



Step by Step Guide: Importing, Syncing, and Updating Student Data from ChildPlus

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Step 1: Go to ChildPlus Online > Reports > 6511 - Learning Genie Export (Grid)

The report we need for this process is only available on ChildPlus Online platform and not ChildPlus Desktop.

Once in ChildPlus Online, click on Reports from the menu at the top of the page.

Use the search bar to look for the **6511** report or also known as the **Learning Genie Export (Grid)**

The screenshot displays the ChildPlus Online user interface. At the top, a dark navigation bar contains several menu items: Attendance, DRDP Assessment, Entry Express, Management, Performance Panel, Reports (highlighted with a red box), Services, Setup, and To-Do List. Below the navigation bar, a search bar is visible with the text '6511' entered and a red box around it. The main content area shows a list of reports, with the first entry being '6511 Learning Genie Export (Grid)'. A modal window is open over this report, titled '6511 - Learning Genie Export (Grid)'. The modal contains two sections: 'Participant Filters' and 'Grid Settings'. The 'Participant Filters' section lists various filters such as Program Term, Program Option, Location, Enrollment Status, Flag/Group, Responsible Staff, and Custom Filters, all set to 'All' or 'Not Filtered'. The 'Grid Settings' section includes options for 'Report columns to show' (All Selected), 'Show horizontal grid lines' (checked), 'Show vertical grid lines' (checked), 'Report Type' (Detail), and 'Group By' (Classroom). At the bottom right of the modal, there are two buttons: 'View Report' and 'Close'.

Participant Filters	Grid Settings
Program Term: All	Report columns to show: All Selected
Program Option: All	Show horizontal grid lines: <input checked="" type="checkbox"/>
Location: All	Show vertical grid lines: <input checked="" type="checkbox"/>
Enrollment Status: All	Report Type: Detail
Flag/Group: Not Filtered	Group By: Classroom
Responsible Staff: All	
Custom Filters: Not Filtered	

Step 2: Select Filters for Export

Select Program Term

6511 - Learning Genie Export (Grid) ☆

Participant Filters

Program Term	All
Program Option	All
Location	All
Enrollment Status	All
Flag/Group	Not Filtered
Responsible Staff	All
Custom Filters	Not Filtered

Grid Settings

Report columns to show	All Selected
Show horizontal grid lines	<input checked="" type="checkbox"/>
Show vertical grid lines	<input checked="" type="checkbox"/>
Report Type	Detail
Group By	Classroom

Program Term

All

- 2024 - 2025
 - 2024-2025 Early Head Start
- 2023 - 2024
- 2022 - 2023

Current Year Only

OK Cancel

Step 2: Select Filters for Export

Select Location

6511 - Learning Genie Export (Grid)

Participant Filters

Program Term	All
Program Option	All
Location	All
Enrollment Status	All
Flag/Group	Not Filtered
Responsible Staff	All
Custom Filters	Not Filtered

Grid Settings

Report columns to show	All Selected
Show horizontal grid lines	<input checked="" type="checkbox"/>
Show vertical grid lines	<input checked="" type="checkbox"/>
Report Type	Detail
Group By	Classroom

Location

- ...
- Ki ...
- Lit ... er
- Lit ...
- Mi ...
- SK ...
- Srr ...
- Ta ...
- < I ...
- Classroom A (...)
- Classroom B (...)
- Classroom C (...)
- Classroom D (...)
- Classroom E (...)
- Classroom F (...)
- Classroom G (...)
- Classroom H (...)
- Classroom I (...)
- Classroom J (...)
- Classroom K (...)
- The ...
- Te ...

Options

OK

Cancel

Step 2: Select Filters for Export

Select **Enrollment Status** and check only **Enrolled**

6511 - Learning Genie Export (Grid)

Participant Filters

Program Term	All
Program Option	All
Location	All
Enrollment Status	All
Flag/Group	Not Filtered
Responsible Staff	All
Custom Filters	Not Filtered

Grid Settings

Report columns to show	All Selected
Show horizontal grid lines	<input checked="" type="checkbox"/>
Show vertical grid lines	<input checked="" type="checkbox"/>
Report Type	Detail
Group By	Classroom

Enrollment Status

All

- New
- Waitlisted
- Accepted
- Enrolled**
- Dropped
- Drop/Wait
- Drop/Accept
- Completed
- Abandoned

OK

Cancel

Step 2: Select Filters for Export

Configure the following Grid Settings shown in the screenshot below

The screenshot displays the '6511 - Learning Genie Export (Grid)' interface. On the left, under 'Participant Filters', the following settings are listed: Program Term (All), Program Option (All), Location (All), Enrollment Status (All), Flag/Group (Not Filtered), Responsible Staff (All), and Custom Filters (Not Filtered). On the right, a 'Grid Settings' panel is highlighted with a red box. It contains: Report columns to show (All Selected), Show horizontal grid lines (checked), Show vertical grid lines (checked), Report Type (Detail), and Group By (Classroom). At the bottom right, a red arrow points to a green 'View Report' button, with a 'Close' button next to it.

Participant Filters	
Program Term	All
Program Option	All
Location	All
Enrollment Status	All
Flag/Group	Not Filtered
Responsible Staff	All
Custom Filters	Not Filtered

Grid Settings	
Report columns to show	All Selected
Show horizontal grid lines	<input checked="" type="checkbox"/>
Show vertical grid lines	<input checked="" type="checkbox"/>
Report Type	Detail
Group By	Classroom

[View Report](#) [Close](#)

Then click View Report

Step 3: Review Report and Export as .CSV

Review the report to ensure accuracy before exporting it to CSV.

6511 - Learning Genie Export (Grid)

Report 1 ▾

Agency Name	Site Name	Class Name	ChildName (Last)	ChildName (First)	Birthday	ChildPlus ID	Hispanic	Gender Code	Race	
Report: Learning Genie Export (Grid) (Continues on the next page)										
	Kid	Baby Bears (Toddler)	B	C	8/02/2023		No	F	Black or African American	0
	Kid	Baby Bears (Toddler)	L	R	7/06/2023		Yes	M	White	0
	Kid	Baby Bears (Toddler)	O	A	6/19/2023		Yes	F	White	0
	Kid	Baby Bears (Toddler)	R	A	9/01/2023		Yes	F	White	0

Export all data to PDF
Export all data to CSV
Export all data to Excel



Step 4: Go To Learning Genie

Go to Learning Genie > Admin Settings > Agency Management > Import/Sync > ChildPlus

The screenshot displays the 'Admin Settings' page in Learning Genie, specifically the 'Import/Sync' section. The left sidebar contains a navigation menu with 'Import/Sync' highlighted in a red box. The main content area is divided into three sections: 'API Sync', 'SFTP Sync', and 'Manual Import from Roster File'. The 'API Sync' section includes buttons for 'ONEROSTER' (marked 'New'), 'GoEngage', and 'ClassLink' (marked 'New'). The 'SFTP Sync' section includes 'SFTP Sync in SIS' and 'Export Ratings to SIS' (marked 'New'). The 'Manual Import from Roster File' section includes a red arrow pointing to the 'ChildPlus Software' button (which is also highlighted with a red box), along with buttons for 'DRDPOnline', 'PowerSchool', 'CenterTrack' (with a 'Learn More About CenterTrack' link), and 'GoEngage'. A 'Help' icon is visible in the bottom right corner.

Admin Settings | 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 >

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 ^{New} **GoEngage** **ClassLink** ^{New}

SFTP Sync

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

SFTP Sync in SIS **Export Ratings to SIS** ^{New}

Manual Import from Roster File

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

ChildPlus Software **DRDPOnline** **PowerSchool** **CenterTrack**
[Learn More About CenterTrack](#)

GoEngage **Other**

?

Step 5: Upload CSV file

Select the CSV file you have exported from ChildPlus obtained from following the previous steps.

Import from ChildPlus



Import/Sync > Import from ChildPlus

Fastest growing cloud-based child care center management solution. <https://www.childplus.com>

Before importing, please connect to your ChildPlus account.

Please read this PDF instruction guide, which explains how to export ChildPlus CSV files.

Before uploading, please verify that the column names on your template are identical to the column names on our master template.

PDF Instruction Guide

Download Template

Choose File

No file chosen

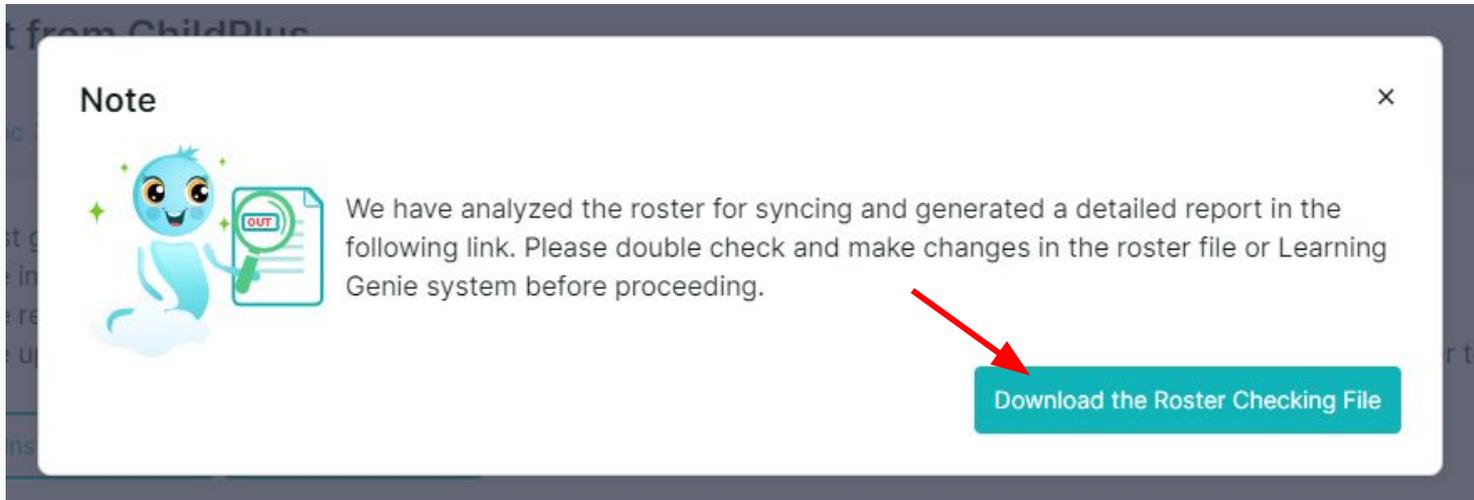
Upload



Step 6: Review Checking File

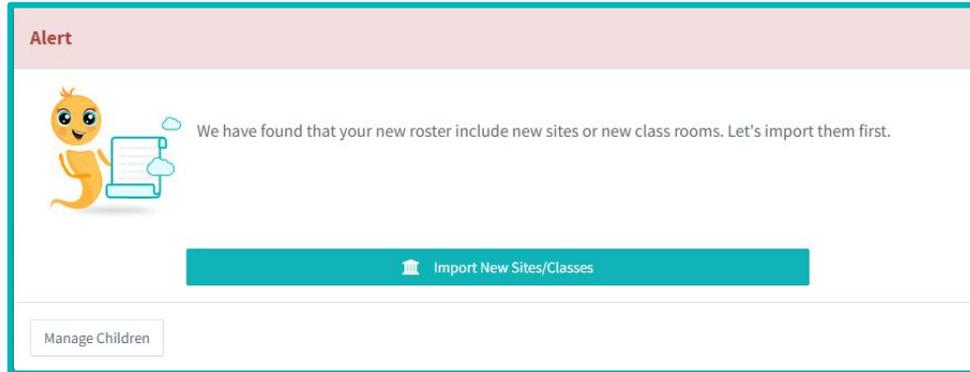
After uploading the CSV file, Learning Genie will generate a roster checking file that summarizes and breaks down the changes that will be applied based on the imported file. This allows you to review the accuracy of the import before proceeding.

- Click on "**Download the Roster Checking File**" button
- An Excel file will be downloaded
- Open the downloaded file to review the proposed changes
- Carefully verify all student information and planned updates
- Make any necessary corrections before proceeding with the import



Step 7: Set up Sites/Classrooms

After reviewing the roster checking file and confirming to proceed, go back to Learning Genie and click on **Import New Sites/Classes**



Step 7: Set up Sites/Classrooms

- Setup the classrooms' framework and rating period (*this step can be completed later*)
- Choose to invite parents to Learning Genie via email through this import (for Family Engagement)
 - *Note: If this option is selected, as soon as you confirm/finalize the import, the emails will be sent to the parents right away.*

The screenshot displays the 'Import from ChildPlus' configuration page. On the left is a navigation sidebar with 'Import/Sync' selected. The main content area shows the 'Sunflower Agency' and 'Carlsbad' class configuration. A red box highlights the 'Class rating framework' section, which includes a dropdown menu set to 'DRDP2015-INFANT-TODDLER Comprehensive', radio buttons for 'Apply to all classes in the site' and 'Apply to all sites in the agency', and a 'Set Rating Period' section with a 'Set New Rating Period' button. Another red box highlights a checkbox at the bottom of the page labeled 'Click here if you would like us to automatically invite these families via email.' The interface also shows a 'Teachers' table with no data and a 'Students' table with one student named 'One'.

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

Children First Name	Children Last Name	Date of Birth	Status	Primary Ad First Nam
One	Student	11/19/2015	In newly enrolled	

Step 8: Confirm and Proceed with Import

After configuring the classrooms setup, click **“Import and load next”** to process the import for the current site. You will need to repeat this process (*Steps 7 and 8*) site by site (*if there are multiple sites*)

Students

<input type="checkbox"/>	Children First Name	Children Last Name	Date of Birth	Status	Primary First Name
<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. ✉



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



Thank You!

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