# Child Development Management Information System (CDMIS) User Manual

**A Guide for Program Staff**

**Version 11.0**

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**This version supersedes previous versions of this guide.**

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## Glossary

Below is an alphabetical list of acronyms, initialisms, and terms that are frequently referenced throughout this document.

* **ACF:** Administration for Children and Families
* **ACS:** American Community Survey
* **Agency:** Agency that maintains a childcare and development contract with the California Department of Education, Early Education Division and/or with the California Department of Social Services, Child Care Development Division.
* **Analyst:** Early Education and Fiscal Nutrition Services Office, Fiscal Apportionment Analyst
* **CCDD**: Child Care and Development Division
* **CDD-801A:** CDD-801A Monthly Childcare Population Report
* **CDE:** California Department of Education
* **CDMIS:** Child Development Management Information System
* **CDSS:** California Department of Social Services
* **Consultant:** Program Quality Implementation Consultant
* **Contract:** Subsidized Childcare and/or Early Education Services Contract
* **CPS:** Child Protective Services
* **CR/LF:** Carriage Return/Line Feed
* **DOF:** Department of Finance
* **EED:** Early Education Division
* **FAQ:** Frequently Asked Question
* **FCCH:** Family Child Care Home
* **FEIN:** Federal Employer Identification Number
* **FFS:** Family Fee Schedule
* **FICN:** Family Identification Case Number
* **FIPS:** Federal Information Processing Standards
* **FY:** Fiscal Year
* **HoH:** Head of Household
* **IEP:** Individualized Education Program
* **IFSP**: Individualized Family Service Plan
* **MB:** Management Bulletin
* **QRIS:** Quality Rating and Improvement System
* **Report Period:** Month and Year of a CDD-801A Monthly Childcare Population Report.
* **SMI:** State Median Income
* **TANF:** Temporary Assistance for Needy Families
* **Vendor:** Software vendor who has expressed interest in working contracted agencies on the electronic reporting of the CDD-801A Monthly Childcare Population Report

Below is an alphabetical list of current early education and childcare and development contract codes with descriptions.

* **C2AP:** CalWORKS Stage 2
* **C3AP:** CalWORKS Stage 3
* **CAPP:** Alternative Payment Program
* **CCTR:** General Child Care and Development Program
* **CFCC:** Family Child Care Home Education Networks
* **CHAN:** Severely Disabled Program
* **CMAP:** Migrant Alternative Payment Program
* **CMIG:** Migrant Child Care and Development Programs
* **CRRP:** Resource and Referral Program
* **CSPP:** California State Preschool Program]

## Revision History

FFS: Family Fee Schedule; FY: Fiscal Year; HoH: Head of Household; SMI: State Median Income

| **Version Number** | **Revision Date** | **Section** | **Summary of Changes** |
| --- | --- | --- | --- |
| v 7.0 | 10/09/2017 | All Sections | CDMIS User Manual created |
| v 8.0 | 10/02/2018 | Appendix A: File Format Specifications | HoH SSN revised comments |
| v 8.0 | 10/02/2018 | Appendix B: Childcare Family Fee Schedule | Addition of revised FFS with SMI for FY 2018-19 |
| v 8.0 | 10/02/2018 | Appendix D: Data Definitions | Revised references to data definitions |
| v 8.0 | 10/02/2018 | Appendix F: Error Message Codes | Addition of appendix listing error message codes and descriptions |
| v 9.0 | 06/2019 | Glossary | Addition of section |
| v 9.0 | 06/2019 | Chapter 3: CDD-801A Reporting | Addition of Input/Edit step-by-step instructions; Revised references from reporting attendance to reporting days of enrollment claimed for fiscal reimbursement purposes; Addition of Management Reports information |
| v 9.0 | 06/2019 | Chapter 4: Manage Program Information | Revised definition of three-year-old children |
| v 9.0 | 06/2019 | Appendices | Reorganized appendices; Revised references for FY 2019-20; Addition of Appendix F |
| v 10.0 | 06/2022 | Chapter 2: System Access | Updated log in process due to CDMIS Maintenance and Optimization Contract; updated references from ELCD to EED |
| v 11.0 | 11/2024 | All Sections | Updated chapters |

## Security and Privacy

All family and child information collected and submitted through the Child Development Management Information System online reporting portal is confidential information and restricted to purposes directly connected with the administration of the program. Only persons designated by the program director may view the information, and these persons may only view the information for purposes directly connected with the administration of the program or except as provided for by law. The editing of this information is limited to users designated by the program director and for purposes directly connected with the administration of the program. (48 CFR Part 98, Childcare and Development Fund, Subpart H-Program Reporting Requirements sections 98.70 and 98.71; California *Education Code* Section 8261.5; and *California Code of Regulations*, Title 5 sections 18117 and 18246).

## Chapter 1: Overview

This chapter is intended to provide an overview of the CDMIS.

### Contents

This chapter contains the following topics:

* 1.1 Overview
* 1.2 CDD-801A Monthly Childcare Population Report
* 1.3 Managing Agency Information

### 1.1 Overview

California must report information to the federal Administration for Children and Families (ACF) on subsidized childcare and development programs to receive federal matching grant funds, and to comply with state and federally mandated reporting requirements.   
  
The CDE, Early Education Division (EED) developed the CDD-801A Monthly Childcare Population Report (CDD-801A). The information collected from these reports is used by state and federal legislators to develop public policy for childcare and early education services in California, and to request increased funds to expand childcare and early education availability in unserved and underserved areas.

### 1.2 CDD-801A Monthly Childcare Population Report

The CDD-801A is the collection in which agencies that maintain a contract with the CDE and/or CDSS report specific information on all children receiving subsidized childcare or early education services. This section contains specific information of the "who," "what," "when," "where," "why," and "how" of the CDD-801A.

#### Frequently Asked Questions

##### Who

###### Which agencies must submit the CDD-801A?

The CDD-801A must be submitted for each report period during which subsidized childcare and early education services were provided through an agency’s contract with the CDE and/or CDSS. If no subsidized services were provided through an agency’s contract with for a given report period, “No Services” must be reported. Detailed instructions for reporting “No Services” are provided in Chapter 4: Manage Agency Information.

###### Which children should be reported in the CDD-801A?

Children who were enrolled in subsidized childcare and early education services through an agency’s contract should be included in the CDD-801A.

##### What

###### What is the CDD-801A?

The CDD-801A is a report that includes children who were enrolled in subsidized childcare and early education services through an agency’s contract during a given report period. The CDD-801A is submitted monthly by agencies that contract with the CDE and/or CDSS to provide subsidized childcare and early education services.

The CDD-801A is also used to draw a sample of approximately 250 records per month from which more detailed information of children whose childcare services were subsidized through an agency’s contract is gathered.

##### When

###### When is the deadline for submitting the CDD-801A?

The CDD-801A is due on the twentieth of the month following the end of the report period. For example, the October 2023 CDD-801A is due by November 20, 2023. Late notifications are sent via email to agencies who fail to submit the CDD-801A or fail to report “No Services,” on the following business day.

Agencies who fail to submit the CDD-801A by the final date stated in the late notification email will have their apportionments withheld until a complete CDD-801A is submitted. Agencies should revise the CDD-801A as soon as possible if discrepancies are found in reported information.

##### Where

###### Where is the CDD-801A submitted?

The CDD-801A is submitted by agencies electronically via the CDMIS Online Portal which is located at <https://www4.cde.ca.gov/cdmis/default.aspx>.

##### Why

###### Why must agencies submit the CDD-801A?

The CDD-801A is very important. If agencies do not submit the CDD-801A, the CDE and/or CDSS are unable to pull a sample that accurately represents the universe of children whose childcare and early education services are subsidized through an agency’s contract. This in turn prevents the state from meeting the reporting requirements of federal law.

As a requirement of receiving federal childcare funding, all states must submit the federally mandated ACF-801 report, which is a requirement of the Personal Responsibility and Work Opportunity Act of 1996 (PL 104-193). States were given a choice to submit the required information for one of the following groups: all children whose Childcare services are provided by federal funds, or a sample of children whose Childcare services are provided by federal funds. California currently submits sample information to fulfill the requirements of the ACF-801 report; the monthly information submitted via the CDD-801A is used to draw this sample.

Failure to submit the ACF-801 reports to the federal government will result in a sanction (fiscal penalty) against the state. Therefore, failure of agencies with contracts to submit the CDD-801A in a timely manner will result in the withholding of apportionments.

##### How

###### How do agencies submit the CDD-801A?

Submission of the CDD-801A is completed online via the CDMIS Online Portal. Agencies may submit the CDD-801A by utilizing one of the following functions available on the CDMIS:

* **CDD-801A Input/Edit:** This function is used to carry out the following actions: copy records from month to month; fill in data entry screens to add new children who were enrolled in subsidized childcare and early education services through an agency’s contract during a given report period; and delete children who were not enrolled in subsidized services through an agency’s contract during a given report period. Step-by-step instructions addressing how to submit the CDD-801A using this method are available in the section below.
* **CDD-801A Electronic File Transfer:** This function is used to submit text files created by agencies, which contains all required information and is formatted specifically for the CDMIS to process. If agencies choose to submit the CDD-801A via this function, refer to Appendix C: Creating Electronic Files. Step-by-step instructions addressing how to submit the CDD-801A using this method are available in the section below.

###### How do agencies report "No Services?"

If an agency has a contract but does not provide any subsidized childcare and early education services through the contract during a given report period, the agency must report “No Services”. Detailed instructions for reporting “No Services” are provided in Chapter 4: Manage Program Information.

###### How can agencies view previously submitted CDD-801A Reports?

Submitted CDD-801A reports can be viewed or edited for a period of time after the report due date. Agencies may view or edit information submitted by utilizing the “CDD-801A Input/Edit” function, which is available on the CDMIS website, for approximately ninety (90) days after the CDD-801A due date.

Once a report period is locked, agencies may view, but not edit, information submitted by utilizing the “CDD-801A Management Reports” function available on the CDMIS.

###### How can previously submitted CDD-801A reports be revised?

If agencies find that a particular report period does not contain the correct information (e.g., children are not reported or children are incorrectly reported) or if minor changes to a record need to be made, it is encouraged that those changes are made to the CDD-801A as soon as they are discovered.

For agencies that use the **CDD-801A Input/Edit** function, select the report period to be updated. Make the necessary changes to reflect accurate information for that report period.

For agencies that use the **CDD-801A Electronic File Transfer** function, carry out one of the following: use the CDD-801A Electronic File Transfer function to resubmit a corrected text file or use the CDD-801A Input/Edit function to add, delete, or edit individual records.

### 1.4 Managing Agency Information

The CDMIS contains functions for agencies to update their administrative information. Super Users may request program director and executive director changes; report no service periods; enter site and license information; and add and edit CDMIS users.

## Chapter 2: System Access

This chapter contains information regarding accessing the CDMIS.

### Contents

This chapter contains the following topics:

* 2.1 Log On to the CDMIS
* 2.2 About Super Users and Users
* 2.3 Add/Edit Users
* 2.4 System Updates

### 2.1 Log On to the CDMIS

Agencies can log on to the CDMIS to fulfill CDD-801A requirements.

The URL for the CDMIS Online Portal is located at

[https://www4.cde.ca.gov/cdmis/default.aspx](https://www4.cde.ca.gov/cdmis/default.aspx" \o "CDMIS Website)

This screen provides access to the CDMIS. Users must enter their user name and password and select the “Log on” button to access the CDMIS.

Passwords must contain only alphanumeric characters with a minimum of fifteen characters in length, at least one capital/uppercase letter, at least one lowercase letter, and at least one unique character (!@#$^\*). New passwords cannot be the same as the username or old passwords.

For username or password assistance, users can navigate to the log in menu of the CDMIS and select either the "Forgot username?" or "Forgot password?" for assistance.

* For username assistance, users must enter the email address registered with their CDMIS account in order to retrieve their username. After submitting their email information, users will receive an automatically generated email from the CDMIS with their username information.
* For password assistance, users must enter their CDMIS username. After submitting their username information, users will receive an automatically generated email to the email address registered to their CDMIS account. This email will contain instructions on how to reset their CDMIS password.

User accounts are deactivated after ninety (90) days of inactivity. If a CDMIS user would like to reactivate their account, they can click the "Account Reactivation" in the log in menu. From there, input the username of the CDMIS account they would like to reactivate. An automatically generated email will be sent to the email address registered with the deactivated account. This email will contain a link to unlock the account. After clicking the link provided by the account reactivate email, a webpage will populate stating that the account has been reactivated. From there, users can log in with their CDMIS username and most recent password.

If CDMIS users require further assistance, agencies can contact the CDMIS Support Office by email at [CDMIS@cde.ca.gov](mailto:CDMIS@cde.ca.gov).

### 2.2 User Access Levels

There are two types of user access levels in the CDMIS: Super Users and Regular Users.

An agency's super user is usually the program director. The director is responsible for completing the CDD-801A, or designating individuals in the agency to complete these reports.

An agency may have as many Super Users and Regular Users as deemed necessary; however, an agency must always have at least one active Super User.

Detailed lists of permissions and functionalities Super Users and Regular Users maintain are provided below.

###### Super User

Super Users can do the following:

* See all user names and passwords
* Change information for all users
* Request new Super Users and Regular Users
* Deactivate existing users
* Report “No Services” for programs not operating during specific months
* Create and change sub-agencies (if sub-agencies are used for the CDD-801A)
* Assign users to sub-agencies (if sub-agencies are used for the CDD-801A)
* Complete and submit the CDD-801A for the entire agency (regardless of if the agency reports by sub-agency for the CDD-801A or not)

###### Regular User

Regular Users can do the following:

* Change his or her own user information only
* Complete and submit the CDD-801A for only one sub-agency (if sub-agencies are used for the CDD-801A)
* Complete and submit the CDD-801A for the entire agency (if sub-agencies are not used for the CDD-801A)

### 2.3 Add/Edit Users

Super Users can manage users by selecting the “Add/Edit Users” function from the Home.

#### Add Users

##### Overview

At the bottom of the Users screen, there is a “Register New User” button. Super Users can use this function to request a new user. When all required information is entered, a request for the new user is sent to the CDMIS Support Team for approval. CDMIS Support Team staff typically respond to user activation requests within 24 hours.

##### Important Reminder

Use the navigation buttons and links on the screen. Do not select the "Back" button on the browser as this may result in error messages or duplicate information. Always select the "Save" button when information is entered on the screen.

##### Required Information

Required information is indicated with an asterisk (“\*”). For every user, agencies must enter the following information:

* First name
* Last name
* Phone number with area code
* Email address (ensure that users’ email addresses are entered correctly; incorrect email address entries will result in users not receiving notifications from the CDMIS)
* User access level (i.e., Super User or Regular User)
  + Super Users do not need a sub-agency assignment
  + Agencies must select a sub-agency assignment for new users **if all of the following apply:**
* An agency has created sub-agencies for reporting (the sub-agency selection option is not displayed for agencies that have not created sub-agencies), **and**
* The new user is a Regular User (not a Super User), **and**
* The new user will submit the CDD-801A.

##### Step-by-Step Instructions

1. Enter the required information (indicated with an \*) about the new user
2. Select the "Save" button

**Result:** The Add New User screen is displayed; error messages are displayed at the top of the screen in red text

1. Read all error messages that appear at the top of the screen; correct all error messages by adding or changing information
2. Select the "Save" button
3. Repeat Steps 3–5 until all error messages are resolved
4. Select the "Return to Previous Page" button

**Result:** The Users screen is displayed.

##### What Happens Next

After all required information about the new user is entered and the "Save" button is selected, the following happens:

1. The CDMIS Office reviews and approves the new user request within 24 hours.
2. The new user receives an email from the CDMIS Office. This email includes the name and phone number of the person who requested the new user.
3. The new user contacts the person listed in the email notification and requests his or her new user name and initial password.
4. The new user logs on to the CDMIS website. The first time a new user logs on to the CDMIS website, the user is required to change their initial password.

##### About Users and Sub-Agency Reporting

Reporting by sub-agency is available for the CDD-801**A**.

Reporting by sub-agency is optional; agencies are not required to report by sub-agency.

A super user has access to the CDD-801A for all sub-agencies. A user must be assigned to one sub-agency if he or she is to enter the CDD-801A.

A user can be assigned to only one sub-agency.

A user cannot change their own sub-agency assignment. Only a Super User can change a sub-agency assignment.

##### Exit the Add New User Screen

* Select the "Return to Previous Page" button at the bottom of the screen, or
* Select the "Home" link that appears at the top of the web page, or
* Select the "Log Off" link that appears at the top of the web page.

#### Edit Users

##### Overview

Select the name of any registered user to reach the Edit User screen. This screen is used to view or update information for a specific user. Each user can update their individual contact information as necessary.

Super Users can update information for any user for their agency, as well as change sub-agency assignments and deactivate user access to the CDMIS Online Portal.

**Note Regarding User Name Changes:** Do not use this screen to change a user's name. If a person with access to the CDMIS Online Portal no longer needs access (e.g., due to staff leaving the agency, etc.), deactivate that user's account. New persons needing access to the CDMIS should have their own username and password. Security of children information submitted by agencies is crucial; only those who should be accessing the information on the CDMIS should have usernames and passwords.

##### Important Reminder

Use the navigation buttons and links on the screen. Do not select the "Back" button on the browser as this may result in error messages or duplicate information.

Always select the "Save" button when entering information on the screen.

##### Required Information

Required information is marked with an \*.

For every user, the following information must be entered:

* First name
  + Last name
* Phone number with area code
* Email address (ensure that users’ email addresses are entered correctly; incorrect email address entries will result in users not receiving notifications from the CDMIS)

##### Step-by-Step Instructions

***UPDATE*** user information (Super Users and Regular Users):

1. On the Edit User screen, make necessary changes to the user's contact information and select the "Save" button.

**Result:** If all information was provided, the text "User Information Updated Successfully" is displayed. To return to the Users screen, select the "Return to previous page" button. Error messages are displayed at the top of the screen in red text.

1. Read any error messages that appear at the top of the screen; correct all errors by adding or changing information
2. Select the "Save" button
3. Repeat Steps 2–5 until all error messages are resolved
4. Select the "Return to Previous Page" button

**Result:** The "Users" screen is displayed.

***DEACTIVATE*** a user or super user (super users only):

1. On the Edit User screen, check the box next to "Deactivate User" and select the "Save" button

**Result:** The text "User information has been updated successfully" is displayed. This user is no longer able to log on to the CDMIS website.

1. Select the "Return to previous page" button at the bottom of the screen

**Result:** The "Users" screen is displayed.

***REACTIVATE*** a deactivated users (Super Users only):

1. On the Edit User screen, check the box next to "Request Activation" and select the "Save" button

**Result:** The text "User information has been updated successfully" is displayed. The CDMIS Office is notified of all user reactivation requests. When the request is approved by the CDMIS Office, the user is notified via email and is able to log on to the CDMIS website.

1. Select the "Return to previous page" button at the bottom of the screen

**Result:** The "Users" screen is displayed.

##### What Happens Next

Once all required user information is completed and the "Save" button selected, the new user information is submitted to and stored by the CDMIS.

Once Super Users select the "Deactivate user" check box, that user’s account is immediately deactivated and cannot access the CDMIS Online Portal.

Once super users select the "Request Activation" check box, the following occurs:

1. The CDMIS Support Team reviews user requests within 24 hours.
2. If the user is approved, the user receives an email from the CDMIS Support Team. This email includes the name and phone number of the Super User who originally added this user into the system. Additionally, this email will direct the new user to call the Super User for password assistance.
3. If the new user request is disapproved, the Super User can enter the Users screen and see the reason why the CDMIS Support Team disapproved the user request. The Super User can contact the CDMIS Support Team by email at [CDMIS@cde.ca.gov](mailto:CDMIS@cde.ca.gov) with any questions or concerns.
4. If the user cannot remember their CDMIS password, the user should contact their super user for assistance.
5. If the agency Super User is not available, the user can contact the CDMIS Support Team by email at [CDMIS@cde.ca.gov](mailto:CDMIS@cde.ca.gov) for assistance.
6. Once the user logs on to the CDMIS Online Portal, the user is required to change their password (assuming it has been more than ninety [90] days since their last logon).

##### About Users’ Current Statuses

A user can have one of three status levels:

* Active (the user can access the CDMIS Online Portal), or
* Request activation (the user cannot access the CDMIS Online Portal until their Super User or the CDMIS Support Team approves the reactivation request), or
* Deactivated (the user cannot access the CDMIS Online Portal).

##### About Users and Sub-Agency Reporting

Reporting by sub-agency is available for the CDD-801A. Reporting by sub-agency is optional; agencies **do not** have to report by sub-agency.

###### Super Users

* Can access to the CDD-801A for all sub-agencies; a user must be assigned to one sub-agency if this person is to complete and submit the CDD-801A.
* Can change a user's sub-agency assignment on the Edit Users screen by selecting a different sub-agency from the drop-down list and selecting the "Save" button.

###### Regular Users

* Can be assigned to only one sub-agency.
* Cannot change his or her own sub-agency assignment; only a Super User can change a sub-agency assignment.

##### Exit the Edit User Screen

* Select the "Return to Previous Page" button at the bottom of the screen, or
* Select the "Home" link that appears at the top of the web page, or
* Select the "Log Off" link that appears at the top of the web page.

### 2.4 System Updates

The CDMIS Support Team sends out periodic updates regarding the CDIMS. Agencies may view current and archived system updates on the CDE CDMIS Updates web page at <http://www.cde.ca.gov/sp/cd/ci/update.asp>.

## Chapter 3: CDD-801A Reporting

This chapter contains information regarding CDD-801A reporting.

### Contents

This chapter contains the following topics:

* 3.1 CDD-801A Monthly Childcare Population Report
* 3.2 Data Definitions
* 3.3 Input/Edit: Step-by-Step Instructions
* 3.4 Electronic File Transfer: Step-by-Step Instructions
* 3.5 Management Reports

### 3.1 CDD-801A Monthly Childcare Population Report

The CDD-801A is the collection in which agencies report specific information on all children who were enrolled through an agency’s contract with the California Department of Education (CDE) and/or California Department of Social Services (CDSS).

##### Who

###### Which agencies must submit the CDD-801A?

The CDD-801A must be submitted for each report period during which subsidized childcare and early education services were provided through an agency’s contract.

If no subsidized childcare and early education services were provided through an agency’s contract for a given report period, “No Services” must be reported. Detailed instructions for reporting “No Services” are provided in Chapter 4: Manage Agency Information.

###### Which children should be reported in the CDD-801A?

Children who were enrolled in subsidized childcare and early education services through an agency’s contract should be included in the CDD-801A.

##### What

###### What is the CDD-801A?

The CDD-801A is a list of children whose childcare and early education services were subsidized through an agency’s contract for a given report period. The CDD-801A is submitted monthly by agencies that contract with CDE and/or CDSS.

The CDD-801A is also used to draw a sample of approximately 250 records per month from which more detailed information of children whose childcare services were subsidized through an agency’s contract is gathered. Information gathered from this sample constitutes the Monthly Sample Report, a separate report.

##### When

###### When is the deadline for submitting the CDD-801A?

The CDD-801A is due on the twentieth of the month following the end of the report period. For example, the October 2023 CDD-801A is due by November 20, 2023. Late notifications are sent via email to agencies who fail to submit the CDD-801A or fail to report “No Services,” on the following business day.

Agencies who fail to submit the CDD-801A by the final date stated in the late notification email will have their apportionments withheld until a complete CDD-801A is submitted. Agencies should revise the CDD-801A as soon as possible if discrepancies are found in the reported information.

##### Where

###### Where is the CDD-801A submitted?

The CDD-801A is submitted by agencies electronically via the CDMIS Online Portal at [https://www4.cde.ca.gov/cdmis/default.aspx.](https://www4.cde.ca.gov/cdmis/default.aspx)

##### Why

###### Why must agencies submit the CDD-801A?

As a requirement of receiving federal childcare funding, all states must submit the federally mandated ACF-801 report, which is a requirement of the Personal Responsibility and Work Opportunity Act of 1996 (PL 104-193). States were given a choice to submit the required information for one of the following groups: all children whose childcare services are provided by federal funds, or a sample of children whose childcare services are provided by federal funds. California currently submits sample information to fulfill the requirements of the ACF-801 report; the monthly information submitted via the CDD-801A is used to draw this sample.

Failure to submit the ACF-801 report to the federal government will result in a sanction (fiscal penalty) against the state. Therefore, the failure of agencies with contracts to submit the CDD-801A in a timely manner will result in the withholding of apportionments.

##### How

###### How do agencies submit the CDD-801A?

Submission of the CDD-801A is completed online via the CDMIS. Agencies may submit the CDD-801A by utilizing one of the following functions available on the CDMIS:

* **CDD-801A Input/Edit:** This function is used to carry out the following: copy records from month to month; fill in data entry screens to add new children whose days of enrollment were claimed for fiscal reimbursement purposes through an agency’s contract; and delete children whose days of enrollment were not claimed for fiscal reimbursement purposes through an agency’s contract. Step-by-step instructions addressing how to submit the CDD-801A using this method are available in the section below.
* **CDD-801A Electronic File Transfer:** This function is used to submit text files created by agencies, which contain all required information and is formatted specifically for the CDMIS to process. If agencies choose to submit the CDD-801A via this function, refer to Appendix C: Creating Electronic Files. Step-by-step instructions addressing how to submit the CDD-801A using this method are available in the section below.

###### How do agencies report “No Services”?

If an agency has a contract, but does not provide any subsidized childcare and early education services through the contract during a given report period, the agency must report “No Services.” Detailed instructions for reporting “No Services” are provided in Chapter 4: Manage Program Information.

###### How can agencies view previously submitted CDD-801As?

Submitted CDD-801As can be viewed or edited for a period of time after the report due date. Agencies may view or edit information submitted by utilizing the “CDD-801A Input/Edit” function, which is available on the CDMIS, for approximately ninety (90) days after the CDD-801A due date.

Once a report period is locked, agencies may view, but not edit, information submitted by utilizing the “CDD-801A Management Reports” function available on the CDMIS.

###### How can previously submitted CDD-801As be revised?

If agencies find that a particular report period does not contain the correct information (e.g., children are not reported or children are incorrectly reported) or if minor changes to a record need to be made, it is encouraged that those changes are made to the CDD-801A as soon as they are discovered.

For agencies that use the **CDD-801A Input/Edit** function, select the report period to be updated. Make the necessary changes to reflect accurate information for that report period.

For agencies that use the **CDD-801A Electronic File Transfer** function, carry out one of the following: use the CDD-801A Electronic File Transfer function to resubmit a corrected text file that includes all records or use the CDD-801A Input/Edit function to add, delete, or modify individual records.

### 3.2 CDD-801A Data Definitions

The family, child, and provider information fields from the CDD-801A have their own definitions, guidelines, and frequently asked questions (FAQs). The link provided in Appendix A: Data Definitions provides a comprehensive description of all data fields in the CDD-801A.

### 3.3 CDD-801A Input/Edit: Step-by-Step Instructions

The Input/Edit method of submitting the CDD-801A consists of agencies utilizing the CDD-801A Input/Edit function on the CDMIS to copy records from one month to the next; and add, delete, or modify those records to reflect accurate information for a given report period.

#### Overview

The CDD-801A Input/Edit function is for agencies who manually enter family and child data to submit the CDD-801A. Agencies may opt to enter family and child data manually for each report period or use the copy forward function to copy all family and child data from one report period to the next; and add, delete, or modify these records to reflect current information.

#### Important Reminder

Use the navigation buttons and links on the screen. Do not select the "Back" button on the browser as this may result in error messages or duplicate information.

#### Required Information

Information of all families and children who enrolled in childcare and early education services through an agency’s contract for the given report period.

#### Step-by-Step Instructions

##### View Families

This is the main screen in CDMIS once the user navigates to CDD-801A Input/Edit and selects a reporting period. Use this screen to view the families for your agency (or sub-agency) for the selected report month/year.

About This Screen:

* A maximum of 20 families are displayed on each screen.
* Families are displayed in alphabetical order by last name, then first name and middle initial.
* The "Total Families this report month/year" is displayed at the top of the screen. This number is the total for the agency (if there are no sub-agencies) or for the sub-agency (if a sub-agency was selected).

Available Buttons and Links:

###### Add a Family

To add a new family to the CDD-801A, follow the below steps:

1. Log on to the CDMIS.
2. Select the function "CDD-801A Input/Edit" and indicate the report period for which family and child data will be entered. Select the "View Report Month-Year" button.

**Result:** The View CDD-801A Families screen is displayed. Should data already exist in the indicated report period, the first 20 reported families are displayed. Should data not already exist in the indicated report period, no families are displayed.

1. Scroll to the bottom of the page and select the “Add a Family” button.

**Result:** The Add/Edit CDD-801A Family screen is displayed.

1. Fill in all required fields with the pertinent family, child, and provider information.

* By default, the Add Family screen maintains only one Child information section. If multiple children in a family received subsidized childcare and early education services through an agency’s contract for a given report period, agencies may add additional children’s information by selecting the “Add Child to Family” button.
* By default, the Add Family screen maintains only one Provider/Type of childcare and early education section. If a child in a family received subsidized services through multiple contracts maintained by an agency for a given report period, agencies may add additional provider/type of care information by selecting the “Add Provider/Type of Childcare to Child” button.
* Within the Add/Edit CDD-801A Family screen, agencies may click on the hyperlinked data field name for online instructions and guidance regarding the indicated data field.

1. Scroll to the bottom of the page and select the “Save Changes” button.

**Result:** If no data entry errors are detected, the text “Family Data has been saved” will be displayed. If data entry errors are detected, the pertinent error message will be displayed. All error messages must be resolved in order to save the record’s information; partial or incomplete information will not be saved.

###### Add a Child

Additional children can be added to an existing family reported in the CDD-801A within the CDMIS upon their receipt of subsidized child care and early education services through an agency’s contract.

**Important Note Regarding Families with Multiple Children:** If a family has multiple children certified to receive subsidized services through an agency’s contract, all children should be included in the same family’s file within the CDMIS (i.e., all children within the same family should maintain the same Family Identification Case Number [FICN]).

**Do not** create separate records within the CDMIS for multiple children certified to receive subsidized services within the same family (i.e., children within the same family should maintain the same FICNs).

To add additional children to a family in the CDD-801A, follow the below steps:

1. Log on to the CDMIS.
2. Select the function "CDD-801A Input/Edit" and indicate the report period for which family and child data will be entered. Select the "Submit" button.

**Result:** The View CDD-801A Families screen is displayed. Should data already exist in the indicated report period, the first 20 reported families are displayed. Should data not already exist in the indicated report period, no families are displayed.

1. Locate the family record to be edited. Select the on the head of household’s (HoH’s) name.

**Result:** The Add/Edit CDD-801A Family screen for the selected family is displayed.

1. Scroll to the bottom of the page and select the “Add Child to Family” button.

**Result:** A Child #2 information section will be displayed.

1. Enter all required information for the additional child. Repeat steps 4 – 5 for all pertinent children within the family.
2. Scroll to the bottom of the page and select the “Save Changes” button.

**Result:** If no data entry errors are detected, the text “Family Data has been saved” will be displayed. If data entry errors are detected, the pertinent error message will be displayed. All error messages must be resolved in order to save the record’s information; partial or incomplete information will not be saved.

###### Copy Forward

To copy CDD-801A information from one report period to another report period, follow the below steps:

1. Log on to the CDMIS.
2. Select the function "CDD-801A Input/Edit" and the report period from which families will be copied. Select the "View Report Month-Year" button.

**Result:** The View CDD-801A Families screen appears and the first 20 families reported for that report period are displayed.

Use the buttons and links found below the listed families to “Jump to” specific families that should or should not be copied forward to another report period:

* Select " Return to the Previous Page" to view the previous 20 families.
* Select "Next Page" to view the next 20 families.
* Select a page number from the drop-down list to view the families on that page.
* Select on a letter under the "Jump to families" to move to the first family with a last name that begins with that letter.

1. Scroll to the bottom of the page and select the "Copy Families to a Future Month" button.

**Result:** The Copy CDD-801A Families screen is displayed. All families are automatically selected to be copied, as indicated by the check mark next to each family's name. If only a few families are to be copied forward to another report period, select the "Uncheck All" button. Recheck only those few families to be copied forward. Select the "Check All" button to check or recheck all families.

The subsequent report period is pre-selected. The report period can be changed should agencies wish to copy families to a later report period; however, agencies cannot copy families to a prior report period or to a report period that has not yet ended.

If an agency uses sub-agencies, the CDMIS automatically selects the same sub-agency to receive the copied families. Only super users can select a different sub-agency to copy forward families’ information, should an agency wish to report families in a different sub-agency during the next report period.

1. Select the "Copy Checked Families" button.

**Result:** A confirmation screen(s) is displayed. Read the confirmation screen(s) carefully. One of two screens are displayed depending on if family information is or is not already present in the target report period:

* If there are already **families in the target report period**, agencies are informed of the number of families already in that report period. Agencies are prompted to delete the existing information and replace it with the information being copied forward, or to add the copied information to the information already in the target report period, **or**
* If there are **no families in the target report period**, agencies are prompted to confirm the copying forward of the information.

1. Once one of the above choices is selected, the copy forward process begins; the screen updates as families are processed and copied forward.
2. The Copy Forward Results screen is displayed; two buttons are displayed on this screen.
   * Return to the prior report period (should agencies want to double check that report period’s information), and
   * Continue to the target report period.
3. Families selected to be copied forward but were not copied forward into the target report period are listed in a table; these families could not be copied forward due to some error.
   * To see the error and possibly resolve the problem, select the "Edit" button located to the right of the family's name. The Edit Family screen for that family and the relevant error message(s) printed in red text are displayed. To copy the family forward, all error messages must be resolved and saved. Agencies must ensure that all error messages are corrected before returning to the Copy Forward Results screen.
   * Correcting the error messages and saving the information for each family automatically copies them forward into the target report period.
4. Select the “Continue to the target report period” button to make changes to the families in the target report period; add or delete pertinent family, child, and provider information.
   * The only time agencies should add families (or children) is when the family (or child) being added was claimed for fiscal reimbursement purposes through an agency’s contract during that report period. The only time agencies should delete families (or a child within a family) is when the family (or child) was reported incorrectly and was not enrolled in the subsidized childcare or early education programs through an agency’s contract during that report period.
5. Complete family, child, and provider records are automatically saved to the CDMIS database.

**Important Note Regarding Copy Forward:** Do not make changes to the CDD-801A before copying forward to the target report period.

For example, if an agency is copying forward information from May to June, the agency should not change the information reported in May before copying forward to June, or agencies will have changed May's report, and it will no longer reflect accurate information for that report period.

#### What Happens Next

1. Incomplete family, child, and provider information is not saved; pertinent error messages are displayed.
   1. All error messages must be resolved in order to save the record’s information; partial or incomplete information will not be saved.
2. Complete family, child, and provider information free of data quality errors is automatically saved to the CDMIS database.

#### Exit the View CDD-801A Families Screen

* Select the "Home" link that appears just above the page name, or
* Select the "Log Off" link that appears above the page name.

#### FAQs about Input/Edit

###### When can I use the “CDD-801A Input/Edit” function of the CDMIS?

The CDMIS website is available at all times for agencies to submit the CDD-801A. However, agencies cannot submit data for future report periods. as reporting rules require that agencies submit information on families and children enrolled in a subsidized childcare or early education program.

###### How do I know if my information has been successfully saved to the CDMIS database?

Complete family, child, and provider information free of data quality errors is automatically saved to the CDMIS database. The text “Family data has been saved” is displayed at the top of the family record and indicates that the family record has been successfully saved to the CDMIS database.

###### Can I view information submitted by my agency for previous report periods?

Agencies may view previously submitted CDD-801As by utilizing the “CDD-801A Management Reports” function of the CDMIS. The following management reports are available to agencies who use the CDD-801A Input/Edit function to submit the CDD-801A:

* **CDD-801A Submission Report:** This report displays all families included in the CDD-801A submission in a specified report period and agency/sub-agency.
* **CDD-801A Submission Export:** This report displays all families included in the CDD-801A submission in a specified report period and agency/sub-agency.
* **CDD-801A Program Code Report:** This report displays child count by Program Code included in the CDD-801A submission in a specified report period and agency/sub-agency.

###### I am trying to submit the CDD-801A using the “CDD-801A Input/Edit” function but am receiving the error message, “The selected report month/year cannot be the current month/year or later. CDD-801A data cannot be entered for this report month/year.” Why am I receiving this message?

Agencies cannot submit data for future report periods as reporting rules require that agencies submit enrollment information through agencies’ contract. Agencies receive the aforementioned error message when trying to access a report period that has not yet opened.

For example, in March 2023, an agency tries to submit the CDD-801A for April 2023; however, the agency is unable to do so as the April 2023 month has not yet passed. An agency may submit the CDD-801A for April 2023 beginning on May 1, 2023.

###### I am trying to copy forward information from a previous report month; however, I receive the error message, “The Cut-Off Date for entering CDD-801A data for the selected report month/year has passed. CDD-801A data may no longer be copied to the selected report month/year.” What does this mean? How do I access data from this report period?

An agency is trying to access data for a locked report period. Once a report period is locked, agencies can no longer access data submitted for that report period to revise or copy forward.

Detailed information regarding report deadline and lock dates is available on the CDD-801 Report Schedule web page at: [https://www.cde.ca.gov/sp/cd/ci/archived.asp.](https://www.cde.ca.gov/sp/cd/ci/archived.asp)

### 3.4 CDD-801A Electronic File Transfer: Step-by-Step Instructions

The Electronic File Transfer method of submitting the CDD-801A consists of agencies utilizing the CDD-801A Electronic File Transfer function of the CDMIS to upload a specifically formatted text file that contains all information for a particular report period.

**Warning: Transferred files overwrite existing information**

The CDMIS allows multiple file transfers for the same report period; however, every successful file transfer **completely overwrites all existing family, child, and type of childcare information**for the specified agency (or sub-agency) for that report period.

#### Overview

The CDD-801A Electronic File Transfer function is only for agencies who upload a file to submit the CDD-801A. This function is used to transfer a file from an agency’s computer to the CDE. The file must contain the following:

* Information of children who were enrolled in subsidized childcare and/or early education services in the report month through an agency’s contract(s) with the CDE and/or CDSS
* Information for one report period
* Information for one sub-agency (if the agency reports by sub-agency)

#### Important Reminder

The file must contain information in a very specific format. Refer to Appendix C: Creating Electronic Files for details.

#### Required Information

A sub-agency must be selected if an agency has created sub-agencies and if a super user is transferring the file.

The sub-agency selection option is not displayed if an agency has not created sub-agencies or if a super user is not transferring the file; files uploaded by a user are automatically uploaded to the sub-agency to which they are assigned.

#### Step-by-Step Instructions

##### Transfer a File

1. Log on to the CDMIS Online Portal and agree to the terms and conditions in the privacy statement.
2. Select the function "CDD-801A Electronic File Transfer" and indicate the report period for which a file will be transferred. Select “View Report Month-Year" button.
3. Select a sub-agency, if the sub-agency drop-down list is displayed.
4. Click on “Choose File”.

**Result:** An "Open File" dialog box is displayed. 

* Search the computer for the file.
* Highlight the file name.
* Select the "Open" button.

1. Select the “Upload File” button.

**Result:** The file transfer process begins.

1. If information for the specified report period has already been received by the CDE, a screen explaining that there is already data in the target report period is displayed. If agencies choose to proceed, the data currently in the CDMIS for that report period is deleted and replaced by the data in the file being transferred:

* Select the "OK" button to proceed with the file transfer, **or**
* Select the "Cancel" button to discontinue the file transfer and return to the previous page.

1. Read the CDD-801A Electronic File Transfer Confirmation screen.
2. Select the "Return to the Previous Page" button at the bottom of the screen.

**Result:** The home page is displayed.

##### Access the Electronic File Transfer Status Report

1. Log on to the CDMIS Online Portal
2. Select the function "CDD-801A Management Reports" and select the Electronic File Status Report

**Result:** The Report Selection screen is displayed.

1. Indicate the report period.
2. If the sub-agency drop-down list is displayed, select a sub-agency.
3. Select the "Submit" button.

**Result:** The Available CDD-801A Electronic File Transfer Status Reports screen is displayed.

1. Select the desired report number.
2. Read the file transfer status report thoroughly.

* If the File Status says "**Passed,** L**oaded to database,**" the file has no error messages and the families and children in that file have been added to the report period.
* If the File Status says "**Failed, Not loaded to database,**" the file has error messages and the families and children were not added to the report period.

**Optional:** Use the browser's "Print" button to print the report. Select the "Download this Screen to Excel File" button to save this report as an Excel Spreadsheet while working to resolve the error messages or to have a hard copy of the report.

1. Errors listed on the Electronic File Status Report must be corrected. The file must be resubmitted until all error messages are resolved, the file passes, and the information is successfully loaded to the CDMIS database.

#### What Happens Next

After transferring a file via the CDMIS, the following happens:

1. The original file is stored in the CDMIS database.
2. The CDMIS processes files each day at 2:45 a.m. After that time, status reports are available for files submitted the previous day.

The file is either

* + **Accepted,** all of the information is copied into the CDMIS database, **or**
  + **Rejected,** none of the information is copied into the CDMIS database.

1. A file transfer status report is created and stored.
2. Agencies may read the file transfer status report and confirm the file was accepted by the CDE.

For more information, read the Step-by-Step Instructions: Access the Electronic File Transfer Status Report section above.

#### Exit the CDD-801A Electronic File Transfer Screen

* Select the "Return to Previous Page" link at the bottom of the screen, or
* Select "Home" that appears just above the page name, or
* Select "Log Out" that appears above the page name.

#### FAQs about Electronic File Transfers

###### Can I email my agency's file to the CDE?

No. The CDE does not accept files via email. Email is not a secure form of communication; **never** use email to send files that contain personal identifiable information. Agencies must transfer the file by using the CDMIS Online Portal. In certain circumstances CDMIS Support Team will request a file to be uploaded to an Electronic File Transfer System. Instructions will be provided at that time.

###### Can I send a diskette, CD, or USB with my agency's file to the CDE?

No. The CDE does not accept diskettes, CDs, or USBs. Agencies must transfer the file by using the CDMIS Online Portal.

###### Can I download a file from the CDMIS?

Yes. The CDD-801A Submission Export report, which is available via the CDD-801A Management Reports function, allows agencies to export one month of data into an Excel spreadsheet and save that file onto a computer.

###### How do I know if someone else in my agency has already transferred a file for a report month?

Each time a user attempts to submit a file using the CDD-801A Electronic File Transfer function, the CDMIS checks to see if data already exists for that report period. If data already exists, a screen is displayed asking for confirmation to accept the file and overwrite the existing data in the selected report period or cancel the transfer. If there is no data in the report period, the file is accepted, and the user can check the status of the file the next day.

###### When I format the file, do I put quotation marks around the character fields?

No. Do not use quotation marks before and after character fields. The only delimiters allowed in the file are tabs (to separate fields) and CR/LF (to indicate the end of a row).

###### If I use the file transfer once, do I then have to use the file transfer every month after that?

No. For subsequent report periods, agencies can manually enter data (via the CDD-801A Input/Edit function) directly into the CDMIS Online Portal. For example, agencies can do a one-time electronic file transfer to load all of their data into the CDMIS. For the next report month, agencies can use the "Copy forward" button available within the CDD-801A Input/Edit function to copy data to a subsequent report period. After the data is copied to the new report period, agencies can edit the data by using the CDMIS data entry screens.

###### Can I use the file transfer option whenever I want?

The CDMIS Online Portal is available at all times for agencies to submit the CDD-801A. However, agencies cannot submit data for future report periods and must wait until the current calendar month ends, i.e. the November 2023 report can be submitted starting on December 1, 2023.

###### Can I transfer a partial file now and transfer the rest later?

No. Each time agencies (successfully) transfer a file, existing data in the CDMIS for the given report period is erased. The transfer file replaces all currently existing data.

The only way for agencies to submit data in multiple files is to establish sub-agencies, but those sub-agencies must contain different groups of families.

###### How do I change the information I already transferred? I need to add, edit, and delete data.

Agencies have two options:

* Use the data entry screens on the CDMIS (i.e., utilize the “CDD-801A Input/Edit” function) to correct the information (this may be easier if agencies only need to make a few changes), or
* Make corrections to the file and upload the corrected file to the CDMIS. (For the report period, all currently existing information is erased and the information contained in the new file is loaded into the CDMIS.)

###### Help! I transferred a file with wrong information. How do I delete all of the data in the file?

Agencies have two options:

* Use the data entry screens on the CDMIS (i.e., utilize the “CDD-801A Input/Edit” function) to delete all of the information, or
* Create a new file that contains correct informationand upload the corrected file to the CDMIS. When the file passes, all currently existing information is erased and the information contained in the new file is loaded into the CDMIS.

###### What happens to the file I transferred?

The file is processed in three steps:

1. The file is immediately stored on the CDMIS.
2. The file process begins at 2:45 a.m. the following morning.

* If processing is **successful**, the information in the file is transferred to the CDMIS database.
* If processing is **not successful**, none of the information in the file is transferred to the CDMIS database.

1. A processing status report is created and stored (permanently) on the CDMIS.

###### How do I know if my file transfer was successful?

The CDMIS processes files submitted every day at 2:45 a.m. A processing status report is available the morning after an agency has transferred a file. To view the report, agencies must complete the following steps:

1. Navigate to the CDMIS Home page and select the function "CDD-801A Management Reports."
2. Select the “CDD-801A Electronic File Status Report” function.
3. Indicate the desired report period.
4. All files submitted for a specific report period are displayed in the order they were received. To open and view the status of a file, select the numbered link. The processing status report describes if the processing of a file was successful or unsuccessful. If a file fails, the report displays error messages that must be corrected within the file.

###### If one sub-agency uses the file transfer function, does the other one have to?

No. Every sub-agency is completely independent of any other sub-agency.

###### Can I switch from file transfer to web input (or vice versa) anytime?

Yes.

###### When I look at my transfer file, the data wraps into lots of rows. Did I do something wrong?

When printing or displaying an import file, long records may wrap around the screen or page for multiple “lines.” These are still considered single rows (records) if the end-of-line characters CR/LF appears after the last field.

###### Do I have to give my electronic file a special name before I transfer it to CDMIS?

No. The CDMIS accepts files with any name. For agencies’ convenience, the CDMIS Office recommends that agencies indicate the report period in files’ names.

###### My agency uses a software package to create the CDD-801A. Can I transfer that file to the CDMIS?

Agencies that use software created by vendors can submit files if the software has been updated with the file format specifications detailed in Appendix C: Creating Electronic Files. For more information, consult the specific vendor.

###### I forgot to report some families when I transferred the last report period’s electronic file. Can I just include those families in my file for the next report period?

No. Files must contain information for only **one**report period. If agencies try to transfer a file with information for more than one report period, the entire file will be rejected. To add just a few families to a prior month, use the "CDD-801A Input/Edit" function.

###### What is a FIPS code and how do I find it?

FIPS stands for **F**ederal **I**nformation **P**rocessing **S**tandards. In California, FIPS codes are assigned by county. If the county is known, the FIPS code can be found on the ELCD-9600, look in the box “FIPS Code” in Section I: Family Identification.

For residents of contiguous states, the FIPS code is the two-digit state code followed by three numbers associated with the counties in those states. The CDMIS maintains a Zip/FIPS Lookup function that can be accessed from the CDMIS Home page. Input the zip code into this function; the CDMIS provides the correct FIPS code to enter in files.

###### I used a spreadsheet to create my electronic file. When I try to transfer it, the transfer fails. Help!

Four common problems when using a spreadsheet are as follows:

1. **Problem:** Agencies include column headings at the top of the spreadsheet and enter data into the rows underneath. The CDMIS is unable to read the header row, so the file is rejected.

**Solution:** Remove the header row from the spreadsheet before saving the spreadsheet as a tab-delimited text file.

1. **Problem:** When the spreadsheet application creates the tab-delimited text file, it adds delimiters to the file. For example, quotation marks may be inserted around text fields.

**Solution:** Remove any additional characters from the file.

1. **Problem:** When agencies type a leading zero (“0”) in some entries, the spreadsheet application ignores the 0. For example, agencies enter "04" (i.e., licensed center-based care) as the type of childcare, but the spreadsheet drops the "0" and displays only the "4."

**Solution:** Format the column in the spreadsheet as a "text" column rather than a number column or use custom formatting for the column and enter the format type as “00” so the leading zero is not dropped.

1. **Problem:** When agencies enter a date into the spreadsheet, the spreadsheet changes the format. For example, agencies enter "09/06/2023," but the spreadsheet displays "9/6/2023."

**Solution:** Format the column in the spreadsheet as a "text" column rather than a number column or use custom formatting for the column and enter the format type as “mm/dd/yyyy” so leading zeros are not dropped.

### 3.5 CDD-801A Management Reports

The CDMIS maintains different reports, referred to as CDD-801A Management Reports, agencies may find useful in reviewing information submitted for the CDD-801A.

CDD-801A Management Reports are available by navigating to the CDD-801A drop-down menu and selecting Management Reports.

Four reports are displayed on the CDD-801A Management Reports screen and are as follows:

#### CDD-801A Electronic File Status Report

This report indicates whether a CDD-801A Electronic File was successfully processed and uploaded to the CDMIS database.

#### CDD-801A Submission Report

This report displays all families included in the CDD-801A submission in a specified report period and agency/sub-agency.

#### CDD-801A Submission Export

This report displays all families included in the CDD-801A submission in a specified report period and agency/sub-agency. It can be exported to an Excel document and saved by the user to their computer.

#### CDD-801A Program Code Report

This report displays child count by Program Code included in the CDD-801A submission in a specific report period and agency/sub-agency.

## Chapter 4: Manage Agency Information

This chapter contains information regarding managing program and administrative information for an agency in the CDMIS.

### Contents

This chapter contains the following topics:

* 4.1 Update Agency Information
* 4.2 Add/Edit Executive Director Information
* 4.3 Add/Edit Program Director Information
* 4.4 Add/Edit Family Child Care Home (FCCH) Information
* 4.5 Add/Edit Sites or Offices
* 4.6 Sub-Agencies
* 4.7 No Services

### 4.1 Update Agency Information

The Update Agency Information screen is accessible only to Super Users. This screen is used to update an agency's information. The following information is displayed: agency’s vendor number; agency’s PQI consultant; agency’s name; and agency’s mailing address.

On the Update Agency Information screen, seven buttons are displayed:

1. Edit Executive Director Information\*
2. Edit Program Director Information\*
3. Add/Edit Family Child Care Home (FCCH) Information\*
4. Add/Edit Sites or Offices\*
5. Upload Files
6. Generate Agency Datasheet: This button allows agencies to create a report that contains all contact, site, and office information currently in the CDMIS for the agency. If any of the information is not accurate, agencies can use the buttons in the Agency Name and Mailing Address section to update the information, as necessary.
7. Generate Certification Form: This button allows agencies to print a document that must be signed and returned along with the annual Continued Funding Application package. This form is not required to be submitted at any other time.

\* Instructions for using these buttons are detailed in sections 5.2 through 5.5 below.

**Note Regarding Changes to Agency’s Legal Name:** An agency’s name and mailing address cannot be changed through the Update Agency Information screen as specific documentation is required from the agency to process that change. For information on how to change an agency's legal name or headquarter mailing address, the agency should contact their consultant.

### 4.2 Add/Edit Executive Director Information

#### Overview

The person listed as the Executive Director/Superintendent should be the primary administrator responsible for the overall operations of the agency, such as the chief executive officer or president of a private corporation, president, chancellor of a college, superintendent of a local educational agency (e.g., county office of education, school district.), city mayor, etc.

Questions regarding who should be listed as the Executive Director should be directed to an agency’s consultant.

#### Step-by-Step Instructions: Add/Edit Executive Director Information

To view or update agency executive director information, follow the below steps:

1. Select the function “Update Agency Information” from the User Setting drop-down menu on the CDMIS.
2. Select on the “Edit Executive Director Information” button underneath the Agency Name and Mailing Address section.
3. Review the information on the Edit Executive Director Information screen and make changes as necessary.

* Fields marked with an \* are required.
* The following information is also required in order for the information to be saved: a minimum of two characters in both the first and last name fields (numbers are not allowed); phone and fax numbers with 10 digits; and a complete email address.

1. Select the "Save Changes" button to save the changes.

* If the information is complete, the text "Approval Status: Edited – Pending" appears above the Title field.

1. Await approval of change from agency’s consultant.

* Once an agency’s consultant reviews and approves the changes, the status is no longer displayed. Questions regarding the status of pending changes should be directed to an agency’s consultant.

**Exit the Edit Executive Director Information Screen**

* Select the "Home" link that appears just above the page name, or
* Select the "Log Off" link that appears just above the page name, or
* Select the "Return to Edit Agency Information" button.

### 4.3 Add/Edit Program Director Information

#### Overview

Use this screen to add a new program director, update an existing program director’s contact information, and assign or reassign program directors to agency’s contracts. Any changes, deletions, or additions submitted are marked as “Pending” under the Status column until reviewed and approved by an agency’s consultant. Once the change is approved, the Status column is blank.

Two tables are displayed. The first table lists the current program directors for an agency. The second table displays all current contracts an agency has as well as the program director currently assigned to that contract.

##### Program Director

The program director is the person responsible for the oversight of the agency’s contract. Depending on the contract type, different rules apply to who can hold this position. When adding new program directors or assigning an existing program director to a new contract, follow the below guidelines:

For **Center-Based** contract types (i.e., CCTR, CFCC, CHAN, CMIG, and CSPP), the program director is the person who supervises the childcare and early education programs operated at a single site or multiple-sites; provides services in the care, development, and instruction of children in the childcare and early education programs; serves as the coordinator of curriculum and staff; and has administrative and programmatic responsibility for the program(s).

A Program Director for a center-based contract shall hold one of the following:

* A current Child Development Program Director Permit for multiple sites,
* A current Children's Center Supervision Permit for a single site,
* A current Multiple-subject Credential or Single Subject in Home Economics Credential issued by the Commission on Teacher Credentialing plus 21 qualifying units in Early Childhood Education/Child Development,
* An Administrative Services Credential authorizing administration or supervision in public schools in California that includes a preschool authorization, or
* A qualifications waiver issued by the State Superintendent of Public Instruction

For **Alternative Payment** contract types (i.e., CAPP, C2AP, C3AP, and CMAP), the program director is the person with the overall responsibility over the operations of the agency’s contract.

#### Important Reminder

If a program director's phone number or email address is changed on the Update Agency Information screen, agencies must also ensure that the program director’s user account information is updated on the Add/Edit Users screen within the CDMIS.

#### Required Information

Program director contact information and contract assignment.

#### Step-by-Step Instructions: Program Director Information

A table containing information about an agency’s program director(s) is displayed. The table contains the following:

* **Status column:** This column indicates if the changes an agency submitted for a program director are still pending.
* **Program Director column:** This column shows the names of all program directors currently listed for an agency.
* **Edit and/or Delete buttons**: These buttons are located to the right of each program director’s name.

##### Update Program Director Information

To change information for an existing program director (e.g., updating their mailing address, phone number, or email address), follow the below steps:

1. Under the Program Director section, select the “Edit” button located to the right of the program director's name.

**Result:** The program director’s information is displayed and can be edited.

1. Change the information for the program director and select the "Save Changes" button. Make sure there is information in all the required fields (indicated by an \*). If any error messages are displayed, make corrections as necessary and select the “Save Changes” button again. Repeat this process until no error messages are displayed. Changes are not saved unless all error messages are resolved.

**Result:** Once the changes are submitted, the following is displayed for the program director on the main Edit Program Director screen:

* + The text “Your changes have been submitted" appears below the list of program directors.
  + The “Status” column in the program director’s list displays “Edited–Pending.”
  + A "Cancel Changes" button appears to the left of the program director's name, which allows agencies to undo the recently submitted changes.
  + Agencies can continue to edit the program director's information while changes are pending.

1. When an agency’s consultant approves the changes, the “Edited–Pending” text in the Status column and the "Cancel Changes" button are no longer displayed.

##### Cancel Changes to Program Director Information

If, for any reason, an agency wants to cancel changes made to a program director, follow the below steps:

1. Select the "Cancel Changes" button that appears to the left of the program director's name.

**Result:** The following message appears below the program director table, along with two additional buttons.

**Message:**Selecting "Cancel Changes" will remove all pending edits for [program director name].

**Buttons:**"Keep Changes" or "Cancel Changes."

1. Select the "Cancel Changes" button to remove the changes and restore the original information. Select the "Keep Changes" button to keep the edits made; the edits remain pending.
2. After selecting the "Cancel Changes" button, the “Status” column is blank as there are no longer pending changes for the program director. The original information saved in the CDMIS for the program director is restored.

##### Delete a Program Director

The "Delete" button is not displayed for a program director until all contract assignments are assigned to a different program director and approved by an agency’s consultant. Once completed, a "Delete" button is displayed. Follow the steps below to delete a program director:

1. Select the “Delete” button that appears to the right of the program director’s name.

**Result:** Agencies are prompted to confirm the request.

1. Select the “Confirm Delete” button to submit the delete request through the CDMIS.

**Result:**After confirming the delete request, the following is displayed for the program director on the Edit Program Director screen:

* + The text “Your changes have been submitted” appears below the list of program directors.
  + The text "Deleted – Pending” appears in the Status column of the program director deleted.
  + The "Delete" and "Edit" buttons for the program director are no longer displayed.
  + A "Cancel Changes" button appears to the left of the program director's name, which allows agencies to cancel submitted delete requests.

1. When an agency’s consultant approves the deletion, the program director is removed from the CDMIS.

**Note Regarding Deletion of Program Directors:** After deleting a program director, agencies must deactivate the program director's access to the CDMIS Online Portal (if they no longer need to access this information). For security reasons, agencies are encouraged to deactivate user's CDMIS access when a person leaves the agency or if a person’s responsibility no longer includes the need to access the CDMIS. To deactivate a User or Super User, follow the user deactivation instructions provided in Chapter 2: System Access or contact the CDMIS Support Team.

##### Cancel Deletion of Program Director

If, for any reason, agencies want to cancel the delete request for a program director, follow these steps:

1. Select the "Cancel Changes" button that appears to the left of the program director's name.

**Result:** The following message appears below the program director table along with two additional buttons.

**Message:**Selecting "Cancel Changes" will remove the pending delete for [program director name].

**Buttons:** "Keep Changes" or "Cancel Changes."

1. Select the "Cancel Changes" button to cancel delete requests; the program director is removed from the CDMIS once an agency’s consultant approves the change. Select the "Keep Changes" button to keep the program director delete request in place; the delete request remains pending.
2. After selecting the "Cancel Changes" button, the Status column is blank as there is no longer a pending delete for the program director. The "Delete" and "Edit" buttons are displayed again and the information for the program director can be edited, as necessary.

##### Add a New Program Director

1. Select the “Add a New Program Director” button that appears under the list of existing program directors.

**Result:** A blank program director section appears.

1. Enter the required information (indicated by an \*) for the new program director and select the “Submit Updates” button.

**Result:** A new program director is added to the program director list. The following is displayed for the program director on the Edit Program Director screen.

* + The text “Your changes have been submitted” appears below the list of program directors.
  + “New – Pending” appears in the “Status” column of the added program director.
  + An "Edit" button appears. Additional changes can be made while the add program director request is pending.
  + A "Cancel Changes" button appears to the left of the new program director's name, which allows agencies to delete recently added program directors.

1. Program director must be assigned to an agency’s contract. Program director contract assignment changes remain pending until approved by an agency’s consultant. When an agency’s consultant approves a new program director, the “Status” column is blank.

**Note Regarding Addition of New Program Directors:** After an agency adds a new program director and assigns them to a contract, the agency must then add the new program director as a super user to the CDMIS. If agencies are unsure how to do this, contact the CDMIS Office.

##### Cancel Addition of Program Director

If, for any reason, agencies want to cancel a pending add for a program director, follow the below steps:

1. Select the "Cancel Changes" button that appears to the left of the program director's name.

**Result:** The following message appears below the program director table along with two additional buttons.

**Message:**Selecting "Remove New Program Director" will remove [program director name] as a new program director.

**Buttons:**"Keep Changes" and "Remove New Program Director."

1. Select the "Remove New Program Director" button to cancel addition requests. Select the "Keep Changes" button to keep the addition of the program director in place; the add request remains pending.
2. After selecting the "Remove New Program Director" button, the program director's name is removed from the list and any pending assignment changes revert to the previously assigned program director.

#### Step-by-Step Instructions: Contracts and Assigned Program Directors

A table with five columns containing information about an agency’s contract(s) and the assigned program director is displayed under the Contracts and Assigned Program Directors section. The columns include the following:

* **Status:** This column indicates if any assignment changes are pending. If this column is blank, no changes are currently pending.
* **Pending:** This column allows for users to cancel pending changes.
* **Contract:** This column lists an agency’s contract(s).
* **Assigned Program Director:** This column shows the currently assigned program director for agency’s contract(s).
* **Assign**: This column allows for users to confirm the assignment of the program director to the respective contract type.

##### Change a Contract’s Assigned Program Director

1. Determine which program directors’ assignments must be changed.
2. Click the drop-down list that contains all the program directors for an agency; select the program director’s name whose assignment is to be changed.

**Result:** The program director’s name is listed.

1. Select the “Assign” button to submit the change.

**Result:** The Status column displays “Pending Assignment." The following is also displayed:

* + The text “Your changes have been submitted” appears below the Contracts and Assigned Program Directors table.
  + A "Cancel Pending Assignment" button is displayed, which allows agencies to cancel recently submitted changes.

1. When an agency’s consultant approves an assignment change, the Status column is blank.

##### Cancel Changes to Contract’s Assigned Program Director

If, for any reason, agencies want to cancel the assignment changes made, follow the below steps:

1. Select the "Cancel Pending Assignment" button that appears to the left of the program director's name.

**Result:** The following message appears below program director table along with two additional buttons.

**Message:**Selecting "Cancel Pending Assignment" will remove all pending edits for [program director name].

**Buttons:**"Keep Pending Assignment" or "Cancel Pending Assignment."

1. Select the "Cancel Pending Assignment" button to cancel assignment changes made and restore the original information. Select the "Keep Pending Assignment" button to keep assignment changes made; assignment changes remain pending.
2. After selecting the "Cancel Pending Assignment" button, the Status column is blank as there are no longer pending changes. The original information the CDMIS stored for the program director’s assignment is restored.

**Exit the Edit Program Director Information Screen**

* Select the "Home" link that appears just above the page name, or
* Select the "Log Off" link that appears just above the page name, or
* Select the "Return to Edit Agency Information" button.

#### Error Messages and Solutions

###### A Prefix is required.

**Problem:** An agency added a new program director or edited an existing program director with no prefix selected.

**Solution:** Select a prefix from the drop-down list and select the "Save Changes" button.

###### Program Director First Name is required.

**Problem:**The program director's first name is missing, contains only one letter, or contains only numbers.

**Solution:** Review the information provided for the program director's first name, make corrections as necessary, and select the "Save Changes" button.

###### Program Director Last Name is required.

**Problem:** The program director's last name is missing, contains only one letter, or contains only numbers.

**Solution:**Review the information provided for the program director's last name, make corrections as necessary, and select the "Save Changes" button.

###### The Program Director you are adding already exists.

**Problem:** A program director with the same first and last name already exists. A program director cannot be listed more than once.

**Solution:** Review the existing program directors listed for the agency and select the "Edit" button to update the desired program director’s information.

###### A P.O. Box or a Street Address is required.

**Problem:** The program director’s address is missing or an invalid P.O. Box or street address is listed.

**Solution:** Enter a P.O. Box or street address for the program director and select the "Save Changes" button.

###### A complete P.O. Box or a Street Address is required.

**Problem:** The program director's P.O. Box or street address does not contain enough information.

**Solution:** Review the information entered, enter complete information for the P.O. Box or street address, and select the "Save Changes" button.

###### A City is required.

**Problem:**The city information is not provided.

**Solution:**Review the information entered, make corrections as necessary, and select the "Save Changes" button.

###### The City is not valid for this Zip Code.

**Problem:**The zip code and city entered do not go together, or the city name entered is misspelled.

**Solution:** Review the information entered, make corrections as necessary, and select the “Save Changes” button. The two data fields are validated against each other so both must be entered correctly.

###### A Phone Number is required.

**Problem:**The phone number is not provided.

**Solution:**Enter the program director's phone number and select the "Save Changes" button.

###### The Phone Area Code is not valid for California.

**Problem:**The area code entered does not exist in California.

**Solution:**Review the information entered, make corrections as necessary, and select the "Save Changes" button.

###### A Valid Phone Number is required.

**Problem:** The phone number entered does not contain ten (10) numbers or contains non-numeric (not 0 – 9) characters.

**Solution:** Review the information entered, make corrections as necessary, and select the "Save Changes" button.

###### The Fax Area Code is not valid for California.

**Problem:** The fax area code entered does not exist in California.

**Solution:** Review the information entered, make corrections as necessary, and select the "Save Changes" button.

###### A Valid Fax Number is required.

**Problem:**The fax number entered does not contain ten (10) numbers or contains non-numeric (not 0 – 9) characters.

**Solution:** Review the information entered, make corrections as necessary, and select the "Save Changes" button.

###### A Valid Email Address is required.

**Problem:** The email address provided is either missing or incomplete.

**Solution:** Review the information entered, make corrections as necessary, and select the "Save Changes" button.

###### You cannot unassign a program director from a contract.

**Problem:** A contract assignment has been changed from a program director to "Not Assigned.” A program director must be assigned to every contract an agency holds.

**Solution:** Select the correct program director from the drop-down list and select the "Assign" button. If a program director does not appear on the drop-down menu, select the "Add a New Program Director" button under the Program Directors section. Once the new program director is added, agencies can assign them to a contract.

#### FAQs about Edit Program Director Information

###### Our program director is leaving at the end of the month and we have not found a replacement for him/her yet. Who do we enter as the program director until we find someone?

Contact the agency’s consultant. The agency’s consultant will provide instruction on who to list as the interim program director until a permanent replacement is found.

###### Our new program director doesn't have an email address of his/her own yet. Whose email can we use until we establish one for him/her with our agency?

Agencies can temporarily use the email address of any agency staff as long as it can be guaranteed that emails received by them for the program director will be provided to the program director promptly. It is important that the program director's email address is updated as soon as it is available as the CDMIS will use this information to contact the program director.

###### I made some changes to our program director's information and realized what I entered was wrong. The Status column says "Edited – Pending." Can I make more changes or do I have to wait until the changes I initially submitted are approved?

As long as the "Edit" button is displayed, agencies can make and Save Changes for any program director.

### 4.4 Add/Edit FCCH Information

#### Overview

This Add/Edit FCCH Information screen provides summary information of the number of licensed FCCHs used to provide subsidized childcare services through an agency’s contract. Agencies should not submit any information in this screen if it is not applicable.

**Note:** All CFCC contracts must be listed in this section and must include at least one home and one child served. A CFCC contract cannot be deleted from this screen as this is the only place where summary information of the number of homes and number of children are collected for this contract.

#### Required Information

For each contract where children are served in FCCHs, agencies **must** enter the following:

* The number of licensed FCCHs at which subsidized childcare and early education services are provided through an agency’s contract.
* The number of children served by age group.

#### Step-by-Step Instructions: FCCH Information

##### Age Group Descriptions

* Infants: Birth to 18 months
* Toddlers: 18 months to 36 months
* Preschoolers: 36 months to Kindergarten
* School-age: Kindergarten to 13 years

##### Update Information

1. Select the "Edit" button to the right of the contract to be updated.

**Result:** The screen reloads and displays only the current information for the contract selected. Agencies can update the number of homes and children served in each age group.

1. Enter the number of homes used to serve children and enter the number of children in each age group that received subsidized childcare services through an agency’s contract in those homes. Agencies must enter a number greater than zero (0) in the number of homes and at least one of the age group fields. If agencies do not serve children in every age group, enter zero (0) for those age groups.

If agencies do not want to make any changes at this time, select the "Cancel" button to return to the Add/Edit FCCH Information screen.

1. Select the "Save Changes" button when finished.

**Result:** Agencies are returned to the Add/Edit FCCH Information screen and the changes made are displayed in the table. The text “Your changes were submitted” appears below the table. The "Delete" button is not displayed, but agencies can still make edits while there are pending changes. Changes submitted remain as “Edited – Pending” under the Status column until the agency’s consultant reviews and approves the changes. Once approved, the Status column is blank.

##### Cancel Pending Update Changes

1. Select the “Cancel Changes” button that appears next to the contract number.

**Result:**The following message appears below the list of contracts along with two additional buttons: "Keep Changes" and "Cancel Changes."

**Message:** Selecting "Cancel Changes” will remove all pending edits for contract [contract number].

1. Select the "Cancel Changes" button to remove the changes and restore the original information. Select the "Keep Changes" button to keep changes made; the edits remain pending.
2. After selecting the "Cancel Changes" button, the Status column is blank as there are no longer pending changes for this contract. The original information for the contract’s FCCH is restored.

##### Add Information

1. Select the "Add a FCCH Contract" button.

**Result:** A new section appears in which agencies can select a contract to add and enter information.

1. Select the desired contract from the drop-down list.

**Result:** The page reloads to display only those age groups that apply to the contract selected (some contracts have limited age groups they can serve).

Only active contracts that are not already listed are available in the drop-down list of contracts to add.

1. Enter the number of homes and children served by age group in those homes. Agencies must enter a number greater than zero (0) in the number of homes and at least one of the age group fields. If agencies do not serve children in every age group, enter zero (0) in those fields.

Select the "Cancel" button to cancel the add information process and return to the Add/Edit FCCH Information screen.

1. Select the "Save Changes" button when finished.

**Result:** Agencies return to the Add/Edit FCCH Information screen and the contract added is displayed in the table. The text "Your changes were submitted" is displayed below the table. The Status column displays “New – Pending” until the agency’s consultant reviews and approves the changes. The "Edit" button is displayed should agencies need to make additional edits while the add request is pending. Once approved, the Status column is blank and the "Delete" button is displayed.

##### Cancel Pending Add Request

1. Select the “Cancel Changes” button displayed next to the pending added contract number to be removed.

**Result:**The following message appears below the list of contracts along with two additional buttons: "Keep Changes" and "Cancel Changes"

**Message:** Selecting “Cancel Changes” will remove the add request for contract [contract number].

1. Select the "Cancel Changes" button to remove the contract from the list. Select the "Keep Changes" button to maintain the pending addition; the contract add remains as pending.
2. After selecting the "Cancel Changes" button, the contract is removed from the list.

##### Delete Contract Information

1. Select the "Delete" button to the right of the contract to be deleted.

**Result:** The message "Confirm deletion of FCCH information for Contract [contract number]" appears.

1. To delete the FCCH information for the contract, select the "Confirm Delete" button.

**Result:** The section is compressed and the text "Your change has been submitted" is displayed. Submitted deletions remain as “Deleted – Pending” under the Status column until the agency’s consultant reviews and approves the changes. The "Edit" and "Delete" buttons are not displayed. Once the deletion is approved, the contract is no longer displayed on the screen.

Select the "Cancel Delete" button to cancel the delete information process and return to the Add/Edit FCCH Information screen.

##### Cancel Pending Delete Request

1. Select the “Cancel Changes” button displayed next to the pending deleted contract number to be removed.

**Result:**The following message appears below the list of contracts along with two additional buttons: "Keep Changes" and "Cancel Changes"

**Message:** Selecting “Cancel Changes” will remove the delete request for contract [contract number].

1. Select the "Cancel Changes" button to cancel the delete request for the contract. Select the "Keep Changes" button to maintain the pending deletion; the contract delete remains as pending.
2. After selecting the "Cancel Changes" button, the contract remains listed and the "Delete" and "Edit" buttons are displayed.

**Exit the Add/Edit FCCH Information Screen**

* Select the "Home" link that appears just above the page name, or
* Select the "Log Off" link that appears just above the page name, or
* Select the "Return to Edit Agency Information" button.

#### Error Messages and Solutions

* **Number of Homes must be greater than zero (0).**

**Problem:** Zero (0) is entered in the Number of Homes field.

**Solution:**Enter a number greater than zero (0). If FCCHs related to this contract are no longer used, delete the FCCH summary record.

* **At least one age group must have a child count greater than zero (0).**

**Problem:**All the age groups show zero (0) children served.

**Solution:** At least one of the age groups listed must have a number greater than zero (0).

* **Child Counts for each age group cannot be blank.**

**Problem:**One or more of the age groups is missing information.

**Solution:**Enter a number in the age group that is missing information. If no children are served in an age group, enter zero (0).

* **You cannot delete this contract because a CCTR contract must be associated with at least one site or the contract must be listed on the Add/Edit FCCH Information screen.**

**Problem:**An attempt is made to delete the only CCTR contract listed at a location where children are indicated as being served.

**Solution:**If FCCHs are no longer being used to provide subsidized childcare and early education services to children under an agency’s CCTR contract with the ELCD, the CCTR contract must be added to a site on the Add/Edit Sites or Offices screen before it can be deleted from the Add/Edit FCCH Information screen.

#### FAQs about Add/Edit FCCH Information

* **We used to provide services to children through some licensed family child care homes, but we now only provide services at licensed centers. I tried to change the numbers to zero (0) but I keep getting an error message saying I can't enter zero. What do I do?**

If an agency used to have FCCHs associated with a contract but no longer use them, the agency must remove the FCCH completely by selecting the "Delete" button to the right of that contract.

**Note:** For CCTR contracts, before agencies can delete a CCTR contract that is currently listed on the Add/Edit FCCH Information screen, agencies must ensure the contract is assigned to at least one site to indicate where subsidized services are provided. If the CCTR contract is only listed on the Add/Edit FCCH Information screen, agencies will not be able to delete the CCTR contract until it is assigned to at least one site.

* **We only have a CCTR contract and only provide services to children in licensed family child care homes. We have a site listed but realize that the site is only an administrative address shouldn't be listed as a site as no children actually receive services there. What should we do?**

Ensure that the CCTR contract is listed on the Add/Edit FCCH Information screen. If it is, delete the site from the Add/Edit Sites or Offices screen; select the "Delete" button displayed to the right of the site and confirm the deletion. If the "Delete" button is not displayed cancel any pending changes made to the site by selecting the “Cancel Changes” button. (The "Delete" button is hidden when there are pending changes.)

### 4.5 Add/Edit Sites or Offices

#### Overview

The Add/Edit Sites or Offices screen is used to add or change information about sites or offices, which are used by agencies in relation to their contract(s).

Each contract an agency has must be assigned to at least one site or office based on the definitions below. Agencies with contracts that fall into both the site and office categories should have both sites and offices listed. For the purpose of maintaining information within the CDMIS, sites and offices are defined in the Required Information section below.

When viewing the table on the Add/Edit Sites or Offices screen, the column "Facility Type" indicates whether the facility listed is a "Site" or an "Office."

#### Required Information

##### Site

A site is the physical location (one or more classrooms) where childcare and early education services are provided to children through an agency’s contract(s).

Agencies with the following contract types have sites: CCTR, CHAN, CMIG, and CSPP.

Agencies are required to provide the following information for each site:

* At least one site must be listed to indicate where subsidized childcare and early education services were provided to children through an agency’s contract(s).
* Each site must have at least one assigned contract (i.e., the contract that funds the subsidized childcare and early education services provided to children at that location).
* Each site must have at least one license (whether license-exempt or not).
* Each contract associated with this facility type, as defined above, must be assigned to at least one site.

For each site, agencies **must** provide the following information:

* Site name and address. For licensed facilities, the name and address should match the name and address on the license issued by the CDSS, Community Care Licensing.
* First and last name of site supervisor.
* Phone number of site supervisor.
* All contracts that fund subsidized childcare and early education services provided to children at that site. Specify the maximum capacity by entering the permitted number of children allowed under the licensed capacity in a typical day for each contract. Please note that you are required to input the maximum capacity amount, not the actual number of children served. Enter zero (0) if there are no children in an age group.
* All licenses for that site issued by the CDSS, Community Care Licensing. If a site is license exempt, enter “EXEMPT” as the license number. If unsure, contact the agency’s consultant.

**Note Regarding FCCHs:** If agencies provide services to children in FCCHs through a CSPP, CCTR, or CMIG contract, agencies must also list this contract in the FCCH Information section of the Update Agency Information screen. The number of children reported by age group under the FCCH Information section is a sub-set of the number of children listed that are served at a site.

##### Office

An office is the administrative facility where families apply for services or obtain information related to specific contracts.

Agencies with the following contract types have offices: C2AP, C3AP, CAPP, CFCC, CMAP, and CRRP.

The following rules apply to agencies with these contract types:

* Each agency must have at least one office.
* Each of the agency's contracts that are associated with this facility type, as defined above, must be assigned to at least one office.

For each office, agencies **must** provide the following information:

* Office name and address.
* All contracts that fund subsidized childcare and early education services provided to children at that site. Specify the maximum capacity by entering the permitted number of children allowed under the licensed capacity in a typical day for each contract. Please note that you are required to input the maximum capacity amount, not the actual number of children served. Enter zero (0) if there are no children in an age group.

The following two contracts have specific requirements:

* + **CRRP contracts** must be assigned to the office they are associated with; no license capacity numbers are collected for this contract type as it is a referral contract only.
  + **CFCC contracts** must be assigned to the office they are associated with; no license capacity numbers are collected because this information is collected in the FCCH Information section along with the number of homes where children are served.

**Note Regarding Facilities as Sites and Offices:** If one or more of an agency’s facilities operates as both a site and an office, that facility should be listed twice. For example, an agency with a CAPP contract operates an administrative office at a facility where families can apply for services or obtain childcare information; the same facility has a licensed classroom where services are provided to children funded from the agency’s CCTR contract. Because both services are provided at the same address, both facility types need to be listed.

#### Step-by-Step Instructions: Add a Site or Office

##### Add a Site or Office

1. Select the "Add a New Site or Office" button.

**Note:** Agencies are prompted to select the type of facility to be added. This ensures that agencies are provided with the correct screens to enter information.

1. Select the desired facility type to add and select the "Submit" button.

**Result:** A screen loads where information based on the facility type selected can be entered.

1. Enter all required information for the site (indicated by an \*) and select the “Save Changes” button.

**Note:** If red error messages appear regarding missing or invalid site information, correct the information and select the “Save Changes” button again. Repeat this process until no red error messages are displayed.

1. **For New Sites**: Once agencies have successfully submitted the requisite information, two additional sections appear that must be completed for the new site: Number of Children Served in Each Contract (under this section, agencies must add a contract to this new site), and License (under this section, agencies must add a license to the new site). Follow the instructions provided in the How to Add, Update, or Delete Information for Existing Sites or Offices section and Additional Requirements for Sites section below for detailed steps regarding adding a contract and a license.

**For New Offices**: Once agencies have successfully submitted the requisite information, an additional section appears that must be completed for the new office: Number of Children Served in Each Contract that contains an "Add Contract" button. Select this button to add a contract to the office. Agencies must assign at least one contract to an office before it is considered complete. Follow the instructions above on adding a contract.

**Note Regarding New Sites or Offices:** New sites or offices are not submitted for approval to an agency’s consultant until all information has been provided. If an agency does not add a contract for a new office or if an agency does not add both a contract and a license to a new site, the Status column on the Add/Edit Sites or Offices screen displays "Incomplete" and the new site or office added is not submitted to the agency’s consultant for review.

##### Cancel a Pending Site or Office

1. Select the "Cancel Changes" button that appears to the left of the site or office name.

**Result:** The following message appears below the table containing the sites and offices along with two additional buttons: "Keep Changes" or "Cancel Changes."

**Message:** Selecting "Cancel Changes" removes all pending changes for the [site/office name] site/office. This includes any pending changes to the number of children for each contract and/or pending changes to licenses for the site/office.

1. Select the "Cancel Changes" button to remove the add site/office request. Select the "Keep Changes" button to keep the new site/office as pending; the add site/office request remains pending. The site/office is added to the list of sites/offices along with their associated contracts and licenses when the agency’s consultant approves the changes.
2. After selecting the "Cancel Changes" button, the pending site/office name is removed from the list.

#### Step-by-Step Instructions: Edit/Delete Site or Office Information

This section describes how to add, update, or delete information for a selected site or office. It also provides instructions on how to cancel pending changes made so they are not forwarded to an agency’s consultant for review and approval. Contracts should only be associated with a site or office if funds from that contract are used to provide subsidized childcare services at that site or office. The CDMIS does not allow a contract to be deleted from a site or office if the contract is not associated with at least one other existing site or office.

##### Edit Site or Office Information

1. Select the "Edit" button to the right of the site or office to be updated.

**Result:** The section expands for agencies to update the name, supervisor, phone number, and fax number for the site or office.

**Note:** Agencies cannot update site or office addresses. If an address needs to be changed, agencies must add a new site or office with the updated address and delete the site or office with the outdated address.

1. Select the “Save Changes” button.

**Result:** The changes made were updated; the text "Approval Status: Edited – Pending" appears above the site or office name. The "Edit" button is displayed to allow changes to be made as necessary. The text "Your changes have been submitted" appears.

**Note:** If there are error messages regarding missing or incorrect information, correct the related information and select the “Save Changes” button. Agencies must resolve all error messages or changes made are lost.

1. Select the "Select another Site to Edit" button.

**Result:** Agencies return to the Add/Edit Sites or Offices screen. The Status column displays "Edited – Pending" next to the site or office. A "Cancel Changes" button appears between the status column and the Site/Office name column, which allows agencies to undo changes submitted. In addition, the "Delete" button is no longer displayed. Agencies can continue to edit the site or office information while edits are pending. Once changes have been approved by an agency’s consultant, the Status column is blank and the "Delete" button is displayed.

##### Cancel Pending Changes

1. Select the "Cancel Changes" button that appears to the left of the site or office name.

**Result:** The following message appears below the table containing the sites and offices along with two additional buttons: "Keep Changes" or "Cancel Changes."

**Message:** Selecting "Cancel Changes" will remove all pending changes for the [site/office name]. Any pending changes to contracts or licenses associated with a site or office are also cancelled and the original information is restored. If some changes need to be made, the information must be submitted again.

1. Select the "Cancel Changes" button to remove the changes and restore the original information. Select the "Keep Changes" button to keep the changes made; the changes remain pending.
2. After selecting the "Cancel Changes" button, the Status column is blank as there are no longer any pending changes for the site or office. The original information is restored and the "Delete" button is displayed.

##### Delete Site or Office Information

1. Under the Number of Children Served in Each Contract section, select the “Delete” button to the right of the site or office to be deleted.

**Result:** The following message appears below the list of sites and offices along with two additional buttons: "Cancel Delete" and "Confirm Delete"

**Message:**Confirm Deletion of the [site/office name] site/office.

1. Select the “Confirm Delete” button to submit the delete request. Select the “Cancel Delete” button to cancel the delete request.

**Result:** After confirming the delete, the Status column displays “Delete – Pending” next to the site or office; the "Delete" and "Edit" buttons are no longer displayed. Once an agency’s consultant approves the delete, the site or office is removed from the list.

#### Step-by-Step Instructions: Number of Children Served in Each Contract

This section describes how to cancel a pending add, update, or delete for an agency’s contract.

If an agency needs to undo any changes made to a contract, the agency must cancel all changes for the site or office. This undoes all the changes made to the site or office that are still pending approval.

##### Age Group Descriptions

The age groups defined below are displayed based on the type of contract agencies are updating. Agencies with only a CSPP contract can only enter information in the three-year-old, four-year-old, and preschool-other fields as their programs can only provide services to children in a limited age group.

1. **Infants:** Birth to 18 months
2. **Toddlers:** 18 months to 36 months
3. **Preschoolers**: 36 months to kindergarten
4. **School-age:** Kindergarten to age 13
5. **Three-year-olds:** Children who will turn 3-years-old on or before December 1 of the FY in which they are enrolled in a CSPP through an agency’s contract with the EED. Children who have their third birthday on or after December 2 of the FY may be enrolled in a CSPP on or after their third birthday through an agency’s contract with the EED.
6. **Four-year-olds:** Children who will turn 4-years-old on or before December 1 1 of the FY in which they are enrolled in a CSPP, or a child whose fifth birthday occurs after September 1 of the FY in which they are enrolled in a CSPP and whose parent or guardian has opted to retain or enroll them in a CSPP through an agency’s contract with the EED.
7. **Preschool-other:**

Children receiving services in the CSPP who turn three years old after December 1 and have their third birthday during or before the report period of the FY in which they received subsidized childcare services through an agency’s contract with the EED.

Children receiving services in the CSPP who turn five years old on or before between September 1 of the FY in which they received subsidized childcare services through an agency’s contract with the EED **and** the CDD-801A report month is July, August, or September.

##### Add Information

1. Under the Number of Children Served in Each Contract section, select the “Add a New Contract” button.

**Result:** The section expands to allow information to be added.

1. Select the contract from the drop-down list to be added to the site or office. Depending on the type of contract selected, certain fields are displayed for agencies to enter the number of children served by age group and funded by the contract based on the typical daily enrollment. If no children are served in a particular age group, enter zero (0). Only add contracts to sites or offices that fund subsidized childcare services to children through that site or office.
2. Select the “Save Changes” button to add the contract to this site or office.

**Result:**The changes made are updated and the Status column displays "New – Pending" next to the contract. The text "Child count changes were submitted" appears below the contracts list. The "Edit" button is displayed to allow changes to be made, if needed.

1. Repeat Steps 1–3 to add additional contracts to the site or office.

**Result:** If red error messages appear when the "Save Changes" button is selected, agencies must resolve the error messages indicated and select the "Save Changes" button again; this process must be repeated until error messages no longer appear. When all error messages are resolved, the Number of Children Served in Each Contract list is displayed and the text "Child count changes were submitted" appears below the list of contracts.

##### Update Information

1. In the Number of Children Served in Each Contract section, select the “Edit” button to the right of the contract to be updated.

**Result:** The section expands and agencies can update information for the different age groups displayed.

1. Update the information as necessary to reflect the typical daily enrollment. If no children are served in a particular age group, enter zero (0) for that age group.
2. Select the “Save Changes” button to save changes.

**Result:**The changes made were updated, the Status column displays "Edited – Pending" next to the contract, and the text "Child count changes were submitted" appears below the list of contracts.

If red error messages appeared when the "Save Changes" button is selected, agencies must resolve those error messages indicated and select the "Save Changes" button again. This process must be repeated until red error messages no longer appear.

##### Delete Information

Agencies should only delete a contract from a site or office because funding from that contract no longer provides childcare services to children at the site or office. To delete contract information, follow the steps below. Once an agency’s consultant approves the delete, the contract is no longer displayed.

1. In the Number of Children Served in Each Contract section, select the “Delete” button to the right of the contract to be deleted from the site or office.

**Result:** The message "Confirm deletion of this contract" appears.

1. To delete the contract, select the “Confirm Delete” button to submit the delete request. The message "The deletion was submitted" appears below the list of contracts.

**Result:**The main Add/Edit Sites or Offices screen reloads; agencies see “Delete – Pending” in the Status column next to the contract and the "Delete" and "Edit" buttons are no longer displayed. Once an agency’s consultant approves the delete, the contract is removed from the list.

Agencies cannot delete the only remaining contract from a site or office if that contract is not associated with at least one other site or office. To modify information, follow the instructions above or add the contract to the site or office it should be associated with and delete it from the site or office where it should not be listed.

#### Step-by-Step Instructions: Licenses

Sites are required to have licenses or be exempt from licensing per regulations. Questions regarding licensing should be directed to an agency’s consultant.

##### Add License

1. Select the “Add a New License” button.

**Result:** The section expands to allow information to be added.

1. Enter the License Number as it appears on the license from the CDSS, Community Care Licensing. If agencies are exempt from licensing, enter "EXEMPT" (do not include the quotation marks) in the license field and select the closest License Type that applies to the site. License Types are as follows:

* I: Infant Care Center (birth through 24 months)
* D: Day Care/Child Care Center (25 months through kindergarten)
* S: School Age Center (kindergarten through age 17)
* H: Center for Mildly Ill Children

1. Enter the License Capacity as it appears on the license. If agencies are exempt from licensing, enter the capacity determined by the Fire Marshall or Fire Department inspections.
2. Select the Start and End times, including AM and PM, to indicate the hours of operation.
3. Select the “Save Changes” button to submit the information and add the license to the site.

**Result:**The changes made are updated and the Status column displays "New – Pending" next to the license. The "Edit" button is displayed to allow changes to be made and the text "Your changes have been submitted" appears below the License list.

If red error messages appear when the "Save Changes" button is selected, agencies must resolve the error messages indicated and select the "Save Changes" button again; this process must be repeated until error messages no longer appear. When all error messages are resolved, the text "Your changes have been submitted" appears below the list of licenses.

##### Update License

1. Select the “Edit” button to the right of the license to be edited.

**Result:** The section expands and agencies can update the information for the license.

1. Update the information as necessary.
2. Select the “Save Changes” button to submit the changes.

**Result:**The changes made are updated and the Status column displays "Edited – Pending" next to that license. The text "Your changes have been submitted" appears below the list of licenses. 

If red error messages appear when the "Save Changes" button is selected, agencies must resolve the error messages indicated and select the "Save Changes" button again; this process must be repeated until error messages no longer appear. When all error messages are resolved, the text "Your changes have been submitted" appears below the list of licenses.

##### Delete License

Agencies should only delete a license from a site because that license is no longer applicable. Once an agency’s consultant approves the delete, the contract is no longer displayed in that list.

1. Select the “Delete” button to the right of the license to be deleted.

**Result:** The following message appears below the license table along with two additional buttons: "Cancel Delete" and "Confirm Delete"

**Message:**Confirm Deletion of License [license number] from this site.

1. Select the “Confirm Delete” button to submit the delete request. Select the “Cancel Delete” button to cancel the delete request.

**Result:** After confirming the delete, the Status column displays “Delete – Pending” for that license and the "Delete" and "Edit" buttons are no longer displayed. Once an agency’s consultant approves the delete, the license is removed from that site.

Agencies cannot delete the only remaining license for a site. If agencies wish to update license information, follow the instructions above under the Update License section.

##### Cancel Pending License

* 1. Select the "Cancel Changes" button that appears next to a site's name on the Add/Edit Sites or Offices screen to undo pending changes for a site (i.e., add a license to a site [status is "New – Pending"], update license information for a site [status is "Edited – Pending"], or submit a delete request for a site [status is "Delete – Pending"]).

**Exit the Add/Edit Sites or Offices Screen**

* Select the "Home" link that appears just above the page name, or
* Select the "Log Off" link that appears just above the page name, or
* Select the "Return to Edit Agency Information" button.

#### Error Messages and Solutions

###### A site name is required.

**Problem:**An added or edited site does not contain a name in the Site Name field.

**Solution:**Enter a name for the site.

###### An address is required.

**Problem:**No street address is provided for the site or office.

**Solution:**Enter the street address where this site or office is located and select the "Save Changes" button.

###### A City is required.

**Problem:**No city is provided for the site or office.

**Solution:**Enter the city where this site or office is located and select the "Save Changes" button.

* **A valid 5-digit or 9-digit zip code is required.**

**Problem:**No zip code is provided for the site or office.

**Solution:**Enter a valid zip code for the site or office and select the "Save Changes" button.

###### A valid Site Supervisor's First Name is required.

**Problem:**The site supervisor's first name is missing, too short, or contains invalid characters.

**Solution:**The site supervisor's first name must have at least two characters and cannot contain any numbers or extra spaces. Enter the correct information for the site supervisor's first name and select the "Save Changes" button.

###### A valid Site Supervisor's Last Name is required.

**Problem:**the site supervisor's last name is missing, too short, or contains invalid characters.

**Solution:**The site supervisor's last name must have at least two characters and cannot contain any numbers or extra spaces. Enter the correct information for the site supervisor's last name and select the "Save Changes" button.

###### A valid 10-digit phone number is required.

**Problem:**The phone number for the site supervisor is missing or incomplete.

**Solution:**Enter the correct information for the site supervisor's phone number and select the "Save Changes" button.

###### The phone area code is not valid for California.

**Problem:**An area code that contains non-numeric characters is entered.

**Solution:**Enter the correct area code for the site supervisor's phone number and select the "Save Changes" button.

###### The fax area code is not valid for California.

**Problem:**An invalid area code is entered for the fax number.

**Solution:**Enter the correct area code for the site supervisor's fax number and select the "Save Changes" button.

###### A valid email address is required.

**Problem:**The email address is either missing or incomplete.

**Solution:**Enter the site supervisor's full email address and select the "Save Changes" button.

###### You cannot delete this [site/office] because the contract [contract number] must be assigned to at least one [site/office].

**Problem:**The contract assigned to the site or office to be deleted is not assigned to any other site or office or is still a pending add to another site or office. A contract must be assigned to at least one site or office.

**Solution:**Agencies must assign the contract related to the site or office to another site or office prior to submitting a deletion request. Once the agency’s consultant approves a contract re-assignment, agencies can then delete the desired site or office. If the contract status is “Add – Pending” to another site or office, agencies must wait for their consultant to approve that addition to the other site or office before deleting the desired site or office.

###### You cannot delete the only remaining approved contract from a site or office.

**Problem:**The contract being deleted is the only currently approved contract for the site or office. It cannot be deleted until a new contract is added and approved by the agency’s consultant

**Solution:**Each contract is required to be assigned to at least one site or office. The CDMIS does not allow agencies to remove the last remaining contract assignment for a site or office. If a different contract funds subsidized childcare services at the site, add the contract, receive approval from the agency’s consultant, and delete the other contract.

###### You cannot delete the only remaining approved license from a site.

**Problem:**An agency is trying to delete the only remaining license from a site.

**Solution:**Each site is required to have at least one license. Before an agency can delete a license, a new license must be added to the site and approved by the agency’s consultant. Once a new license is approved (status is blank), agencies can delete the old license.

###### You cannot delete this contract because a CCTR contract must be associated with at least one site or the contract must be listed in the Family Child Care Home (FCCH) Information section.

**Problem:**An agency is trying to delete a CCTR contract from the only site to which it is assigned. The contract must be assigned to a site.

**Solution:**Add the CCTR contract to another site where subsidized childcare services are funded under this contract. If FCCHs are used to provide subsidized childcare services under this contract, navigate to the Update FCCH Information section of the Update Agency Information screen and add the CCTR contract. Once the changes are approved by the agency’s consultant, the agency can delete the CCTR contract from the other site.

###### A site with this address already exists.

**Problem:**An agency is trying to add a new site that already exists at the address entered. An agency cannot have more than one site listed at the same address.

**Solution:**Examine the addresses of the listed sites. Sites and offices are listed alphabetically by name. Once the desired site is located, review and updated the information, as necessary.

###### An office with this address already exists.

**Problem:**An agency is trying to add a new office that already exists at the address entered. An agency cannot have more than one office listed at the same address.

**Solution:** Examine the addresses of the listed offices. Sites and offices are listed alphabetically by name. Once the desired office is located, review and updated the information, as necessary.

#### FAQs about Add/Edit Sites or Offices

* **My agency has both CCTR and CMIG contracts. In providing services under our contracts, we have both licensed centers and family child care homes where the children receive services. Do we include those children served in family child care homes under the number of children served by age group under our site information?**

No. Information reported is based on the location at which children receive subsidized childcare services through an agency’s contract. Report the number of children receiving subsidized childcare services through an agency’s contract at the center (site) for the CCTR contract.

To report the children who received subsidized childcare services through an agency’s contract in a licensed FCCH, navigate to the FCCH Information screen and add the CCTR contract (or update it if it is already listed). Enter the total number of homes being used to serve children under that contract as well as the number of children served by age group.

* **I have added a new site we began operating last month, but when I try to add our new contract to that site, I don't see it in the list of contracts we have. Why isn't it there?**

Contracts only appear in the list of agency’s available contracts after the CDE and or CDSS's Contracts Office has mailed the contract to the agency. This may take time and is dependent upon where an agency's contract is in the Contract’s Office process. All questions pertaining to an agency’s contract should be directed to the agency’s fiscal office.

* **Our agency has C2AP, C3AP, CCTR, and CSPP contracts. All our administrative offices are located at one building and that building includes one of our centers where services are provided to children under our CCTR contract. In addition, we have additional facilities where both our CSPP and CCTR contracts fund services to children. Can we list all the contracts that all share the same building under one site?**

No. Even though all of the contracts are administered in the same facility, two different functions occur and need to be teased out. For the C2AP and C3AP contracts, the agency would report the facility as an office (Facility Type column should say "Office"). The C2AP and C3AP contracts should be assigned to that office.

For the CCTR contracts, the agency would report the facility as a site (Facility Type column should say "Site"). The CCTR contract should be assigned to that site.

The other facilities at which subsidized childcare services are provided through the agency’s CCTR and CSPP contracts would be listed as individual sites with each applicable contract assigned to it.

### 4.6 Sub-Agencies

#### Overview

The purpose of sub-agencies is to allow agencies to break the families being reported in the CDD-801A into more manageable groups. Sub-agencies can represent sites, specific contract types, regional areas, etc. Agencies that choose to create sub-agencies can create as many as determined necessary for reporting purposes.

Sub-agencies are not required; they are optional.

To add a new sub-agency, navigate to the CDMIS Home and select the function “Sub-Agency/No Services.” On the Sub-Agency/No Services Information screen, scroll to the bottom and select the "Add Sub-Agency" button. To edit an existing sub-agency, select the sub-agency's name.

**Result:** The sub-agency section expands at the bottom of the screen to allow agencies to enter information. Follow the step-by-step instructions below to change a sub-agency.

Use this screen to add, change, or delete a sub-agency. Sub-agency assignments are only used for the CDD-801**A**.

#### Important Reminders

**Do not select the "Back" button on the browser** as this may result in error messages or duplicates. Use the navigation buttons and links provided on the screen.  
  
Select the "Save" button when entering or updating information within the CDMIS.

#### Required Information

For each sub-agency, agencies must enter the following:

| **Data Element Name** | **Description or Definition** |
| --- | --- |
| Sub-agency Name | The name of this sub-agency, as entered by the agency super user. This name is used only by the agency's users. The name should brief but descriptive enough to easily identify the sub-agency if questions arise. |
| Start Date | This is the first report period for which the user can submit data for this sub-agency. |
| End Date | This is the last report period for which the user can submit data for this sub-agency. |
| Vendor Number/Submission Code | The vendor number (the first four or five alphanumeric characters) is from the CDE's official files. The submission code is the three-digit code assigned by the CDMIS. The default submission code for each agency is "000." When a sub-agency is added, it is assigned "001" by the CDMIS. Each additional sub-agency added is assigned the next available number (i.e., 002, 003, etc.) in the order in which it was added. |
| Registered Users | This is the list of agency users assigned to enter family information for this sub-agency. The agency super user assigns users to a sub-agency by using the Add/Edit Users screen. |
| Description | This is a description of the sub-agency, as entered by the agency super user. This description should provide more detailed information than the sub-agency name. |

#### Step-by-Step Instructions: Sub-Agencies

##### Change/Edit a Sub-Agency

**To change a sub-agency's name or edit the description,** change the sub-agency name or description and select the "Save Your Work" button.

**Result:** If the edit sub-agency section closes, the changes have been saved. The text "Sub-Agency has been updated" appears in green at the top of the screen. Error messages are displayed in red and must be corrected before the information can be saved.

**To change a sub-agency's start month or year,** change the start month or start year to the desired report period and select the "Save Your Work" button.

**Result:** The text "You have chosen to change the date for the selected sub-agency" appears. To confirm the date change, select the "OK" button. To cancel the change, select the "Cancel" button. Once the information has been saved, the text "Sub-Agency has been updated" appears in green at the top of the screen.

**To end a sub-agency that is no longer needed for the CDD-801A,** change the end date month and year to the report period for which the sub-agency should stop displaying and select the "Save Your Work" button.

**Result:** The text "You have chosen to change the start or end date for the selected sub-agency” appears. Read and understand the technical instructions regarding the creation and maintenance of sub-agencies before continuing. Select the "OK" button to proceed with the change. Select the "Cancel" button to stop and return to the Sub-agency/No Services Information screen.

If the “OK” button is selected, the text "Sub-Agency has been updated" appears in green at the top of the screen. If the “Cancel” button is selected, changes made are not saved.

##### Delete a Sub-Agency

**Important:** Agencies can delete a sub-agency only if no families were ever reported under the sub-agency.

**To delete the sub-agency,** select the name of the sub-agency to be deleted. When the Edit section opens, select the "Delete" button that appears towards the bottom of the screen.

**Result:** If families associated with a sub-agency are found, the text "There are family records associated with this sub-agency, therefore it may not be deleted" appears at the top of the screen. Agencies are unable to delete the sub-agency; however, agencies can end date the sub-agency by following the instructions above. If no families associated with a sub-agency are found, the sub-agency is deleted.

#### Exit the Add/Edit Agency/Sub-Agency Information Screen

* Select the "Home" link that appears just above the page name, or
* Select the "Log Off" link that appears just above the page name, or
* Select the "Return to Agency/Sub-Agency" button.

### 4.7 No Services

#### Overview

“No Services” information is used to determine if no subsidized childcare services are provided through an agency’s contract with the EED (e.g., CCTR, CSPP, C2AP, etc.) during a given report period. If an agency places a check mark in the box under the No Service Periods section of the Sub-Agency/No Services screen, it is indicated that **no** CDD-801A will be submitted for the specified contract type(s) in the selected report period of the indicated fiscal year.

#### Important Reminders

By checking “No Services” boxes, agencies are indicating that no subsidized childcare services are provided **at all** by the entire agency for that contract type and report period.

Many agencies have more than one site providing subsidized childcare services for the same contract type. For instance, if an agency has two sites operating a CCTR contract and only one of those sites is not operating during a particular report period, the agency should **not** report “No Services” as it prevents the operating site from submitting the CDD-801A.

If “No Services” is reported, agencies attempting to submit the CDD-801A for sites providing services receive the following message: **"Program Code 1 (or Program Code 2 or Program Code 3) is marked as No Service for this reporting period."**

No service periods can only be viewed and updated by an agency super user. If “No Services” for a contract type is reported by mistake, contact the agency's super user and have them correct the information by un-checking the pertinent “No Services” box(es) for the report period.

#### Step-by-Step Instructions: Report “No Services”

To report "No Services" for a specific report period and contract type, follow the below steps:

1. From the CDMIS Home select the function "Sub-agency/No Services"
2. Scroll to the No Service Periods section of the Sub-agency/No Services screen
3. Select the fiscal year to be updated
4. Place a check mark in the appropriate box(es) to indicate that no services are or will be provided for the report period(s) and contract type(s) specified
5. Select the "Save No Service Periods" button; if the "Save No Service Periods" button is not selected before leaving the screen, the changes made are not saved.

Agencies attempting to report “No Services” for contracts for report periods in which children were reported as being served through those contracts receive the message **"The No Services Periods for the program and report month you checked cannot be saved because services have already been reported for that program in the report month selected."**This message is followed by the report period and contract type causing the problem. Agencies must verify if the CDD-801As for those contract types have been submitted in error; if yes, agencies must delete all records that should not have been reported.

For agencies operating a contract at multiple sites, if one site is closed and the other sites are open and operating, “No Services” should not be reported.

#### Exit the Sub-Agency/No Services Information Screen

* Select the "Home" link that appears just above the page name, or
* Select the "Log Out" link that appears just above the page name

## Appendix List

This section contains references to helpful documents and information for agencies completing the CDD-801A.

### Contents

This section contains the following topics:

* Appendix A: Data Definitions
* Appendix B: Error Message Codes
* Appendix C: Creating Electronic Files
* Appendix D: Consultant and Analyst Directories
* Appendix E: Family Fee Schedule

### Appendix A: Data Definitions

The family, child, and provider information fields from the CDD-801A have their own definitions, guidelines, and FAQs. To obtain current data definitions, visit the CDMIS User Manual, Appendix A: Data Definitions web page at <https://www.cde.ca.gov/sp/cd/ci/datadefindex.asp>.

### Appendix B: Error Message Codes

To obtain a list of current error message codes users may receive when submitting the CDD-801A via the CDMIS, visit the CDMIS User Manual, Appendix B: Error Message Codes web page at <https://www.cde.ca.gov/sp/cd/ci/errorcodes.asp>.

### Appendix C: Creating Electronic Files

Detailed instructions for creating, formatting, and reading electronic files is available on the CDMIS User Manual, Appendix C: Creating Electronic Files web page at <https://www.cde.ca.gov/sp/cd/ci/main.asp>.

### Appendix D: Consultant and Analyst Directories

#### Field Services Office Consultant Contact Information

For the most recent contact information, visit the CDE Consultant Regional Assignments web page at <https://www.cde.ca.gov/sp/cd/ci/assignments.asp>.

#### Fiscal Apportionment Analyst Contact Information

For the most recent contact information, visit the CDE Fiscal Apportionment Analyst Directory web page at <https://www.cde.ca.gov/fg/aa/cd/faad.asp>.

### Appendix E: State Median Income (SMI) Ceilings and Income Ranking Table

Detailed information on the most recent Schedule of Income Ceilings and Income Ranking Table can be found on the EED Management Bulletins web page at <https://www.cde.ca.gov/sp/cd/ci/allmbs.asp> and CCDD Child Care Bulletins web page at <https://cdss.ca.gov/inforesources/letters-regulations/letters-and-notices/child-care-bulletins>