



Documentation Upload Frequently Asked Questions

FAQ #1

I scanned and named these documents a few days ago but only just now am getting around to uploading them. Do I have to change the date in all the file names?

Answer

If you upload the documents within 4 working days of the date in the file name, then you do not need to rename them.

For example: You have a signed Emergency Consent Form for a child, John Doe. You scan the document on Friday, September 9, 2016. You rename it Doe_John_20160909_Ecf.pdf.

- You **WOULD NOT** need to rename the file if you upload it on or before Thursday September 15, 2016. There would be 4 working days or less between the file name date and the upload date.
- You **WOULD** need to rename the file if you upload it on or after Friday September 16, 2016. There would be 5 or more working days between the file name date and upload date.

FAQ #2

I attached a document in ChildPlus but picked the wrong attachment type. How do I change it?

Answer

Open ChildPlus and select the name of the child to whom the document is attached.

1. Click on Immunizations (for Immunization Forms) or **Health** (as below, for all other documents) → **Attachments**.

The screenshot shows the ChildPlus interface for a child named Luna Lovegood. The 'Attachments (3)' tab is highlighted in yellow. Below the tabs, there is a dropdown menu set to 'Health'. To the right of the dropdown are buttons for 'Add Attachment', 'Edit Details', 'View', and 'Delete'. The 'Edit Details' button is highlighted in yellow. Below these buttons is a table with the following data:

	Service Area	Attachment Type	Description	Date Added	Added By	File Name	Size
	Health	Health and Developmental History		10/28/2015	Training, FS	Lovegood_L...	29,480
	Health	Emergency Consent Form		10/28/2015	Training, FS	Lovegood_L...	11,075
	Health	Doctor's Note		8/11/2016	Training, FS	Lovegood_L...	163,068

2. **Highlight** the file by clicking it once with your mouse.
3. Click on the blue hyperlink with the words **Edit Details**

4. In the pop-up, select the correct **Attachment Type** from the dropdown box, then click **Save**.

Edit Attachment Information

File to Attach (Maximum size is 3MB)
Lovegood_Luna_20160805_Phy.pdf

Service Area
Health

Description

Attachment Type
Doctor's Note

- Health and Developmental History
- Health Screening Results
- Hemoglobin/Hematocrit
- HIPPA Form
- Immunization Record
- Income Documentation
- Interrater Reliability
- Lead Test
- MD Statement
- Medication Administration Authorization
- Medication Record
- Other
- Physical Exam Form
- Post-Partum Visit Summary
- Pre-Enrollment Form
- Pregnancy Health History
- Referral

Save Cancel

5. The document will now appear in the Attachments tab with the correct Attachment Type.

FAQ #3

I uploaded a document but the file is named wrong. How do I fix it?

Answer

You must delete the file from the Attachments tab in ChildPlus, rename it correctly, and then re-attach it.

1. Click on Immunizations (for Immunization Forms) or **Health** (as below, for all other documents) → **Attachments**.

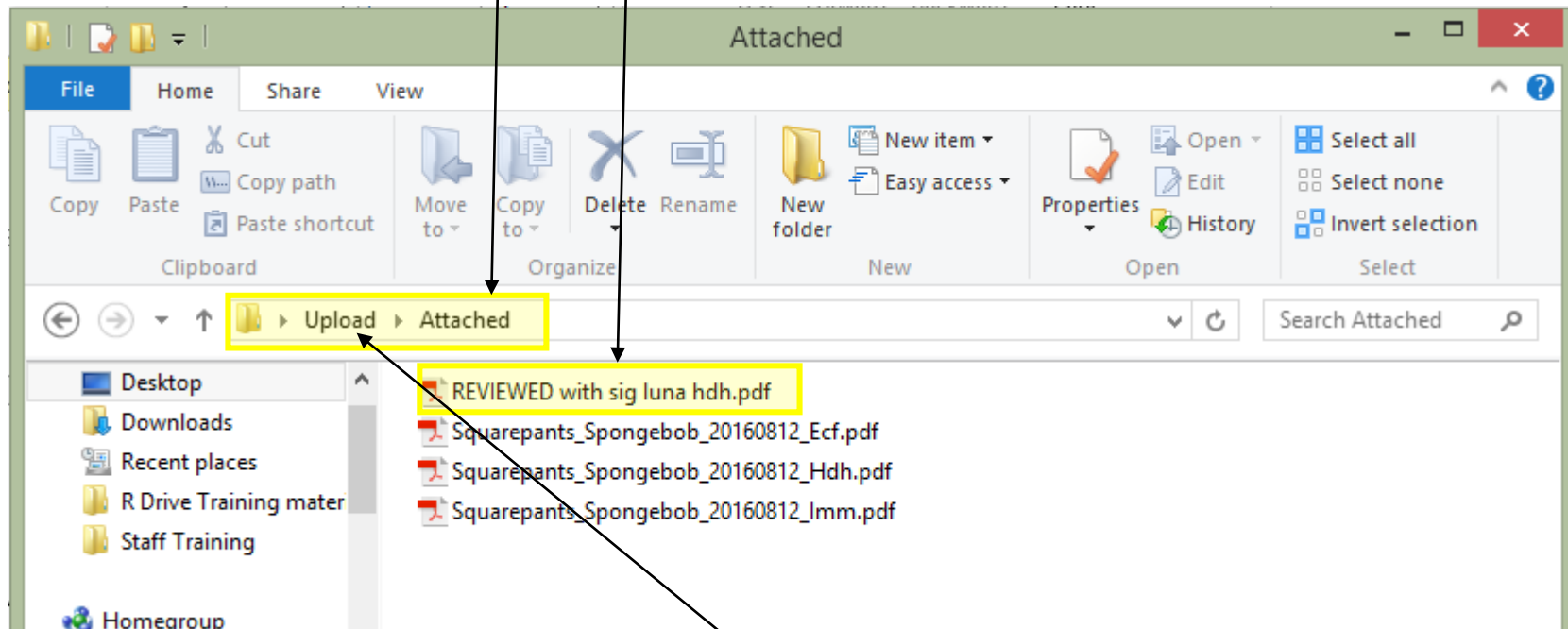
The screenshot shows the ChildPlus interface for a child named Luna Lovegood. The 'Attachments (4)' tab is highlighted. A table lists four attachments. The 'Delete' button is highlighted, and the 'Health and Developmental History' row is highlighted.

	Service Area	Attachment Type	Description	Date Added	Added By	File Name	Size
	Health	Emergency Consent Form		10/28/2015	Training, FS	Lovegood_L...	29,480
	Health	Dental Records		10/28/2015	Training, FS	Lovegood_L...	11,075
	Health	Physical Exam Form		8/11/2016	Training, FS	Lovegood_L...	163,068
	Health	Health and Developmental History		8/11/2016	Training, FS	REVIEWED h...	163,068

2. **Highlight** the file by clicking on it with your mouse, then click **Delete**.

3. The system will ask you to confirm. Click **Yes**.

4. Go into your **Upload** folder, and then double-click on the **Attached** folder to open it. (ChildPlus creates this folder automatically and moves documents into it when they are uploaded.)
5. Highlight the document you just deleted by clicking on it with your mouse.



6. Move it out of the **Attached** folder and back into the main **Upload** folder by either dragging it with your mouse or cutting/pasting.
7. Rename the file correctly using the File Name Template and upload it again into ChildPlus using the upload instructions.

FAQ #4

I attached a document to the wrong child in ChildPlus. How do I remove it?

Answer

You must delete it from the wrong child's attachments tab, move it out of the **Attached** folder and back into your main **Upload** folder, and then attach it to the correct child in ChildPlus.

1. Click on Immunizations (for Immunization Forms) or **Health** (as below, for all other documents) → **Attachments**.

Luna Lovegood x +

Luna Lovegood
Female DOB: 1/01/12 4y 7m CPID: 51440

Application Enrollment Family Services **Health** Immunizations Disability Education Attendance PIR

Events Requirements Health Information **Attachments (4)**

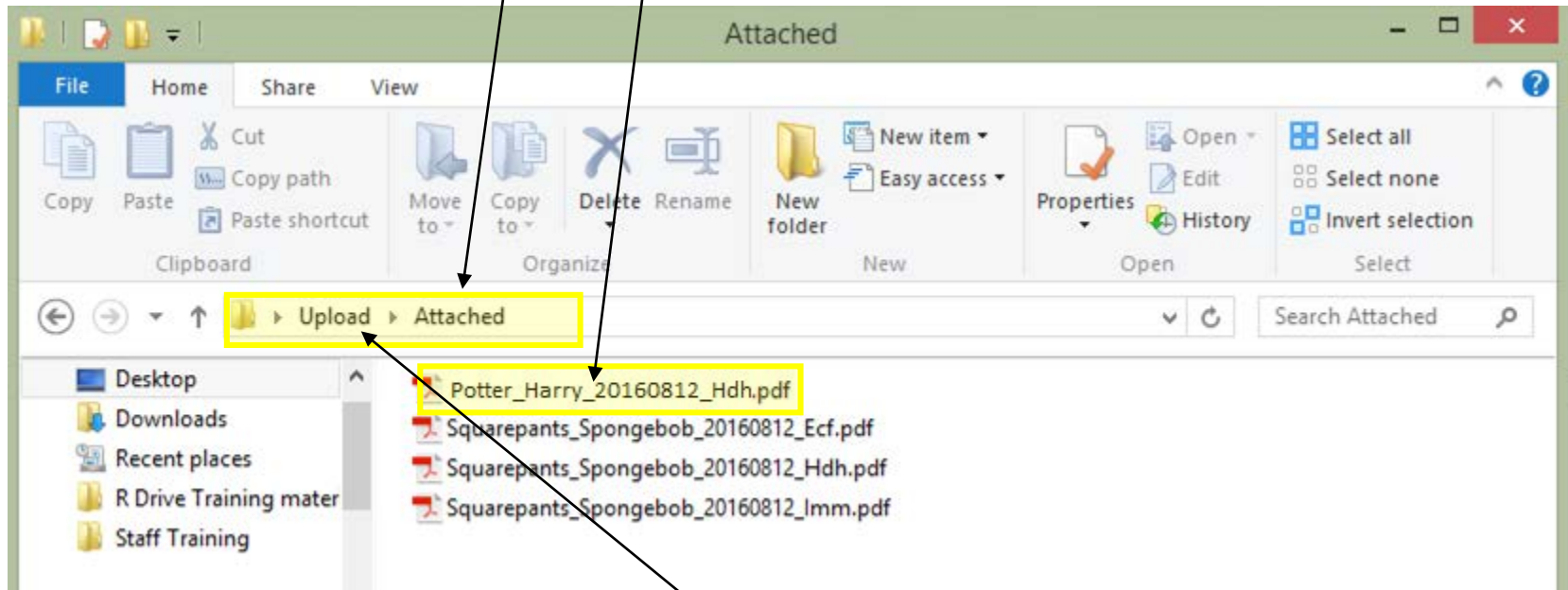
Health

Add Attachment Edit Details View **Delete**

	Service Area	Attachment Type	Description	Date Added	Added By	File Name	Size
	Health	Emergency Consent Form		10/28/2015	Training, FS	Lovegood_L...	29,480
	Health	Dental Records		10/28/2015	Training, FS	Lovegood_L...	11,075
	Health	Physical Exam Form		8/11/2016	Training, FS	Lovegood_L...	163,068
	Health	Health and Developmental History		8/11/2016	Training, FS	Potter_Ha...	163,068

2. **Highlight** the file by clicking on it with your mouse, then click **Delete**.
3. The system will ask you to confirm. Click **Yes**.

4. Go into your **Upload** folder, and then double-click on the **Attached** folder to open it. (ChildPlus creates this folder automatically and moves documents into it when they are uploaded.)
5. Highlight the document you just deleted by clicking on it with your mouse.



6. Move it out of the **Attached** folder and back into the main **Upload folder** by either dragging it with your mouse or cutting/pasting.
7. Once it is saved in your main **Upload** folder again, you can upload it to the correct child into ChildPlus, using the upload instructions.

FAQ #5

I attached an Immunization form in the Health tab; *or*, I attached a health document in the Immunizations tab. How do I move it to the right service area tab?

Answer

You can change the service area for an attachment by clicking on “Edit Details” and updating the Service Area field. In the example below, we accidentally uploaded dental records in the Immunizations screen. We are going to fix that so it appears under Health.

1. Highlight the attachment that was added under the wrong Service Area, then click **Edit Details**. A window will pop up.

The screenshot shows the Luna Lovegood user interface. At the top, there is a header with the user's name 'Luna Lovegood' and a plus sign. Below that is the Luna Lovegood logo and a navigation bar with tabs: Application, Enrollment, Family Services, Health, Immunizations, Disability, Education, Attendance, and PIR. The 'Immunizations' tab is currently selected. Below the navigation bar, there are buttons for 'Immunizations', 'Tuberculosis', and 'Attachments (2)'. A dropdown menu is set to 'Immunizations'. To the right of the dropdown are buttons for 'Add Attachment', 'Edit Details', 'View', and 'Delete'. The 'Edit Details' button is highlighted with a yellow box. Below these buttons is a table with the following columns: Service Area, Attachment Type, Description, Date Added, Added By, File Name, and Size. The table contains two rows. The first row has 'Immunizations' as the Service Area and 'Immunization Record' as the Attachment Type. The second row has 'Immunizations' as the Service Area and 'Dental Records' as the Attachment Type. This second row is highlighted with a yellow border. Two arrows originate from the text above: one points to the 'Dental Records' row in the table, and the other points to the 'Edit Details' button.

	Service Area	Attachment Type	Description	Date Added	Added By	File Name	Size
	Immunizations	Immunization Record		8/26/2016	Training, FS	Lovegood_L...	163,068
	Immunizations	Dental Records		8/26/2016	Training, FS	Lovegood_L...	163,068

2. In the pop-up, select the correct **Service Area** from the dropdown box. In this example we will select Health.

The screenshot shows a form titled "Edit Attachment Information". At the top, it says "File to Attach (Maximum size is 3MB)" with a text box containing "Lovegood_Luna_20160805_Den.pdf". Below this are two dropdown menus: "Service Area" and "Attachment Type". The "Service Area" dropdown is open, showing three options: "Immunizations", "Health", and "Immunizations". A hand cursor is pointing at the "Health" option. The "Attachment Type" dropdown is set to "Dental Records". Below the dropdowns is a large text area with a toolbar containing icons for clock, ABC, print, edit, and copy. At the bottom right, there are two buttons: "Save" (highlighted with a yellow box) and "Cancel".

3. Click **Save**.

4. The attachment will now appear in the correct screen.

Note that this method also applies to immunization forms accidentally attached in the Health tab.

- In that case, you should go to the Health screen → Attachments tab. Highlight the attachment and click **Edit Details**. Select **Immunizations** from the Service Area dropdown and then **Save**. The immunization form will now appear in the Immunizations tab.