



Child Development Management Information System (CDMIS)

Technical Assistance Webinar

March 15, 2018



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CDMIS Online Support

- All materials presented in this Webinar can be found on the CDMIS Support Web page at <https://www.cde.ca.gov/sp/cd/ci/main.asp>
- A complete CDMIS User Manual is also available on the CDMIS Support Web page at <https://www.cde.ca.gov/sp/cd/ci/main.asp>



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Overview

- In this Webinar, the following topics will be covered:
 - CDMIS Update #19
 - System Access
 - Agency Information Updates
 - CDD-801A Reports
 - CDD-801B Reports
 - Questions and Answers



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CDMIS Update #19

- CDMIS maintenance is complete
- The CDD-801A report has been updated to reflect recent eligibility changes outlined in the Budget Act of 2017
 - Child age
 - Family income
- Extended CDD-801A deadlines through February 2018 Report Month
- Normal CDD-801A report deadlines beginning with March 2018 Report Month
- Schedule of Report Month Lock Dates



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Child Age and Family Income Validation Rules

- Agencies now have the ability to report the following:
 - Children of families whose income is between 70-85 percent of the 2015 State Median Income (SMI)
 - Children with Exceptional Needs enrolled in part-day CSPP whose family income exceeds 85 percent SMI
 - Twelve-year-old children who turn thirteen years old during the course of their 12 months of eligibility



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Over-Income Families of Children with IEPs

- To report over-income families of children with exceptional needs, the answers to the following fields must be consistent:
 - Reason for Receiving Child Development Services:
Q - Part-day California State Preschool Program
 - Family Income Greater than 70 Percent of the State Median Income Level: Yes
 - Child Receives Part-Time Care: Yes
 - Child has IEP: Checkbox Selected



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Reporting Family Size Changes

- If a family voluntarily reports a change to their family size, the “Family Size” field on the CDD-801A report should be updated accordingly.
- If the child added to the family size also receives EESD-subsidized services, the child information (i.e. name, date of birth, program type, etc.) should be reported on the CDD-801A report.



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Reporting Family Income Changes

- The “Family Income” field should be updated only in the event that a family voluntarily reports a change in income in order to reduce the family fee.
- For further guidance regarding need and eligibility changes, please contact your assigned FSO consultant.



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Extended Report Deadlines

- The following CDD-801A report deadlines have been extended according to the table below:

CDD-801A Report Month and Year	Original Report Deadline	Extended Report Deadline
November 2017	December 20, 2017	April 6, 2018
December 2017	January 20, 2018	April 6, 2018
January 2018	February 20, 2018	April 6, 2018
February 2018	March 20, 2018	April 6, 2018



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Normal Report Deadlines

- Beginning with the March 2018 report, the CDD-801A report deadlines will return to normal, according to the table below:

CDD-801A Report Month and Year	Report Deadline
March 2018	April 20, 2018
April 2018	May 20, 2018
May 2018	June 20, 2018
June 2018	July 20, 2018



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Report Month Lock Schedule (1)

- All CDD-801A reports for fiscal year 2017-18 will be available for editing until the lock date, according to the table below:

Report Month and Year	Report Lock Date
July 2017	April 6, 2018
August 2017	April 6, 2018
September 2017	April 6, 2018
October 2017	July 6, 2018
November 2017	July 6, 2018
December 2017	July 6, 2018



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Report Month Lock Schedule (2)

- All CDD-801A reports for fiscal year 2017-18 will be available for editing until the lock date, according to the table below:

Report Month and Year	Report Lock Date
January 2018	September 20, 2018
February 2018	September 20, 2018
March 2018	September 20, 2018
April 2018	December 20, 2018
May 2018	December 20, 2018
June 2018	December 20, 2018



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CDMIS Update #19 Online

- The complete CDMIS Update #19 is available on the CDMIS Update #19 Web page at <https://www.cde.ca.gov/sp/cd/ci/update19.asp>



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Checkpoint: CDMIS Update #19

- CDMIS maintenance is complete
- Child Age and Family Income Validation Changes
- Extended CDD-801A deadlines through February 2018 Report Month
- Normal CDD-801A report deadlines beginning with March 2018 Report Month
- Schedule of Report Month Lock Dates available on CDMIS Update #19 Web page



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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
 - User Deactivation
 - System Updates



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CDMIS Log On

- The CDMIS Log On Web page is located at <https://www4.cde.ca.gov/cdmis/default.aspx>
 - User names and passwords are case sensitive
 - Accounts are automatically deactivated after ninety (90) days of inactivity
- For password assistance, agencies may contact the CDMIS Office by phone at 916-445-1907



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User Access Levels

- Super Users
 - Access functions that manage agency administration
 - 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)

- 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
- **Note:** These functions are available on the CDMIS User screen
 1. Navigate to the CDMIS Main Menu
 2. Select the “Add/Edit Users” function
 3. Click the “Submit” button



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Super Users (2)

- Super Users can also do the following:
 - Enter CDD-801A reports for the agency
 - If the agency reports by subagency
 - Assign users to subagencies
 - Create and change subagencies
 - Enter CDD-801B reports for the agency
 - Update No Service Periods information to report programs not operating during specific months



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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 subagency
 - 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; approval must be received from the CDMIS Office
 - **Deactivated:** User cannot access CDMIS



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Add Users (1)

- **Note:** This function is only available to Super Users
- To add users, Super Users must complete the following:
 1. Scroll to the bottom of the “Add/Edit Users” screen
 2. Select the “Register New User” button
 3. Enter the user contact information
 4. Indicate the user access level
 5. Select the subagency
 - “000” (default/no subagency) for Super Users
 - Indicate subagency for all other users



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Add Users (2)

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



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User Deactivation

- Users may be deactivated for the following reasons:
 - 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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System Updates

- Periodic updates to CDMIS are posted on the Child Development Management Information System Web page at <https://www.cde.ca.gov/sp/cd/ci/update.asp>
 - Contains current and archived system updates



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Checkpoint: System Access

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 - User Access Levels
 - User Statuses
 - Add/Edit Users
 - User Deactivation
 - 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

- To update agency information, Super Users must complete the following:
 - Navigate to the CDMIS Main Menu
 - Select the “Update Agency Information” function
 - Select the pertinent add/edit button
 - 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 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 Education and Support Division
- Notes regarding 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)

- Navigate to the CDMIS Main Menu
- Select the “Update Agency Information” function
- Update the applicable fields
 - Fields marked with an asterisk (*) are required
- Click the “Submit Changes” button



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Edit Executive Director (2)

- An “Approval Status: Edited – Pending” message will appear upon change submissions
- A “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)

- Navigate to the CDMIS Main Menu
- Select the “Update Agency Information” function
- Click the “Edit Program Director Information” button
- Click the “Add a New Program Director” button
 - A blank Program Director section will appear
- Enter all required information, as indicated by an asterisk (*)
- Click the “Submit Changes” button



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Add Program Director (2)

- **Note:** 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)

- Navigate to the CDMIS Main Menu
- Select the “Update Agency Information” function
- Click the “Edit Program Director Information” button
- Click the “Edit” button next to the pertinent program director
- Update the applicable fields
- Click the “Submit Changes” button



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Edit Program Director (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 Early Education and Support Division
 - Applies to the following contract types: CCTR, CSPP, CHAN, and CMIG
- **Office**
 - The administrative facility where families apply for services and obtain information related to contracts
 - Applies to the following contract types: C2AP, C3AP, CAPP, CFCC, CMAP, and CRRP



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Add/Edit Sites/Offices (1)

- Navigate to the CDMIS Main Menu
- Select the “Update Agency Information” function
- 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
- Update the applicable fields
- Click the “Submit” button



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Add/Edit Sites/Offices (2)

- Submitted changes will be indicated as “Edited – Pending” 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/Offices (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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Subagencies

- 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 subagencies as deemed necessary for reporting purposes
 - Agencies are not obligated to create subagencies; the use of subagencies is optional



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Add/Edit Subagencies

- Navigate to the CDMIS Main Menu
- Select the “Subagency/No Services” function
- Add a subagency
 - Navigate to the bottom of the current screen
 - Click the “Add Sub-Agency” button
- Edit a subagency
 - Click on the existing subagency name
- Update the applicable fields
- Click the “Save” button



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No Services

- Agencies are required to inform the Early Education and Support Division 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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Designating No Services Periods (1)

- Navigate to the CDMIS Main Menu
- Select the “Subagency/No Services” function
- Choose the fiscal year to be updated
- Check the box(es) that correspond to the month(s) and program type(s) during which no services will be provided
- Click the “Save No Service Periods” button



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Designating No Services Periods (2)

- **Note:** 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
 - Data Definitions
 - Web Input
 - Electronic File Upload
 - Resources



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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 California Department of Education, Early Education and Support Division
- **CDD-801A Due Date:** 20th of the month following the end of the report period
 - For example, the report for November 2017 is due by December 20, 2017



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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 CDD-801A Management Reports



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Data Definitions

- CDMIS User Manual, Appendix D: Data Definitions
 - Contains requirements, frequently asked questions, and error messages for each field of the CDD-801A report



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Web Input

- The Web Input/Edit method of submitting the CDD-801A report consists of manually adding families' information into CDMIS and copying families from one month to the next
- Once copied forward, families' 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)

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



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Web Input: Add a Family (2)

- Click the “Add a Family” button
- Update the applicable fields
- Click the “Save” button
 - **Note:** 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)

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



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Web Input: Copy Families (2)

- Navigate to the bottom of the current screen
- Click 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
- Click the “Copy Checked Families” button
 - Select one of the following prompts
 - 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 (1)

- The Electronic File Upload method of submitting the CDD-801A report consists 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 Web site



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Electronic File Upload (2)

- Navigate to the CDMIS Main Menu
- Select the “CDD-801A Electronic File Transfer” function
- Select the “Month” and “Year” in which the file should be uploaded
- Click the “Submit” button



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Electronic File Upload (3)

- Select a subagency if the subagency dropdown list is displayed
- Enter the “File Name”
 - Select the “Browse...” button and navigate to the file’s location on the computer
- Click the “Submit” button
 - The file upload process will begin
 - If information for the specified month has already been received, a prompt confirming that the data will be replaced is displayed



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Electronic File Upload (4)

- Click the “OK” button to proceed with the file transfer
 - **Warning: Transferred files overwrite existing information**
- Read the “CDD-801A Electronic File Transfer Confirmation” screen
- Click the “Return to Main Menu” button to return to the CDMIS Main Menu



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What Happens Next? (1)

- Electronic files are processed by CDMIS every day at 2:45 a.m.
- The electronic file uploaded is either:
 - Accepted: all information submitted is copied into the California Department of Education database **or**
 - Rejected: None of the information submitted is copied into the California Department of Education database



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What Happens Next? (2)

- File transfer status reports are created and stored
 - Status reports are available to be viewed for files submitted the previous day
- Agencies can confirm that the uploaded file was accepted by reading the file transfer status report



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Electronic File Upload Status Check (1)

- Navigate to the CDMIS Main Menu
- Select the “CDD-801A Management Reports” function
- Click the “Submit” button
 - A month and year does **not** need to be indicated
- Click the “CDD-801A Electronic File Status Report” link
- Select the desired report month and year



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Electronic File Upload Status Check (2)

- Select a subagency if the subagency dropdown list is displayed
- Click the “Submit” button
- Click on the desired report
- Read the file transfer status report thoroughly



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Electronic File Upload Troubleshooting

- Refer to the Data Definitions to resolve electronic file upload error messages
 - Data definitions can be found on the California Department of Education Child Care Report Data Definitions Web page at <https://www.cde.ca.gov/sp/cd/ci/datadefindex.asp>
- Contact the CDMIS Office for additional technical assistance



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CDMIS Test Web site (1)

- The CDMIS Test Web site is located at <https://www4test.cde.ca.gov/cdmis/default.asp>
[X](#)
- This site can be used by agencies to test electronic files for errors prior to submitting the file to the production CDMIS Web site
- **Note:** This site is only to be used by agencies that submit monthly CDD-801A report data via Electronic File Upload
 - Not for agencies that use Web Input and Copy Forward



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CDMIS Test Web site (2)

- Files must be uploaded to the CDMIS Production Web site, upon having successfully passed on the CDMIS Test Web site
 - Files submitted to the CDMIS Test Web site are **not** counted as report submissions
 - Only files that are uploaded and have successfully passed on the CDMIS Production Web site are deemed as meeting the monthly reporting requirement
- Contact the CDMIS Office for access to the CDMIS Test Web site



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Software Vendors

- Specific vendors have expressed interest in working with child development agencies on the electronic reporting of CDD-801A monthly reports; for agencies' convenience, information regarding these vendors is provided
 - For further information, refer to the CDMIS User Manual, Appendix E: Software Vendors
- **Note:** The California Department of Education does not endorse any vendors or their products



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CDD-801A Resources

- CDMIS User Manual
 - **Appendix A: File Format Specifications:** lists the field names, number of characters, and format requirements for the CDD-801A electronic file
 - **Appendix B: Child Care Family Fee Schedule:** graphs family fees with the 70 percent of the State Median Income (SMI) clearly marked
 - **Appendix D: Data Definitions:** contains requirements, frequently asked questions, and error messages for each field of the CDD-801A report



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Checkpoint: CDD-801A Reporting

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



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CDD-801B Reporting

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



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CDD-801B Overview (1)

- **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)

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



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CDD-801B Reporting (1)

- Navigate to the CDMIS Main Menu
- Select the “CDD-801B Input/Edit” function
- Select the sample month and year indicated in the e-mail from the CDMIS Office
- Click on the Head of Household name to open the “Edit Family” screen
- 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)

- 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
- Click the “Return to View Families” button
 - If “Yes” appears under the “Completed” column, which is next to the family name, all information was provided; the CDD-801B report for this family is complete



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Excluding Families (1)

- To exclude a child that did not receive Early Education and Support Division-subsidized services during the indicated sample month, select a reason for exclusion
 - Navigate to the screen area above the child information section
 - Select a reason for exclusion from the dropdown menu
 - Click the “Exclude” button



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Excluding Families (2)

- The Web page will automatically reload itself
- 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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CDD-801B Resources

- CDMIS User Manual, Appendix D: Data Definitions
 - Contains requirements, frequently asked questions, and error messages for each field of the CDD-801A report
- Cost Calculator
 - Assists in completing the “State Subsidized Cost of Care”
 - Available at the bottom of the CDD-801B Input/Edit screen for center-based program types



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Checkpoint: CDD-801B Reporting

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 - CDD-801B Reporting
 - Excluding Families
 - Resources



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CDMIS Contact Information

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