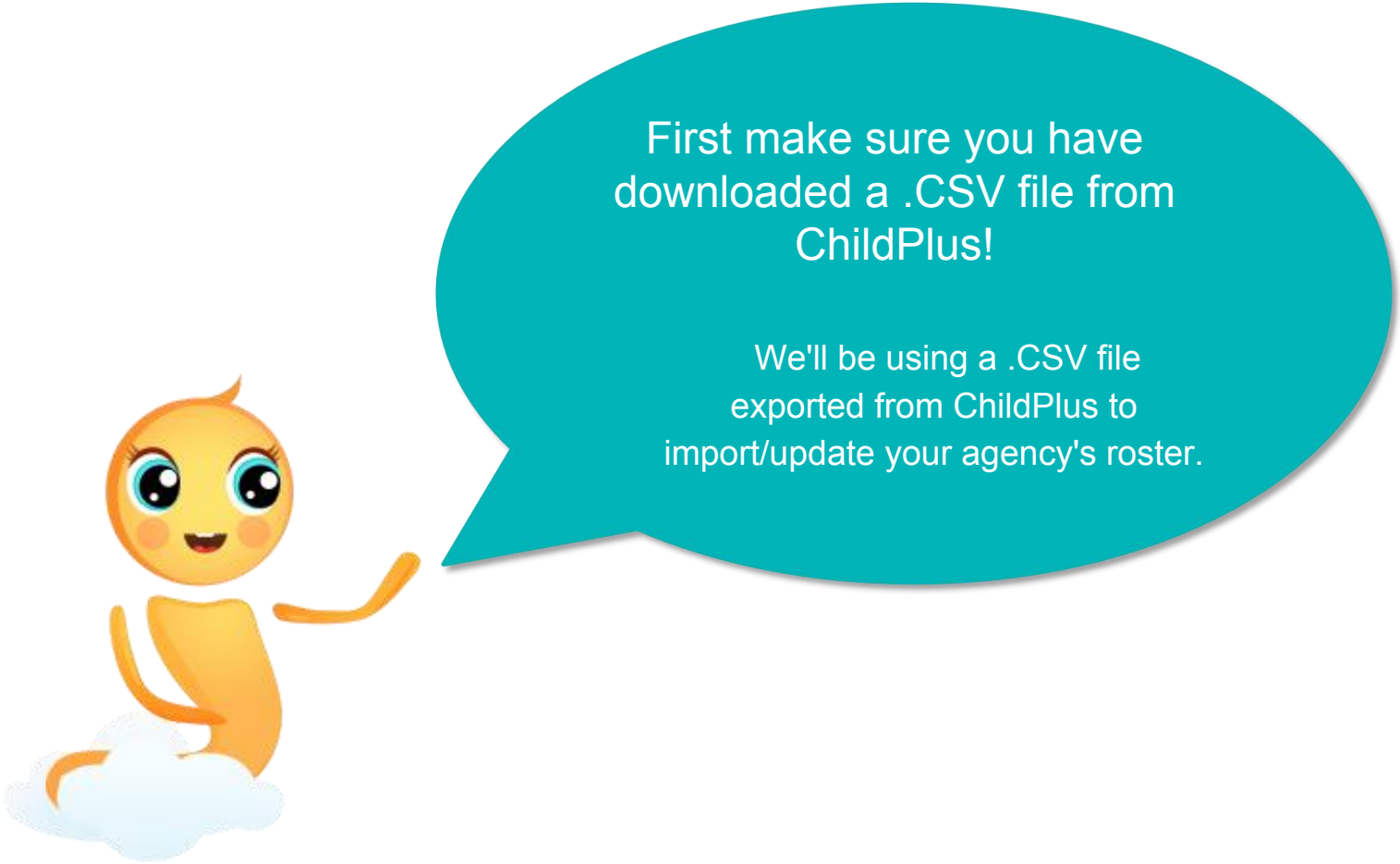
STEP BY STEP GUIDE:

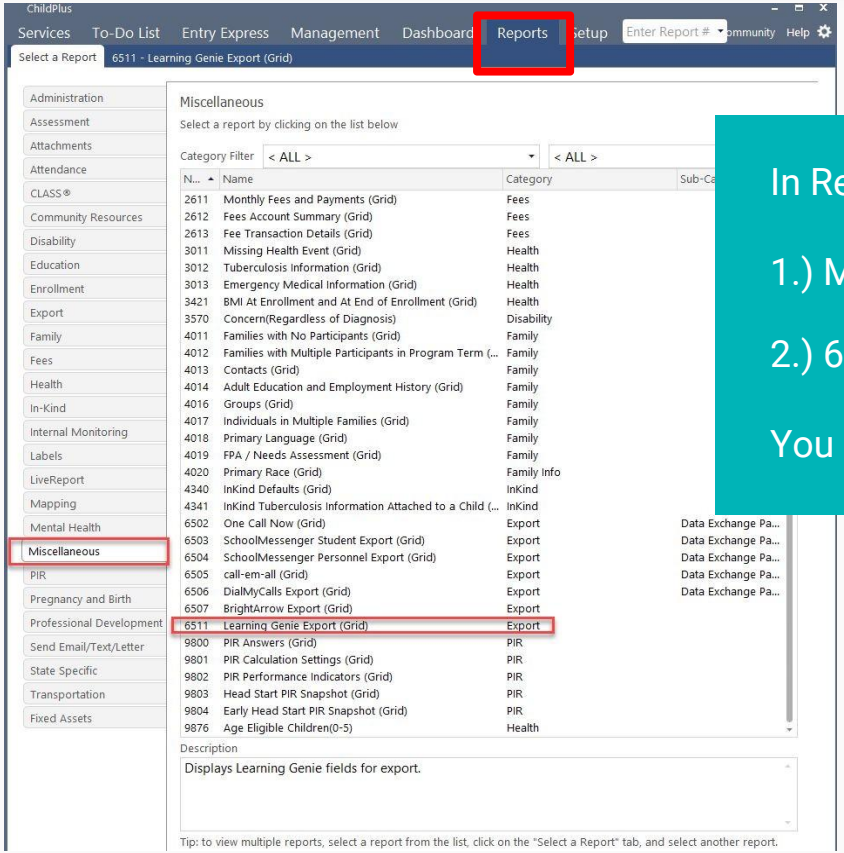
Importing, Syncing, and Updating Student Data from ChildPlus

Learning Genie Helpdesk: +1 (760) 576-4822 | help@learning-genie.com

Updated 8/11/2023


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)



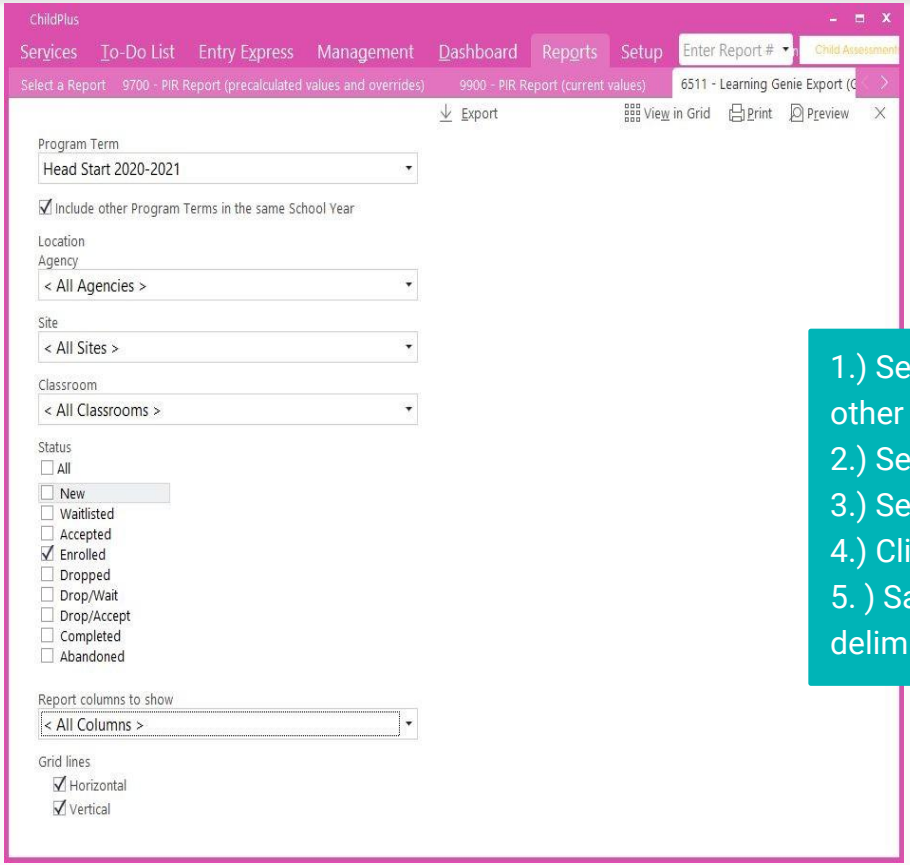
In Reports…

1.) Miscellaneous

2.) 6511 Learning Genie Export (Grid)

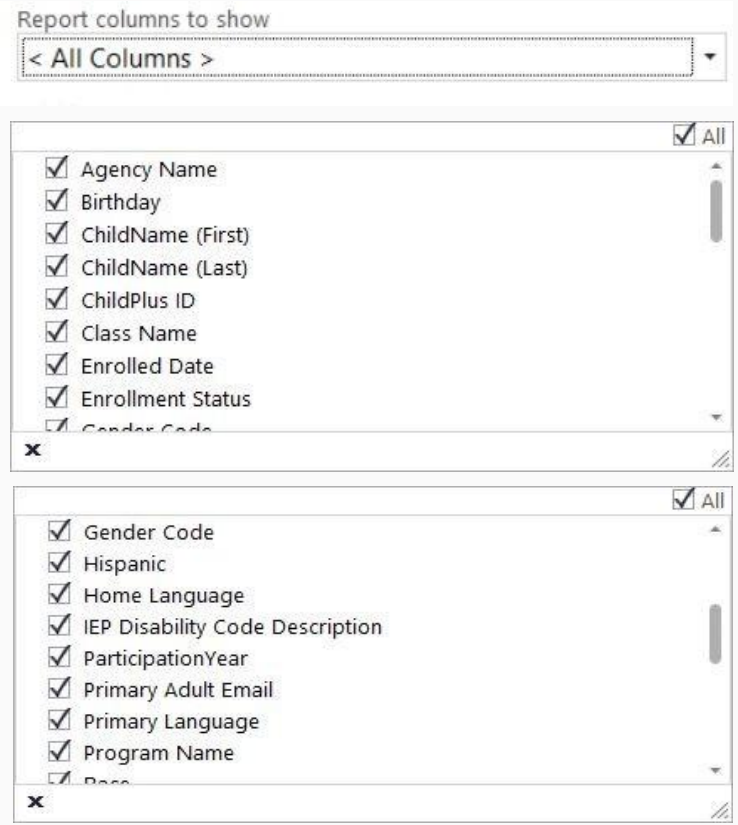
You can also search for report # 6511

Step 2: Review and Export



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

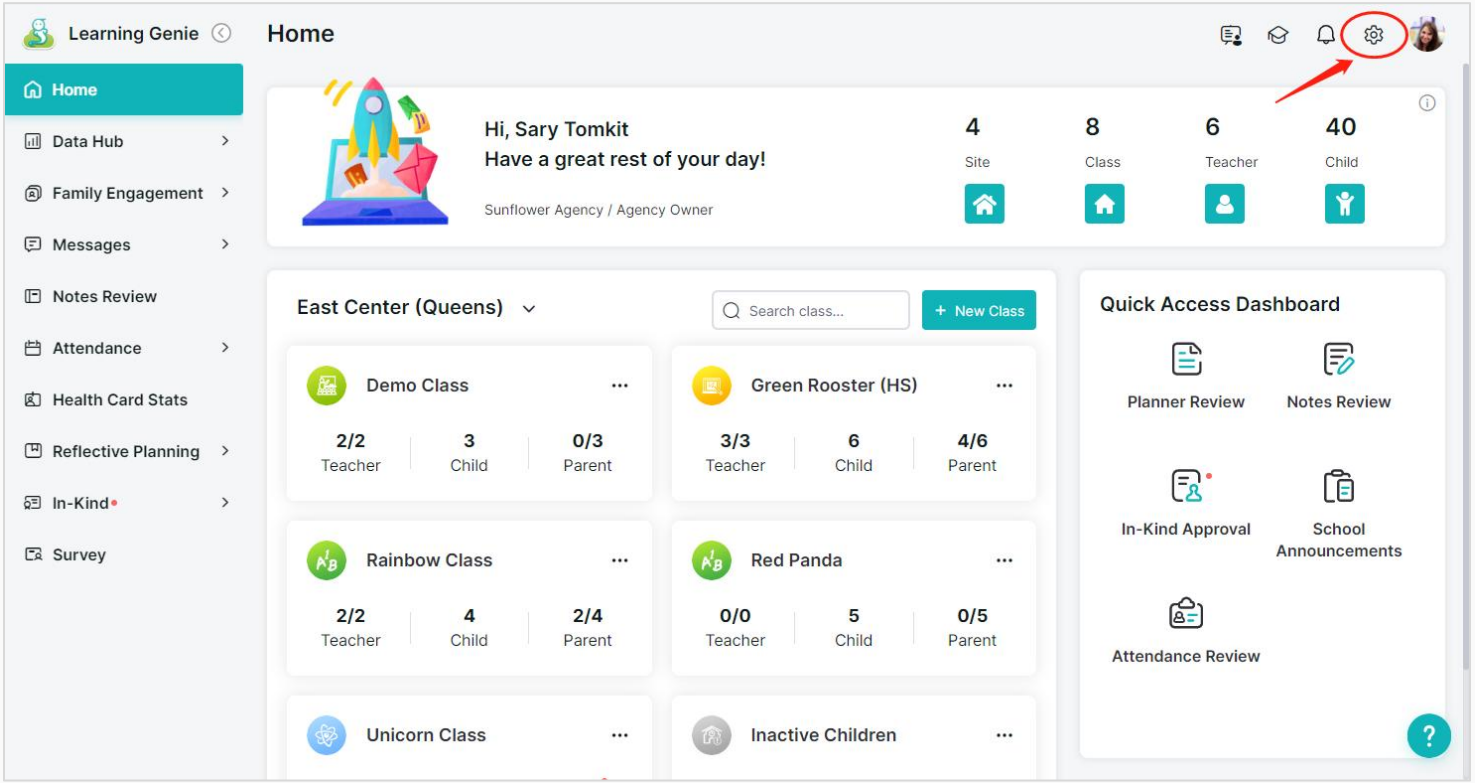


This process can be used to import rosters for the first time, or for updating and syncing your agency's information.

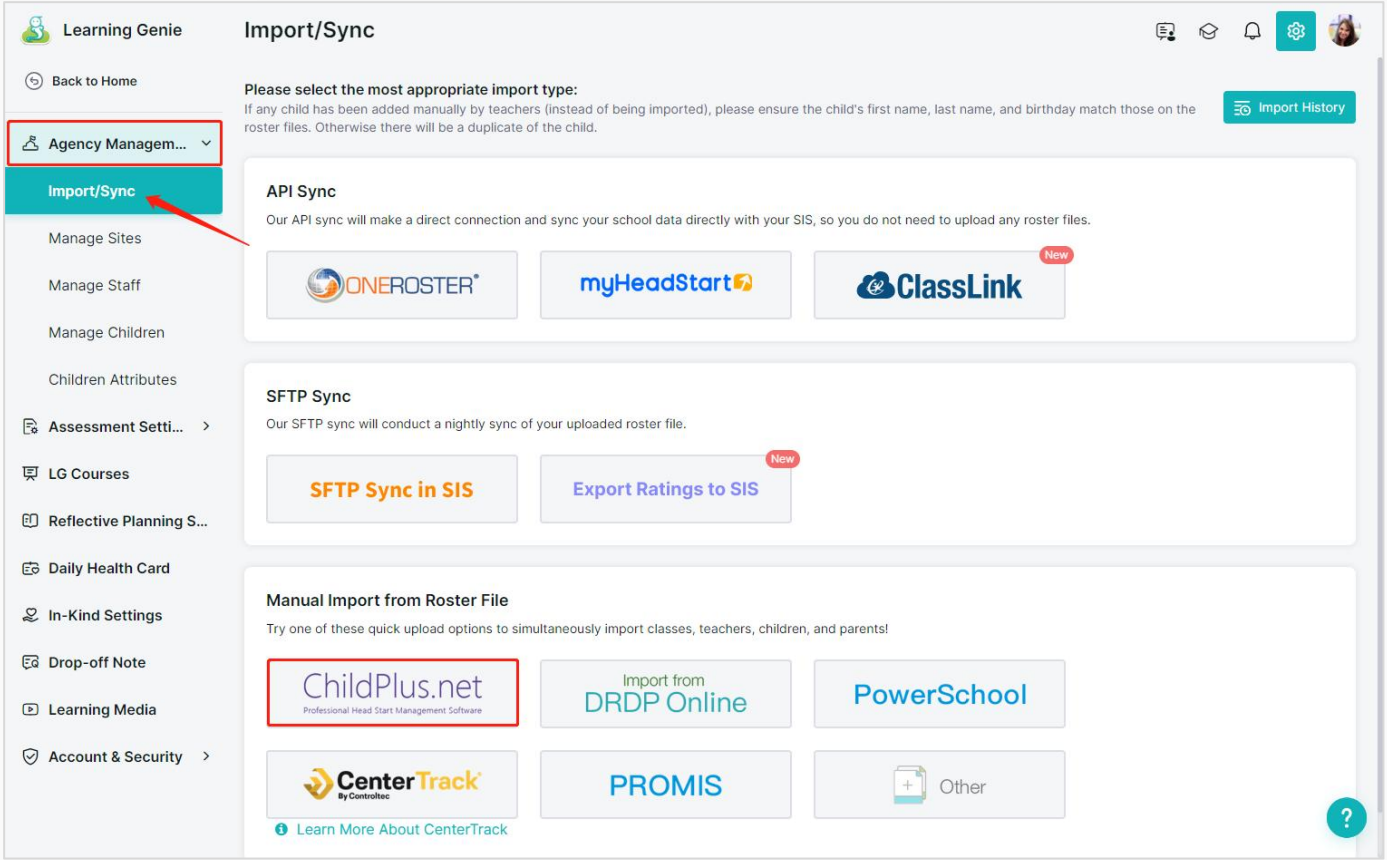
Any students will be added, moved, or removed as needed. Any new centers will be labeled “new” during the import process.

Step 1: Go to Admin Settings

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

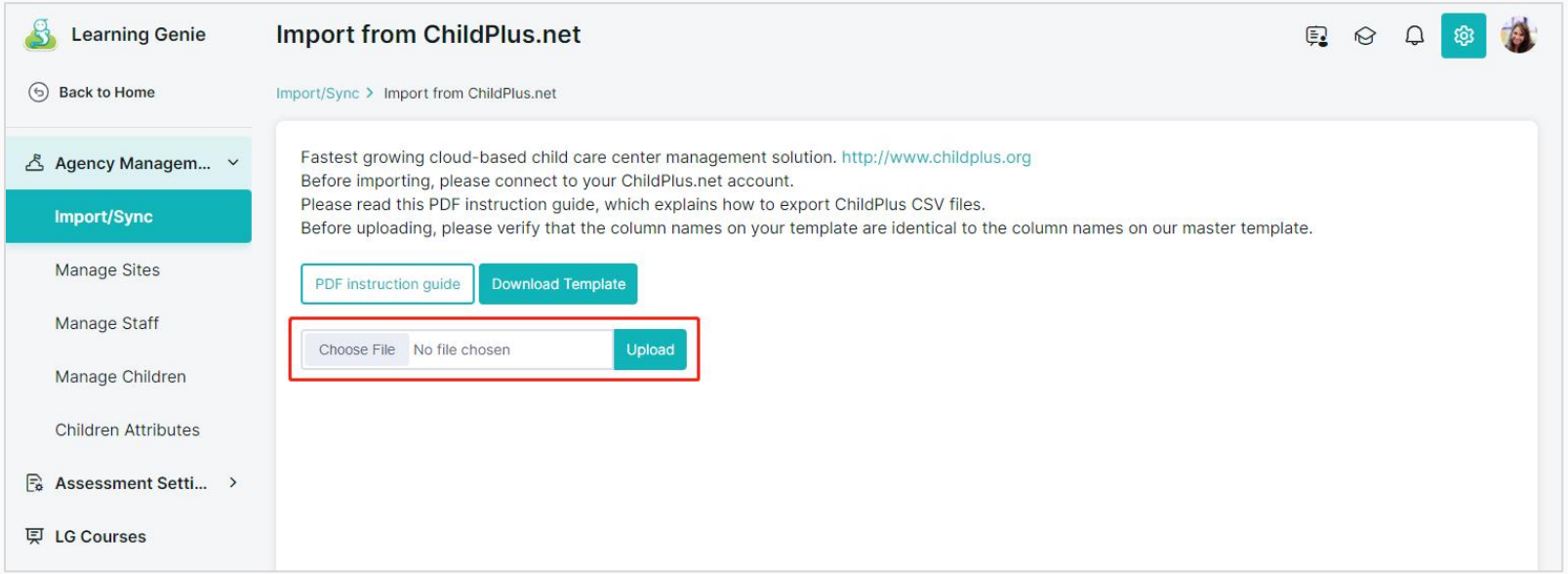


Step 2: Go to “Agency Management” > “Import/Sync”, select “ChildPlus”



Step 3: Select your .CSV file

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

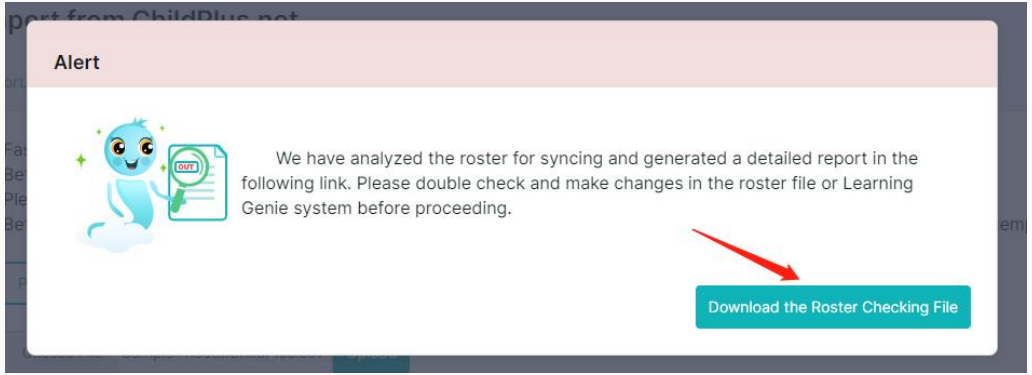


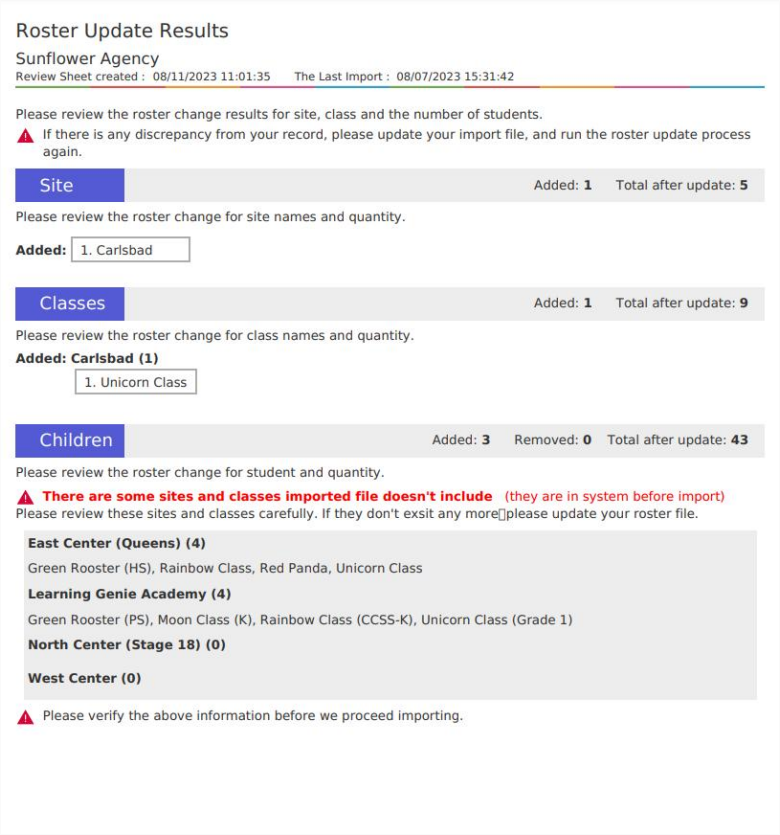
OPTION ONE: Roster Import

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.

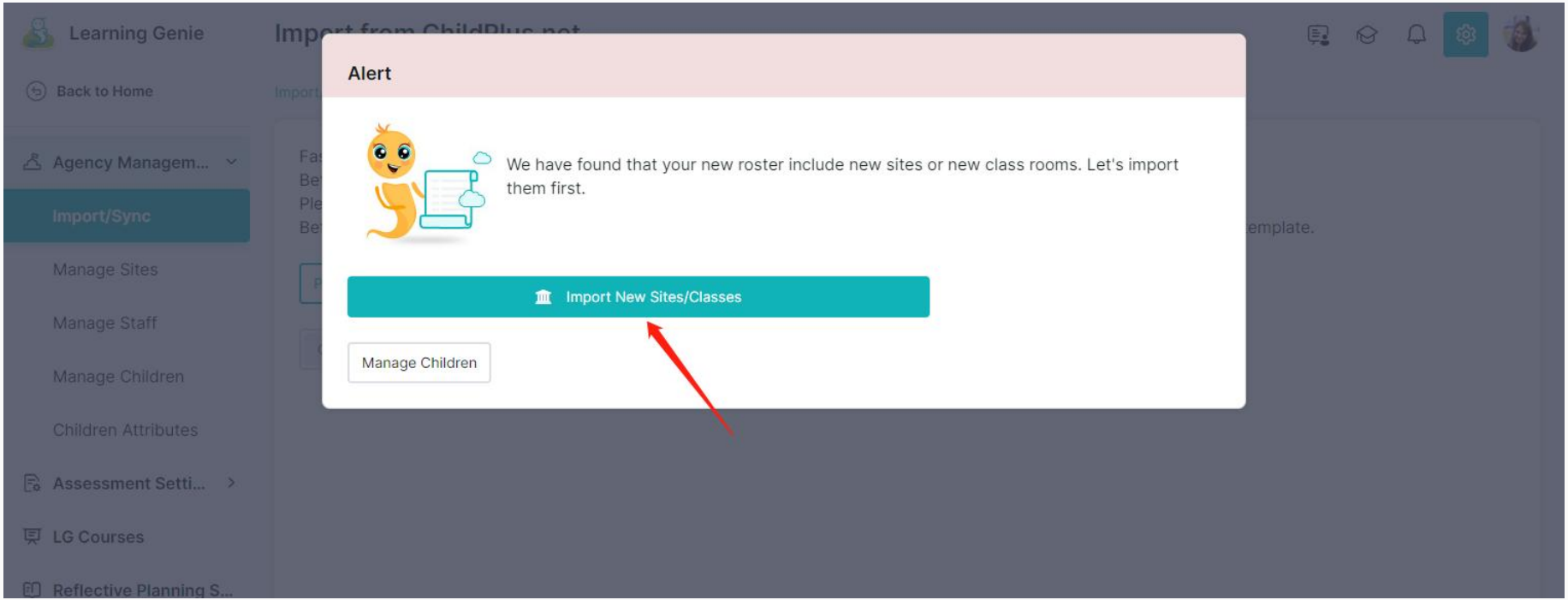
Step 4: Download and Review The Roster Review File





Step 5: Proceed To Import Sites and Classes

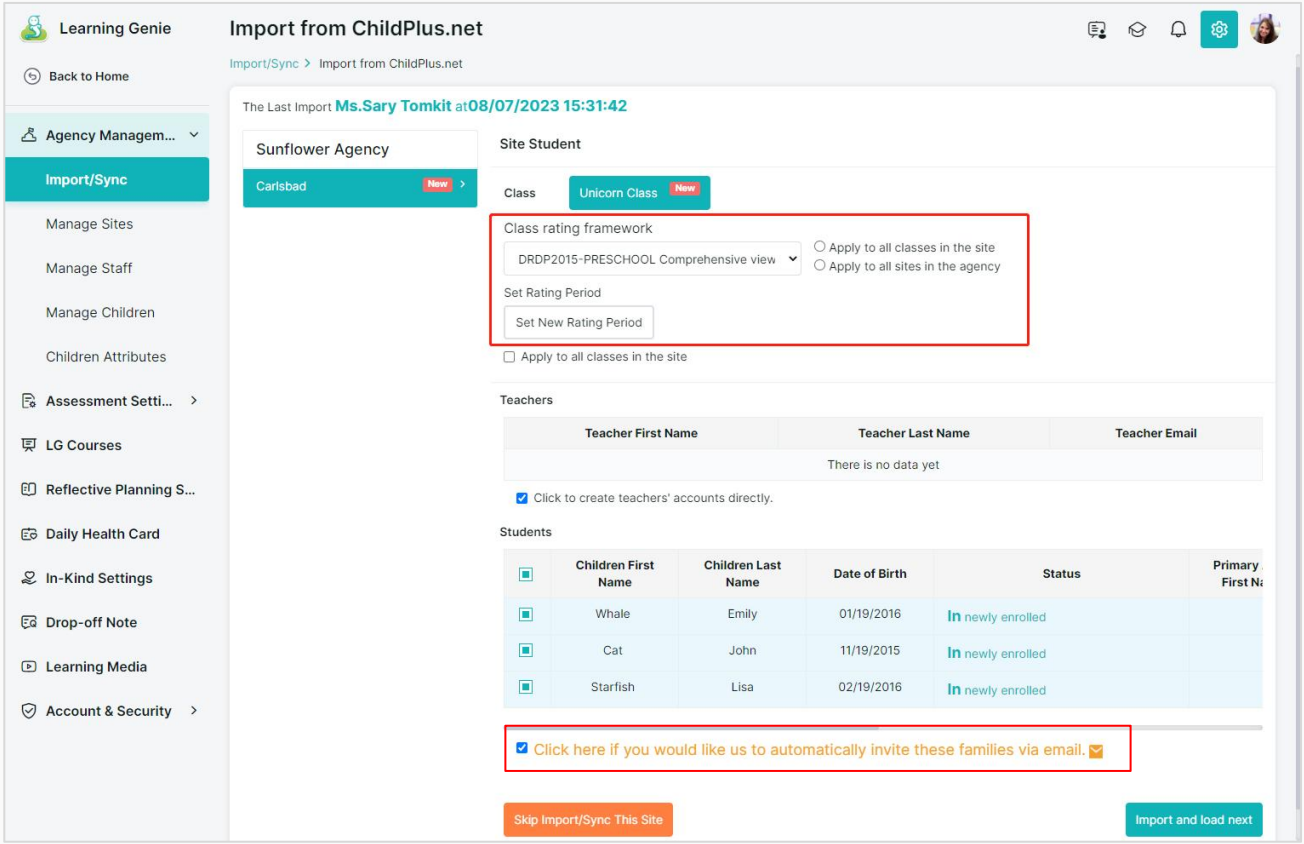
Note: “Import” is to add new data that does not exist in Learning Genie.



Step 6: Proceed To Import Sites and Classes

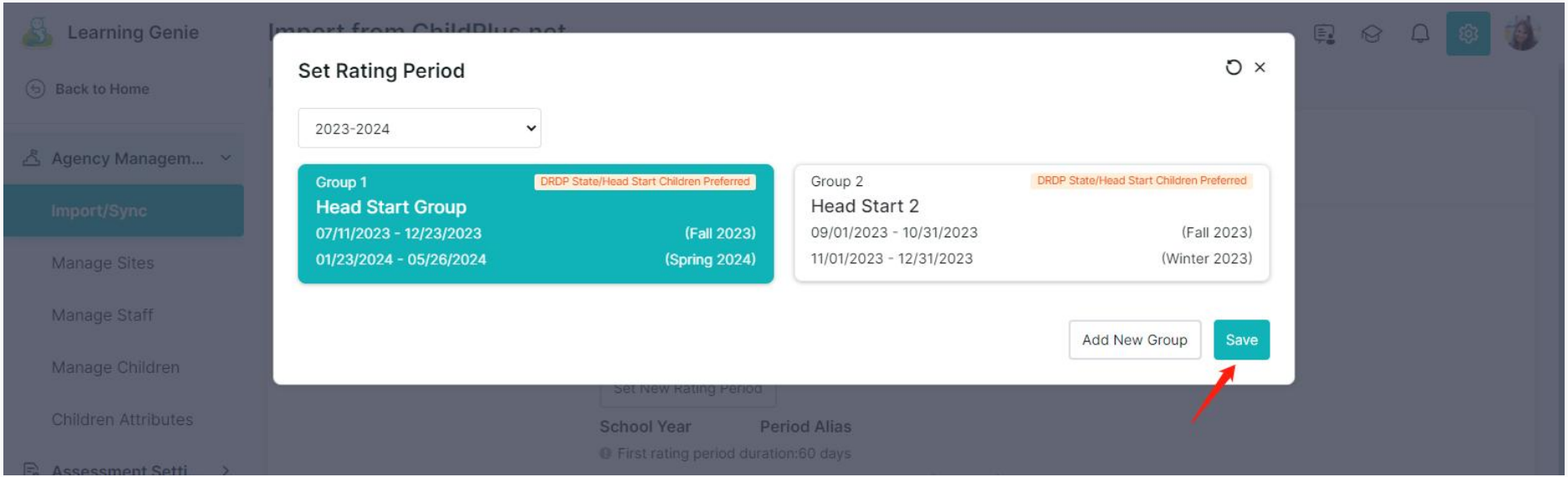
Note: “Import” is to add new data that does not exist in Learning Genie.

Supports auto-invite families via email.



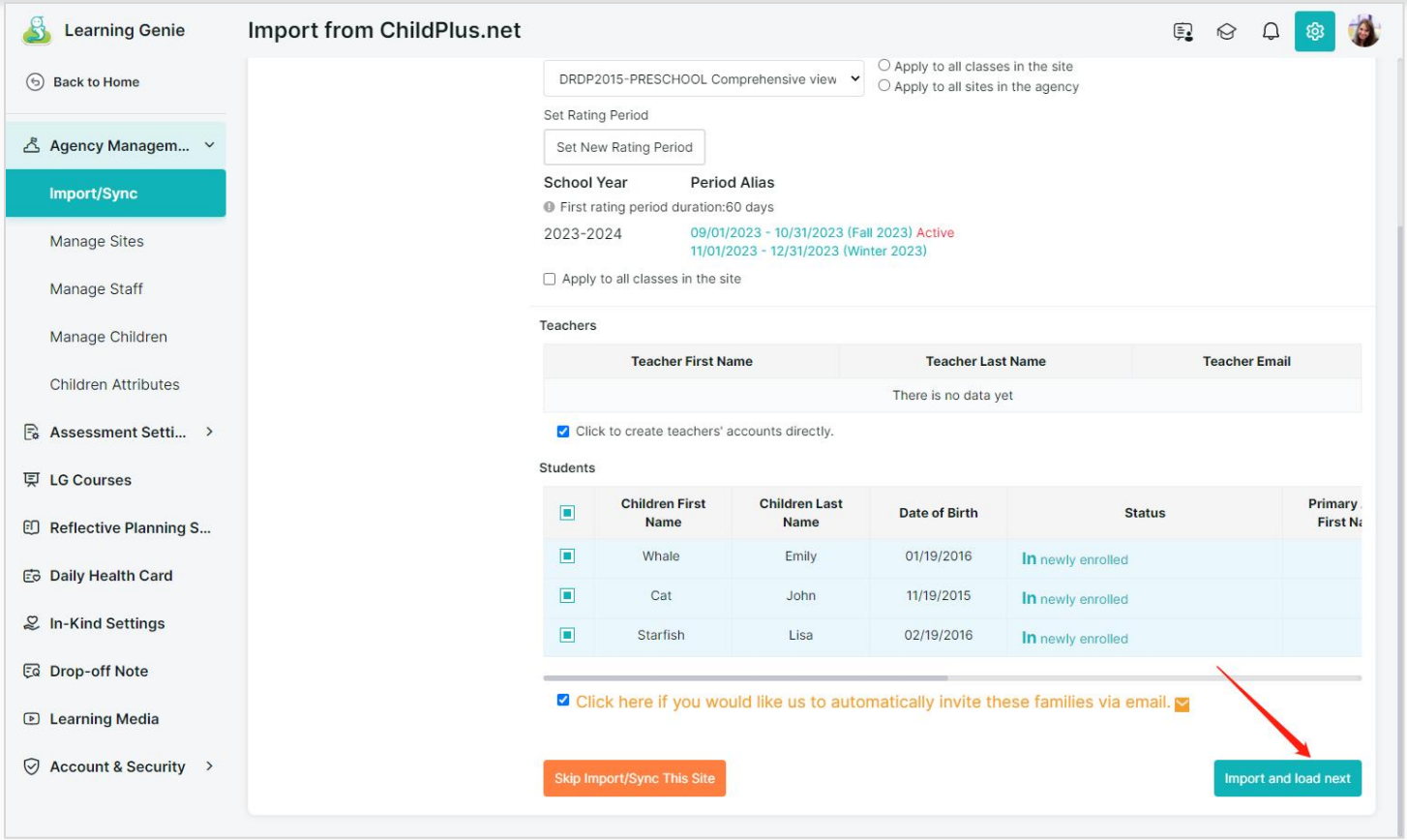
Step 7: Add your rating period dates (minimum 2)

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.



Step 8: Click “Import and Load Next”.

Repeat **Step 6** As Necessary



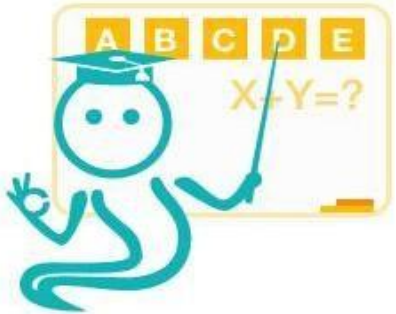
Congratulations! Your agency has been imported!

Back to Import History

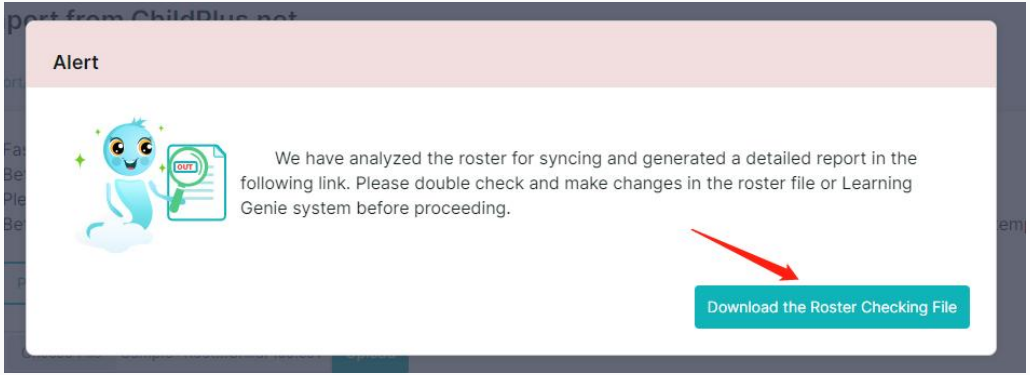
Site	Before import	Newly enrolled	Transferred from other sites	Transferred to other sites	Set to inactive	After import
Carlsbad	0	3	0	0	0	3

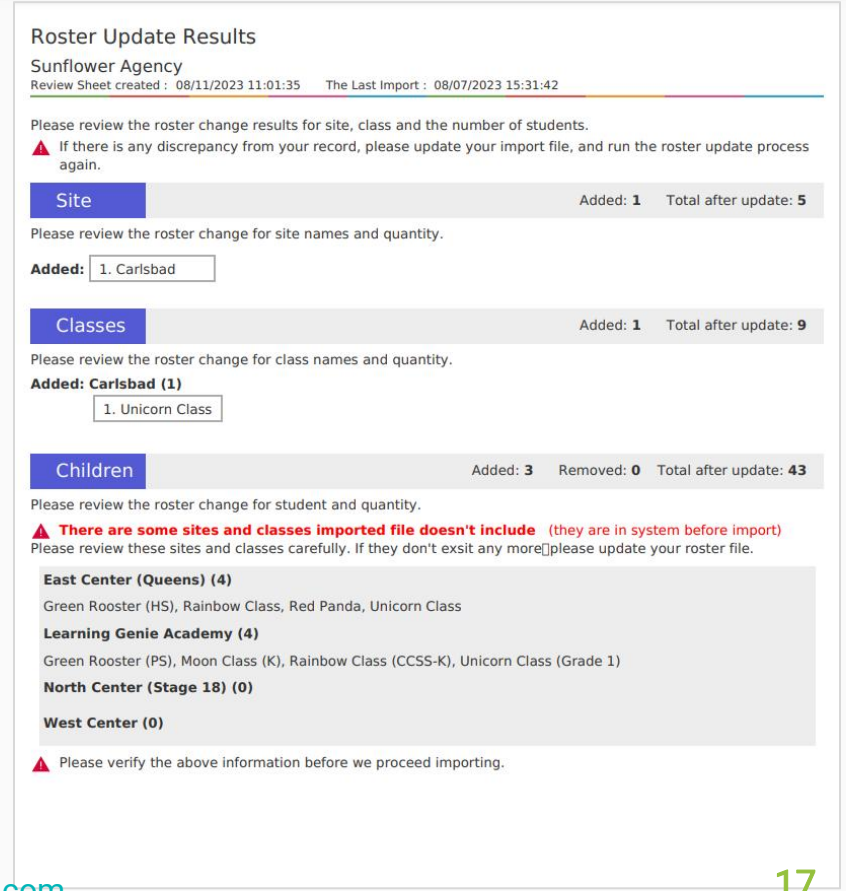
OPTION TWO: Roster Sync

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

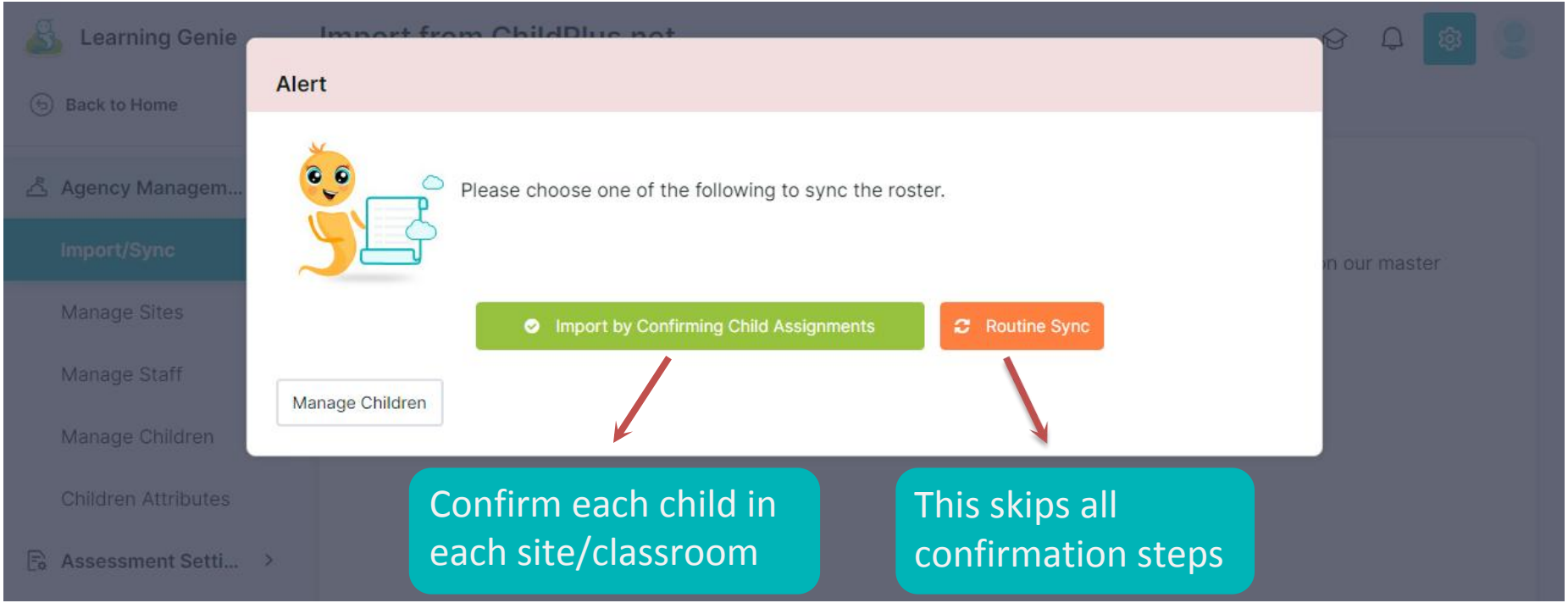


Step 4: Download and Review The Roster Review File

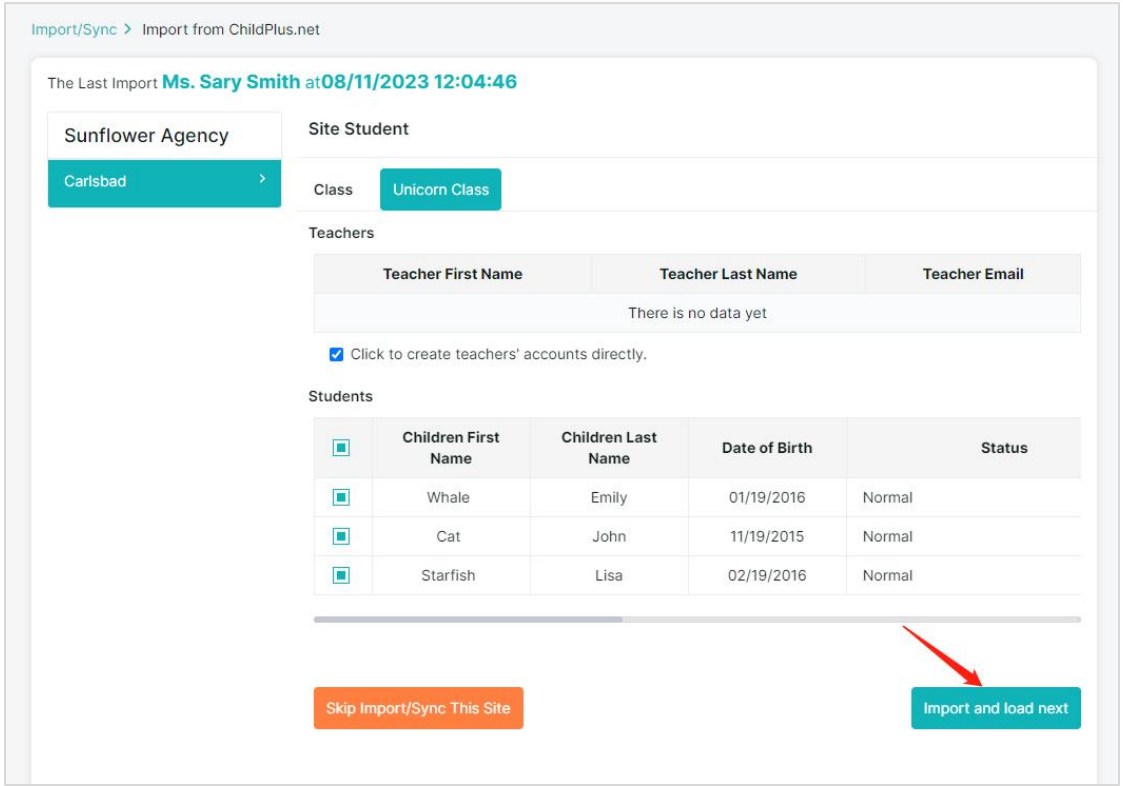




Step 9: Select whether you'd like to sync by confirming the children in each class or skip that and just do a Routine Sync



Step 10: For each center/class, confirm each child to be added, removed, or transferred. Then “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!

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