Instructions for Enrolling Children to Cocoa 2019-2020

Follow the below instructions after you set up your 2019-2020 sites, classrooms, and sessions. See “Setting Up Cocoa for 2019-2020” tip sheet for help.

Enrolling Continuing Children
After setting up 2019-2020 year, you must re-enroll children continuing at your site. Thanks to a new feature, you can now copy all enrollments for a session with Copy All Enrollments, or copy one child with Exit & Copy to New Enrollment.

Copy All Enrollments  New Feature!
Copies all child enrollments in a session to the new year. It is important to review each enrollment afterwards and exit children who will not be continuing and update information for those who are.

1. Go to Setup and select 2018-2019
2. Select Copy All Enrollments next to the session you would like to copy
3. Use the drop-down bar to select which 2019-2020 session to move the enrollments to
4. Select the Copy Enrollments button
5. Children successfully copied over will have a green check mark next to their name
6. Select Return to Setup and select 2019-2020
7. Select the session you copied and choose the Enrollment tab
8. Review each child’s start date, schedule, and funding for accuracy
9. If a child will not be continuing, select Exit Session and add an exit date and reason

Exit & Copy to New Enrollment
Exits one currently enrolled child and copies to a session in the new year.

1. Find the Child (by List Currently Enrolled Children or by searching through Find Child)
2. Select the Enrollment tab in top bar
3. Select Exit & Copy to New Enrollment
4. Enter the session end date. This is most likely, but not necessarily, the 18-19 calendar end date.
5. Select a reason (usually “End of Program Year” or “Transferred within Agency”)
6. Select Exit and Copy Enrollment
7. This will link you to a new enrollment form for the future enrollment. It copies data from the Year 2018-2019 Enrollment Record into a 2019-2020 Enrollment Record
8. Change the year to 2019-2020. Very important!
9. Use the drop down to select the Site, Classroom, and Session
10. Enter the child’s Start Date. (Will likely be day after end of last year’s session)
11. Review Days of Attendance and edit if necessary
12. Select child’s Funding type
13. Select Part Time or Full Time
14. Select Adjustment Factor if child is ELS Gap on CCTR or CSPP
15. Press Finish
16. You will be re-directed to the Enrollment tab
   - If done correctly, this page lists “Current Enrollment” and “Future Enrollment”
   - Review for accuracy, especially starting and ending dates
   - If incorrect, select Edit Enrollment and correct information

Important Note: Please do not use the Delete Enrollment button unless a duplicate mistake has been made. In most cases you can correct mistakes by choosing Edit Enrollment. Not sure? Give the Help Desk a call.

Questions? Contact the Help Desk at 415-343-4669 or support@childrenscouncil.org

The Help Desk is funded by OECE to support ELS and PFA programs.
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Enrolling Continuing Children (continued)

Copy to New Enrollment

Copies one previously enrolled child to a session in the new year.

1. Find the Child (by List All Children or by searching through Find Child)
2. Select the Enrollment tab in top bar
3. Select Copy to New Enrollment
4. Change the year to 2019-2020. Very important!
5. Use the drop down to select the Site, Classroom, and Session
6. Enter the child’s Start Date
7. Select Days of Attendance
8. Select child’s Funding type
9. Select Part Time or Full Time
10. Select Adjustment Factor if child is ELS Gap on CCTR or CSPP
11. Select Finish
12. You will be re-directed to the Enrollment tab
   • If done correctly, the enrollment will be on this page
   • Review for accuracy, especially starting and ending dates
   • If incorrect, select Edit Enrollment and correct information

Enrolling New Children

After re-enrolling continuing children, you must enroll new children. You can use the new feature View ELSF Waitlist to copy information from Early Learning SF, or add all the information yourself with New Child.

View ELSF Waitlist New Feature!

Copies information for children referred to you from the Early Learning SF waitlist.

1. Go to Children in the navigation bar and select View ELSF Waitlist
2. Select Log in to Early Learning SF to link your account (must be done only once a year)
3. Choose the name of your site and select Search
4. Select Add child to fill the New Child form with family information from the waitlist
   • Complete missing information (required fields noted with red asterisk)
   • Select Save Information.
   • Select Continue with Enrollment
   • Change the year to 2019-2020. Very important to do this step!
   • Use the drop down to select the Site, Classroom, and Session.
   • Enter the child’s Start Date.
   • Enter Start Time and End Time or daily start and end times.
   • Select Days of Attendance.
   • Select child’s Funding type.
   • Select Part Time or Full Time.
   • Select Adjustment Factor if child is ELS Gap on CCTR or CSPP.
   • Press Finish.
5. Select Enroll to open the Enrollment form if the child already exists in Cocoa (schedule data from ELSF will be populated and subsidy and site info displayed).
   • Select child’s Funding type.
   • Select Part Time or Full Time.
   • Select Adjustment Factor if child is ELS Gap on CCTR or CSPP.
   • Press Finish.

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Enrolling New Children (continued)

New Child
Allows you to manually enter a new child. (Not sure if they are in Cocoa already? Search for the child’s name using Find Child. If you do not see the child, continue below.)
1. Go to Children in the navigation bar and select New Child
2. Complete Information (required fields noted with red asterisk)
3. Select Save Information.
4. Select Continue with Enrollment.
5. Change the year to 2019-2020. Very important to do this step!
6. Use the drop down to select the Site, Classroom, and Session.
7. Enter the child’s Start Date.
8. Enter Start and End Time or daily start and end times.
10. Select child’s Funding type.
11. Select Part Time or Full Time.
12. Select Adjustment Factor if child is ELS Gap on CCTR or CSPP.

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