

CHAPTER 7 – REPORTS

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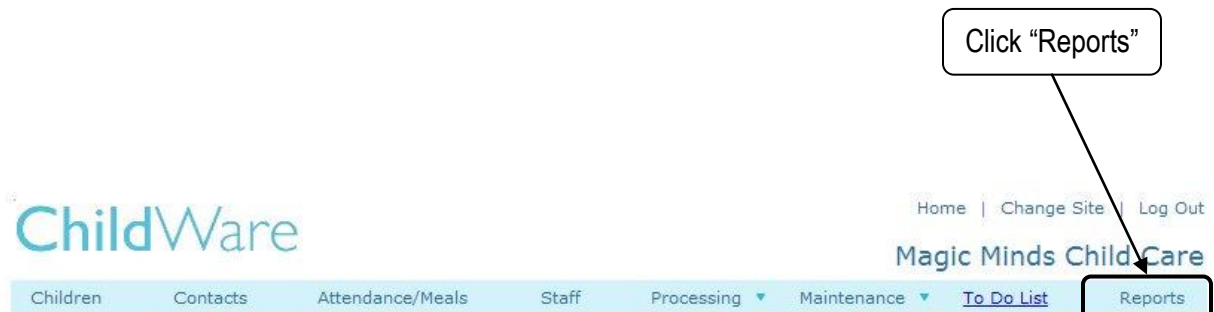
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Section A: Accessing Reports

ChildWare has a variety of reports that will help you manage and organize information at your agency. In order to print reports, you must have Adobe Reader or Microsoft Excel (version 2003 or later). You can download Adobe Reader free at this website: <http://get.adobe.com/reader/>. With these programs you can export data into an Excel or PDF document and print forms such as a Sign-In / Sign-Out Sheet.

To access the Reports menu, click the Reports link on the main menu.



ChildWare

Home | Change Site | Log Out

Magic Minds Child Care

Children | Contacts | Attendance/Meals | Staff | Processing | Maintenance | **To Do List** | **Reports**

Jessica's Home Page

Hot List Items Print List

	Category	For	To Do	Needed By	Site
Select	Staff	Allison Bruce Miller	Emergency plan training expired	02/05/2012	TESST3
Select	Staff	Cecilia Royster-Hamm	CPR training expired	02/06/2012	TESST3
Select	Staff	Jane Mason	Fire safety training due to expire	03/24/2012	TESST3
Select	Staff	Jennifer Nash	CPR training expired	02/06/2012	TESST3
Select	Staff	Molly McMorris	Fire safety training due to expire	03/24/2012	TESST3
Select	Staff	Oliver Fredricks	Fire safety training expired	12/28/2011	TESST3
Select	Staff	Shelly Figueroa	Emergency plan training expired	12/15/2011	TESST3
Select	Staff	Sheryl Johnson	Fire safety training due to expire	03/24/2012	TESST3
Select	Staff	Sybill Trelawney	Fire safety training due to expire	02/18/2012	TESST3
Select	Child	Abbott, Hannah	Emergency contact form expired	02/01/2012	TESST3
Select	Child	Bobbsey, Lily	Recruitment Waiting List	02/08/2012	TESST3
Select	Child	Cisneros, Rodrigo	Emergency contact form due to expire	03/06/2012	TESST3

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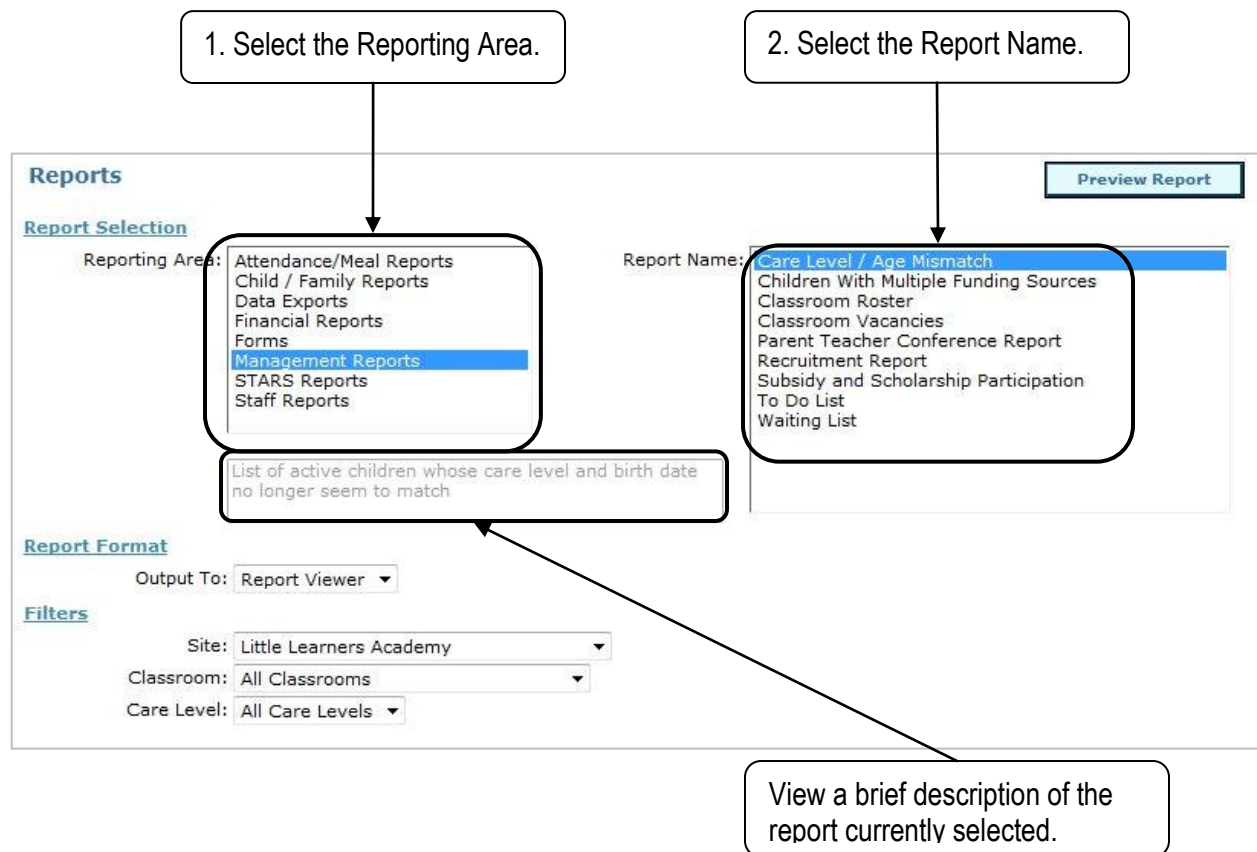
Section A: Accessing Reports

General Navigation of Reports Menu

Reports are grouped into specific areas to help you easily navigate the menu. Below is a list of reporting areas:

- Attendance / Meal Reports
- Child / Family Reports
- Financial Reports
- Forms
- Management Reports
- STARS Reports
- Staff Reports

There are multiple reports within each area. For a complete list of reports in each area, see *Section C: List of Reports by Reporting Area*.



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Section A: Accessing Reports

General Navigation of Reports Menu (cont.)

The screenshot shows the 'Reports' interface with the following elements:

- Report Selection:** A list of reporting areas including Attendance/Meal Reports, Child / Family Reports, Data Exports, Financial Reports, Forms, Management Reports (highlighted), STARS Reports, and Staff Reports. A callout box (3) points to this list.
- Report Name:** A list of report titles including Care Level / Age Mismatch (highlighted), Children With Multiple Funding Sources, Classroom Roster, Classroom Vacancies, Parent Teacher Conference Report, Recruitment Report, Subsidy and Scholarship Participation, To Do List, and Waiting List. A callout box (5) points to the 'Preview Report' button.
- Report Format:** An 'Output To' dropdown menu set to 'Report Viewer'.
- Filters:** Three dropdown menus for 'Site' (Little Learners Academy), 'Classroom' (All Classrooms), and 'Care Level' (All Care Levels). A callout box (4) points to this filter section.
- Preview Report:** A button in the top right corner.
- Text:** A box below the reporting areas contains the text: 'List of active children whose care level and birth date no longer seem to match'.

3. Allows you to select the format for viewing or printing the report. See *Section B: Report Formats* for further details.

5. Click "Preview Report" to view.

4. Allows you to apply filters to the report. This is useful for viewing certain data such as information for children in a specific classroom. See *Section A: Accessing Reports* for further details.

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Section A: Accessing Reports

Filtering Reports

Each report in ChildWare has a different set of filters, or categories that help you limit the information displayed.

Date filters are mandatory because the information in the report will change according to the dates you select. Not all reports require you to specify dates. In this example, invoices must be filtered by transaction dates. The dates default to the most recent billing week, but you can filter by any time frame.

There are also set date parameters you can select such as today, last fiscal year, this fiscal year, last month, this quarter, etc. Selecting a parameter will automatically update the date filters.

The screenshot displays the 'Reports' interface with the following sections:

- Report Selection:** A dropdown menu for 'Reporting Area' with 'Financial Reports' selected. A 'Report Name' dropdown menu is also present with 'Invoices' selected. A preview box shows: 'Family invoices showing opening balance, payments, charges and closing balance for a specified period'.
- Report Format:** 'Output To:' is set to 'Report Viewer'.
- Filters:** 'Site:' is 'Little Learners Academy'. 'Transactions Between:' is '07/01/2011 and 06/30/2012'. 'Show Zero Family Balances:' is checked. 'Child:' is 'All Children'. 'Billing Contact:' is 'All Billing Contacts'. 'Classroom:' is 'All Classrooms'.

A 'Preview Report' button is located in the top right corner.

The classroom filter gives you the option of running invoices for children assigned to a specific classroom rather than the entire center.

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Section B: Report Formats

There are several formats for viewing reports.

PDF: View the report as a PDF file. You can *save the file and print from here*.

Report Viewer: View the report in your browser. When viewing in this format, you will have the option to sort columns. If you want to print, you can export from here, or return to the Reports menu and select PDF as the format type.

Excel (data): Report data is exported to an Excel spreadsheet in columnar format. This is useful if you want to manipulate data, merge information from multiple reports, or use this data to create your own report.

Select the report format here.

The screenshot shows a web interface for selecting reports. At the top right is a 'Preview Report' button. The main area is divided into 'Report Selection' and 'Report Format'. Under 'Report Selection', there is a 'Reporting Area' dropdown menu with options: Attendance/Meal Reports, Child / Family Reports, Data Exports, Financial Reports, Forms, Management Reports (highlighted), STARS Reports, and Staff Reports. To the right is a 'Report Name' dropdown menu with options: Care Level / Age Mismatch (highlighted), Children With Multiple Funding Sources, Classroom Roster, Classroom Vacancies, Parent Teacher Conference Report, Recruitment Report, Subsidy and Scholarship Participation, To Do List, and Waiting List. Below these is a text box: 'List of active children whose care level and birth date no longer seem to match'. Under 'Report Format', there is an 'Output To:' dropdown menu with 'Report Viewer' selected. Below that is a 'Filters' section with three dropdown menus: 'Site' (Little Learners Academy), 'Classroom' (All Classrooms), and 'Care Level' (All Care Levels).

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Section B: Report Formats

PDF

After selecting PDF as your format and clicking the “Preview Report” button, ChildWare will open a new window or a tab within your web browser (depending on your internet settings and browser). If you are not able to view the report, check to see if you have a pop-up blocker. If so, you can allow pop-ups from cwapp.phmc.org.

If the report opens as a new tab, remember to click the previous tab to return to the database.

ABC Day Care
Magic Minds Child Care
Child Health Assessment Status
Report Date: 5/21/2012

Name	Room	Last Health Assessment	Expiration	Frequency
No Health Assessment				
Keene, Betsy	101			Every 6 months
Simpson, Lisa J				Every 6 months
White, Lily J				Every 6 months
No Health Assessment Totals: 3				
Overdue				
Jones, Jughead	102	6/15/2011	12/15/2011	Every 6 months
Lodge, Veronica	102	8/12/2011	2/12/2012	Every 6 months
Overdue Totals: 2				
Due in Next Month				
Andrews, Archie	102	12/15/2011	6/15/2012	Every 6 months
Cisneros, Stephanie F	301	7/2/2011	6/1/2012	Every 12 months
Cooper, Betty	102	12/04/2011	6/04/2012	Every 6 months
Wood, Oliver	401	6/15/2011	6/15/2012	Every 12 months

When the report is exported to PDF you can save and print the document using the Adobe Reader toolbar. If you have an older version of Adobe Reader, the toolbar may look different. We recommend installing Adobe Reader X.

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Section B: Report Formats

Report Viewer

After selecting Report Viewer as your format and clicking the “Preview Report” button, ChildWare will open a new window or a tab within your web browser (depending on your internet settings and browser). If you are not able to view the report, check to see if you have a pop-up blocker. If so, you can allow pop-ups from cwapp.phmc.org.

Use arrows or type in a page number to display other pages on the screen.

Enlarge the view here.

If the report opens as a new tab, remember to click the previous tab to return to the database.

Search for specific text in the report.

Some reports feature custom sorting. If you see two small arrows next to a column header, you can click to sort the report by that column.

If you would like to print or save the report, select Acrobat (PDF) file and then click Export to the right of the dropdown. You can also export all reports to Excel.

The screenshot shows a web browser window displaying a report titled "Child Health Assessment Status" for "ABC Day Care" and "Magic Minds Child Care". The report date is 5/18/2012. The report is divided into two sections: "No Health Assessment" and "Overdue".

Name	Room	Last Health Assessment	Expiration	Frequency
No Health Assessment				
Keene, Betsy	101			Every 6 months
Simpson, Lisa J				Every 6 months
White, Lily J				Every 6 months
No Health Assessment Totals: 3				
Overdue				
Jones, Jughead	102	6/15/2011	12/15/2011	Every 6 months
Lodge, Veronica	102	8/12/2011	2/12/2012	Every 6 months
Overdue Totals: 2				

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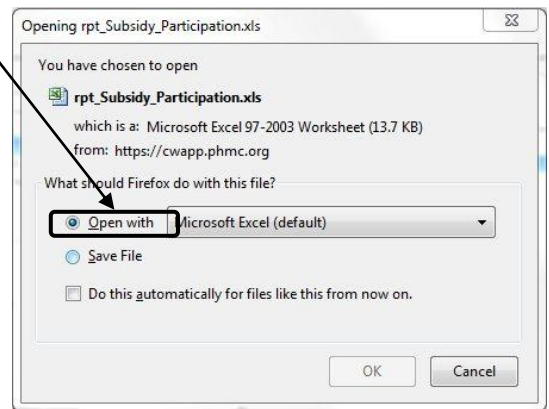
Excel (data)

If you select Excel (data) as your format, ChildWare will export the information in the report directly into an Excel worksheet in columnar format.

You may receive one of the following messages prior to opening up the Excel document:



Click "Open" or "Open with" then "OK" to view the report.



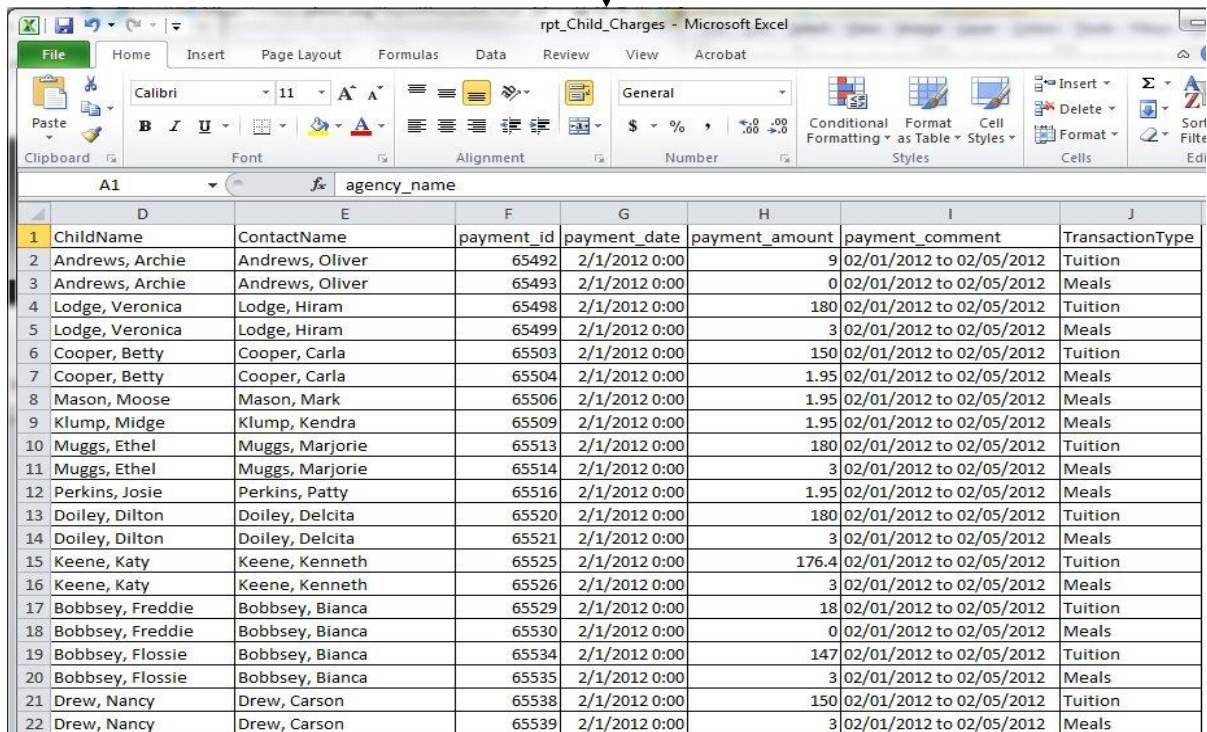
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Section B: Report Formats

Excel (data) cont.

The system defaults to Microsoft Excel 2003 for the convenience of users with older versions of Microsoft Office.

Once you open the file, you can edit, sort and modify information.



	D	E	F	G	H	I	J
1	ChildName	ContactName	payment_id	payment_date	payment_amount	payment_comment	TransactionType
2	Andrews, Archie	Andrews, Oliver	65492	2/1/2012 0:00	9	02/01/2012 to 02/05/2012	Tuition
3	Andrews, Archie	Andrews, Oliver	65493	2/1/2012 0:00	0	02/01/2012 to 02/05/2012	Meals
4	Lodge, Veronica	Lodge, Hiram	65498	2/1/2012 0:00	180	02/01/2012 to 02/05/2012	Tuition
5	Lodge, Veronica	Lodge, Hiram	65499	2/1/2012 0:00	3	02/01/2012 to 02/05/2012	Meals
6	Cooper, Betty	Cooper, Carla	65503	2/1/2012 0:00	150	02/01/2012 to 02/05/2012	Tuition
7	Cooper, Betty	Cooper, Carla	65504	2/1/2012 0:00	1.95	02/01/2012 to 02/05/2012	Meals
8	Mason, Moose	Mason, Mark	65506	2/1/2012 0:00	1.95	02/01/2012 to 02/05/2012	Meals
9	Klump, Midge	Klump, Kendra	65509	2/1/2012 0:00	1.95	02/01/2012 to 02/05/2012	Meals
10	Muggs, Ethel	Muggs, Marjorie	65513	2/1/2012 0:00	180	02/01/2012 to 02/05/2012	Tuition
11	Muggs, Ethel	Muggs, Marjorie	65514	2/1/2012 0:00	3	02/01/2012 to 02/05/2012	Meals
12	Perkins, Josie	Perkins, Patty	65516	2/1/2012 0:00	1.95	02/01/2012 to 02/05/2012	Meals
13	Doiley, Dilton	Doiley, Delcita	65520	2/1/2012 0:00	180	02/01/2012 to 02/05/2012	Tuition
14	Doiley, Dilton	Doiley, Delcita	65521	2/1/2012 0:00	3	02/01/2012 to 02/05/2012	Meals
15	Keene, Katy	Keene, Kenneth	65525	2/1/2012 0:00	176.4	02/01/2012 to 02/05/2012	Tuition
16	Keene, Katy	Keene, Kenneth	65526	2/1/2012 0:00	3	02/01/2012 to 02/05/2012	Meals
17	Bobbsey, Freddie	Bobbsey, Bianca	65529	2/1/2012 0:00	18	02/01/2012 to 02/05/2012	Tuition
18	Bobbsey, Freddie	Bobbsey, Bianca	65530	2/1/2012 0:00	0	02/01/2012 to 02/05/2012	Meals
19	Bobbsey, Flossie	Bobbsey, Bianca	65534	2/1/2012 0:00	147	02/01/2012 to 02/05/2012	Tuition
20	Bobbsey, Flossie	Bobbsey, Bianca	65535	2/1/2012 0:00	3	02/01/2012 to 02/05/2012	Meals
21	Drew, Nancy	Drew, Carson	65538	2/1/2012 0:00	150	02/01/2012 to 02/05/2012	Tuition
22	Drew, Nancy	Drew, Carson	65539	2/1/2012 0:00	3	02/01/2012 to 02/05/2012	Meals

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Section C: List of Reports by Reporting Area

Below is a list of all reports grouped by reporting areas.

Attendance / Meal Reports

Monthly Attendance Detail
Attendance Summary
Attendance/Meal Detail (Weekday)
Meals Summary

Child / Family Reports

Allergies / Food Restrictions – Detail
Birthdays by Room and Month
Demographics
Health Assessment Status
Meal Subsidy Status
Parent/Guardian Directory
Special Needs

Financial Reports

Balances Report
Charge Batch
Charges Report
Deposit Summary
Fiscal Summary
Fiscal Summary by Care Level
Invoices
Payment/Credit Batch
Payments/Credits Report
Transactions Report

*Forms

Attendance Sheet (Monthly)
Attendance / Meals Tracking (Weekly)
Sign-in / Sign-Out Sheet (Daily)
Sign-in / Sign-Out Sheet (Weekend)
Sign-in / Sign-Out Sheet (Weekly)

Management Reports

Care Level / Age Mismatch
Children with Multiple Funding Sources
Classroom Roster
Classroom Vacancies
Parent Teacher Conference
Recruitment Report
Subsidy and Scholarship Participation
To Do List
Waiting List

Staff Reports

AEYC Membership
Basic Training
Basic Training Expirations
Contact List
Contact List - Substitutes
DPW Compliance
Health Assessment Status
Personnel Detail
Qualifications
Training Report

*STARS Reports

Career Lattice - Detail
Career Lattice - Summary
ERS Report
Health & Safety Training
New Staff Orientation
Specialty Area Training
Staff Classroom Observations
Staff Performance Evaluations
Staff Professional Development Plan Status
Staff Professional Growth & Development Activity
STARS Training - Detail
Training Hours

*Not all reports are relevant to every user depending on the location (i.e. State, Zip Code) of the agency.

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Section C: Report Definitions

Below is a full description of all reports available in ChildWare.

Attendance / Meal Reports

Monthly Attendance Detail: Displays a list of active children grouped by classroom and their recorded attendance for a given month.

Filters: Must be filtered by attendance month and can be filtered by site, classroom, care level or subsidy.

Attendance Summary: Displays a list of active children and calculates attendance percentages by comparing expected and actual attendance.

Filters: Must be filtered by attendance dates and can be filtered by site, classroom, care level or subsidy.

Attendance/Meal Detail (Weekday): Displays a list of active children and their recorded meals and attendance during a given week. Layout is identical to Attendance/Meal Tracking (Weekday) Form.

Filters: Must be filtered by attendance week and can be filtered by site or classroom.

Meals Summary: Displays a list of active children, their meal subsidy status and counts for each meal type. A summary at the bottom of the report calculates totals of each meal type by meal subsidy status. These totals can be used for reporting monthly meal totals to CACFP.

Filters: Must be filtered by attendance dates and can be filtered by site, classroom or care level.

Child / Family Reports

Allergies / Food Restrictions - Detail: Displays a list of active children with food restrictions or allergies grouped by classroom. This report includes information on reactions and treatment options as well. Allergies and food restrictions can be modified or added on the health tab of the child's record.

Filters: Can be filtered by site or classroom.

Birthdays by Room and Month: Displays a list of active children grouped by classroom and birthday month. Birth date can be modified on the main tab of the child's record.

Filters: Can be filtered by site or classroom.

Demographics: Displays a summary of demographic information for all children currently enrolled at your center. Demographic categories are broken down by percentage and include sex, age, race, Hispanic ethnicity, meal subsidy status, care level, and subsidy participation. For multi-site agencies the report can be run at the agency or site level. Child demographic information can be modified or added on the main tab and services tab of the child's record.

Filters: Must be filtered by active dates and can be filtered by site or classroom.

Emergency Contact and Health Information: Displays a detailed record of information for each active child. Information listed includes demographic, doctor, insurance, allergies/food restrictions, special needs, and all contacts and their relationship to the child.

Filters: Can be filtered by site, child or classroom.

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Health Assessment Status: Displays a list of active children grouped by the status of their most recent health assessment date. Status categories include No health assessment, Overdue, Due in next month and Up to date. Date of health assessment can be updated or added on the health tab of the child's record.
Filters: Can be filtered by child, site, classroom or health assessment status.

Meal Subsidy Status: Displays a list of active children grouped by meal subsidy status and classroom. Classroom totals and subsidy status totals are provided. Meal subsidy status can be modified or added to the most recent service profile located on the services tab of the child's record.
Filters: Must be filtered by active dates and can be filtered by site or classroom.

Parent/Guardian Directory: Displays a list of active children grouped by classroom along with their contacts. Contact information of parents and guardians includes address, home phone, cell phone and email address. Contact information can be modified or added via the relationships tab of the child's record. Contact information that is not relational can also be modified via the Contacts menu.
Filters: Can be filtered by site or classroom.

Special Needs: Displays a list of active children with special needs grouped by classroom. includes information on accommodations for special needs as well. Special needs can be modified or added on the special needs tab of the child's record.
Filters: Can be filtered by site, special need type or classroom.

Financial Reports

Balances Report: Displays a list of individual and family balances. Family balances are grouped by balance type of outstanding, zero or credit. The report displays all active children within a given period of time as well as any pending, wait-listed or discharged children whose families carry a balance that is not zero. Children are grouped by family and sorted by the primary billing contact's last name.
Filters: Must be filtered by transactions as of a given date and can also be filtered by site, classroom and subsidy.

Charge Batch: Displays a list of charges in a selected batch. Charges can be edited via the charge batch section of the processing menu. Charges can also be modified from the financial tab on the child's record.
Filters: Must be filtered by the batch name and can be filtered by charge type.

Charges Report: Displays a list of charges grouped by charge type and sorted by transaction date within a given period of time.
Filters: Must be filtered by transaction date range and can be filtered by site, specific child, classroom and/or charge type.

Deposit Summary: Displays a list of active children with the amount charged and collected for escrow deposit. Children are grouped by family and sorted by the primary billing contact's last name.
Filters: Can be filtered by site classroom.

Fiscal Summary: Displays a summary of all transactions within a given period of time. Transactions include all charges, payments and credits. Also displays a running balance prior to and after the reporting

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period.

Filters: Must be filtered by transaction date range and can be filtered by site.

Fiscal Summary by Care Level: Displays a summary of all transactions within a given period of time. Transactions include all charges, payments and credits and are grouped by the care level of the child. Report totals indicate the difference between charges and payments/credits. This report can help you identify the care level that generates the most and least revenue.

Filters: Must be filtered by transaction date range and can be filtered by site.

Invoices: Each page displays a record of opening balances, transactions and closing balances within a given period of time. Invoices print by family, defined by the primary billing contact. Invoices are sorted by the youngest child's last name. Individual invoices can also be printed via the child's financial tab. Financial transactions can be modified, added or deleted via the child's financial tab or via batch entry screens.

Filters: Must be filtered by transaction date range and can be filtered by individual child, billing contact or classroom. You also have the option to exclude families that have a balance of zero or have no transactions within the date range selected by unchecking "Show Zero Family Balances".

Payment/Credit Batch: Displays a list of payments/credits in a selected batch. Payments and credits can be edited via the payment/credit batch section of the processing menu and can also be modified from the financial tab of the child's record.

Filters: Must be filtered by the batch name and can be filtered by payment/credit type.

Payments/Credits Report: Displays a list of payments and credits grouped by payment/credit type and sorted by transaction date within a given period of time.

Filters: Must be filtered by transaction date range and can be filtered by site, specific child, classroom and/or payment/credit type.

Transaction Report: Displays a record of opening balances, transactions and closing balances for all active children within a given period of time. The report is sorted by child's last name.

Filters: Must be filtered by transaction date range and can be filtered by site, a specific child or classroom. You can choose to hide or display balance transfers between siblings and deposit transfers.

Forms

Attendance Sheet (Monthly): Displays a list of active children in a specific month and groups them by classroom. The form includes blank slots to fill in actual attendance for the month selected as well as spaces to calculate monthly totals by student and attendance totals by day.

Filters: Must be filtered by attendance month and can also be filtered by site or classroom.

Attendance / Meal Tracking (Weekly): Displays a list of active children as of a specific date and groups them by classroom. The form includes blank slots to fill in actual attendance and meal counts for the week selected as well as spaces to calculate weekly totals and totals by meal subsidy status

Filters: Must be filtered by active date and can also be filtered by site or classroom.

Sign-In / Sign-Out Tracking Sheet (Daily): Displays a list of active children as of a specific date and groups them by classroom. The form includes blank slots to fill in actual attendance as well as seven slots

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for mid-day tracking.

Filters: Must be filtered by active date and can also be filtered by site or classroom.

Sign-In / Sign-Out Sheet (Weekend): Displays a list of active children as of a specific date and groups them by classroom. The form includes blank slots for parents to fill in the time-in and time-out as well as a signature for weekends only.

Filters: Must be filtered by active date and can also be filtered by site or classroom.

Sign-In / Sign-Out Sheet (Weekly): Displays a list of active children as of a specific date and groups them by classroom. The form includes blank slots for parents to fill in the time-in and time-out as well as a signature for each weekday.

Filters: Must be filtered by active date and can also be filtered by site or classroom.

Management Reports

Care Level / Age Mismatch: Displays a list of children whose birth dates do not match the age criteria for the care level specified on his/her current service profile. The report includes their age, current care level, suggested care level and classroom.

Filters: Can be filtered by site, classroom or care level.

Children with Multiple Funding Sources: Displays a list of children who are covered by multiple subsidies or other funding sources.

Filters: Must be filtered by active date range and can be filtered by site, classroom, care level, or specific subsidy combinations.

Classroom Roster: Displays a list of active children grouped by classroom.

Filters: Can be filtered by site or classroom.

Classroom Vacancies: Displays a list of classrooms and their capacity. Based on the number of children assigned to each classroom, the report calculates the number of open and fulfilled slots. The user can identify classrooms with over-enrollment and see the number of children who are pending or on the waiting list for a specific room

Filters: Must be filtered by active date and can be filtered by site.

Parent Teacher Conference: Displays a list of active children grouped by the number of parent teacher conferences recorded. Groups are categorized as No Parent Teacher Conferences Recorded, One Parent Teacher Conference Recorded, and Two or More Parent Teacher Conferences Recorded. The report includes the dates and notes associated with each conference. Parent teacher conferences can be recorded on the events tab of the child's record.

Filters: Must be filtered by date range of events and can also be filtered by site or classroom.

Recruitment Report: Displays a summary of statistics related to referrals in a given period of time. This report provides a snapshot of your recruitment efforts by calculating the percentage of children in each referral status (Enrolled, Pending, Waiting List, Did Not Enroll), the percentage of referrals by source, and average wait time and enrollment rate (the percentage of referrals that became enrolled for the selected dates). Enrollment information can be added or updated on the enrollments/consents tab of the child's

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record.

Filters: Must be filtered by the referral period and can be filtered by site.

Subsidy and Scholarship Participation Report: Displays a list of active children as of a specific date and groups them by funding source. The report lists the child's tuition and/or co-payment rate. For children with multiple funding sources, the report will list them in both funding categories.

Filters: Must be filtered by active date and can also be filtered by site, classroom, care level or subsidy.

To Do List: Displays a list of missing or expired data grouped by to-do items. *Chapter 8: To Do List* describes these items in greater detail.

Filters: Can be filtered by site or to-do category.

Waiting List: Displays a list of children who have been assigned to the waiting list. The report also lists the referral date, child's date of birth, child's age and future classroom assignment. Enrollment status (pending, waiting list, enrolled, discharged) can be updated or modified on the enrollments/consents tab of the child's record.

Filters: Can be filtered by site.

STARS Reports

Career Lattice – Detail: Displays a list of active staff members grouped by their position and career lattice level. Career lattice level can be added or updated on the credentials tab of the staff member's record.

Filters: Can be filtered by site, staff title or program staff.

Career Lattice – Summary: Displays the total and percentage of staff members at each career lattice level. Career lattice level can be added or updated on the credentials tab of the staff member's record.

Filters: Can be filtered by site, staff title or program staff.

Child Observation Report: Displays a list of children grouped by the status of their initial observation. Categories include Overdue, Due, Completed late and Completed on time. Initial observation dates can be added on the events tab of the child's record.

Filters: Can be filtered by site or classroom.

ERS Report: Displays a summary of ERS scores grouped by date. An average score is calculated for each date. ERS scores can be added or updated on classroom records via the Agency and Site section on the main menu.

Filters: Can be filtered by site or classroom.

Health and Safety Training: Displays a list of active staff grouped by the number of health and safety training hours. Groups are broken down by Less Than Two Hours of Health and Safety Training and Two or More Hours of Health and Safety Training. Training records can be added or modified via the PD-Training tab on the staff member's record, or via Group PD-Training Entry on the Processing menu.

Filters: Must be filtered by training dates and can be filtered by site, staff title or program staff.

New Staff Orientation: Displays a list of active staff grouped by their status as it relates to the completion of the new staff orientation. Status is either Completed or Not Completed. Training records can be added or

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modified via the PD-Training tab on the staff member's record, or via Group PD-Training Entry on the Processing menu.

Filters: Can be filtered by site, staff title or program staff.

STARS Training - Detail: Displays a detailed list of trainings completed by each staff member. Trainings are grouped by STARS Knowledge Area. Training records can be added or modified via the PD-Training tab on the staff member's record, or via Group PD-Training Entry on the Processing menu.

Filters: Must be filtered by training dates and can be filtered by site, staff person, staff title or program staff.

Specialty Area Training: Displays a list of active staff grouped by the number of specialty training hours completed in various areas. Staff members are grouped as having less than two specialty area training hours, 2 to 3.5 specialty area training hours, and 4 or more specialty area training hours. Training records can be added or modified via the PD-Training tab on the staff member's record, or via Group PD-Training Entry on the Processing menu.

Filters: Must be filtered by training dates and can be filtered by site, staff title or program staff.

Staff Classroom Observation: Displays a list of active staff grouped by the number of completed classroom observations. Staff members are grouped by No observations recorded, One observation recorded, and Two or more observations recorded. Classroom observations can be recorded or modified on the PD Events tab of the staff member's record.

Filters: Must be filtered by PD event dates and can be filtered by site, staff title or program staff.

Staff Performance Evaluations: Displays a list of active staff grouped by the number of completed performance evaluations. Staff members are grouped by No Performance Evaluation Recorded and One or More Performance Evaluations Recorded. Performance evaluations can be recorded or modified on the PD Events tab of the staff member's record.

Filters: Must be filtered by PD event dates and can be filtered by site, staff title or program staff.

Staff Professional Development Plan Status: Displays a list of active staff grouped by their professional development plan status. Staff members are grouped by No PDR on file, PDR Overdue, PDR Due to expire, and PDR Up to date. Professional development plans can be recorded or modified on the PD Events tab of the staff member's record.

Filters: Can be filtered by site, staff title or program staff.

Staff Professional Growth and Development Activity: Displays a list of active staff grouped by the number of professional development activities completed. Staff members are grouped by No activities recorded, One activity recorded and Two or more activities recorded. Professional development activities can be recorded or modified on the PD Events tab of the staff member's record.

Filters: Must be filtered by PD event dates and can be filtered by site, staff title or program staff.

Staff Training Hours: Displays a list of active staff grouped by the number of completed training hours. Staff members are grouped by 0 to 11.5 hours, 12 to 17.5 hours, 18 to 23.5 hours and 24 hours or greater. Training records can be added or modified via the PD-Training tab on the staff member's record, or via the Group PD-Training Entry on the Processing menu.

Filters: Must be filtered by training dates and can be filtered by site, staff title or program staff.

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Staff Reports

AEYC Membership: Displays a list of active staff grouped by their AEYC membership status. Staff are grouped by No membership on file, Membership expired, Membership due to expire, and Membership up to date. AEYC memberships can be recorded or modified via the PD Events tab of the staff member's record using the event type "professional development activities".

Filters: Can be filtered by site, staff title or program staff.

Basic Training: Displays a list of active staff with dates and expirations for the following basic trainings: First aid, CPR, Fire safety, Emergency plan, and Child abuse (mandated reporter). Training records can be added or modified via the PD-Training tab on the staff member's record, or via Group PD-Training Entry on the Processing menu.

Filters: Must be filtered by training dates and can be filtered by site, staff title or program staff.

Staff Basic Training Expirations: Displays a list of active staff grouped by basic training status and type. Staff members are grouped by Expired trainings, Trainings due to expire, Up to date trainings, and No trainings on file. Basic trainings include First aid, CPR, Fire safety, Emergency plan, and Child abuse (mandated reporter). Training records can be added or modified via the PD-Training tab on the staff member's record, or via Group PD-Training Entry on the Processing menu.

Filters: Can be filtered by site, staff title or program staff.

Staff Contact List: Displays a list of active staff and their contact information. Contact information can be added or modified via the Contact Information tab on the staff member's record.

Filters: Can be filtered by site, staff title or program staff.

Substitute Contact List: Displays a list of active substitutes and their contact information. Contact information can be added or modified via the Contact Information tab on the staff member's record.

Filters: Can be filtered by site, staff title or program staff.

DPW Compliance: Displays a detailed record of information necessary for DPW inspection. Information listed includes an education summary, a list of clearances, dates and results of most recent medical exams, and dates of required trainings.

Filters: Must be filtered by training dates and can be filtered by site, staff title or program staff.

Staff Health Assessment Status: Displays a list of active staff grouped by the status of their most recent health assessment date. Status categories include No health assessment, Overdue, Due in next month and Up to date. Date of health assessment can be updated or added on the health tab of the staff member's record.

Filters: Can be filtered by site, staff title, program staff or assessment status.

Staff Personnel Detail: Displays a list of active staff, their contact information, date of birth and social security number. This information can be added or modified via the Main tab and the Contact Information tab on the staff member's record.

Filters: Can be filtered by site, staff title or program staff.

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Staff Qualifications: Displays a list of active staff and their degrees, ECE credits and years of experience. This information can be updated or added on the Credentials tab of the staff member's record.

Filters: Can be filtered by site, staff title, program staff or assessment status.

Staff Training: Displays a detailed list of trainings completed by each staff member. This report calculates total hours in addition to Act 48 and PQAS hours. Training records can be added or modified via the PD-Training tab on the staff member's record, or via Group PD-Training Entry on the Processing menu.

Filters: Must be filtered by training dates and can be filtered by site, staff person, staff title or program staff.