

Add and Manage Child Records

This guide takes you through the steps for adding, editing, and importing child records.

Child Functions on the Dashboard

On the dashboard, you can:

- Click the plus sign beside **Add Child** to open the Add Child Information page and add a child.
- Type in the **Search Child Name** box. As you type, matching names are listed. Click a name to open the Child Information page.
- Click the search icon to open the Search/Edit Child page.
- Under **Child Record Activity**:
 - Click a child name to open the Child Information page for that Child.
 - Click the add record form icon to add one or more record forms for the child.



To add a child:

1 On the menu, click **Child Administration** and select **Add Child** or click the plus sign beside **Add Child** on the dashboard. The Add Child page opens on the General Information tab.

2 Complete the *required fields on the General Information tab:

- ***First Name** – Type the first name.
- ***Last Name** – Type the last name.
- ***Gender** – Select a gender from the drop-down list.
- ***Date of Birth** – Click the calendar icon and select a date or type the date with the mm/dd/yyyy format.
- ***Location** – Select a location from the drop-down list.

Note: When you have completed the required fields, the **Save** and **Save & Add Another** buttons are active. You can save the record.

3 Complete additional fields on the General Information tab.

4 Click the **Demographics/Programs** tab. Complete fields as needed. If you click IFSP or IEP, additional fields appear.

5 Click the **User Identified Fields** tab. Type a code and value. You can use the fields and codes for data not covered on the first two tabs.

6 Click **Save** to save and open the Child Information page or **Save & Add Another** to save this record and return to the Add Child Information page.

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The Child Information Page

The Child information page opens when you add an individual child, when you click the child's name under Child Activity on the dashboard or in search results, or when you type into the Search Child Name field on the dashboard. On the Child Information page, you can:

- Click **Edit Child** to open the Edit Child Information page.
- Click **Delete Child** to delete the child record.
- Under Record Forms: click **Add Record Form** to add one or more record forms, click a record form to open it, delete or merge record forms

| Select All | Test Date | Test Committed | Record Form | Status | Days to Edit ^ | Actions |
|--------------------------|------------|----------------|---------------------------------|--------|----------------|---------|
| <input type="checkbox"/> | 09/18/2020 | --- | BDI-3 Developmental Record Form | Saved | | |
| <input type="checkbox"/> | 09/18/2020 | --- | BDI-3 Developmental Record Form | Saved | | |

To search for a child:

There are two ways to find a child record:

On the dashboard, type in the **Search Child Name** box. As you type, matching names are listed. Click a name to open the Child Information page.

- 1 There are two ways to open the Search/Edit Child page.
 - On the menu, click **Child Administration** and select **Search/Edit Child**.
 - Click the Search icon on the dashboard.

- 2 Type the search criteria in the fields.

Note: To find only deleted child records, click the **Search deleted child** checkbox.

- 3 Click **Search**. The search results are listed.

| Select All | Last Name, First Name | Child ID | Date of Birth | Location | Enrollment | Actions |
|--------------------------|-----------------------|----------|---------------|-------------------|------------|---------|
| <input type="checkbox"/> | Alexander, Sharon | | 05/21/2016 | Counseling Office | | |
| <input type="checkbox"/> | Demard, Julia | 87096 | 07/14/2016 | Counseling Office | | |
| <input type="checkbox"/> | Gonzalez, Mark | | 04/12/2013 | Counseling Office | | |
| <input type="checkbox"/> | Parker, Caroline | 67035 | 05/15/2016 | Counseling Office | 05/30/2020 | |

To edit a child record:

- 1 There are two ways to open the Edit Child Information page.
 - Click the Edit icon in the **Actions** column of search results.
 - Click **Edit Child** under **Tools** on the Child Information page.
- 2 Make changes to the information.
- 3 Click **Save**.

To delete a child record:

- 1 Click the Delete icon in a list of search results or click **Delete Child** on the Child Information page. The Delete Child message appears.

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- 2 Click **Confirm** to delete the child record or click **Cancel** to exit without deleting the child record.

Import Children

In BDI-3, you can upload child records on an Excel spreadsheet following the data requirements for each field.

To import child records:

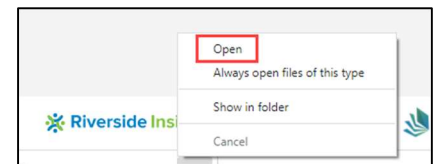
- 1 On the menu, click **Child Administration** and select **Import Child Roster**. The Import Children page opens.

Note: When you have saved the template once, you can skip to step 8 and upload the file.

- 2 Click the **here** link above the **Download** button to open a document with data requirements. You can use it as reference when filling in the data.

- 3 Click **Download** to download the template.

- 4 In the lower left of the screen, click **Open** to open the downloaded Excel spreadsheet.



- 5 (Optional) Save the document to a location where you can access it to upload it.

- 6 Complete the information on the Excel spreadsheet following the formatting instructions on the document you opened in step 2.

- 7 Save the Excel spreadsheet.

- 8 Click **Browse**.

- 9 Locate and open the completed spreadsheet. The file appears in the **File Name** field.

- 10 Click **Upload**. Statistics appear at the bottom of the screen, showing the number of records uploaded and errors that kept records from being uploaded.

Note: You can click **Print Errors** to open a document that lists the errors. You can save the document as a PDF file.

- 11 Correct any errors and repeat steps 8 – 10.