Participants List</th>
<th>Change List</th>
<th>Alvey Cortez</th>
<th>Barron Alex</th>
<th>Beltran Johnson</th>
<th>Chalmers, Kimberly</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>10/10/12</td>
<td>2/25/12</td>
<td>3/19/12</td>
<td>10/08/13</td>
</tr>
</tbody>
</table>

Right click on the Participant name tabs to select an option to close tabs.

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Right-click on a highlighted Participant in the Participants List and you have two choices:

1. Replace the open tab with the new Participant record or
2. Open a completely new tab!
Toolbar - General

- Flags
  Opens a dialogue box that shows what group(s) the Participant belongs to

- Send Message
  Open the option to send an email or text message to the Primary Adult, In-Kind Volunteer or Staff

- Print
  Varies according to module; prints reports pertaining to that module

- Undo

- Data History Log

- Refresh

- Save
  Saves data at that screen

Toolbar - Notes Field

- Date and user stamp (set up by system administrator)

- Spellcheck

- Print notes

- Shorthand notes (set up by system administrator or individual user)

- Copy to clipboard

- Zoom out
Date Fields

All date fields have a calendar drop-down.

![Calendar Drop-Down](image)

Drop-down fields are designated with this icon and have lists available for the appropriate selection.

![Drop-Down List](image)

Buttons

- **Add Event**
  - Green buttons designate important actions for the particular screen.
- **More**
  - More functions are available on specific buttons.

Active/Inactive Items

Active or Inactive items may be controlled by your system administrator. If the box is checked, the item is active and available, unchecked, the item is inactivated and not available.

![Active Checkbox](image)
what?
A quick access menu for personalizing ChildPlus and instant tools in one convenient location.

Click the icon.

1. Click to lock ChildPlus if you are leaving your desk and want to secure access.
2. Click for an Instant Poverty Calculator tool.
3. Click to bring up a map of your Agency sites.
4. Click to change your password on the fly.
1. Personalize the border and header colors
2. Select the color for the left sidebar (Participant List, Personnel List, In-Kind List, etc.)
3. Select the color for the right sidebar
4. Select your preferred screen mode.
# Document and Screenshot Icon Guide

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Attachment</td>
<td>Attachments can be added, edited or deleted</td>
</tr>
<tr>
<td>Data Entry</td>
<td>Begins a data entry section in the document</td>
</tr>
<tr>
<td>Filter</td>
<td>Expand or narrow lists</td>
</tr>
<tr>
<td>Key</td>
<td>Indicates that there is an explanation on screen of symbols or colors</td>
</tr>
<tr>
<td>IT</td>
<td>Indicates an IT or System Administrator note</td>
</tr>
<tr>
<td>Mouse Click</td>
<td>Mouse click left or right</td>
</tr>
<tr>
<td>PIR</td>
<td>PIR field</td>
</tr>
<tr>
<td>Save</td>
<td>Reminder or recommendation to save data</td>
</tr>
<tr>
<td>Setup</td>
<td>Begins a setup section in the document</td>
</tr>
<tr>
<td>Warning</td>
<td>An error message or warning</td>
</tr>
<tr>
<td>Customize</td>
<td>Customize Drop-down Choices</td>
</tr>
<tr>
<td>Drop-down Choices</td>
<td></td>
</tr>
<tr>
<td>Types</td>
<td>Custom filters created or edited</td>
</tr>
</tbody>
</table>