# **[CHILDCARE FACILITY NAME]**

### **Enrollment and Admission Checklist**

**Date:** **/**/\_\_\_\_
**Applicant’s Child Name:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
**Parent/Guardian Name:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
**Classroom/Age Group:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

## **1. Enrollment Forms Verification**

| **Item** | **Completed** | **Notes** |
| --- | --- | --- |
| Completed Enrollment Application | ☐ |  |
| Parent/Guardian Information | ☐ | Includes contact details |
| Emergency Contact Information | ☐ | At least two alternate contacts |
| Consent Forms (photography, field trips, etc.) | ☐ |  |
| Enrollment Fee Payment (if applicable) | ☐ |  |

## **2. Medical Records Verification**

| **Item** | **Completed** | **Notes** |
| --- | --- | --- |
| Updated Medical History Form | ☐ | Includes any chronic conditions |
| List of Current Medications | ☐ | If applicable |
| Physician’s Contact Information | ☐ | For emergencies |
| Allergy Information | ☐ | Detailed allergy list |
| Immunization Records | ☐ | See Section 3 for details |

## **3. Immunization Records Verification**

| **Item** | **Completed** | **Notes** |
| --- | --- | --- |
| Up-to-Date Immunization Records | ☐ | As per [INSERT STATE/COUNTRY] requirements |
| Medical or Religious Exemption Forms | ☐ | If applicable |
| Annual Immunization Update Requirement | ☐ | Inform parents of upcoming updates |
| Proof of Immunization Compliance | ☐ | Meets [INSERT STATE/COUNTRY] standards |

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## **4. Parent Agreements Verification**

| **Item** | **Completed** | **Notes** |
| --- | --- | --- |
| Signed Parent/Guardian Agreement | ☐ | Includes hours, fees, policies |
| Acknowledgment of Policies | ☐ | Health, safety, behavior policies |
| Payment Schedule Agreement | ☐ | Due dates, late fees |
| Confidentiality Agreement | ☐ | Protecting child and family privacy |
| Termination Policy Agreement | ☐ | Notice periods, refund policies |

## **5. Additional Documentation Verification**

| **Item** | **Completed** | **Notes** |
| --- | --- | --- |
| Birth Certificate or Proof of Age | ☐ | Required for age verification |
| Proof of Residency (if required) | ☐ | As per facility’s requirements |
| Previous School or Daycare Records | ☐ | If transferring from another facility |
| Special Needs Documentation | ☐ | Individualized Education Plans (IEPs) or 504 Plans, if applicable |

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## **6. Orientation and Tour Scheduling**

| **Item** | **Completed** | **Notes** |
| --- | --- | --- |
| Schedule Orientation Session | ☐ | Date and time |
| Arrange Facility Tour | ☐ | Show classrooms, play areas, facilities |
| Introduce to Staff and Teachers | ☐ | Meet key personnel |
| Provide Welcome Pack (if applicable) | ☐ | Includes schedule, policies, contact info |

## **7. Final Approval and Enrollment Confirmation**

| **Item** | **Completed** | **Notes** |
| --- | --- | --- |
| Review All Documentation | ☐ | Ensure all sections are complete |
| Final Approval from Administration | ☐ | Sign-off by center director or manager |
| Send Enrollment Confirmation to Parent/Guardian | ☐ | Via email, mail, or in-person |
| Assign to Classroom/Age Group | ☐ | Based on age and developmental stage |

## **8. Sign-Off**

| **Role** | **Name** | **Signature** | **Date** |
| --- | --- | --- | --- |
| **Enrollment Coordinator** | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | **/**/\_\_\_\_ |
| **Center Director/Administrator** | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | **/**/\_\_\_\_ |
| **Parent/Guardian** | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | **/**/\_\_\_\_ |

## **Instructions for Use**

1. **Completeness:** Ensure that each section is fully completed before moving to the next. Incomplete applications should be returned to parents for completion.
2. **Verification:** Double-check all medical and immunization records for accuracy and compliance with local regulations.
3. **Confidentiality:** Store all completed checklists and associated documents securely to protect the privacy of children and families.
4. **Communication:** Keep parents informed throughout the process, especially if additional information or documentation is required.
5. **Record-Keeping:** Maintain copies of all completed checklists for regulatory compliance and future reference.

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## **Example of a Completed Enrollment and Admission Checklist**

# **Sunshine Childcare Center**

### **Enrollment and Admission Checklist**

**Date:** 04/27/2024
**Applicant’s Child Name:** Olivia Brown
**Parent/Guardian Name:** Michael Brown
**Classroom/Age Group:** Preschool (3-4 years)

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## **1. Enrollment Forms Verification**

| **Item** | **Completed** | **Notes** |
| --- | --- | --- |
| Completed Enrollment Application | ☑ |  |
| Parent/Guardian Information | ☑ | Includes phone and email |
| Emergency Contact Information | ☑ | Two alternate contacts provided |
| Consent Forms (photography, field trips, etc.) | ☑ |  |
| Enrollment Fee Payment (if applicable) | ☑ | Paid on 04/20/2024 |

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## **2. Medical Records Verification**

| **Item** | **Completed** | **Notes** |
| --- | --- | --- |
| Updated Medical History Form | ☑ | No chronic conditions |
| List of Current Medications | ☑ | None |
| Physician’s Contact Information | ☑ | Dr. Jane Smith, 555-1234 |
| Allergy Information | ☑ | Peanut allergy |
| Immunization Records | ☑ | Up-to-date as of 04/20/2024 |

## **3. Immunization Records Verification**

| **Item** | **Completed** | **Notes** |
| --- | --- | --- |
| Up-to-Date Immunization Records | ☑ |  |
| Medical or Religious Exemption Forms | ☐ | Not applicable |
| Annual Immunization Update Requirement | ☑ | Informed parent of upcoming updates |
| Proof of Immunization Compliance | ☑ | Meets [INSERT STATE/COUNTRY] standards |

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## **4. Parent Agreements Verification**

| **Item** | **Completed** | **Notes** |
| --- | --- | --- |
| Signed Parent/Guardian Agreement | ☑ | Signed on 04/25/2024 |
| Acknowledgment of Policies | ☑ | Includes health and safety policies |
| Payment Schedule Agreement | ☑ | Monthly payments due on the 1st |
| Confidentiality Agreement | ☑ | Signed and acknowledged |
| Termination Policy Agreement | ☑ | Reviewed and signed |

## **5. Additional Documentation Verification**

| **Item** | **Completed** | **Notes** |
| --- | --- | --- |
| Birth Certificate or Proof of Age | ☑ | Provided copy of birth certificate |
| Proof of Residency (if required) | ☑ | Provided utility bill |
| Previous School or Daycare Records | ☐ | Not applicable (new enrollment) |
| Special Needs Documentation | ☐ | Not applicable |

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## **6. Orientation and Tour Scheduling**

| **Item** | **Completed** | **Notes** |
| --- | --- | --- |
| Schedule Orientation Session | ☑ | Scheduled for 05/01/2024 at 10:00 AM |
| Arrange Facility Tour | ☑ | Included tour of classrooms and playground |
| Introduce to Staff and Teachers | ☑ | Met Ms. Emily Thompson and Mr. Mark Evans |
| Provide Welcome Pack (if applicable) | ☑ | Included schedule, policies, contact info |

## **7. Final Approval and Enrollment Confirmation**

| **Item** | **Completed** | **Notes** |
| --- | --- | --- |
| Review All Documentation | ☑ | All sections complete |
| Final Approval from Administration | ☑ | Signed by Center Director on 04/27/2024 |
| Send Enrollment Confirmation to Parent/Guardian | ☑ | Sent via email on 04/27/2024 |
| Assign to Classroom/Age Group | ☑ | Assigned to Preschool (3-4 years) |

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## **8. Sign-Off**

| **Role** | **Name** | **Signature** | **Date** |
| --- | --- | --- | --- |
| **Enrollment Coordinator** | Lisa Thompson | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | 04/27/2024 |
| **Center Director/Administrator** | Mark Evans | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | 04/27/2024 |
| **Parent/Guardian** | Michael Brown | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | 04/27/2024 |

## **Instructions for Use**

1. **Completeness:** Ensure that each section is fully completed before moving to the next. Incomplete applications should be returned to parents for completion.
2. **Verification:** Double-check all medical and immunization records for accuracy and compliance with local regulations.
3. **Confidentiality:** Store all completed checklists and associated documents securely to protect the privacy of children and families.
4. **Communication:** Keep parents informed throughout the process, especially if additional information or documentation is required.
5. **Record-Keeping:** Maintain copies of all completed checklists for regulatory compliance and future reference.

## **Tips for Effective Use**

* **Consistency:** Use the checklist consistently for all new enrollments to maintain standardized records.
* **Training:** Ensure that all staff involved in the enrollment process are trained on how to use the checklist effectively.
* **Review:** Periodically review the checklist to ensure it aligns with current regulations and best practices.
* **Digital Records:** Consider maintaining digital copies of the checklist for easier access, backup, and organization.
* **Feedback:** Gather feedback from staff and parents to improve the enrollment process and checklist usability.

## **Customization Ideas**

* **Add Your Logo:** Incorporate your childcare center’s logo at the top of the checklist for a professional appearance.
* **Digital Integration:** Utilize digital tools like Google Forms, Microsoft Excel, or childcare management software to create a fillable and searchable version of the checklist.
* **Additional Fields:** Include fields for specific requirements unique to your facility, such as transportation arrangements, dietary preferences, or language needs.
* **Color Coding:** Use color codes to differentiate between sections or to highlight critical compliance areas.
* **Automated Reminders:** Implement automated reminders for parents to submit required documents before the enrollment deadline.

# **Example of a Completed Enrollment and Admission Checklist**

# **Sunshine Childcare Center**

### **Enrollment and Admission Checklist**

**Date:** 04/27/2024
**Applicant’s Child Name:** Olivia Brown
**Parent/Guardian Name:** Michael Brown
**Classroom/Age Group:** Preschool (3-4 years)

## **1. Enrollment Forms Verification**

| **Item** | **Completed** | **Notes** |
| --- | --- | --- |
| Completed Enrollment Application | ☑ |  |
| Parent/Guardian Information | ☑ | Includes phone and email |
| Emergency Contact Information | ☑ | Two alternate contacts provided |
| Consent Forms (photography, field trips, etc.) | ☑ |  |
| Enrollment Fee Payment (if applicable) | ☑ | Paid on 04/20/2024 |

##

##

## **2. Medical Records Verification**

| **Item** | **Completed** | **Notes** |
| --- | --- | --- |
| Updated Medical History Form | ☑ | No chronic conditions |
| List of Current Medications | ☑ | None |
| Physician’s Contact Information | ☑ | Dr. Jane Smith, 555-1234 |
| Allergy Information | ☑ | Peanut allergy |
| Immunization Records | ☑ | Up-to-date as of 04/20/2024 |

## **3. Immunization Records Verification**

| **Item** | **Completed** | **Notes** |
| --- | --- | --- |
| Up-to-Date Immunization Records | ☑ |  |
| Medical or Religious Exemption Forms | ☐ | Not applicable |
| Annual Immunization Update Requirement | ☑ | Informed parent of upcoming updates |
| Proof of Immunization Compliance | ☑ | Meets [INSERT STATE/COUNTRY] standards |

##

## **4. Parent Agreements Verification**

| **Item** | **Completed** | **Notes** |
| --- | --- | --- |
| Signed Parent/Guardian Agreement | ☑ | Signed on 04/25/2024 |
| Acknowledgment of Policies | ☑ | Includes health and safety policies |
| Payment Schedule Agreement | ☑ | Monthly payments due on the 1st |
| Confidentiality Agreement | ☑ | Signed and acknowledged |
| Termination Policy Agreement | ☑ | Reviewed and signed |

## **5. Additional Documentation Verification**

| **Item** | **Completed** | **Notes** |
| --- | --- | --- |
| Birth Certificate or Proof of Age | ☑ | Provided copy of birth certificate |
| Proof of Residency (if required) | ☑ | Provided utility bill |
| Previous School or Daycare Records | ☐ | Not applicable (new enrollment) |
| Special Needs Documentation | ☐ | Not applicable |

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##

## **6. Orientation and Tour Scheduling**

| **Item** | **Completed** | **Notes** |
| --- | --- | --- |
| Schedule Orientation Session | ☑ | Scheduled for 05/01/2024 at 10:00 AM |
| Arrange Facility Tour | ☑ | Included tour of classrooms and playground |
| Introduce to Staff and Teachers | ☑ | Met Ms. Emily Thompson and Mr. Mark Evans |
| Provide Welcome Pack (if applicable) | ☑ | Included schedule, policies, contact info |

## **7. Final Approval and Enrollment Confirmation**

| **Item** | **Completed** | **Notes** |
| --- | --- | --- |
| Review All Documentation | ☑ | All sections complete |
| Final Approval from Administration | ☑ | Signed by Center Director on 04/27/2024 |
| Send Enrollment Confirmation to Parent/Guardian | ☑ | Sent via email on 04/27/2024 |
| Assign to Classroom/Age Group | ☑ | Assigned to Preschool (3-4 years) |

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## **8. Sign-Off**

| **Role** | **Name** | **Signature** | **Date** |
| --- | --- | --- | --- |
| **Enrollment Coordinator** | Lisa Thompson | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | 04/27/2024 |
| **Center Director/Administrator** | Mark Evans | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | 04/27/2024 |
| **Parent/Guardian** | Michael Brown | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | 04/27/2024 |

## **Additional Notes**

Olivia has a peanut allergy; ensure all staff are aware and follow allergen-safe protocols. Schedule a follow-up meeting with parents to discuss daily routines and any special requirements.

## **Customization Tips**

* **Add Your Logo:** Incorporate your childcare center’s logo at the top of the checklist for a professional appearance.
* **Digital Integration:** Utilize digital tools like Google Forms, Microsoft Excel, or childcare management software to create a fillable and searchable version of the checklist.
* **Additional Fields:** Include fields for specific requirements unique to your facility, such as transportation arrangements, dietary preferences, or language needs.
* **Color Coding:** Use color codes to differentiate between sections or to highlight critical compliance areas.
* **Automated Reminders:** Implement automated reminders for parents to submit required documents before the enrollment deadline.

**Note:** This **Enrollment and Admission Checklist** is designed to help your childcare facility maintain a structured and thorough enrollment process. Regular use of this checklist ensures compliance with regulatory requirements, promotes organized record-keeping, and fosters clear communication with parents and guardians.