

# STEP BY STEP GUIDE:

Importing, Syncing, and Updating Student Data from  
ChildPlus





First make sure you have  
downloaded a .CSV file from  
ChildPlus!

We'll be using a .CSV file  
exported from ChildPlus to  
import/update your agency's roster.

# Step 1: Select # 6511 Learning Genie Export (Grid)

The screenshot shows the ChildPlus application interface. The 'Reports' menu is highlighted with a red box. The 'Miscellaneous' category is selected in the left sidebar, also highlighted with a red box. The main content area displays a list of reports under the 'Miscellaneous' category. The report '6511 - Learning Genie Export (Grid)' is highlighted with a red box. The 'Export' column for this report is also highlighted with a red box. The description for this report is 'Displays Learning Genie fields for export.'

N...	Name	Category	Sub-C
2611	Monthly Fees and Payments (Grid)	Fees	
2612	Fees Account Summary (Grid)	Fees	
2613	Fee Transaction Details (Grid)	Fees	
3011	Missing Health Event (Grid)	Health	
3012	Tuberculosis Information (Grid)	Health	
3013	Emergency Medical Information (Grid)	Health	
3421	BMI At Enrollment and At End of Enrollment (Grid)	Health	
3570	Concern(Regardless of Diagnosis)	Disability	
4011	Families with No Participants (Grid)	Family	
4012	Families with Multiple Participants in Program Term (...)	Family	
4013	Contacts (Grid)	Family	
4014	Adult Education and Employment History (Grid)	Family	
4016	Groups (Grid)	Family	
4017	Individuals in Multiple Families (Grid)	Family	
4018	Primary Language (Grid)	Family	
4019	FPA / Needs Assessment (Grid)	Family	
4020	Primary Race (Grid)	Family Info	
4340	InKind Defaults (Grid)	InKind	
4341	InKind Tuberculosis Information Attached to a Child (...)	InKind	
6502	One Call Now (Grid)	Export	
6503	SchoolMessenger Student Export (Grid)	Export	
6504	SchoolMessenger Personnel Export (Grid)	Export	
6505	call-em-all (Grid)	Export	
6506	DialMyCalls Export (Grid)	Export	
6507	BrightArrow Export (Grid)	Export	
6511	Learning Genie Export (Grid)	Export	
9800	PIR Answers (Grid)	PIR	
9801	PIR Calculation Settings (Grid)	PIR	
9802	PIR Performance Indicators (Grid)	PIR	
9803	Head Start PIR Snapshot (Grid)	PIR	
9804	Early Head Start PIR Snapshot (Grid)	PIR	
9876	Age Eligible Children(0-5)	Health	

Tip: to view multiple reports, select a report from the list, click on the "Select a Report" tab, and select another report.

In Reports...

1.) Miscellaneous

2.) 6511 Learning Genie Export (Grid)

You can also search for report # 6511

## Step 2: Review and Export

ChildPlus

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

Select a Report 9700 - PIR Report (precalculated values and overrides) 9900 - PIR Report (current values) 6511 - Learning Genie Export (C >

Export View in Grid Print Preview X

Program Term  
Head Start 2020-2021

Include other Program Terms in the same School Year

Location  
Agency  
< All Agencies >

Site  
< All Sites >

Classroom  
< All Classrooms >

Status  
 All  
 New  
 Waitlisted  
 Accepted  
 Enrolled  
 Dropped  
 Drop/Wait  
 Drop/Accept  
 Completed  
 Abandoned

Report columns to show  
< All Columns >

Grid lines  
 Horizontal  
 Vertical

- 1.) Select the Program Term and check mark 'Include other program Terms in the same School Year'
- 2.) Select Status and check mark 'Enrolled' only
- 3.) Select Report columns to show and <All Columns>
- 4.) Click on Export
- 5.) Save the student roster as a .csv (comma delimited)

## Step 3: Double check the following options

Report columns to show

< All Columns >

All

- Agency Name
- Birthday
- ChildName (First)
- ChildName (Last)
- ChildPlus ID
- Class Name
- Enrolled Date
- Enrollment Status
- Gender Code

x

All

- Gender Code
- Hispanic
- Home Language
- IEP Disability Code Description
- ParticipationYear
- Primary Adult Email
- Primary Language
- Program Name
- Race

x

All

- Program Name
- Race
- Race American Indian Or Alaskan Native
- Race Asian
- Race Black or African American
- Race Hispanic
- Race Multi-Racial
- Race Native Hawaiian or Other Pacific Islander
- Race Other
- Race Other Description
- Race White
- Secondary Adult Email
- Site Name


x

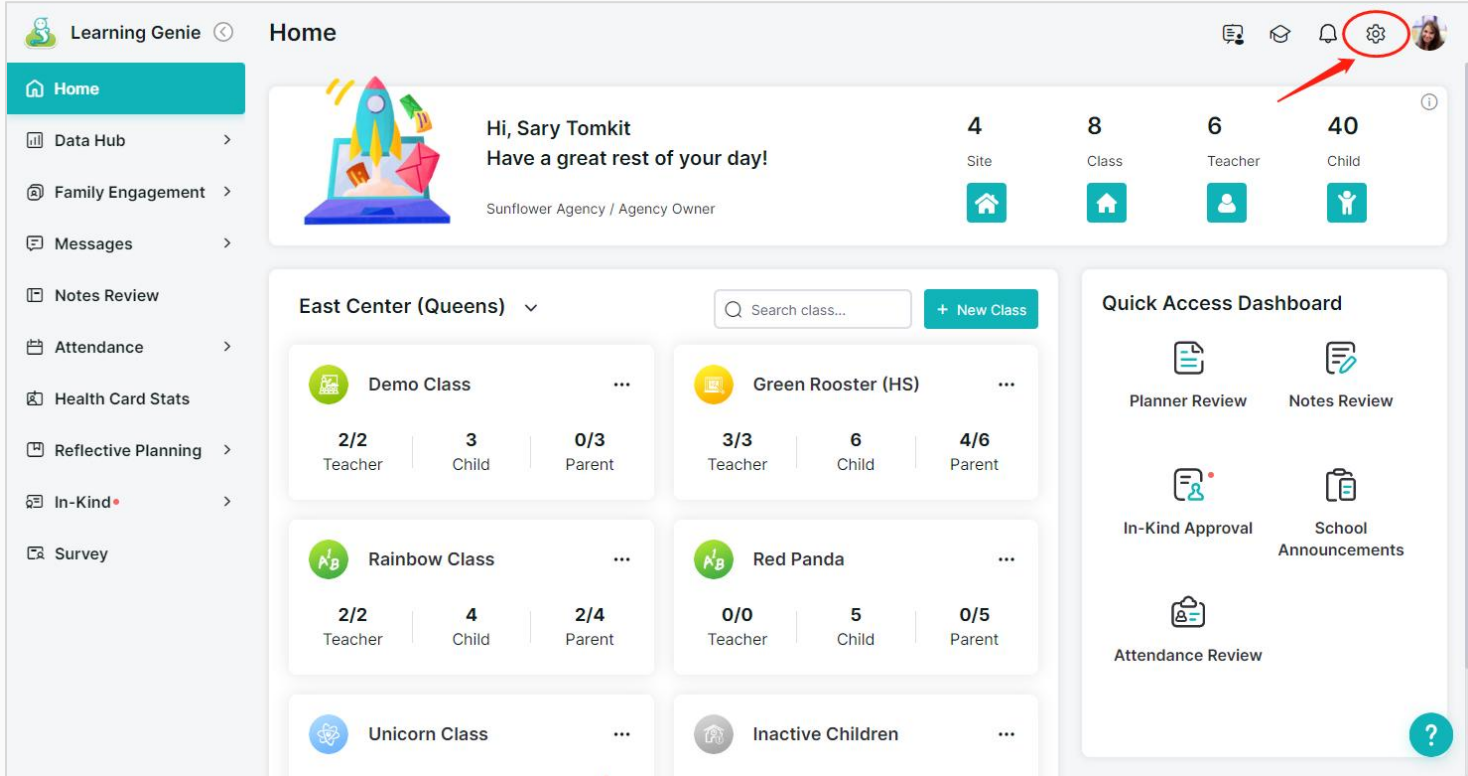
This process can be used to import rosters for the first time, or for updating and syncing your agency's information.

Any students will be added, moved, or removed as needed. Any new centers will be labeled “new” during the import process.



# Step 1: Go to Admin Settings

- From your home screen, click on the “  ” icon.



The screenshot shows the Learning Genie Home interface. At the top right, there is a navigation bar with icons for messages, a graduation cap, a bell, and a settings gear. The settings gear icon is circled in red, and a red arrow points to it from the right. Below the navigation bar, the main content area is divided into several sections. On the left is a sidebar menu with options like Home, Data Hub, Family Engagement, Messages, Notes Review, Attendance, Health Card Stats, Reflective Planning, In-Kind, and Survey. The main content area starts with a greeting: "Hi, Sary Tomkit Have a great rest of your day!" followed by "Sunflower Agency / Agency Owner". To the right of the greeting are four statistics: 4 Site, 8 Class, 6 Teacher, and 40 Child, each with a home icon below it. Below this is a section for "East Center (Queens)" with a search bar and a "+ New Class" button. It contains six class cards: Demo Class, Green Rooster (HS), Rainbow Class, Red Panda, Unicorn Class, and Inactive Children. Each card shows counts for Teacher, Child, and Parent. On the right side of the main content area is a "Quick Access Dashboard" with icons for Planner Review, Notes Review, In-Kind Approval, School Announcements, and Attendance Review.

# Step 2: Go to “Agency Management” > “Import/Sync”, select “ChildPlus”

**Learning Genie** **Import/Sync**

Back to Home

Agency Management

Import/Sync

Manage Sites

Manage Staff

Manage Children

Children Attributes

Assessment Settings

LG Courses

Reflective Planning S...

Daily Health Card

In-Kind Settings

Drop-off Note

Learning Media

Account & Security

**Please select the most appropriate import type:**  
If any child has been added manually by teachers (instead of being imported), please ensure the child's first name, last name, and birthday match those on the roster files. Otherwise there will be a duplicate of the child.

Import History

### API Sync

Our API sync will make a direct connection and sync your school data directly with your SIS, so you do not need to upload any roster files.

ONEROSTER myHeadStart ClassLink <sup>New</sup>

### SFTP Sync

Our SFTP sync will conduct a nightly sync of your uploaded roster file.

SFTP Sync in SIS Export Ratings to SIS <sup>New</sup>

### Manual Import from Roster File

Try one of these quick upload options to simultaneously import classes, teachers, children, and parents!

ChildPlus.net Professional Head Start Management Software Import from DRDP Online PowerSchool

CenterTrack By Controltec PROMIS Other

[Learn More About CenterTrack](#)



# Step 3: Select your .CSV file

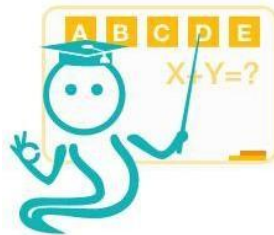
- Locate the file you have exported from ChildPlus, and click “Upload.”

The screenshot displays the 'Import from ChildPlus.net' page in the Learning Genie system. The left sidebar contains navigation options: 'Agency Management...', 'Import/Sync' (highlighted), 'Manage Sites', 'Manage Staff', 'Manage Children', 'Children Attributes', 'Assessment Setti...', and 'LG Courses'. The main content area includes a breadcrumb 'Import/Sync > Import from ChildPlus.net', a link to 'http://www.childplus.org', and instructions to connect to a ChildPlus.net account and read a PDF instruction guide. Below the text are two buttons: 'PDF instruction guide' and 'Download Template'. At the bottom, a file upload area is highlighted with a red box, containing a 'Choose File' button, the text 'No file chosen', and an 'Upload' button.

# OPTION ONE: Roster Import

This first part will show you how to import your agency roster for a brand new Learning Genie account.

If you already have data in Learning Genie and just need to do a Roster Sync, jump to [page 16](#).



# Step 4: Download and Review The Roster Review File

## Alert



We have analyzed the roster for syncing and generated a detailed report in the following link. Please double check and make changes in the roster file or Learning Genie system before proceeding.

[Download the Roster Checking File](#)

## Roster Update Results

### Sunflower Agency

Review Sheet created : 08/11/2023 11:01:35 The Last Import : 08/07/2023 15:31:42

Please review the roster change results for site, class and the number of students.

▲ If there is any discrepancy from your record, please update your import file, and run the roster update process again.

#### Site

Added: 1 Total after update: 5

Please review the roster change for site names and quantity.

Added: 1. Carlsbad

#### Classes

Added: 1 Total after update: 9

Please review the roster change for class names and quantity.

Added: Carlsbad (1)

1. Unicorn Class

#### Children

Added: 3 Removed: 0 Total after update: 43

Please review the roster change for student and quantity.

▲ **There are some sites and classes imported file doesn't include** (they are in system before import) Please review these sites and classes carefully. If they don't exist any more please update your roster file.

#### East Center (Queens) (4)

Green Rooster (HS), Rainbow Class, Red Panda, Unicorn Class

#### Learning Genie Academy (4)

Green Rooster (PS), Moon Class (K), Rainbow Class (CCSS-K), Unicorn Class (Grade 1)

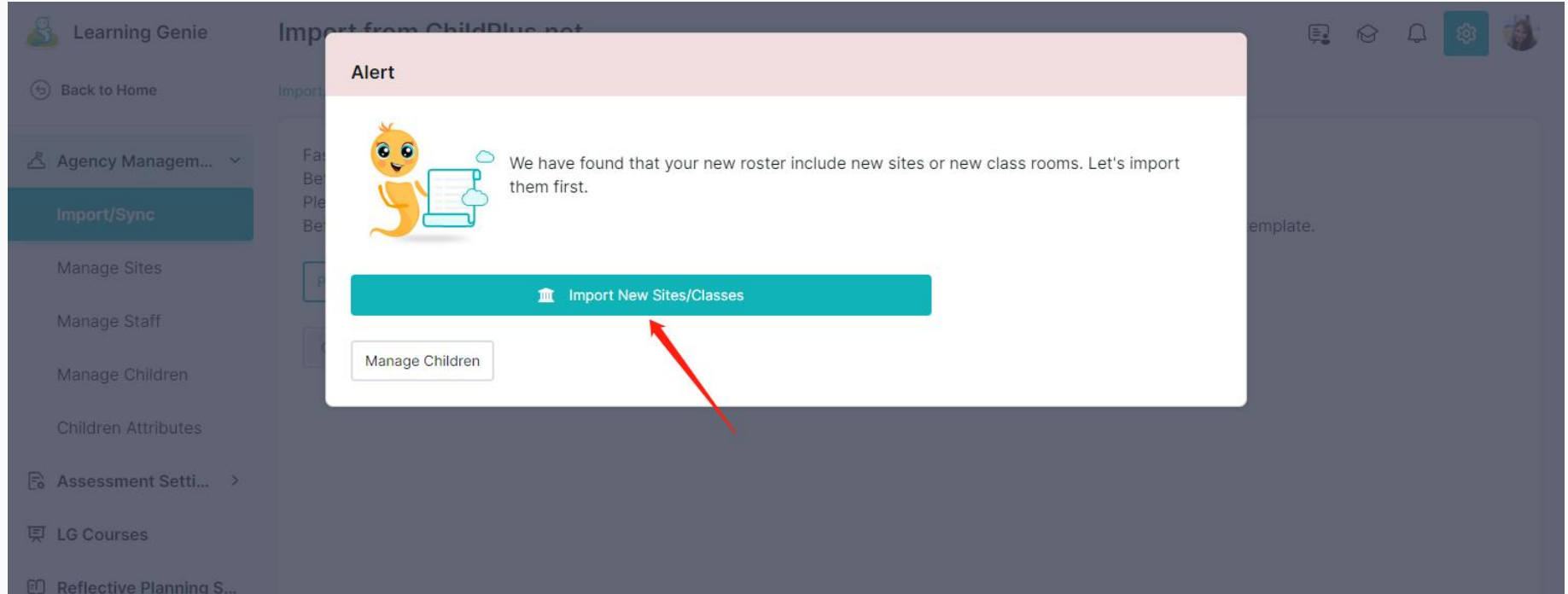
#### North Center (Stage 18) (0)

#### West Center (0)

▲ Please verify the above information before we proceed importing.

# Step 5: Proceed To Import Sites and Classes

Note: "Import" is to add new data that does not exist in Learning Genie.



The screenshot shows the Learning Genie interface with a sidebar on the left containing menu items like 'Agency Management...', 'Import/Sync', 'Manage Sites', 'Manage Staff', 'Manage Children', 'Children Attributes', 'Assessment Setti...', 'LG Courses', and 'Reflective Planning S...'. The main content area is titled 'Import from ChildPlus.net'. An alert dialog box is centered on the screen with a pink header and a white body. The dialog contains a cartoon character holding a document, the text 'We have found that your new roster include new sites or new class rooms. Let's import them first.', and two buttons: 'Import New Sites/Classes' (highlighted in teal) and 'Manage Children' (white with a grey border). A red arrow points to the 'Import New Sites/Classes' button.

**Alert**

We have found that your new roster include new sites or new class rooms. Let's import them first.

[Import New Sites/Classes](#)

[Manage Children](#)

# Step 6: Proceed To Import Sites and Classes

Note: "Import" is to add new data that does not exist in Learning Genie.

Supports auto-invite families via email.

Learning Genie

Import from ChildPlus.net

Import/Sync > Import from ChildPlus.net

The Last Import **Ms.Sary Tomkit** at **08/07/2023 15:31:42**

Sunflower Agency

Carlsbad **New**

Site Student

Class **Unicorn Class** **New**

Class rating framework

DRDP2015-PRESCHOOL Comprehensive view

Apply to all classes in the site

Apply to all sites in the agency

Set Rating Period

Set New Rating Period

Apply to all classes in the site

Teachers

Teacher First Name	Teacher Last Name	Teacher Email
There is no data yet		

Click to create teachers' accounts directly.

Students

	Children First Name	Children Last Name	Date of Birth	Status	Primary First N:
<input checked="" type="checkbox"/>	Whale	Emily	01/19/2016	In newly enrolled	
<input checked="" type="checkbox"/>	Cat	John	11/19/2015	In newly enrolled	
<input checked="" type="checkbox"/>	Starfish	Lisa	02/19/2016	In newly enrolled	

Click here if you would like us to automatically invite these families via email. 📧

Skip Import/Sync This Site

Import and load next

# Step 7: Add your rating period dates (minimum 2)

Note: you can select from your previous rating period group or add a new group.

If you have never setup any rating period group, we will walk you through the setup process after import.

The screenshot displays the 'Set Rating Period' dialog box within the Learning Genie application. The dialog is titled 'Set Rating Period' and features a dropdown menu at the top left showing '2023-2024'. Below this, there are two rating period groups. Group 1, titled 'Head Start Group', is highlighted in teal and includes two periods: '07/11/2023 - 12/23/2023 (Fall 2023)' and '01/23/2024 - 05/26/2024 (Spring 2024)'. Group 2, titled 'Head Start 2', is highlighted in light orange and includes two periods: '09/01/2023 - 10/31/2023 (Fall 2023)' and '11/01/2023 - 12/31/2023 (Winter 2023)'. Both groups have a label 'DRDP State/Head Start Children Preferred'. At the bottom right of the dialog, there are two buttons: 'Add New Group' and 'Save'. A red arrow points to the 'Save' button. The background shows the Learning Genie interface with a sidebar menu and a top navigation bar.

# Step 8: Click “Import and Load Next”.

Repeat Step 6 As Necessary

**Learning Genie** Import from ChildPlus.net

Back to Home

Agency Management... ▾

**Import/Sync**

Manage Sites

Manage Staff

Manage Children

Children Attributes

Assessment Settings... >

LG Courses

Reflective Planning S...

Daily Health Card

In-Kind Settings

Drop-off Note

Learning Media

Account & Security >

DRDP2015-PRESCHOOL Comprehensive view ▾  Apply to all classes in the site  
 Apply to all sites in the agency

Set Rating Period

Set New Rating Period

School Year Period Alias

● First rating period duration: 60 days

2023-2024 09/01/2023 - 10/31/2023 (Fall 2023) Active  
11/01/2023 - 12/31/2023 (Winter 2023)

Apply to all classes in the site

Teachers

Teacher First Name	Teacher Last Name	Teacher Email
There is no data yet		

Click to create teachers' accounts directly.

Students

<input type="checkbox"/>	Children First Name	Children Last Name	Date of Birth	Status	Primary First Name
<input type="checkbox"/>	Whale	Emily	01/19/2016	In newly enrolled	
<input type="checkbox"/>	Cat	John	11/19/2015	In newly enrolled	
<input type="checkbox"/>	Starfish	Lisa	02/19/2016	In newly enrolled	

Click here if you would like us to automatically invite these families via email. ✉

Skip Import/Sync This Site

**Import and load next**

# Congratulations! Your agency has been imported!

[Back to Import History](#)

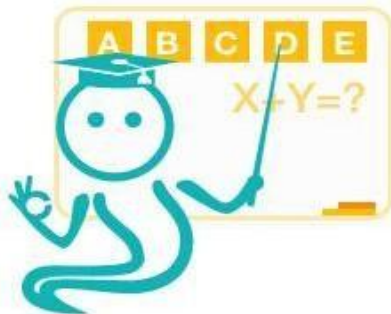
Site	Before import	Newly enrolled	Transferred from other sites	Transferred to other sites	Set to inactive	After import
Carlsbad	0	3	0	0	0	3






# OPTION TWO: Roster Sync

This first part will show you how to Sync your agency roster to update the information currently in your Learning Genie account.



# Step 4: Download and Review The Roster Review File

Alert



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### Roster Update Results

Sunflower Agency  
Review Sheet created : 08/11/2023 11:01:35 The Last Import : 08/07/2023 15:31:42

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Please review the roster change for site names and quantity.

Added: 1. Carlsbad

**Classes** Added: 1 Total after update: 9

Please review the roster change for class names and quantity.

Added: Carlsbad (1)

1. Unicorn Class

**Children** Added: 3 Removed: 0 Total after update: 43

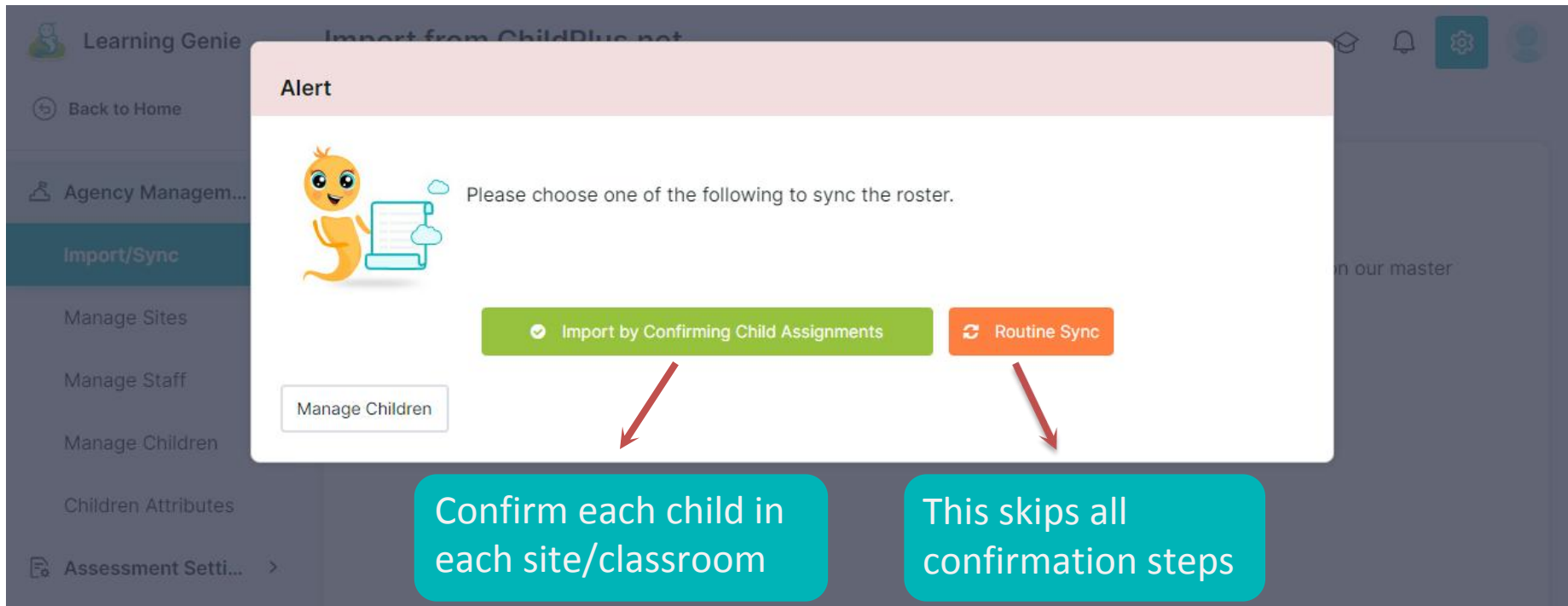
Please review the roster change for student and quantity.

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- East Center (Queens) (4)**  
Green Rooster (HS), Rainbow Class, Red Panda, Unicorn Class
- Learning Genie Academy (4)**  
Green Rooster (PS), Moon Class (K), Rainbow Class (CCSS-K), Unicorn Class (Grade 1)
- North Center (Stage 18) (0)**
- West Center (0)**

▲ Please verify the above information before we proceed importing.

# Step 9: Select whether you'd like to sync by confirming the children in each class or skip that and just do a Routine Sync



The screenshot shows the 'Alert' dialog box in the Learning Genie interface. The dialog has a pink header with the word 'Alert' and a white body. On the left is a cartoon orange character holding a document. The text says 'Please choose one of the following to sync the roster.' There are three buttons: a green button with a checkmark icon labeled 'Import by Confirming Child Assignments', an orange button with a refresh icon labeled 'Routine Sync', and a white button with a grey border labeled 'Manage Children'. Two red arrows point from the green and orange buttons to teal callout boxes below. The background shows a sidebar with 'Import/Sync' highlighted and a main area with 'Import from ChildPlus.net'.

Alert

Please choose one of the following to sync the roster.

Import by Confirming Child Assignments

Routine Sync

Manage Children

Confirm each child in each site/classroom

This skips all confirmation steps

# Step 10: For each center/class, confirm each child to be added, removed, or transferred. Then “import and load next”

Import/Sync > Import from ChildPlus.net

The Last Import **Ms. Sary Smith** at **08/11/2023 12:04:46**

Sunflower Agency

Carlsbad >

Site Student

Class Unicorn Class

Teachers

Teacher First Name	Teacher Last Name	Teacher Email
There is no data yet		


Click to create teachers' accounts directly.

Students

<input type="checkbox"/>	Children First Name	Children Last Name	Date of Birth	Status
<input type="checkbox"/>	Whale	Emily	01/19/2016	Normal
<input type="checkbox"/>	Cat	John	11/19/2015	Normal
<input type="checkbox"/>	Starfish	Lisa	02/19/2016	Normal

Skip Import/Sync This Site

Import and load next



# Congratulations! Your agency has been imported!

[Back to Import History](#)

Site	Before import	Newly enrolled	Transferred from other sites	Transferred to other sites	Set to inactive	After import
Carlsbad	0	3	0	0	0	3





Contact us  
anytime you  
need us!

- +1 (760) 576 - 4822
- [help@learning-genie.com](mailto:help@learning-genie.com)
- [www.learning-genie.com](http://www.learning-genie.com)