

ChildWare

Creating a Batch Record

Many times, there are incidents where multiple children receive the same service on a given day (ex: Dental Van visits). To make the recording of such an event easier on the provider, ChildWare has updated our system to include “Batch Recording.” This feature allows for adding the same service of a given day to multiple children’s records. By using this feature, a provider can add a service to multiple children’s accounts at once. This saves the provider from having to touch every child’s record individually to add a service and saves time and energy for the staff.

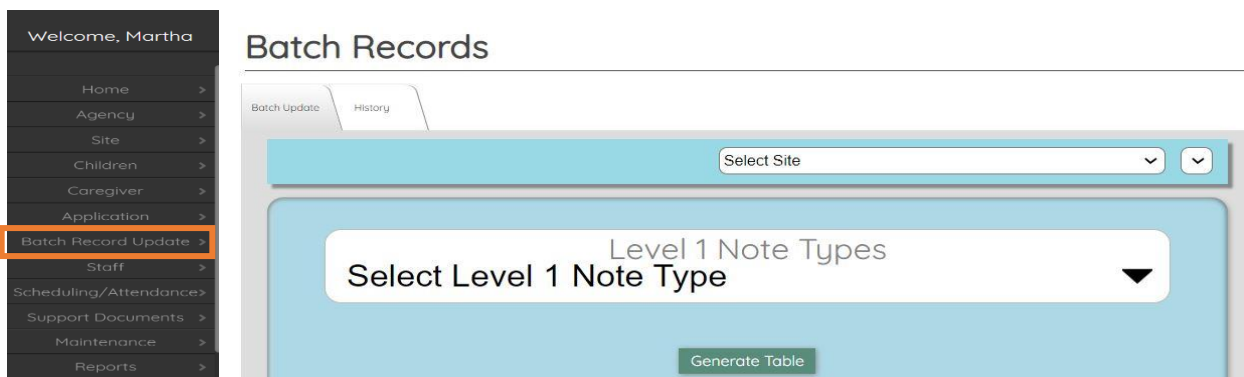
Contents

Accessing the Batch Record	1
Health Events Batch Record	2
Events/Notes Batch Record	4
History Tab	5

Accessing the Batch Record

On the Navigation menu, scroll down to **Batch Record Update**. The Batch Record window will appear

You will see two tabs: **Batch Update and History**



The **Batch Update Tab** is where you start to enter your information.

The **History Tab** will show you a record of the batch entries you have entered.

Level I Note Type includes: **Health Events** and **Events/Case Notes** (Kindergarten/CCW)

Select **Site and Classroom**

Batch Records

The screenshot shows the 'Batch Records' form. At the top, there are two dropdown menus: 'TEST-Magic Minds Daycare' and 'LLama'. Below these, there is a 'Level 1 Note Types' dropdown menu with a blue selection bar. The dropdown list is open, showing 'Select Level 1 Note Type', 'Health Events', and 'Events/Case Notes'. Two red arrows point from the text 'Select Site and Classroom' to the two dropdown menus at the top.

Health Events Batch Record

Once you choose either Health Events or Events/Case Notes an additional drop down appears.

The screenshot shows the 'Batch Records' form with 'Health Events' selected in the 'Level 1 Note Types' dropdown. A second dropdown menu, 'Level 2 Note Types', is now visible below it, with the text 'Select Level 2 Note Type'.

Select a Note type from the List (Health Event Selected)

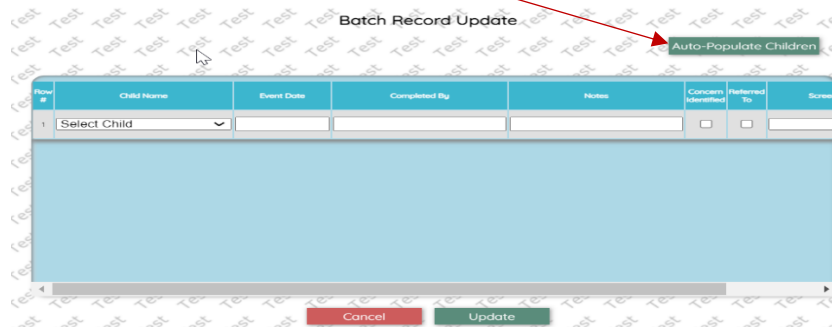
The screenshot shows the 'Level 2 Note Types' dropdown menu open. The list includes: 'Select Level 2 Note Type', 'Vision Assessment', 'Vision Screening', 'Dental Assessment', 'Dental Screening', 'Hearing Assessment', 'Hearing Screening', 'Physical Health Assessment', 'Mental Health Assessment', 'Mental Health Screening', 'Developmental Outcomes Assessment', 'Developmental Screening', and 'Select Level 2 Note Type'. A 'Generate Table' button is visible at the bottom of the form.

Batch Records

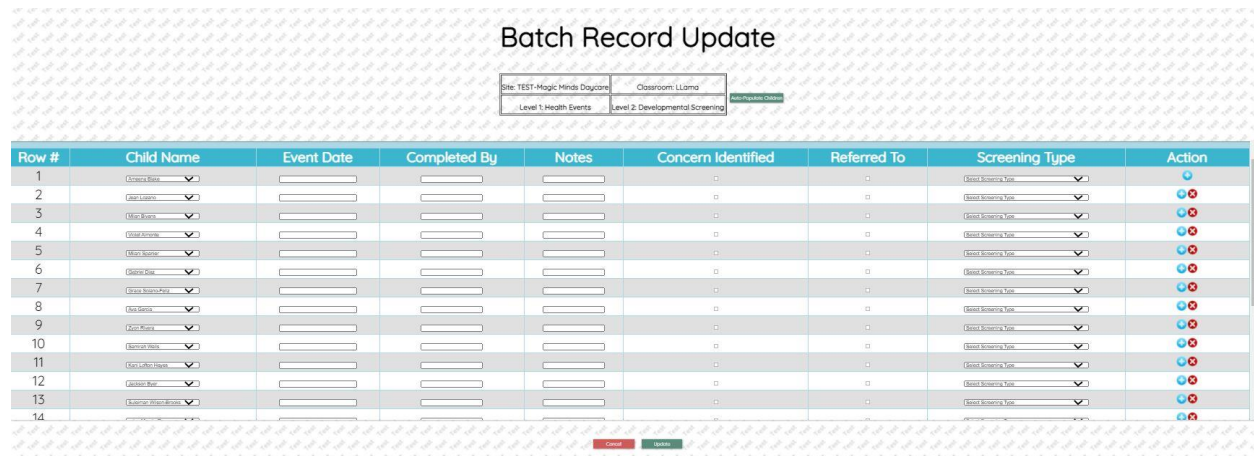
The screenshot shows the 'Batch Records' form with 'Health Events' selected in the 'Level 1 Note Types' dropdown and 'Developmental Screening' selected in the 'Level 2 Note Types' dropdown. A 'Generate Table' button is visible at the bottom of the form. A red arrow points from the text 'Click on Generate Report.' to the 'Generate Table' button.

Click on **Generate Report**.

Click on **Auto-Populate Children**



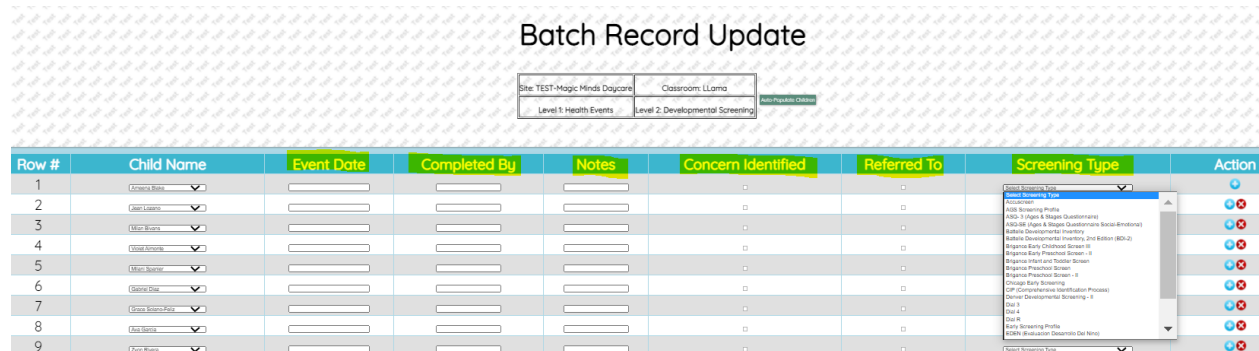
A list of children from the selected classroom appears.



You have the option to **remove any child's line** by clicking on **x** (you would want to do this if the child did not participate in the event).

If you click on the **+**, you will add a line to the bottom of the list, which will allow you to add another child -

Make sure you **add the event date, completed by, any notes, checkmarks if a concern was identified or the child was referred to, and screening tool type.**



Click **Update**. All the children's records will be updated with the entry from the batch entry.

Events/Notes Batch Record

The Events/Notes Batch Entry is very similar to the Health Events Batch entry, except there are a couple of extra drop-downs.

- Click on **the Batch Update Tab**
- Choose your **Site and Classroom**
- Click on **Level 1 Note Type** dropdown arrow and scroll down and click on Events/Case Notes
- Click on **Level 2 Note Type** dropdown arrow and scroll down and click on Kindergarten Transition
- Click on **Level 3 Note Types** (*Transition Plan, Transition Meeting, K Registration, Other K Transition*) – choose one.

The screenshot shows the 'Batch Records' interface. At the top, there are tabs for 'Batch Update' and 'History'. Below the tabs, there are two dropdown menus for site and classroom selection, currently showing 'TEST-Magic Minds Daycare' and 'Llama'. The main area contains three dropdown menus for note types: 'Level 1 Note Types' (selected: Events/Case Notes), 'Level 2 Note Types' (selected: Kindergarten Transition), and 'Level 3 Note Types' (selected: Transition Plan). A dropdown menu for 'Level 3 Note Types' is open, showing options: 'Select Level 3 Note Type', 'Transition Plan', 'Transition Meeting', 'K Registration', and 'Other K Transition'.

Click on **Generate Table**.

Click on **Auto-Populate Children**

Batch Record Update

[Auto-Populate Children](#)

Row #	Child Name	Event Date	Completed By	Caregiver 1	Caregiver 2	Registered Date	School Name	Notes	Action
1	Ameena Blake		Select Completed B	Select Caregiver 1	Select Caregiver 2				+
2	Jean Lozano		Select Completed B	Select Caregiver 1	Select Caregiver 2				+ ✖
3	Milan Bivans		Select Completed B	Select Caregiver 1	Select Caregiver 2				+ ✖
4	Violet Almonte		Select Completed B	Select Caregiver 1	Select Caregiver 2				+ ✖
5	Milani Spanier		Select Completed B	Select Caregiver 1	Select Caregiver 2				+ ✖
6	Gabriel Diaz		Select Completed B	Select Caregiver 1	Select Caregiver 2				+ ✖
7	Gracia Solano Feliz		Select Completed B	Select Caregiver 1	Select Caregiver 2				+ ✖

Complete **Event Date, Completed By, Caregiver 1, Caregiver 2, and Note** for **EVERY** entry.

At **final K-Registration**> add **Registration Date** and **School Name**.

You have the option **to remove any child's line** by clicking on ✖ (*you would want to do this if the child did not participate in the event*).

If you click on the +, you **will add a line** to the bottom of the list, which will allow you to add another child.

History Tab

The **History Tab** displays the Batch Records that have been entered in ChildWare.

Click on the **History Tab**

Batch Records


Batch Update **History**

Count: 8 Show All Advanced Filter Search History

Level 1 Note Type	Level 2 Note Type	Level 3 Note Type	Site	Classroom	Updated By	Updated Date	Action
Health Events	Developmental Scr...		Amazing-Broad	Prek-1	gfaralysmerad	2021-10-18 10:29...	View Detail
Health Events	Developmental Scr...		A Child's First S...	Tree of Knowledge	gfaralysmerad	2021-10-18 10:26...	View Detail
Health Events	Vision Assessment		Amazing-Cheltenham	Pre-K 3	mmoscanello	2021-10-05 11:19...	View Detail
Health Events	Developmental Out...		A Child's First S...	Tree of Knowledge	hmarwich	2021-09-28 10:04...	View Detail
Health Events	Developmental Out...		A Child's First S...	Tree of Knowledge	hmarwich	2021-09-28 10:03...	View Detail
Health Events	Developmental Scr...		TEST-Magic Minds ...	Preschool	gfaralysmerad	2021-08-25 09:11...	View Detail
Events/Case Notes	Kindergarten Tran...	Transition Plan	TEST-Magic Minds ...	Preschool	gfaralysmerad	2021-08-25 09:09...	View Detail
Health Events	Developmental Out...		Amazing-Cheltenham		mmoscanello	2021-08-20 11:40...	View Detail

You can also view the detail of each batch record, by clicking on the view detail button:

[View Detail](#)

Click on the Export icon  to create a report of your batch record.