

Family Record, Child Tab- More, Documents/Checklist

Last Modified on 01/04/2019 12:48 pm EST

The Documents/Checklist screen from the Children tab allows users to upload student-specific documents into the system. Administrators can create a list of required documents for students meeting certain criteria, such as the center they attend, age or grade of the student, etc.

For document setup instructions, click [here](#)

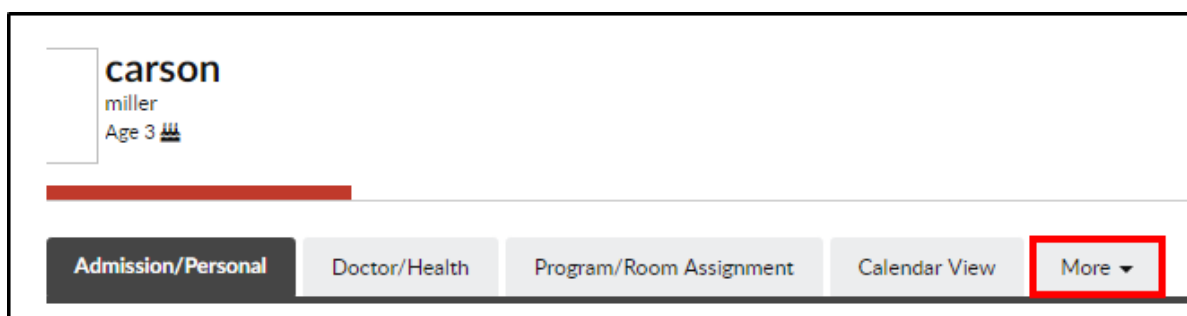
Viewing Required/Uploaded Documents Per Student

To view documents previously uploaded or uploads required for a student, follow the steps below:

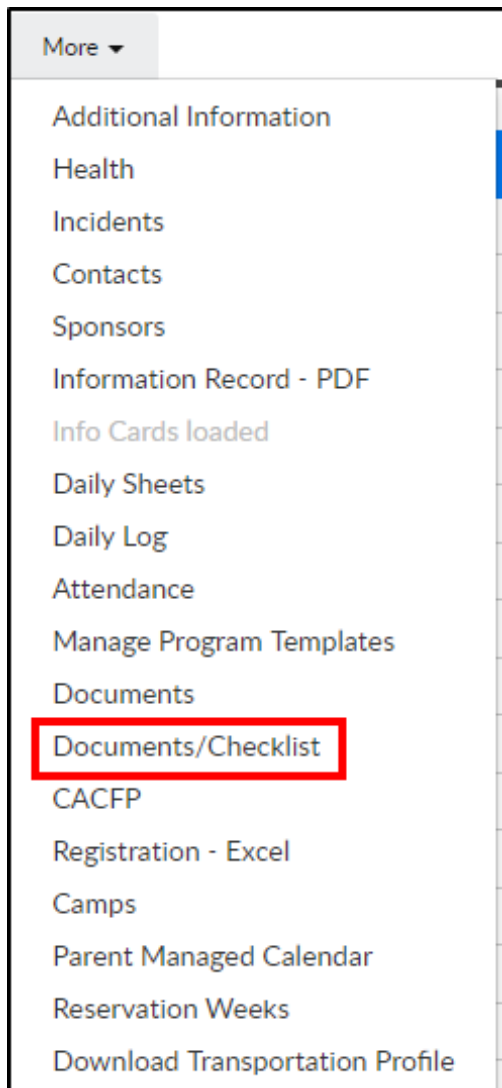
1. Navigate to a family's record and click the Children tab



2. Click the More tab



3. Select Documents/Checklist from the drop-down menu



4. The Document List section will show required and previously uploaded documents for the selected student

Document List								
Document Type	Received	Description	File Name	Display On Connect	Create Date	Expiration Date	Upload Required	
Immunization/PDF	<input type="checkbox"/>						Yes	
Miscellaneous	<input checked="" type="checkbox"/>	Child Custody Documents	950106-49500-Misc. Document.pdf	No	12/18/2018 11:01:01 AM EST		Yes	✘
Birth Certificate/PDF		Birth Certificate	950106-49498-Birth Certificate.pdf	No	12/18/2018 10:07:54 AM EST			✘

- o Document Type – the type of document selected from a drop-down list
- o Received

<input type="checkbox"/>	document is required for selected student and <u>has not</u> been uploaded
<input checked="" type="checkbox"/>	document is required and <u>has</u> been uploaded
Blank	a document was uploaded, but was not required

5. Description – the description field is a free text field to enter the name or a description of the document

6. File Name – the file name is the name of the document uploaded. The system will automatically place the student’s ID and a document ID in front of the document name. In the below example, the student’s ID is 950106, the document ID is 49500, and the file name uploaded was “Misc. Document”

Document List								
Document Type	Received	Description	File Name	Display On Connect	Create Date	Expiration Date	Upload Required	
Immunization/PDF	<input type="checkbox"/>						Yes	
Miscellaneous	<input checked="" type="checkbox"/>	Child Custody Documents	950106-49500-Misc. Document.pdf	No	12/18/2018 11:01:01 AM EST		Yes	✘
Birth Certificate/PDF		Birth Certificate	950106-49498-Birth Certificate.pdf	No	12/18/2018 10:07:54 AM EST			✘

7. Display on Connect

- Yes - the document should be available for parents to view via the Connect (Parent) Portal
- No – the document should not be viewable from Connect

8. Create Date – the date and time the document was uploaded

9. Expiration Date – if the document expires, the expiration date will be in this field

10. Upload Required

- Yes - a document is required to be uploaded
- No – no upload is required

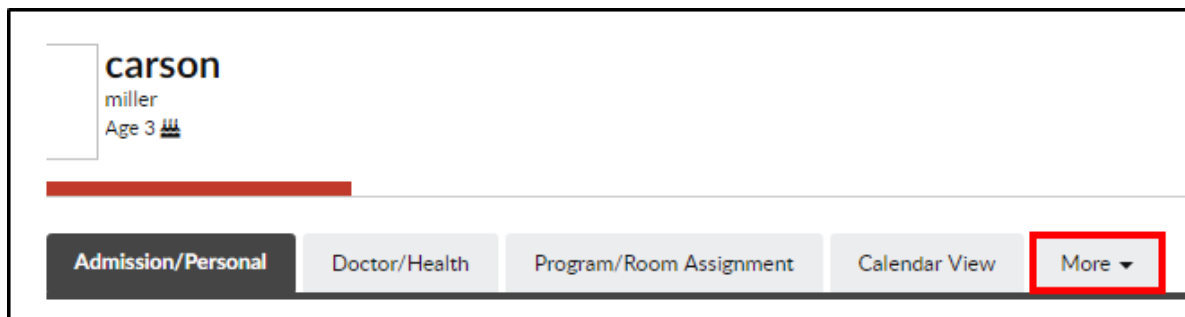
Uploading a Document to a Student’s Record

To upload a document to a student's record, follow the steps below:

1. To upload a new document, navigate to the family’s record and select the Children Tab



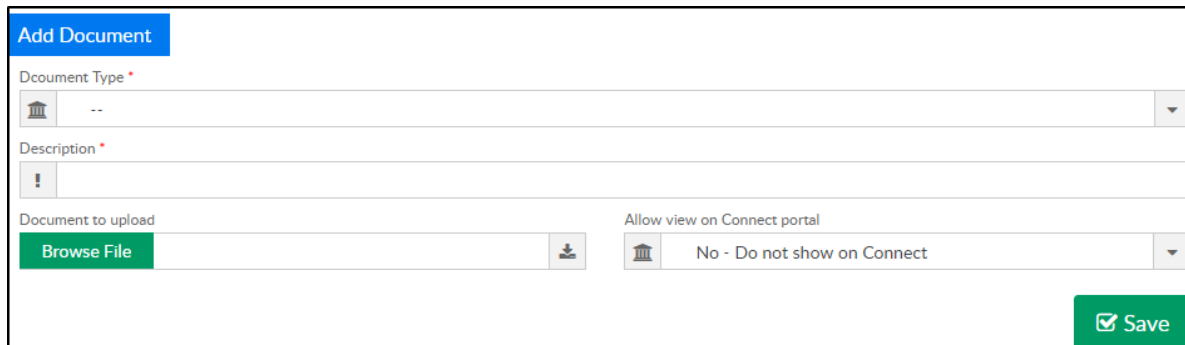
2. Click the More tab and select Documents/Checklist from the drop-down menu



carson
miller
Age 3

Admission/Personal Doctor/Health Program/Room Assignment Calendar View **More ▾**

3. Complete the Add Document section



Add Document

Document Type *
-- ▾

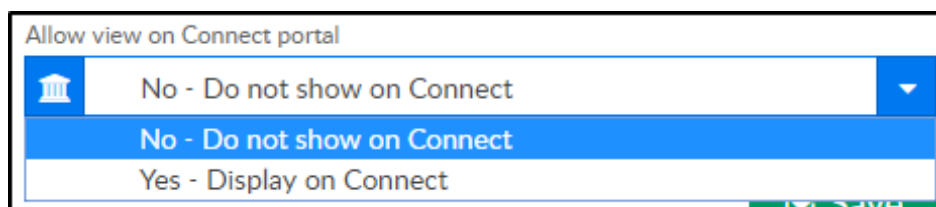
Description *
!

Document to upload Allow view on Connect portal

Browse File No - Do not show on Connect ▾

Save

4. Document Type – choose from the drop-down menu
5. Description – enter a description or name of the document
6. Document to Upload – click into the Browse File field to search and select the document to upload from the computer
7. Allow View on Connect Portal
 - No – Do no show on Connect – parents are unable to see the uploaded document on the Parent Portal
 - Yes – Display on Connect – this option will allow parents to see the uploaded document on the Parent Portal



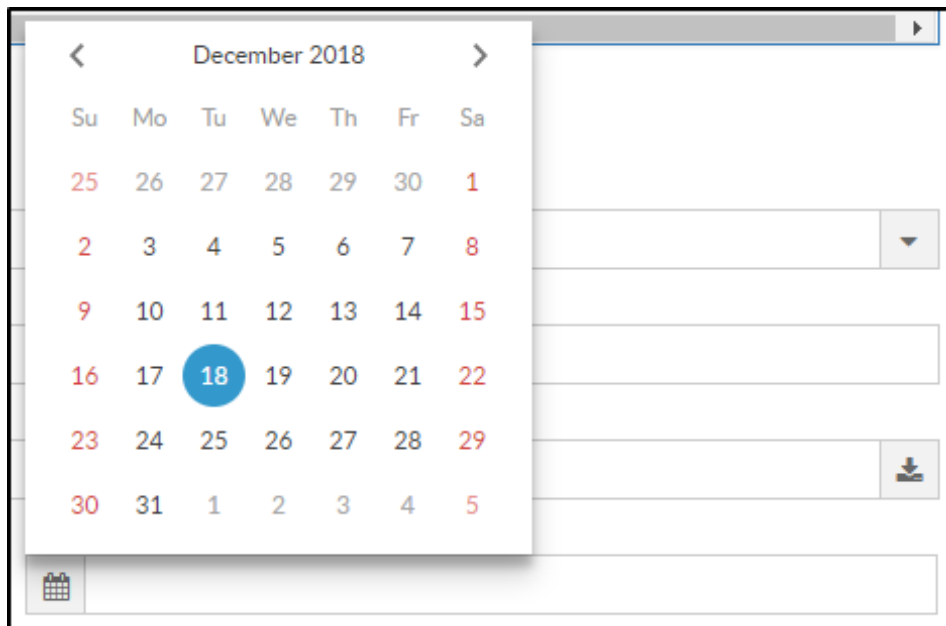
Allow view on Connect portal

No - Do not show on Connect ▾

No - Do not show on Connect

Yes - Display on Connect

8. Expiration Date – if the document expires or needs to be updated annually, semi-annually, etc., select the date from the calendar



9. Click Save

10. A confirmation popup will appear, click OK

