

GOLD Administrators: End-of-Year Data

When your program is ready to transfer children to new classrooms, add new children and say goodbye to graduating children, please use the following guide to help manage your data from one year to the next.

1. Clean up your children's files.

It may be time to archive or transfer children's records to ensure that your program has space for new children. Here's what you need to know about these options:

- a. If your program is year round, you may not need to transfer or archive children until after the summer checkpoint period.
- b. If your program has some year round classes and some classes that are not participating in the Summer Checkpoint due to a modified schedule, then follow both instructions:
 - Year round classes -wait until after Summer Checkpoint to archive and transfer children and,
 - Classes that have modified schedules and are not participating in summer checkpoint- archive and transfer those children now.
- c. For programs closed for the summer, please follow the below steps to prepare for the Fall 2014/2015 checkpoint:

***IMPORTANT* Do not delete any children or teachers!**

3. Archive children

All children leaving your program for any reason should be archived. Archiving children's files will allow you to store and reactivate the data at any time. Additionally, all administrative reports can include archived files.

4. Transfer children

Children who will remain active in your program may be assigned to new classes. Their records should be transferred for next school year.

5. Change children's color bands (*not applicable for children birth to 36 months*)

For children who are 3 years of age or older, you will need to change their color band when they are transferred to a new age group/class. Most programs will have the child's color band match the class color band, unless the classroom has mixed ages such as 3, 4, and 5 year olds.

6. Clean up your staff files

Disable the accounts of any teachers who no longer work for your organization. Be sure to transfer or archive the children's files before disabling the account of the departing staff member. For classrooms that have a new teacher, make sure you have changed the primary teacher to the new teacher prior to disabling the former teacher's account.

7. Use your Resources

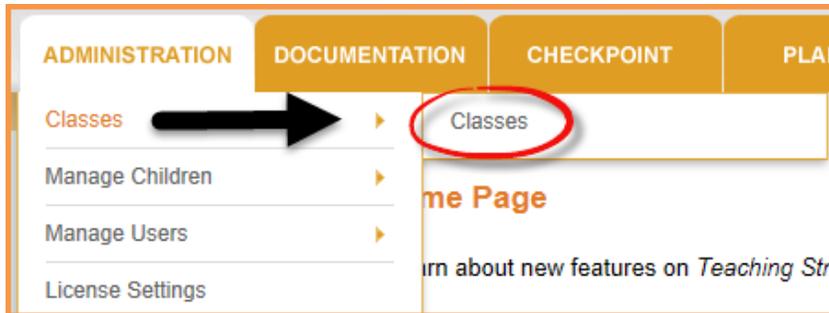
Use the attached GOLD Instructions:

- How to transfer and archive the children in your program
- How to change a child's color band
- Assigning color bands

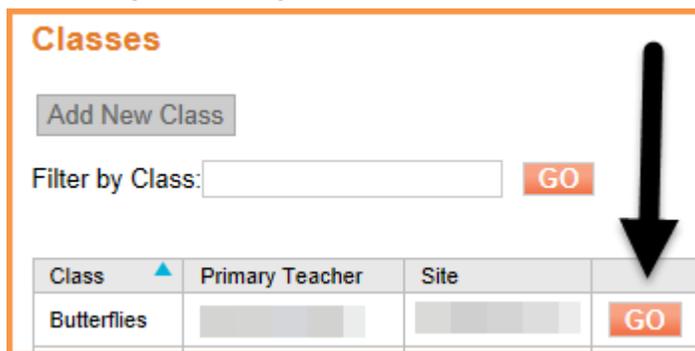
GOLD: How to Transfer or Archive children in your program

OPTION #1

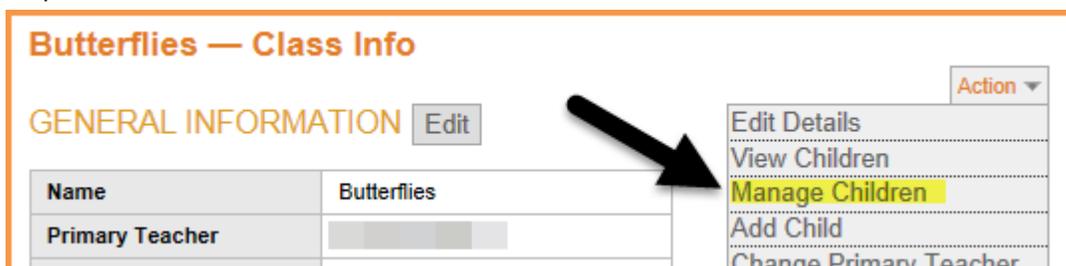
1. Log into your GOLD account, using your Administrator view
2. Go to the Administration tab, choose Classes



3. A list of your program's classes will appear, and then select the class in which you are transferring or archiving children.



4. The class details will be listed. Go to the Action button and select Manage Children from the drop down menu.



GOLD: How to Transfer or Archive children in your program

5. Select the children to be transferred or archived under the appropriate box.

Butterflies — Manage Children

Add a Child to this Class

Child Name	Date of Birth	Edit	Transfer	Archive	Delete
			Check / Uncheck All	Check / Uncheck All	Check / Uncheck All
John Doe	12/15/2008	View	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Jennifer Anderson	4/5/2009	View	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Tasha Crawford	4/6/2009	View	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Nathan Lewiston	3/10/2009	View	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Christian			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

6. Once you have made your selection, click on the Transfer or Archive button on the bottom of the page.

John Doe	12/10/2008	View	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
			TRANSFER	ARCHIVE	DELETE

Congratulations! You have now successfully transferred and/or archived a child.

OPTION #2

1. Log into your GOLD account, using your Administrator view
2. Go to the Administration tab, choose Manage Children

ADMINISTRATION DOCUMENTATION CHECKPOINT PLAN

Classes

Manage Children → Children

Manage Users → Add/Edit Funding Sources

License Settings

Information about the Recent Internet Security Issue April 11, 201

GOLD: How to Transfer or Archive children in your program

- A list of all the children in your program will appear. On the top of the screen your program name will be after Children Services Council of Palm Beach County, select your program name.

Children's Services Council of Palm Beach County / Program Name / View Children

Children

Add New Child

Filter by child: GO

Active Archived Deleted

First Name	Last Name ▲	Class	
			GO

- This will display your Site Info. From the Action drop down menu, select Manage Children.

Children's Services Council of Palm Beach County / Program Name / View

Program Name — **Site Info**

GENERAL INFORMATION

Name	Program Name
Address	
Phone	

SITE PORTFOLIO USE

Number of Active Children	96
Maximum Number of Active Children	100
Number of Archived Children	42

Action ▼

- Edit Details
- Add New Teacher
- View Teachers/Admins
- View Classes
- View Children
- Manage Children**
- Manage Archived Children
- Manage Deleted Children
- Manage Interrater Reliability
- View Reports

GOLD: How to Transfer or Archive children in your program

7. Select the children to be transferred or archived under the appropriate box.

Butterflies — Manage Children

Add a Child to this Class

Child Name	Date of Birth	Edit	Transfer	Archive	Delete
			Check / Uncheck All	Check / Uncheck All	Check / Uncheck All
John Doe	12/15/2008	View	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Jennifer Anderson	4/5/2009	View	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Tasha Crawford	4/6/2009	View	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Nathan Lewiston	3/10/2009	View	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Christian			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

8. Once you have made your selection, click on the Transfer or Archive button on the bottom of the page.

John Doe	12/10/2008	View	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
			TRANSFER	ARCHIVE	DELETE

Congratulations! You have now successfully transferred and/or archived a child.

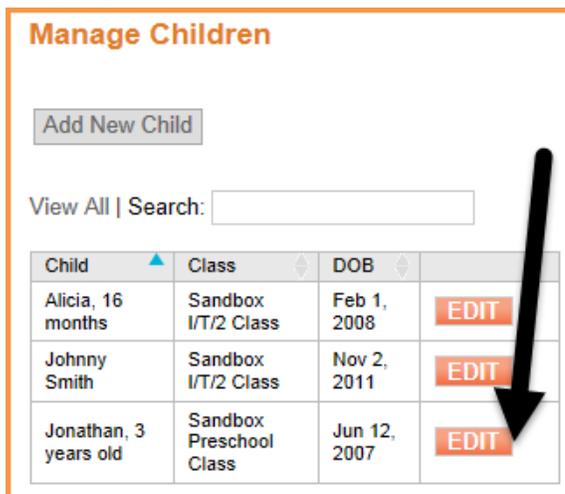
GOLD: How to Change a Child's Color Band

OPTION #1

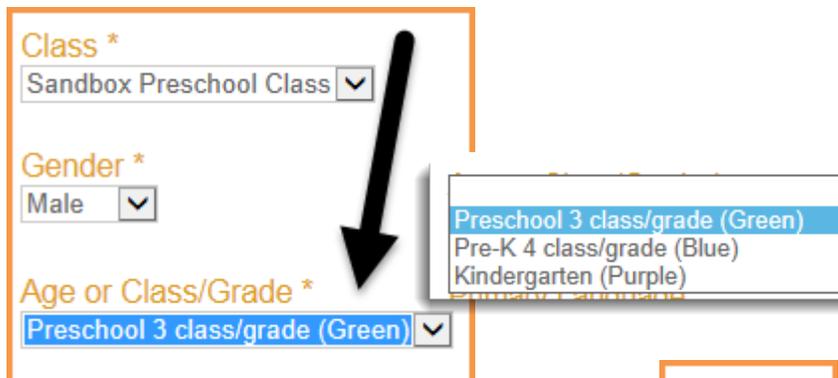
1. Log into your GOLD account, using your Teacher view
2. Go to the Children tab, choose Manage Children



3. A list of your program's children will appear, and then go to the children in which you are changing their color band and select EDIT.



4. The child's information will be listed. Go to the Age or Class Grade field and select the new color band from the drop down menu.



5. Scroll to the bottom of the screen and select UPDATE.

UPDATE

Congratulations! You have now successfully changed a child's color band.

GOLD: How to Change a Child's Color Band

OPTION #2

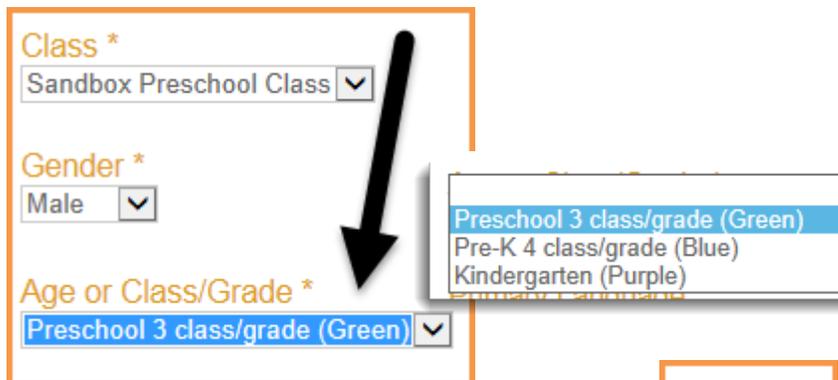
1. Log into your GOLD account, using your Administrator view
2. Go to the Administration tab, choose Manage Children then Children



3. A list of all the children in your program will appear. Find the child and select GO.



4. The child's information will be listed. Go to the Age or Class Grade field and select the new color band from the drop down menu.



5. Scroll to the bottom of the screen and select UPDATE.

Congratulations! You have now successfully changed a child's color band.

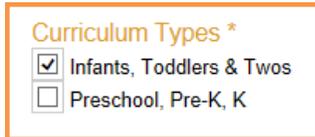
GOLD: Assigning Color Bands

Class color band designations are managed differently for children in infant, toddler, twos classrooms than for children in 3 year old, pre-K and VPK classrooms.

Infants, Toddlers, Twos

- **Assigning Classroom Color Bands**

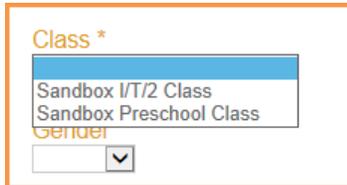
For infant, toddler and two year old classes the system does not require a color band designation.



A screenshot of a form titled "Curriculum Types *". It contains two checkboxes: "Infants, Toddlers & Twos" which is checked, and "Preschool, Pre-K, K" which is unchecked.

It is important to ensure the primary teacher you select for this type of class has the Infant, Toddler and Two Year old curriculum checked in their user profile before creating a new class.

- **Assigning Children Color Bands** (typically children aged 0 to 36 months)



A screenshot of a form showing a dropdown menu labeled "Class *". The menu is open, showing two options: "Sandbox I/T/2 Class" and "Sandbox Preschool Class". Below the dropdown is a "Gender" label and a dropdown arrow.

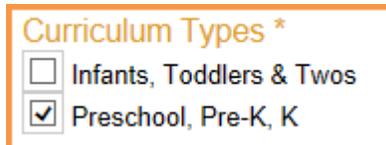
When you create a record for a child who is in an infant, toddler, and/or twos classroom, select the class name from the dropdown list under Class.

When you submit the completed form, the system automatically generates an age or class/grade designation based on the child's birth date. In addition, the system will automatically change the age designation if the child has a birthday during the program year.

For example, suppose a 10-month-old child's record is added to the system in September. She will be included automatically in the group of children from birth to 1 year (red). When she turns 1 in November, her record will be updated automatically to include her in the group of 1- to 2-year-olds (orange).

Preschool 3 (Green), Pre-K 4 (Blue)

- **Assigning Classroom Color Bands**



A screenshot of a form titled "Curriculum Types *". It contains two checkboxes: "Infants, Toddlers & Twos" which is unchecked, and "Preschool, Pre-K, K" which is checked.

As stated above, it is important to ensure the primary teacher you select for this type of class has the Preschool, Pre-K and K curriculum checked in their user profile before creating a new class.

The color band designation for a preschool classroom is based on the curriculum you teach rather than the children's ages.

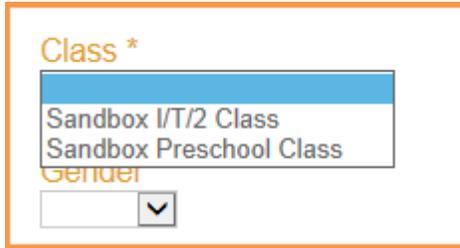
- Green Color Band- children in class will be in preschool 2 years before kindergarten
- Blue Color Band-children in class will be in preschool 1 year before kindergarten
- Purple Color Band is never used in a preschool program, even if a child is five years old.
- Purple is only used in kindergarten classrooms by kindergarten teachers using a kindergarten curriculum.

GOLD: Assigning Color Bands

Preschool 3 (Green), Pre-K 4 (Blue)

- **Assigning Children Color Bands**

Adding a record for a child who is in a Preschool 3 (Green), Pre-K 4 (Blue) classroom is a bit different because the system does not designate the child's placement automatically (as it does for children in infant, toddler, two classes).

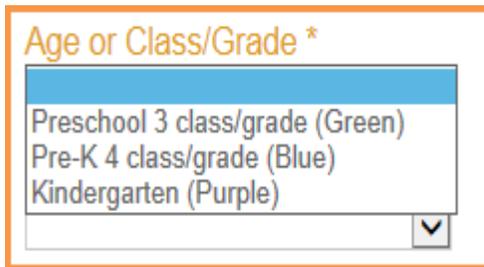


Class *

Sandbox I/T/2 Class
Sandbox Preschool Class

Gender

On the form, first choose the class name from the dropdown list under Class.



Age or Class/Grade *

Preschool 3 class/grade (Green)
Pre-K 4 class/grade (Blue)
Kindergarten (Purple)

Then, from the dropdown list for Age or Class/Grade, choose the applicable checkbox to indicate whether the child is in Preschool 3 (Green), Pre-K 4 (Blue). Base your selection on the child's class placement rather than the child's birth date. That is because children typically remain in the same group with the same teacher for the year.

Even when a child in a Preschool 3 (Green), Pre-K 4 (Blue) class is a few months younger than the age usually associated with the class, the child is considered to be in the class and the child's skills are compared with expectations for the group. Similarly, a child with developmental delays is considered to be in the class even when he or she is older than most of the other children in the group. For example: the knowledge, skills, and behaviors of children in a Pre-K 4 (Blue) class are held to expectations shown by the blue band, regardless if they are 3, 4, or 5 years old.

- **Are preschool color bands changed during the year?**

- **No!** A child in preschool must be on the same color band all year, regardless of the child's birthday.
- *Exception:* If a child turns 3 during the year and goes into a preschool program at that time, the child's color band is then changed to green and will be green for the remainder of that year and all of the following year.