



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

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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.
9. Select **Days of Attendance**.
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.
13. Press **Finish**.

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