



Child Development Management Information System (CDMIS)

Technical Assistance Webinar
October 9, 2018

Early Learning and Care Division



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State Superintendent
of Public Instruction

CDMIS Support

- CDMIS Support web page
 - CDMIS User Manual
 - CDMIS Updates
 - CDMIS Webinar materials



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Overview

- In this webinar, the following topics will be covered:
 - CDMIS Updates
 - System Access
 - Agency Information Updates
 - CDD-801A Reports
 - CDD-801B Reports
 - Questions and Answers



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CDMIS Update #21 (1 of 2)

- CDD-801A Report Update
 - Beginning the October 2018 report month, the CDMIS is no longer accepting Head-of-Household social security numbers (SSNs)
 - Files containing Head of Household SSNs will be rejected from the CDMIS



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CDMIS Update #21 (2 of 2)

- CDD-801B Report Update
 - The following data fields have been added to the CDD-801B report
 - Active military
 - National guard or reserves
 - Family homeless status



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CDMIS Update #22 (1 of 2)

- State Median Income for fiscal year 2018-19
 - Management Bulletin 18-03
 - Updated income ranking table
 - Revised income ceilings



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CDMIS Update #22 (2 of 2)

- CDMIS Webinars
 - Web page
 - “Electronic File Uploads in the CDMIS”
 - Tuesday, October 30, 2018
 - 10 a.m. to 12 p.m.



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System Access

- In this section, the following topics will be covered:
 - CDMIS Log On
 - User Access Levels
 - User Statuses
 - Add/Edit Users
 - System Updates



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CDMIS Log On

- The CDMIS Log On web page
 - User names and passwords are case sensitive
 - Accounts are automatically deactivated after ninety (90) days of inactivity
- For password assistance, contact the CDMIS Office by phone at 916-445-1907



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User Access Levels

Super Users

- Access to agency administration management functions
- Are typically the program directors of the agencies
- All agencies should have at least one

Users

- Submit reports



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Super Users (1 of 2)

- Super Users can do the following:
 - View the user names and passwords of all users
 - Request new super users and users
 - Deactivate existing users
 - Provide log on assistance



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Super Users (2 of 2)

- Super Users can also do the following:
 - Enter CDD-801A reports for the agency
 - Manage sub-agency functions
 - Enter CDD-801B reports for the agency
 - Update “No Service” periods



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Users

- Users can do the following:
 - Change his/her own user information
 - Enter CDD-801A reports for either the entire agency or one sub-agency
 - Enter CDD-801B reports for the entire agency



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User Statuses

- Users can have one of the following three status levels:
 - **Active:** User can access CDMIS
 - **Request Activation:** User cannot access CDMIS; requests must be approved by the CDMIS Office
 - **Deactivated:** User cannot access CDMIS



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User Deactivation

- Users may be deactivated due to
 - Ninety (90) days of CDMIS inactivity
 - No longer employed by the agency
- Deactivated Users
 - Cannot log on to CDMIS
 - Cannot be deleted from CDMIS
 - May request reactivation by contacting their agency's Super User or the CDMIS Office



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Add Users (1 of 2)

- Super Users can add and edit users
 1. From the CDMIS Main Menu select the function “Add/Edit Users”
 2. Scroll to the bottom of the “Add/Edit Users” screen
 3. Select the “Register New User” button
 4. Enter the user contact information
 5. Indicate the user access level
 6. Select the sub-agency



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Add Users (2 of 2)

- Added Users
 - “Awaiting Approval” will appear next to the names of added users
 - User requests are reviewed by the CDMIS Office within 24 hours of submission
 - Once approved, users will receive an email from the CDMIS Office with CDMIS log on instructions



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System Updates

- CDMIS Updates web page
 - Contains current and archived system updates



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Checkpoint: System Access

- In this section, the following topics were addressed:
 - CDMIS Log On
 - User Access Levels
 - User Statuses
 - Add/Edit Users
 - System Updates



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Managing Program Information

- In this section, the following topics will be covered:
 - Update Agency Information
 - Generate Datasheets and Forms
 - Add/Edit Director Information
 - Add/Edit Site and/or Office Information
 - Add/Edit Subagencies
 - Report No Services



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Update Agency Information

- Super Users can update agency information
 1. From the CDMIS Main Menu select the function “Update Agency Information”
 2. Select the pertinent add/edit button
 3. Update the necessary information



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Generate Agency Datasheet

- Selecting this button creates an agency-specific report that contains all contact, site, and office information currently in the CDMIS
- Information can be updated using the buttons beneath the “Agency Name and Mailing Address” section



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Generate Certification Form

- Selecting this button prints the certification form that must be signed and returned to the Early Learning and Care Division (ELCD)
- The certification form
 - Must be submitted with the annual Continued Funding Application package
 - Is not required to be submitted at any other time



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Edit Executive Director (1 of 2)

1. From the CDMIS Main Menu select the function “Update Agency Information”
2. Update the applicable fields
 - Fields marked with an asterisk (*) are required
3. Click the “Submit Changes” button



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Edit Executive Director (2 of 2)

- “Approval Status: Edited – Pending” button will appear
- “Cancel Changes” button will also appear
 - Selecting this button allows users to undo the changes submitted
- All changes require review and approval from agencies’ assigned Field Services Office consultant
 - Once changes have been approved, the edited pending message will no longer be displayed



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Add Program Director (1 of 2)

1. From the CDMIS Main Menu select the function “Update Agency Information”
2. Click the “Edit Program Director Information” button
3. Click the “Add a New Program Director” button
 - A blank Program Director section will appear
4. Enter all required information, as indicated by an asterisk (*)
5. Click the “Submit Changes” button



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Add Program Director (2 of 2)

- Adding a program director is a two-step process
 1. Add the program director
 2. Assign the program director to a contract
- Navigate to the “Contracts and Assigned Program Directors” section
- Assign the newly added director to a contract



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Edit Program Director (1 of 2)

1. From the CDMIS Main Menu select the function “Update Agency Information”
2. Click the “Edit Program Director Information” button
3. Click the “Edit” button next to the pertinent program director
4. Update the applicable fields
5. Click the “Submit Changes” button



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Edit Program Director (2 of 2)

- Submitted changes will be indicated as “Pending” under the Status column
- All changes require review and approval from agencies’ assigned Field Services Office consultant
- Once changes have been approved, the Status column will be blank



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Sites and Offices

- **Site:** the physical location (one or more classrooms) where subsidized services are provided to children through an agency's contract(s) with the ELCD
 - Applies to CCTR, CSPP, CHAN, and CMIG contracts
- **Office:** the administrative facility where families apply for services and obtain information related to contracts
 - Applies to C2AP, C3AP, CAPP, CFCC, CMAP, and CRRP contracts



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Add/Edit Sites or Offices (1 of 3)

1. From the CDMIS Main Menu select the function “Update Agency Information”
2. Click the “Add/Edit Sites or Offices” button
 - To add a new site or office, select the “Add a New Site or Office” button
 - To edit a currently listed site or office, select the “Edit” button next to the pertinent site or office
3. Update the applicable fields
4. Click the “Submit” button



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Add/Edit Sites or Offices (2 of 3)

- “Edited – Pending” will appear under the Status column
- A “Cancel Changes” button will appear in between the Status column and Site/Office Name column
 - Selecting this button allows users to undo the changes submitted



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Add/Edit Sites or Offices (3 of 3)

- All changes require review and approval from agencies' assigned Field Services Office consultant
 - Once changes have been approved, the Status column will appear blank and a "Delete" button will appear



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Sub-agencies

- Used exclusively for CDD-801A reporting, **not** CDD-801B reporting
- Allow agencies to organize families being reported into more manageable groups
- Can represent sites, specific contract types, regional areas, etc.
- Agencies can create as many sub-agencies as deemed necessary for reporting purposes
- The use of sub-agencies is optional



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Add/Edit Sub-agencies

1. From the CDMIS Main Menu select the function “Sub-agency/No Services”
2. Add a sub-agency
 - a. Navigate to the bottom of the current screen
 - b. Click the “Add Sub-Agency” button
3. Edit a sub-agency
 - a. Click on the existing sub-agency name
4. Update the applicable fields
5. Click the “Save” button



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No Services

- Agencies are required to inform the ELCD if no services will be provided for a specific contract/program type during a report month
- The “No Services” function allows agencies to indicate that no CDD-801A report will be submitted for a specific month for the specified program type(s) in the selected fiscal year



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Reporting “No Services” (1 of 2)

1. From the CDMIS Main Menu select the function “Sub-agency/No Services”
2. Choose the fiscal year to be updated
3. Check the box(es) that correspond to the month(s) and program type(s) during which no services will be provided
4. Click the “Save No Service Periods” button



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Reporting “No Services” (2 of 2)

- Agencies that have more than one site providing services for the same program type
 - For example, an agency has two sites operating a CCTR program; only one of those sites is not operating during a particular report month
 - **Do not** designate “No Services” as doing so will prevent the operating site from submitting their report



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Checkpoint: Managing Program Information

- In this section, the following topics have been addressed:
 - Update Agency Information
 - Generate Datasheets and Forms
 - Add/Edit Director Information
 - Add/Edit Site and/or Office Information
 - Add/Edit Subagencies
 - Report No Services



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CDD-801A Reporting

- In this section, the following topics will be covered:
 - CDD-801A Overview
 - Resources
 - Web Input/Edit
 - Electronic File Upload



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CDD-801A Overview

- **CDD-801A:** Monthly data collection report in which agencies provide specific information about all families receiving child care and development services provided by funding from a contract with the CDE, ELCD
- **CDD-801A Due Date:** 20th of the month following the end of the report period
 - For example, the report for September 2018 is due by October 20, 2018



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Report Month Locking

- Reports are open for review and revision for approximately sixty (60) days after the due date
- Reports are locked after the sixty (60) days; no further changes to data can be made
- Previously-submitted data may be viewed and exported using the function “CDD-801A Management Reports”



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CDD-801A Resources

- CDMIS User Manual
 - Appendix A: File Format Specifications
 - Appendix B: Child Care Family Fee Schedule
 - Appendix D: Data Definitions
 - Appendix E: Software Vendors



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Web Input/Edit

- This method of submitting CDD-801A reports consists of manually adding family information into the CDMIS and copying families from one month to the next
- Once copied forward, family information can be added, deleted, or modified to reflect actual services provided in that report month



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Web Input: Add a Family (1 of 2)

1. From the CDMIS Main Menu select the function “CDD-801A Input/Edit”
2. Select the “Month” and “Year” in which a family needs to be added
3. Click the “Submit” button



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Web Input: Add a Family (2 of 2)

4. Click the “Add a Family” button
5. Input family information
6. Click the “Save” button
 - All error messages must be resolved before a family’s information can be saved
 - Instructions for resolving errors can be found in the CDMIS User Manual, Appendix D: Data Definitions



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Web Input: Copy Families (1 of 3)

1. From the CDMIS Main Menu select the function “CDD-801A Input/Edit”
2. Select the “Month” and “Year” in which a family will be copied from
3. Click the “Submit” button
 - A “View CDD-801A Families” screen will appear and display the first 20 families reported in the selected month



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Web Input: Copy Families (2 of 3)

4. Scroll to the bottom of the screen and select the “Copy Families” button
 - All families are marked to be copied
 - Families that do not need to be copied forward can be deselected
 - The subsequent report month is preselected
 - The target month may be changed as necessary



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Web Input: Copy Families (3 of 3)

5. Click the “Copy Checked Families”
button

- Confirm copy forward (if there are no families in the target month)

or

- Choose to append or replace family records (if there are families in the target month)



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Electronic File Upload

- This method of submitting CDD-801A reports consist of agencies generating a specially formatted text file
- This file contains all family, child, and provider information for a particular month and can be uploaded to the CDMIS website



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CDMIS Test Website

- The CDMIS Test website can be used by agencies to test electronic files for errors prior to submitting the file to the CDMIS Production website
- The CDMIS test website is used only by agencies that submit monthly CDD-801A reports via Electronic File Upload
 - Not for agencies that use Web Input and Copy Forward



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Electronic File Upload Webinar

- The “Electronic File Uploads in the CDMIS” webinar will be held on Tuesday, October 30, 2018 from 10:00 a.m. to 12:00 p.m.
- The webinar will cover reading, creating, uploading and troubleshooting electronic file uploads in the CDMIS
- Refer to the CDMIS Webinars webpage and your email inbox for further information



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Checkpoint: CDD-801A Reporting

- In this section, the following topics were addressed:
 - CDD-801A Overview
 - Resources
 - Web Input
 - Electronic File Upload



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CDD-801B Reporting

- In this section, the following topics will be covered:
 - CDD-801B Overview
 - Resources
 - CDD-801B Reporting
 - Excluding Families



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CDD-801B Overview (1 of 2)

- **CDD-801B:** Monthly data collection report limited to approximately 250 families randomly sampled from the CDD-801A statewide submittals for a given month
 - In this data collection, agencies provide more thorough descriptions of the families selected as a part of the sample
 - Because the sample for this data collection is small, most agencies will not be required to complete a CDD-801B report, monthly



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CDD-801B Overview (2 of 2)

- Agency executive directors and program directors are notified via email if one or more families have been selected to be a part of the CDD-801B sample
- The email will include the following:
 - Sample month
 - Number of families sampled
 - Date information is due (approximately 14 calendar days after the date the email is sent)



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CDD-801B Resources

- CDMIS User Manual
 - Appendix D: Data Definitions
- Cost Calculator



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CDD-801B Reporting (1 of 2)

1. From the CDMIS Main Menu select the function “CDD-801B Input/Edit”
2. Select the sample month and year indicated in the email from the CDMIS Office
3. Click on the Head of Household name to open the “Edit Family” screen
4. Enter all information requested for the family
 - Update incorrect information listed in the CDD-801B **and** the corresponding CDD-801A



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CDD-801B Reporting (2 of 2)

5. Click the “Save” button
 - Resolve all error messages, if displayed
 - Click the “Save” button
 - Repeat the above steps as necessary until no error messages appear
6. Click the “Return to View Families” button
 - If “Yes” appears under the “Completed” column next to the family name, the CDD-801B report for this family is complete



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Excluding Families (1 of 2)

- To exclude a child that did not receive ELCD-subsidized services during the indicated sample month, select a reason for exclusion
 1. Navigate to the screen area above the child information section
 2. Select a reason for exclusion from the dropdown menu
 3. Click the “Exclude” button



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Excluding Families (2 of 2)

- The web page will automatically reload
- The child and provider type of child care information will be indicated as “Excluded from Reporting”
- An “Un-exclude” button will appear above the child information section
- Delete the family/child from the CDD-801A report for the selected month



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Checkpoint: CDD-801B Reporting

- In this section, the following topics have been addressed:
 - CDD-801B Overview
 - Resources
 - CDD-801B Reporting
 - Excluding Families



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CDMIS Online Support (2)

- CDMIS Support web page
 - CDMIS User Manual
 - CDMIS Webinar materials



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Contact Information

- The CDMIS Office can be contacted by phone at 916-445-1907 and by email at CDMIS@cde.ca.gov
- The CDMIS website is located at <https://www4.cde.ca.gov/cdmis>
- The CDMIS Test website for electronic file uploads is located at <https://www4test.cde.ca.gov/cdmis>