

Lesson 19 – Child Program Promotions

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Overview

The Child Program Promotions function was installed with the release of 'bob' Version 2006.4.1 in the fall of 2006. Although it is partially a manual process, screen displays and reports will assist you in forecasting and determining the time at which a child should be promoted to another program.

This document will discuss in detail the following areas:

- Preferences – Child Program Promotion Activation
- Program Masters – Promotion Start, End, and new Program
- Child Program Records – Promotion Date, new Program, and Promotion Status
- Child Program Promotions – processing, forecasting, and printing

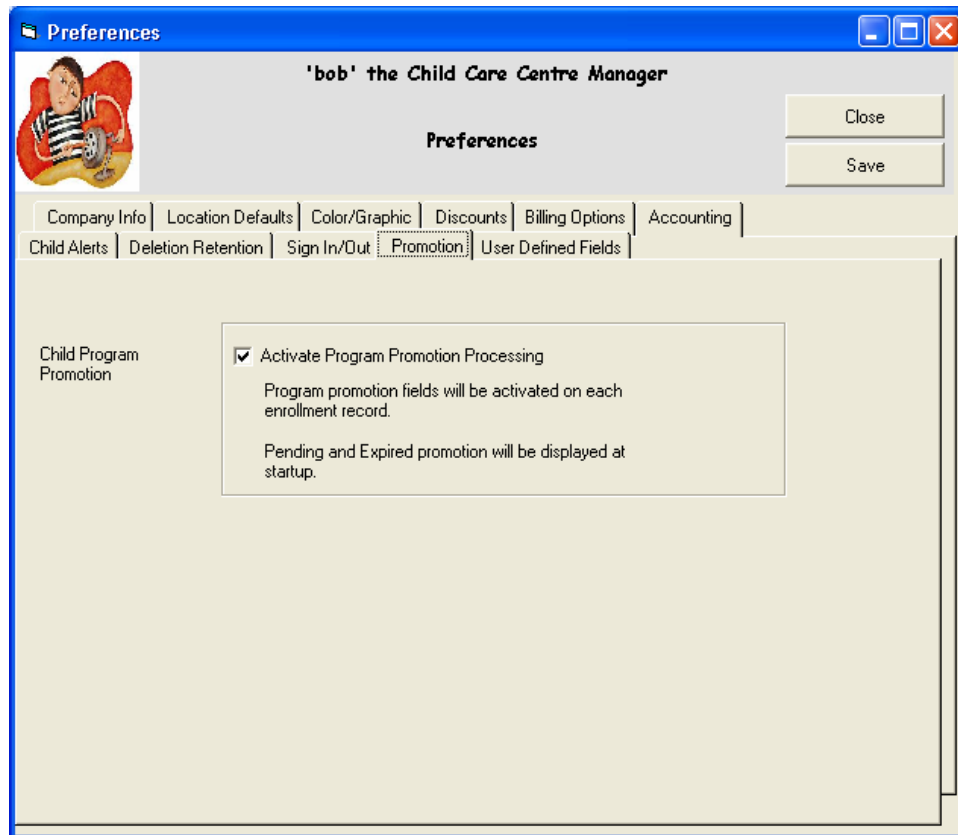
Note: In all cases when a Child Promotion is processed, the source Child Program record is terminated on the day immediately preceding the start date of the new Child Program record and the End Date of the new Program record is the same as the source Child Program was originally. This is discussed in more detail following.

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Preferences Screen

A new tab has been added to the Preferences screen for the purpose of Activating/Deactivating the Child Promotion functions within 'bob'.

Upon installation of Version 2006.1.4 or later, the default setting is to be activated.



Onscreen Toolbar

When Child Program Promotions is activated, a new icon is added to the Family Manager -> Onscreen Toolbar.



Press the new icon to display the Child Program Promotion screen.
This screen and its functions are discussed later in this document.

Program Masters

The Promotion settings are displayed on the Program Master records whether the Child Program Promotion is activated or not. The purpose of these settings is to set the guidelines for promotion of children from one program to another. When completed, there should be a logical progression through the programs you are offering.

Promotion Settings

Program Masters

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Program Masters

Close

New

Save

Delete

Program Group: Infant

or New Group Name: Infant

Program Group Identifiers

GL Income Account: Fees:Infant

Room Capacity: 10 Home Care:

Starting Age: 1 Mos. = 1 Mos.

Promotion Age: 18 Mos. = 1 Yrs. 6 Mos.

Promote to Group: Toddler

Unique Program Identifiers

Time of Day: Full Day

Lunch:

Transportation: No Transportation

Press 'Edit' to create additional Time of Day identifiers.

Rates

Daily/Flat	49.50	O/T	0.00
PD Day	0.00	Hourly	7.50

Enter the Daily Rate to make this program active.
Enter the PD Day Rate to replace Daily/Flat rate on PD Days.

1. Enter the **Starting Age** for the Program Group
 - a. Entry must be inserted as the number of months for age.
 - b. Notice that the entry is converted and displayed as the age in Yrs./Mos.
2. Enter the **Promotion Age**
 - a. Entry must be inserted as the number of months for age.
 - b. Notice that the entry is converted and displayed as the age in Yrs./Mos.
3. Select the **Program to Group** to be promoted to.
 - a. The Program Group you select is the recommended promotion for a logical progression from this group to the next.

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4. Save your changes
 - a. When Saved, the changes are propagated to all other program definitions within the Program Group.

Child Program Records

The Child Program records have been modified by adding tabs in the lower portion of the screen. This has allowed us to fit the additional fields onto the form.

If Child Program Promotion is activated, the third tab contains the Promotions settings for this child's program. Otherwise, the Promotion tab is hidden and the third tab is displayed as Programs List.

Promotion Tab

The screenshot shows the 'Child Program Enrolment' window for 'bob' the Child Care Centre Manager. The main form includes fields for Child (Jimmy Horseley), Rate Per. (1/1/2006 to 12/31/2010), Program (Infant), Start (09/01/2006), and End (12/31/2010). A weekly attendance pattern grid is shown with columns for Mon, Tue, Wed, Thur, Fri. The Promotion tab is active, displaying 'Promotion Settings' with 'Age as of today' (5 Mos.), 'Promotion Date' (02/01/2008), and 'Promotion To' (Toddler). The 'Program Master Promotion Settings' section includes a table of program masters.

Selected Program Masters	Starting Age	Ending Age	Promote To
Infant	1 Mos.	1 Yrs. 6 M	Toddler
Toddler	1 Yrs. 6 M	2 Yrs.	Junior

Age as of today

- The child's age is calculated and displayed in Yrs/Mos.

Promotion Date

- Enter/Select the date this child should be promoted.
- After selection, a note is displayed stating the child's age on the promotion date.

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Promotion To

- Select the Program that the child is to be promoted to on the scheduled promotion date.
 1. See the Program Master Promotions Settings discussions below.
- After selection, the Promotion Program Description is updated to display the Program / Time of day @ Rate

Promotion Status

- There are 4 possible statuses of a promotion
 1. **Unscheduled**
 - No entries have been made in the promotion fields
 2. **Pending**
 - The promotion has been scheduled but has not yet taken place.
 3. **Expired**
 - The promotion has been schedule, but the promotion date is in the past.
 4. **Completed**
 - The scheduled promotion was processed
 - All Promotion fields are locked.

Promote Now (button)

- Press this button to process the promotion immediately
 1. A new Child Program is created
 - The Billing Start date is set to the Promotion Date setting.
 - The Billing End date remains the same as the current program.
 - The Program Master is set to the Promotion To setting.
 - The Attendance Pattern is the same as the current program.
 2. The Current Child Program is terminated
 - The Billing End date is set to the day immediately prior to the Promotion Date setting.
 - The Promotion Status is set to Completed.
 - All Promotion fields are locked

Cancel Promotion (button)

- Press this button to reset all of the promotion fields
 1. The Promotion Date is emptied.
 2. The Promotion To selector is reset.
 3. The Promotion Status is set to **Unscheduled**

Program Master Promotion Settings

The purpose of this display is to provide you with the Program Master settings for each of the current program and the Promote To program. These are display only and have no function other than to provide the settings from the Master Program definitions.

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The first line displayed contains master settings for the current program.

The second line displayed contains master settings for the promote to program.

Child Program Promotions

The Child Program Promotions screen is displayed by pressing the new icon on the toolbar.



The screen displayed is tabbed to provide multiple functionality. When the screen is initially displayed, the Child Program Promotions tab is displayed.

This is a full list of children having a current program record with a scheduled promotion. The Status field of the grid display is coded so that you can easily see the Pending, Expired, or Completed promotions.

Child Program Promotions Tab

The screenshot shows the 'Child Promotion' window with the following components:

- Title Bar:** Child Promotion
- Header:** 'bob' the Child Care Centre Manager, Child Program Promotion, Close button.
- Navigation:** Child Program Promotions (selected), Promotion Forecast, Master Program Promotion Settings.
- Form Fields:** Promotion Selections, View Options (All), Sort Order (Lastname, Firstname, Promotion Date), Actions (Promote, Print).
- Instructions:**
 - Select the program child records you wish to promote.
 - Enter a 'Revised Date' in the grid column for each program record as required.
 - Press 'Promote'
- Grid Data:**

Select	Status	Child	Age Today	Age at Promotion	Revised Date for Promotion (mm/dd/yyyy)	Promotion Date	Promote FROM Program	Prom
<input type="checkbox"/>	Expired	Ashley, Allison	5 Yrs. 3 Mos.	5 Yrs. 3 Mos.		9/5/2006	Kindergarten	Scho
<input type="checkbox"/>	Pending	Bancroft, Anne	1 Yrs. 2 Mos.	1 Yrs. 6 Mos.		1/1/2007	Infant	Todd
<input type="checkbox"/>	Pending	Bancroft, John	1 Yrs. 2 Mos.	1 Yrs. 6 Mos.		1/1/2007	Infant	Todd
<input type="checkbox"/>	Expired	Brandt, Alexander	5 Yrs. 6 Mos.	5 Yrs. 6 Mos.		9/5/2006	Kindergarten	Scho
<input type="checkbox"/>	Completed	Buttery, Jenna	3 Yrs. 1 Mos.	3 Yrs.		8/1/2006	Intermediates	Senic
<input type="checkbox"/>	Expired	Culostrovevus, Cierra	5 Yrs. 2 Mos.	5 Yrs. 2 Mos.		9/5/2006	Kindergarten	Scho
<input type="checkbox"/>	Pending	Cuttersworth, Hanna	2 Yrs. 5 Mos.	2 Yrs. 6 Mos.		10/2/2006	Intermediates	Senic
<input type="checkbox"/>	Completed	Daylor, Daniel	4 Yrs. 2 Mos.	4 Yrs. 2 Mos.		9/5/2006	Seniors	Kinde
<input type="checkbox"/>	Expired	Forman, Mackenzie	5 Yrs.	5 Yrs.		9/5/2006	Kindergarten	Scho
<input type="checkbox"/>	Pending	Forman, Maxwell	2 Yrs. 2 Mos.	2 Yrs. 6 Mos.		1/1/2007	Toddler	Junio
<input type="checkbox"/>	Completed	George, Danny	2 Yrs. 10 Mos.	2 Yrs. 6 Mos.		5/1/2006	Junior	Interr
<input type="checkbox"/>	Completed	Henstrom, Johnny	1 Yrs. 6 Mos.	1 Yrs. 6 Mos.		9/1/2006	Infant	Todd
<input type="checkbox"/>	Pending	Horsely, Jimmy	1 Mos.	1 Yrs. 6 Mos.		2/1/2008	Infant	Todd

View Options

The default is 'All' meaning that all current Child Program records having a scheduled promotion are displayed.

Select Pending, Expired, or Completed to filter the display grid accordingly.

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Sort Order

The default is to order the grid in order of Lastname, Firstname, and Promotion Date.

Select any of the other Sort Order options to display the grid accordingly.

Grid Display

There are two functions available on each line of the display grid.

1. Select
 - a. To select a line for processing, mouse-click on the Select column
 - b. If the status is 'Completed' a message will be displayed stating that "Completed records cannot be selected for processing."
2. Revised Date for Promotion
 - a. If the Promotion Date for the select line needs to be changed before the promotion is processed, you may enter a new date directly on the grid.
 - b. You could also exit the screen and modify the actual Child Program record, then come back to the Child Program Promotion screen.

Promote (button)

After selecting one or more Pending or Expired promotions from the grid, press the Promote button to process each promotion. When processing the following occurs:

1. A new Child Program is created
 - The Billing Start date is set to the Promotion Date setting.
 - The Billing End date remains the same as the current program.
 - The Program Master is set to the Promotion To setting.
 - The Attendance Pattern is the same as the current program.
2. The Current Child Program is terminated
 - The Billing End date is set to the day immediately prior to the Promotion Date setting.
 - The Promotion Status is set to Completed.
 - All Promotion fields are locked

As each promotion is processed, the Status field on the grid is updated to 'Completed'. When finished a completion message is displayed.

Print (button)

Press this button to print a report containing the same information that is displayed on the grid.

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Promotion Forecast Tab

Child Promotion

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Child Program Promotion

Forecast Selections

Promotion Forecast: 09/21/2006

Program Group: All

Actions

Remove Complete Promotions from the grid.

Remove Non-Alert records from the grid.

Remove Scheduled Promotions.

1. Child Program records requiring your attention are highlighted in red.
2. Change the Promotion Forecast, Program Group, and the Remove Actions to customize the grid.

Child	Program Group	Start Age	End Age	Age on Forecast Date	Promotion Date	Promotion Program	Promotio Status
Olsen, Samantha	Infant	1 Mos.	1 Yrs. 6 Mos.	1 Yrs. 2 Mos.	1/1/2007	Toddler	Pending
Sanderson, Bryan	School Age	5 Yrs.	14 Yrs.	8 Yrs.			Unschec
Stodulski, Mitchell	School Age	5 Yrs.	14 Yrs.	8 Yrs. 4 Mos.			Unschec
Stodulski, Sean	Junior	2 Yrs.	2 Yrs. 6 Mos.	2 Yrs. 3 Mos.	12/1/2006	Intermediates	Pending
Stodulski, Tyler	Kindergarten	4 Yrs.	5 Yrs.	5 Yrs.	9/4/2006	School Age	Expired
Trainer, Carol	Toddler	1 Yrs. 6 Mos.	2 Yrs.	1 Yrs. 7 Mos.			Unschec
Weilan, Allison	School Age	5 Yrs.	14 Yrs.	9 Yrs. 2 Mos.			Unschec
Weilan, Rebecca	School Age	5 Yrs.	14 Yrs.	10 Yrs. 11			Unschec
Zeldor, Jimmy	School Age	5 Yrs.	14 Yrs.	5 Yrs. 10			Unschec
Zigfried, Ivana	Kindergarten	4 Yrs.	5 Yrs.	5 Yrs. 3 Mos.	9/5/2006	School Age	Expired
Zigfried, Peter	School Age	5 Yrs.	14 Yrs.	9 Yrs. 10			Unschec
Zorba, Zoe	Intermediates	2 Yrs. 6 Mos.	3 Yrs.	2 Yrs. 8 Mos.			Unschec

Grid Display

The information displayed is all Child Program records that do not have a status of 'Completed' as of the Promotion Forecast date selected.

In other words, any Child Program with a promotion status of Pending or Expired, or any Child Program that has not been scheduled to promote as of the Promotion Forecast date selected, is displayed.

Promotion Forecast

The date to search for Pending, Expired, or Unscheduled promotions.

Program Group

You may filter the search results to a specific program group.

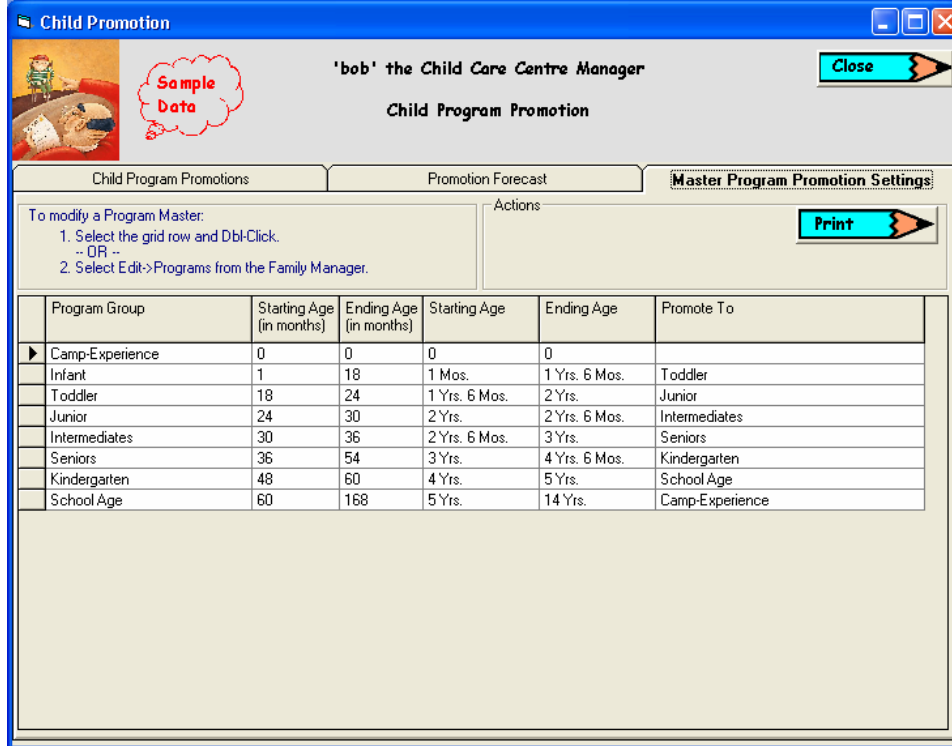
Action Checkboxes

Select one or more of the checkboxes to alter the records displayed.

Print (button)

Press this button to print a report containing the same information that is displayed on the grid.

Master Program Promotion Settings Tab



Child Promotion

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Child Program Promotion

Child Program Promotions Promotion Forecast Master Program Promotion Settings

To modify a Program Master:
1. Select the grid row and Dbl-Click.
-- OR --
2. Select Edit->Programs from the Family Manager.

Actions

Print

Program Group	Starting Age (in months)	Ending Age (in months)	Starting Age	Ending Age	Promote To
▶ Camp-Experience	0	0	0	0	
Infant	1	18	1 Mos.	1 Yrs. 6 Mos.	Toddler
Toddler	18	24	1 Yrs. 6 Mos.	2 Yrs.	Junior
Junior	24	30	2 Yrs.	2 Yrs. 6 Mos.	Intermediates
Intermediates	30	36	2 Yrs. 6 Mos.	3 Yrs.	Seniors
Seniors	36	54	3 Yrs.	4 Yrs. 6 Mos.	Kindergarten
Kindergarten	48	60	4 Yrs.	5 Yrs.	School Age
School Age	60	168	5 Yrs.	14 Yrs.	Camp-Experience

Grid Display

The information displayed is for information only.

All Program Group Promotion Settings are displayed in Starting Age order.

You can easily see the progression between programs when displayed in this manner.

Print (button)

Press this button to print a report containing the same information that is displayed on the grid.