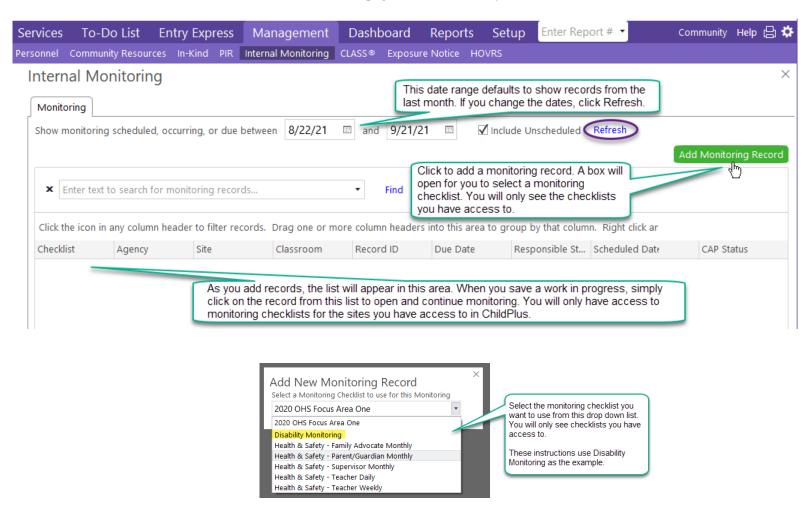
Internal Monitoring Checklists – ChildPlus Instructions for Supervisors

General Information

Go to Management tab, Internal Monitoring.

- To start a new monitoring checklist, click Add Monitoring Record.
- To continue monitoring in progress, click on the monitoring record that will appear on the list.
 - By default, you will see only the monitoring records from the last month. If you change the dates, click Refresh to update the list of monitoring records available to select.
 - You will see monitoring records for the sites you have access to in ChildPlus (even if you are not the person who did the monitoring).

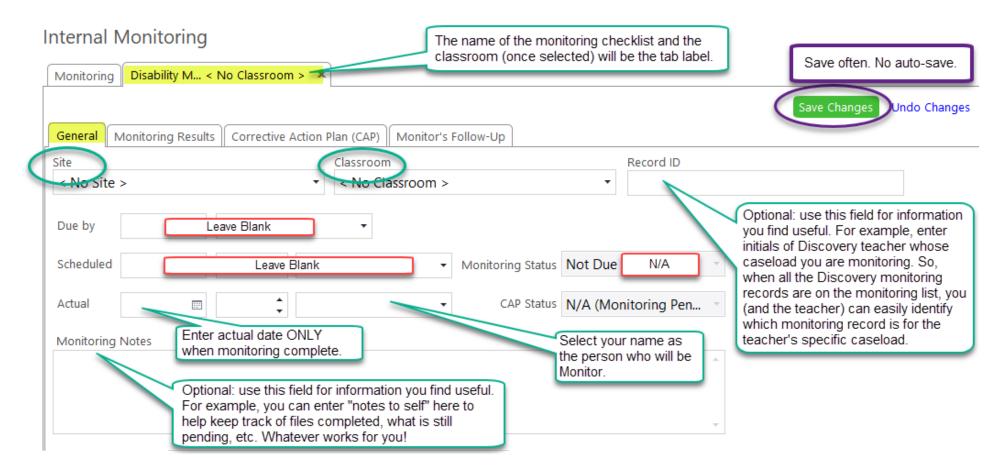
Note: Many of the screen shots have sections cut out to fit the width of the page. Actual data entry screens will look different.



Adding a Monitoring Record

After you select the monitoring checklist, the record opens. Under the General Tab, data enter as follows:

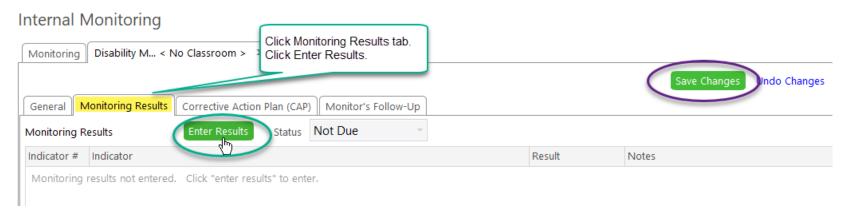
- Site: select a site. Do not leave blank.
- Classroom: select a classroom/caseload. Do not leave blank.
- Record ID: Optional for information you find useful.
- Due by: Leave Blank.
- Scheduled: Leave Blank.
- Monitoring Status: Not Applicable (because we do not schedule in advance).
- Actual: never enter the actual date before monitoring is complete (because you do not want to generate corrective action due dates before you complete the monitoring checklist).
- Select your name to identify yourself as the person doing the monitoring (Actual Monitor).
- Monitoring Notes: Optional for information you find useful. For example, you can enter "notes to self" here to help keep track of files completed, what is still pending, etc. Whatever works for you!



Monitoring Results

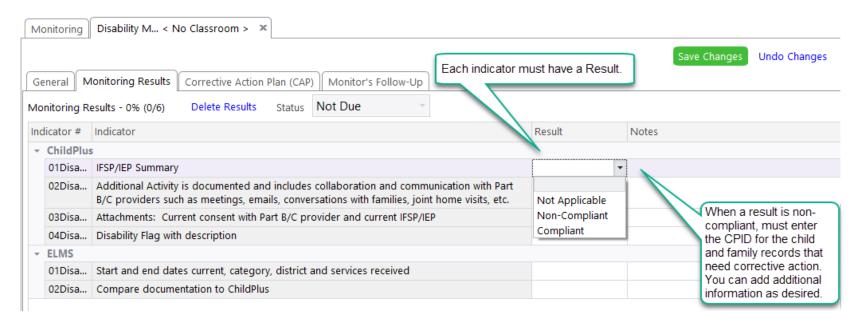
To use the monitoring checklist and enter your monitoring results, click on Monitoring Results tab in the specific checklist record you created.

Note: when working with monitoring checklists, always click Save Changes. ChildPlus does not auto-save in this module.



When you click Enter Results, the indicators load in.

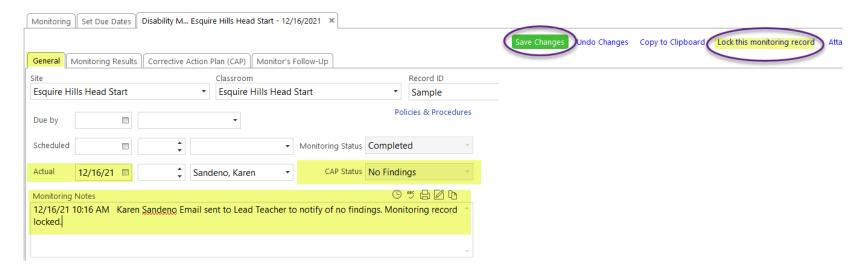
- Each indicator must have a result.
- Non-compliant indicators must have CPID(s) entered under Notes to identify the records that need corrective action. You can add additional notes as desired.



Monitoring Completed with No Findings

When the monitoring checklist is completed and there are no findings, follow these steps:

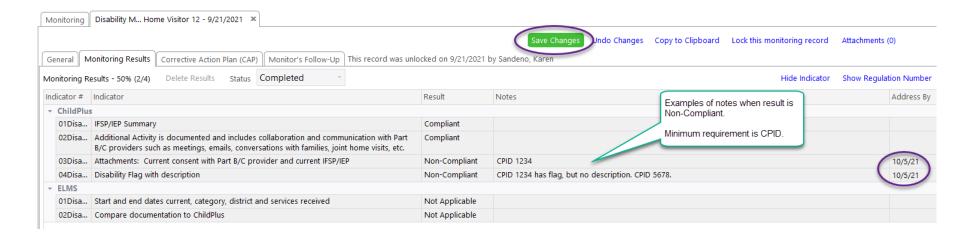
- 1. Click General tab and enter the actual date.
- 2. Notify the staff person via email that monitoring is complete and there are no findings. Include Checklist Name and Actual Date so the staff person can locate the correct monitoring record to open it and review the results, especially if you have added notes about the compliant indicators.
- 3. Add a monitoring note (under General tab) to document that you sent the email to the staff person.
- 4. Save Changes.
- 5. Lock the monitoring record.



Monitoring Completed with Findings

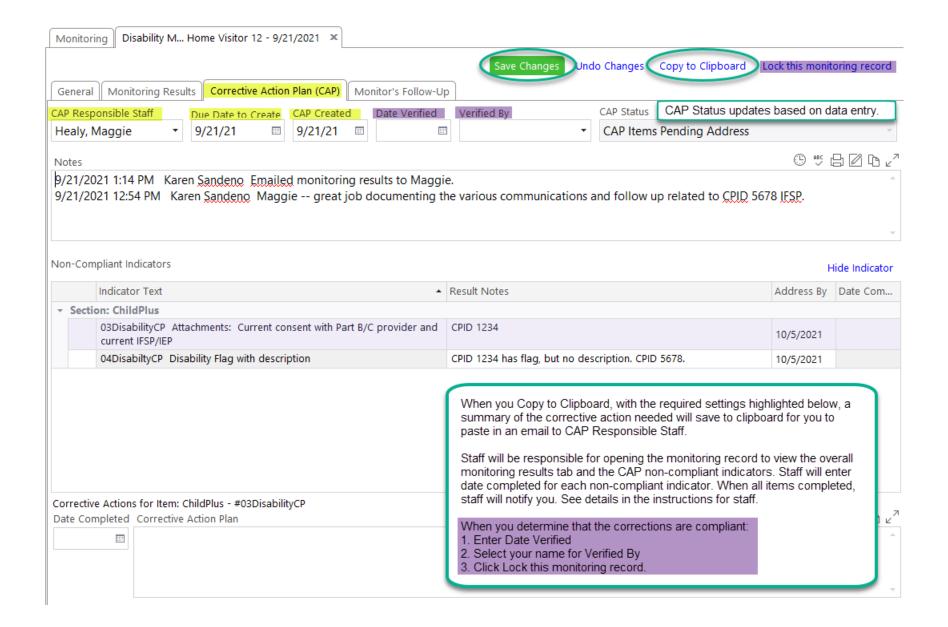
When monitoring is completed and there are findings, follow these steps:

- 1. Click over to General tab and enter Actual Date.
- 2. Click back to the Monitoring Results tab. Notice that "Address By" dates auto-populate for the non-compliant indicator results. The default setting for Address By is 2 weeks. If needed, you can change the date(s) to meet individual circumstances. The reason for changing the date must be documented in Notes under Corrective Action Plan (CAP) tab.
- 3. Save Changes.



- 4. Click on Corrective Action Plan (CAP) tab. Data enter:
 - CAP Responsible Staff: select staff person responsible for corrective action.
 - Due Date to Create: enter date monitoring checklist was completed (Actual date).
 - CAP Created: enter date monitoring checklist was completed (Actual date).
 - Notes: enter any general comments, feedback you would like to share with the staff person, reason for changing the Address By date, if applicable. After you send the email notification about monitoring results, log that in to this notes area.
- 5. Click Copy to Clipboard. Select settings. Click OK. See below for required settings.
- 6. Send email to staff person responsible for corrective action, paste clipboard. See sample email below.
- 7. When you receive email notification from staff person that all corrective action items have been addressed, you must follow these steps:
 - a. Verify that all corrections meet requirements. If not, follow up with staff person and document in Notes.
 - b. Enter Date Verified and Verified By (only when all corrections meet requirements).
 - c. Lock the monitoring record. See purple highlights below.

Final Version 1/2.1/2.022.



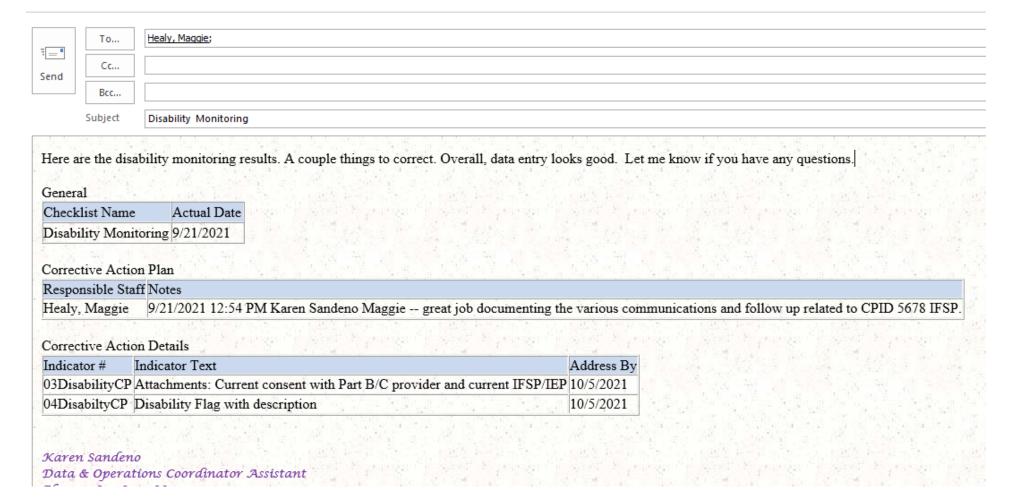
Required Settings for Copy to Clipboard

When you click Copy to Clipboard, the following box opens. Select the highlighted items. Click Ok.

This information saved to the clipboard will be pasted in an email to the staff person responsible for corrective action.

Copy Monitoring Results to the Clipboard	
General All	Corrective Action Plans 🗌 All
✓ Monitoring Checklist Name	✓ Indicator #
Location Monitored	✓ Indicator Text
Responsible Staff	✓ Notes
☐ Due Date	Corrective Action Plan Text
Scheduled Monitor	Corrective Action Plan Notes
☐ Scheduled Date	✓ Responsible Staff
Scheduled Time	☑ Address By
Actual Monitor	Date Addressed
☑ Actual Date	☐ Date Verified
Actual Time	☐ Verified By
Results All	Follow Ups
☐ Show only non-compliant results	Responsible Staff
Compliance Score	☐ Scheduled Date
☐ Indicator #	☐ Actual Date
☐ Indicator Text	□ Notes
Result	
Result Notes	
□ All	Ok Cancel

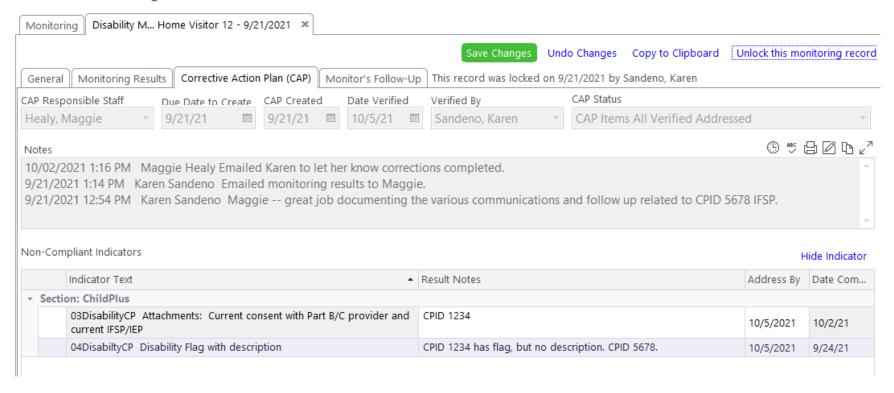
Example of Email to Staff when Corrective Action Needed



Example of Verified and Locked Internal Monitoring Checklist

As the list of monitoring records grows, locking the record will help make sure no one makes changes by accident.

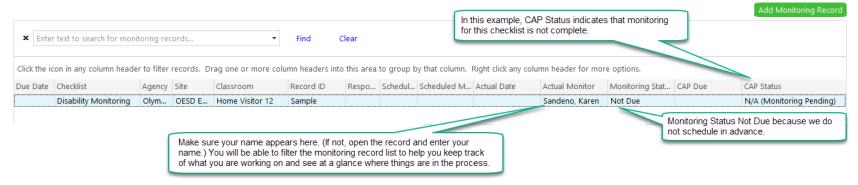
Internal Monitoring



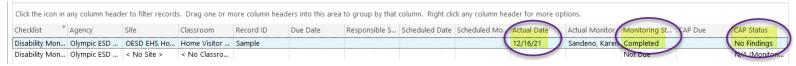
Navigating the List of Monitoring Records

As the monitoring process moves along, the monitoring record list shows key information about the status of monitoring for a specific checklist. You can filter on any of the headings to help locate a record.

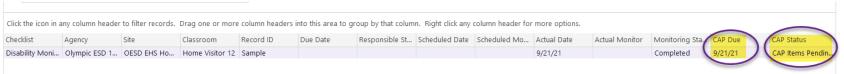
Example of Monitoring in Progress



Example of Monitoring Completed, No Findings



Example of Monitoring Completed, Corrective Action Due Date, Items Pending



Example of Corrective Action Complete and Verified

