

Internal Monitoring Checklists – ChildPlus Instructions for Staff

General Information

Supervisor or Program Manager monitors child and family records by using various internal monitoring checklists created in ChildPlus:

- Disability
- Family Services
- Attendance and USDA
- Education
- Health Services
- Prenatal

These instructions create a sample scenario for disability monitoring. Some of the screen shots have sections cut out to fit the width of the page. Actual data entry screens will look different.

Step 1: Email Received from Supervisor or Program Manager

When the supervisor or program manager completes a monitoring checklist for your classroom/caseload, you will receive an email.

- If there are no findings, the email will tell you which monitoring checklist is completed and ready for your review.
- If there are findings, the email will contain the information below, including the indicators that require corrective action and the due date (Address By).

Send

To... Segerman, Jennifer;

Cc...

Bcc...

Subject Disability Monitoring Results

Hi Jennifer – there are a few items that require follow up. Please contact me if you have any questions and let me know when the corrections are completed.

General

Checklist Name	Actual Date
Disability Monitoring	12/16/2021

This tells you the name and date of the checklist.

If the monitor added general notes about this checklist, they will be in this part of the email.

Corrective Action Plan

Responsible Staff	Notes
Segerman, Jennifer	12/16/2021 2:01 PM <Karen Sandeno> Jennifer -- great job overall with IEP documentation and follow up.

Corrective Action Details

Indicator #	Indicator Text	Address By
3	Attachments: Current consent with Part B/C provider and current IFSP/IEP	12/30/2021
4	Disability Flag with description	12/30/2021

This tells you the indicator(s) that require corrective action and the due date(s).

Karen Sandeno
Data & Operations Coordinator Assistant

Step 2: Open the Completed Monitoring Checklist

Go to Management tab. Click on Internal Monitoring. Locate the checklist. Click to open.

Services To-Do List Entry Express Management Dashboard Reports Enter Report # Help

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Internal Monitoring

Monitoring

Show monitoring scheduled, occurring, or due between and Include Unscheduled Refresh

Find Clear

Locate the monitoring record using information from the email.
Click to open the checklist.

Add Monitoring Record

Click the icon in any column header to filter records. Drag one or more column headers into this area to group by that column. Right click any column header for more options.

Checklist	Site	Classroom	Record ID	Due Date	Responsible St...	Scheduled Date	Scheduled Mon...	Actual Date	Actual Monitor	Monitoring Stat...	CAP Due	CAP Status
Disability Monit...	Esquire Hills He...	Esquire Hills He...	Sample					12/16/21	Sandeno, Karen	Completed	12/16/21	CAP Items Pending Ad...
Health & Safety...	Esquire Hills He...	Esquire Hills He...		12/13/21	Dunklin, Brittany	12/13/21	Dunklin, Brittany	12/13/21	Dunklin, Brittany	Completed		No Findings
Health & Safety...	Esquire Hills He...	Esquire Hills He...		12/7/21	Dean, Morgan	12/7/21	Dean, Morgan	12/7/21	Dean, Morgan	Completed		No Findings

The checklist opens as a new tab. The General tab has basic set up data for the checklist. Click on next tab: Monitoring Results.

Internal Monitoring

Monitoring Disability M... Esquire Hills Head Start - 12/16/2021

General Monitoring Results Corrective Action Plan (CAP) Monitor's Follow-Up

Site: Esquire Hills Head Start Classroom: Esquire Hills Head Start Record ID: Sample

Due by: Policies & Procedures

Scheduled: Monitoring Status: Completed

Actual: 12/16/21 Sandeno, Karen CAP Status: CAP Items Pending A...

Monitoring Notes

Under Monitoring Results, you can review the results by indicator and any notes from Supervisor or Program Manager.

- If all results are compliant or not applicable, you are done with the process for this checklist.
- If there are non-compliant indicators, continue to Step 3.

Internal Monitoring ×

Monitoring | Disability M... Esquire Hills Head Start - 12/16/2021 ×

Save Changes
[Undo Changes](#)
[Copy to Clipboard](#)
[Lock this monitoring record](#)
[Attachments \(0\)](#)

[General](#)
Monitoring Results
[Corrective Action Plan \(CAP\)](#)
[Monitor's Follow-Up](#)

Monitoring Results - 50% (2/4) [Delete Results](#) Status: Completed [Hide Indicator](#) [Show Regulation Number](#)

Indicator #	Indicator	Result	Notes	Address By
▼ ChildPlus				
1	IFSP/IEP Summary	Compliant		
2	Additional Activity is documented and includes collaboration and communication with Part B/C providers such as meetings, emails, conversations with families, joint home visits, etc.	Compliant		
3	Attachments: Current consent with Part B/C provider and current IFSP/IEP	Non-Compliant	CPID 1234	12/30/21
4	Disability Flag with description	Non-Compliant	CPID 1234 CPID 5678.	12/30/21
▼ ELMS				
5	Start and end dates current, category, district and services received	Not Applicable		
6	Compare documentation to ChildPlus	Not Applicable		

Step 3: Take Corrective Action

Click on next tab: Corrective Action Plan (CAP).

- Notes: Review the notes for information or feedback from Supervisor or Program Manager.
- Non-Compliant Indicators: this section includes the specific indicators that require corrective action and the result notes.
 - Result Notes provide the CPID so you know which record to open and make corrections.
- Corrective Actions for item: click on an indicator to activate this section for that indicator.
 - Optional: you can use the Corrective Action Plan text field for “notes to self” to help keep track of pending items, etc. See screen shots below for additional information.
 - When all items under the indicator have been corrected, enter Date Completed and Save. See screen shots below for additional guidance.
 - When all corrective actions are addressed for the checklist, notify Supervisor or Program Manager via email. Document under Notes that you sent the notification email. See screen shots below for additional guidance.

Example of entering "notes to self" for corrective action that is in process

Internal Monitoring

Monitoring | Disability M... Esquire Hills Head Start - 12/16/2021

Save Changes | Undo Changes | Copy to Clipboard | Lock this monitoring record

General | Monitoring Results | **Corrective Action Plan (CAP)** | Monitor's Follow-Up

CAP Responsible Staff: Segerman, Jennifer | Due Date to Create: 12/16/21 | CAP Created: 12/16/21 | Date Verified: | Verified By: | CAP Status: CAP Items Pending Address

Notes

12/16/2021 2:11 PM Karen Sandeno Emailed monitoring results to Jennifer.
12/16/2021 2:01 PM Karen Sandeno Jennifer -- great job overall with IEP documentation and follow up.

Non-Compliant Indicators

Indicator Text	Result Notes	Address By	Date Com...
Section: ChildPlus			
3 Attachments: Current consent with Part B/C provider and current IFSP/IEP	CPID 1234	12/30/2021	
4 Disability Flag with description	CPID 1234 CPID 5678.	12/30/2021	12/16/21

Corrective Actions for Item: ChildPlus - #3

Date Completed	Corrective Action Plan
	Consent form attached. Waiting to get the current IEP.

This section tells you the specific child record(s) with non-compliant results.

Select each indicator above to activate this section. When you complete all the corrective actions for all the child records listed in Result Notes, enter date completed. In this example, indicator #3 Date Completed is left blank and the teacher made a "note to self" as a reminder of what is still pending. Adding notes here is optional.

Example of entering Date Completed when corrective action has been addressed for all child records for that indicator

Services To-Do List Entry Express Management Dashboard Reports Enter Report #

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Internal Monitoring

Monitoring Disability M... Esquire Hills Head Start - 12/16/2021

Save Changes Undo Changes Copy to Clipboard Lock this monitoring record

General Monitoring Results Corrective Action Plan (CAP) Monitor's Follow-Up

CAP Responsible Staff: Segerman, Jennifer
Due Date to Create: 12/16/21
CAP Created: 12/16/21
Date Verified:
Verified By:
CAP Status: CAP Items Pending Address

Notes

12/16/2021 2:11 PM Karen Sandeno Emailed monitoring results to Jennifer.
12/16/2021 2:01 PM Karen Sandeno Jennifer -- great job overall with IEP documentation and follow up.

Non-Compliant Indicators [Hide Indicator](#)

Indicator Text	Result Notes	Address By	Date Com...
Section: ChildPlus			
3 Attachments: Current consent with Part B/C provider and current IFSP/IEP	CPID 1234	12/30/2021	
4 Disability Flag with description	CPID 1234 CPID 5678.	12/30/2021	12/16/21

Corrective Actions for Item: ChildPlus - #4

Date Completed: 12/16/21 Corrective Action Plan

In this example, the teacher corrected the flag issues for both child records and did the following:

1. Selected indicator #4
2. Entered Date Completed
3. Clicked Save Changes

Example of entering Date Completed and documenting email notification to Supervisor or Program Manager

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Internal Monitoring

Monitoring Disability M... Esquire Hills Head Start - 12/16/2021

Save Changes Undo Changes Copy to Clipboard Lock this monitoring record

General Monitoring Results Corrective Action Plan (CAP) Monitor's Follow-Up

Segerman, Jennifer 12/16/21 12/16/21 CAP Items Pending Address

Notes

12/21/2021 2:37 PM Jennifer Segerman Emailed Karen to let her know corrections completed.
12/16/2021 2:11 PM Karen Sandeno Emailed monitoring results to Jennifer.
12/16/2021 2:01 PM Karen Sandeno Jennifer -- great job overall with IEP documentation and follow up.

Non-Compliant Indicators [Hide Indicator](#)

Indicator Text	Result Notes	Address By	Date Com...
Section: ChildPlus			
3 Attachments: Current consent with Part B/C provider and current IFSP/IEP	CPID 1234	12/30/2021	12/21/21
4 Disability Flag with description	CPID 1234 CPID 5678.	12/30/2021	12/16/21

In this scenario, the teacher received the IEP and attached it to CPID record. Then, the teacher opens up the Disability Monitoring Checklist where the corrective action was pending and follows these steps:

1. Under Corrective Action Plan, select the indicator.
2. Enter Date Completed.
3. Send email to the monitor to notify checklist is completed.
4. Document in notes (above) that email notification sent.
5. Click Save Changes.

Corrective Actions for Item: ChildPlus - #3

Date Completed Corrective Action Plan

12/21/21 Consent form attached. Waiting to get the current IEP.

Example of how the status updates on the list of monitoring records once all corrective action items are addressed

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Internal Monitoring

Monitoring

Show monitoring scheduled, occurring, or due between and Include Unscheduled [Refresh](#) [Add Monitoring Record](#)

[Find](#) [Clear](#)

Click the icon in any column header to filter records. Drag one or more column headers into this area to group by that column. Right click any column header for more options.

Checklist	Site	Classroom	Record ID	Due Date	Responsible St...	Scheduled Date	Scheduled Mon...	Actual Date	Actual Monitor	Monitoring Stat...	CAP Due	CAP Status
Disability Monit...	Esquire Hills He...	Esquire Hills He...	Sample					12/16/21	Sandeno, Karen	Completed	12/16/21	CAP Items All Addressed
Health & Safety...	Esquire Hills He...	Esquire Hills He...		12/13/21	Dunklin, Brittany	12/13/21	Dunklin, Brittany	12/13/21	Dunklin, Brittany	Completed		No Findings
Health & Safety...	Esquire Hills He...	Esquire Hills He...		12/7/21	Dean, Morgan	12/7/21	Dean, Morgan	12/7/21	Dean, Morgan	Completed		No Findings