Coalition Portal User Guide

Version 5.11

September 27, 2022

Table of Contents

Document Revision History

Document Version	Date	Author	Revision
5.4	01/20/22	Jim Ledbetter	Final
5.5	02/24/22	Jim Ledbetter	Final
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Document Overview

This document provides a step-by-step guide for Coalition staff who are assisting families to navigate the Family Portal and providers to navigate the Provider Portal.

Purpose of this Document

The purpose of this document is to provide coalition users with a reference document to successfully navigate and perform business processes included in Release 5.11 of EFS Mod.

Intended Audience

The intended audience for this document includes staff responsible for processing School Readiness Program and/or VPK Program applications, as well as staff responsible for providing technical assistance to parent users of the Family Portal, in addition to staff responsible for processing Provider Portal profiles, contracts, enrollments, attendance, and reimbursement, as well as staff responsible for providing technical assistance to Provider Portal users.

What's New in this User Guide?

New screenshots for VPK & SR Contracts/Amendments and Temporary Closures.

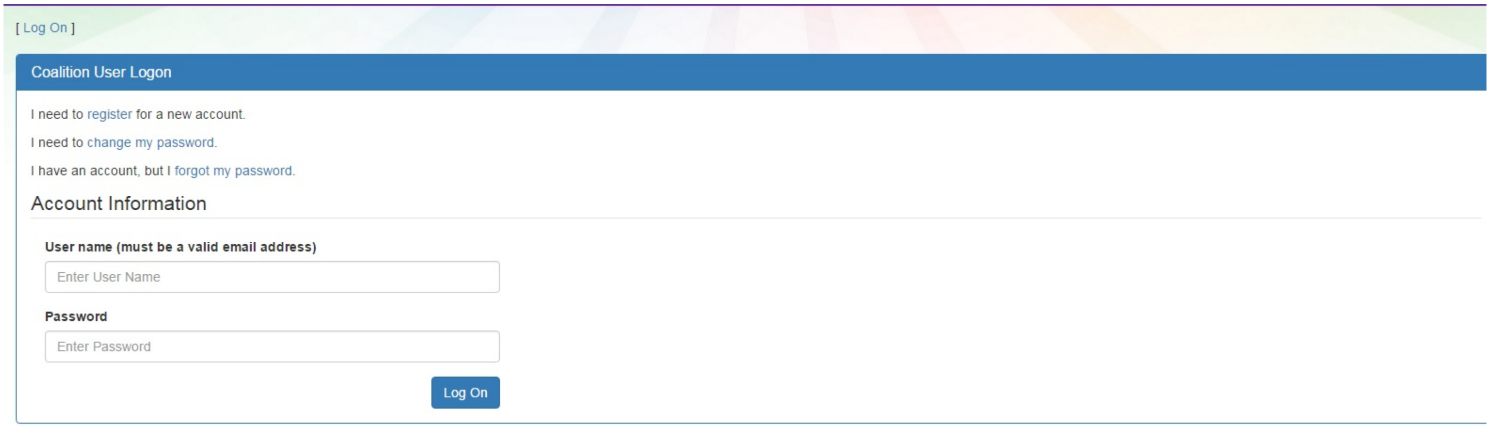
Assistance

If you have questions about any of the material in this User Guide or about any processes not covered by this guide, please contact the Division of Early Learning Service Desk at Service.Desk@oel.myflorida.com or (850) 717-8600.

Logging on to the Coalition Services Portal

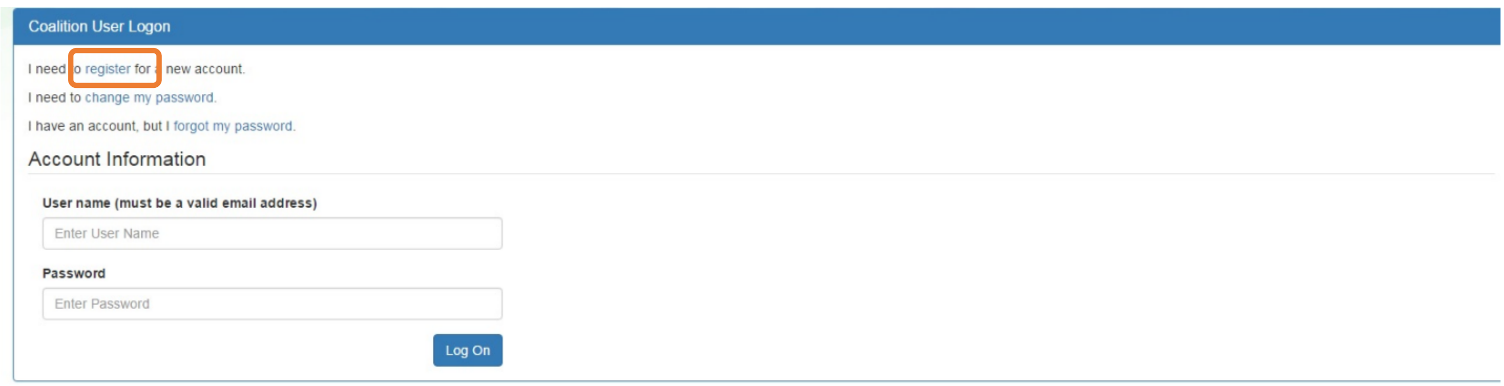
The Coalition Services Portal allows coalition users to manage all School Readiness and VPK applications submitted through the Family Portal. Coalition admins will also be able to manage coalition user accounts and run ad hoc reports from the Coalition Services Portal.

Coalition users can access the Coalition Services Portal at https://coalitionservices.floridaearlylearning.com.



Creating a New Coalition Services Portal Account

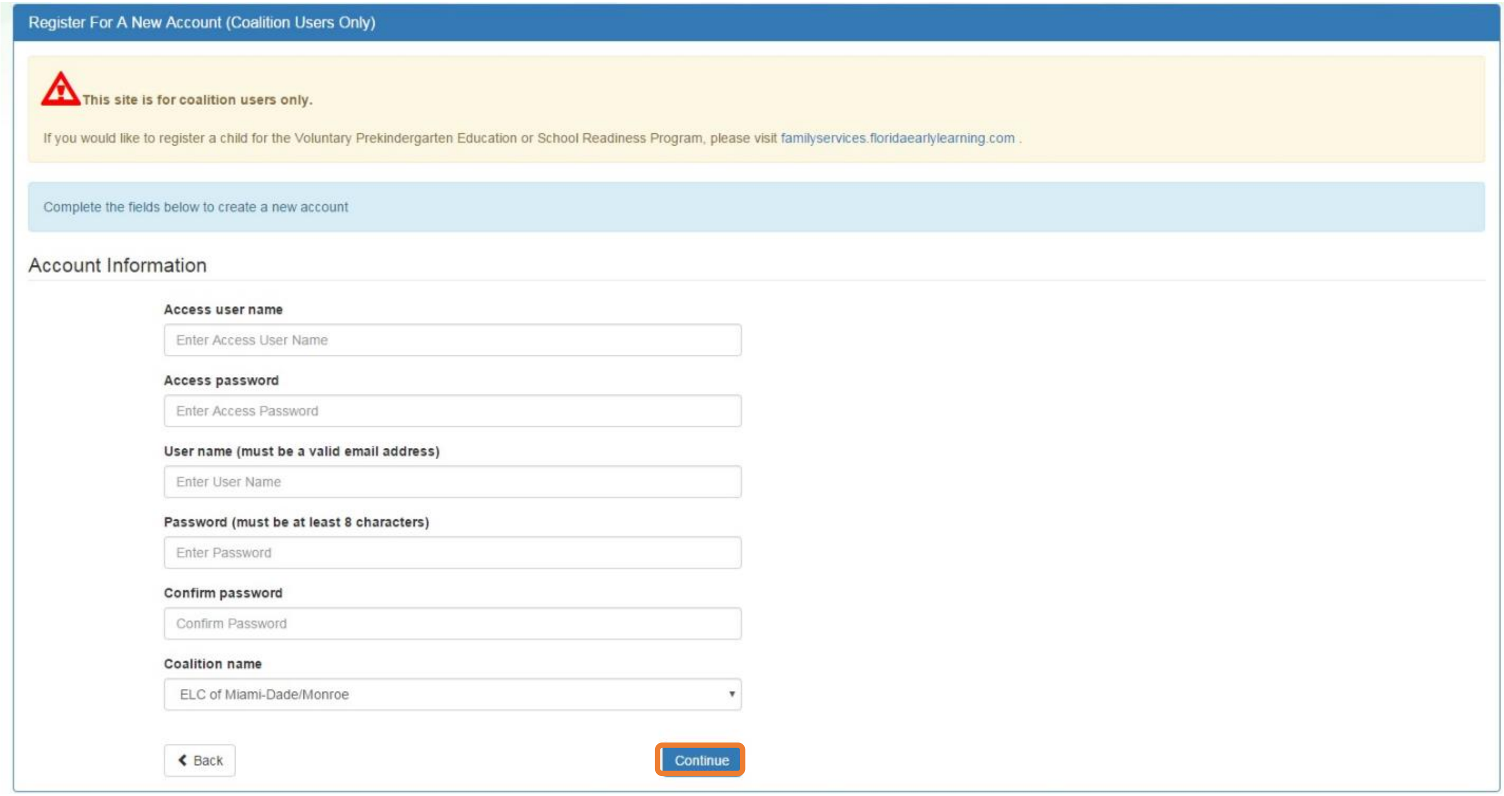
To access the Coalition Services Portal, the coalition user must first register an account. To get started, click the **register** link.

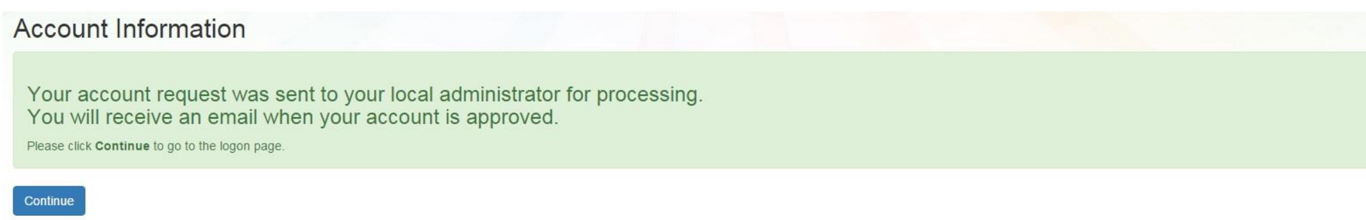


The **Access user name** (email address) and **Access password** must be obtained from the Coalition Services Portal administrator.

The coalition user must fill in all fields and click the **Continue** button to submit a request for approval to create an account.

NOTE: It is important for the coalition user to select the correct **Coalition Name** to enable the coalition admin to find the correct account to activate.

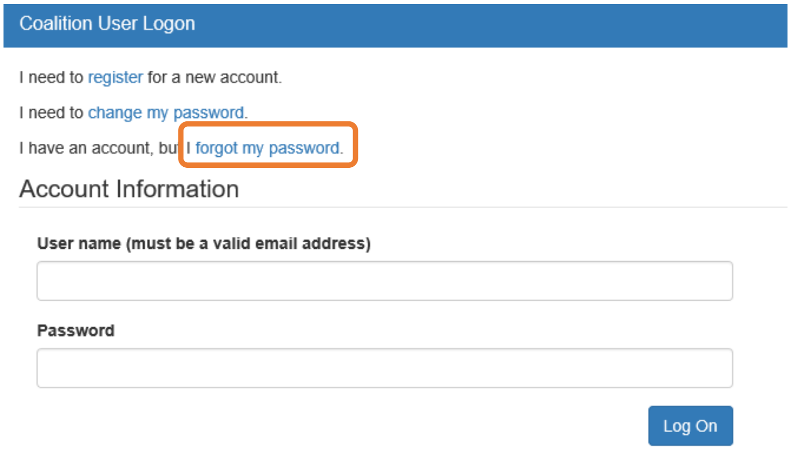




The coalition user must wait until the coalition admin activates the account before the user can log on.

Re-Adding a Coalition User

If a coalition user ended employment with the coalition, was inactivated from the portal, but then returned to employment with the same coalition, the user can be re-added by a coalition admin. The user will go to Coalition Services logon screen and click the forgot my password link.

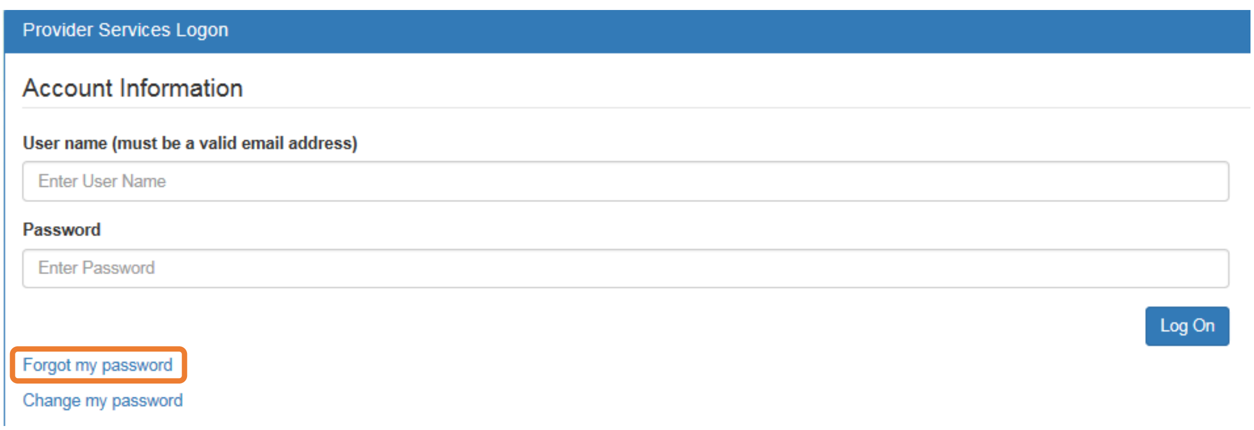


Once the user receives the new password and logs on to the Coalition Services Portal, the user must enter the Access user name and Access password. Then, the Coalition Admin will reactivate the user.

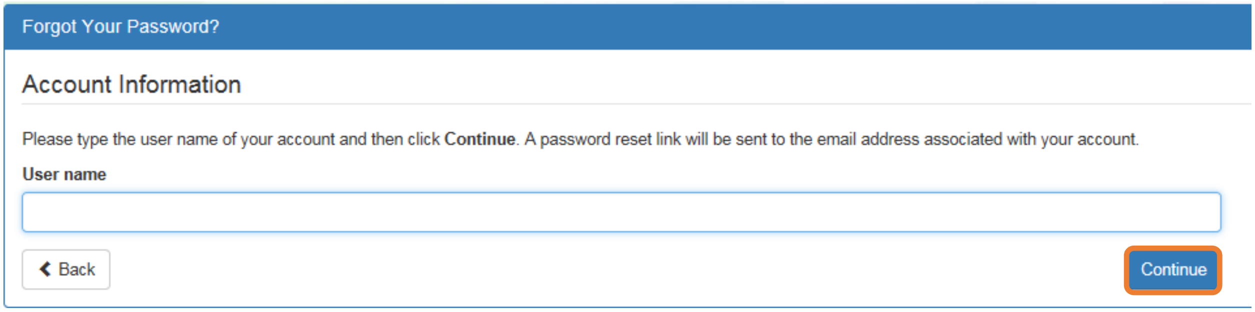
If the user receives a new coalition email address upon reemployment, the user will create a new account.

Password Recovery

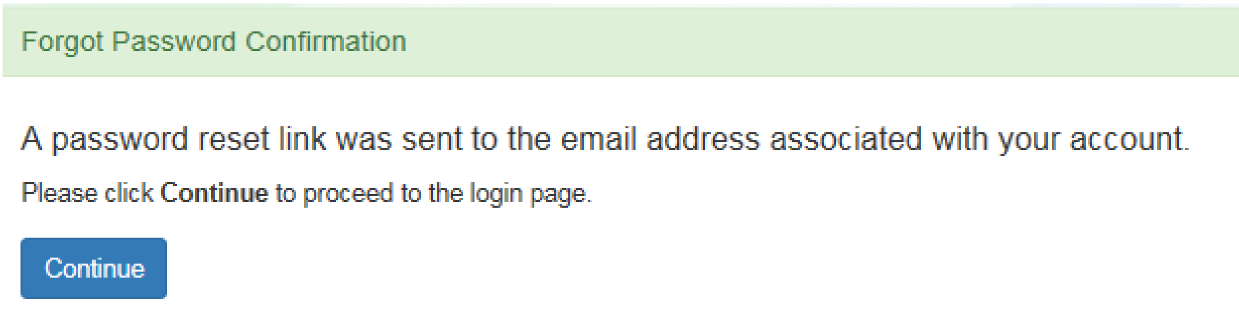
If the Coalition user cannot remember the password, the user can click the **Forgot my password** link.



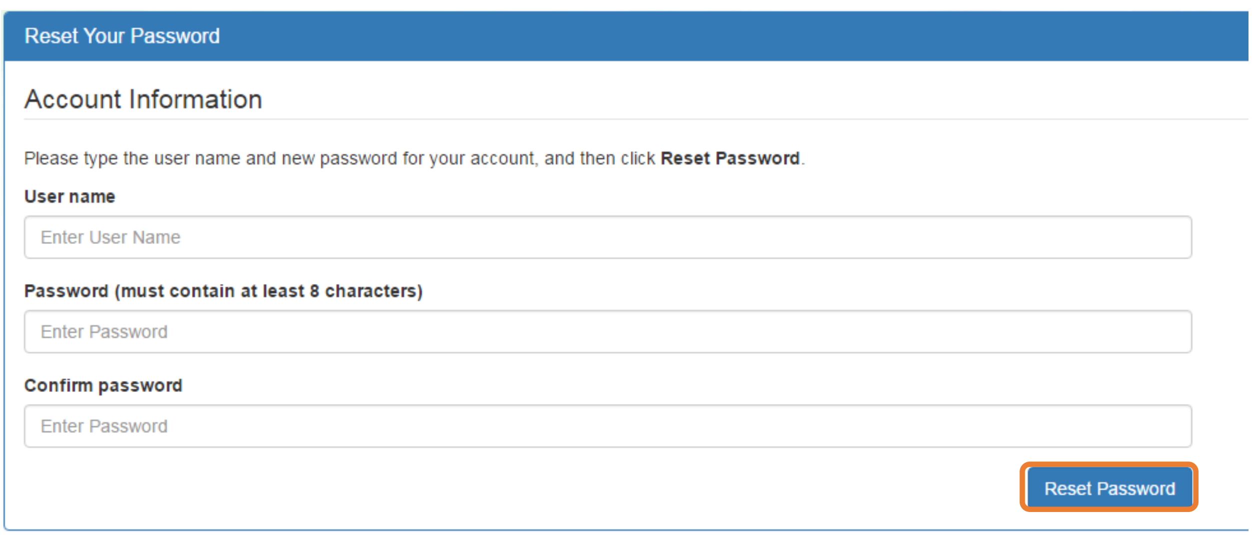
Clicking the **Forgot my password** link will display the following page:



The Coalition user must know the email address used for the account. Once the user enters an email address and clicks the **Continue** button, the following page will display:

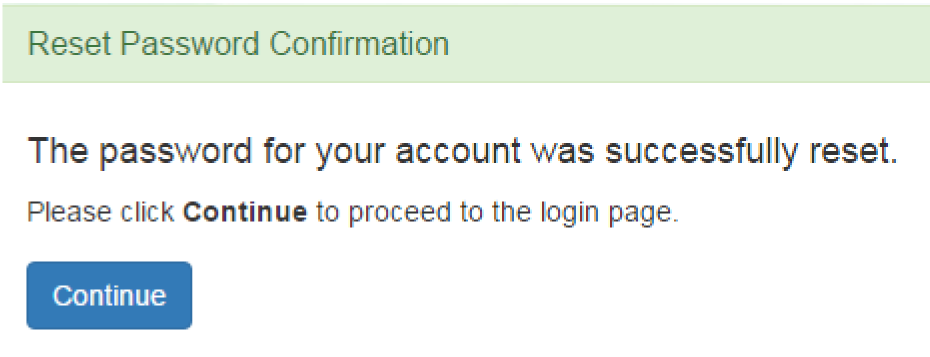


The Provider Portal user should then access the email account used for the account and find the email sent by DONOTREPLY@oel.myflorida.com. After clicking the **here** link in the email, the following page will display:



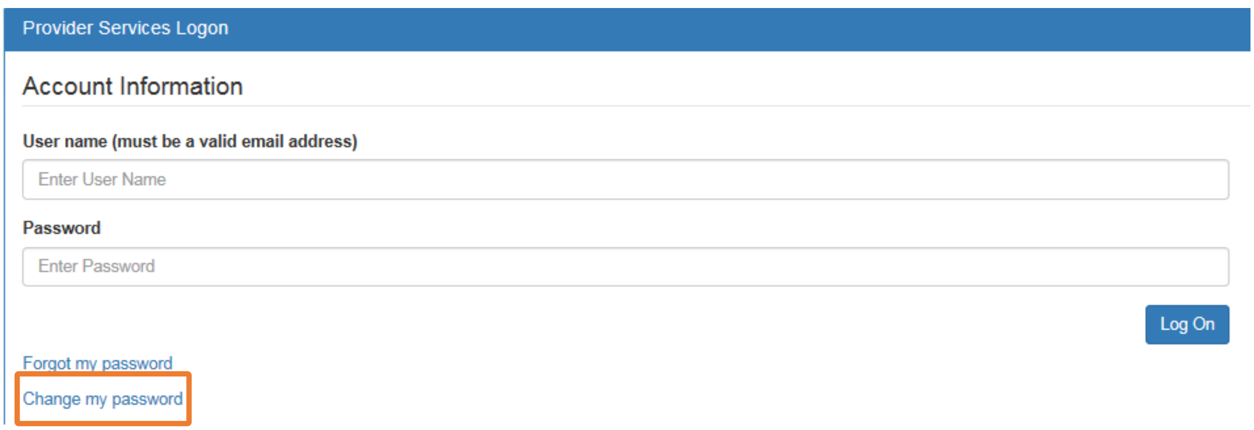
The Coalition user must enter the user name (email address), new password and confirm the new password. After entering the required fields, click the **Reset Password** button to continue.

If the user successfully changes the password, the following page will display:

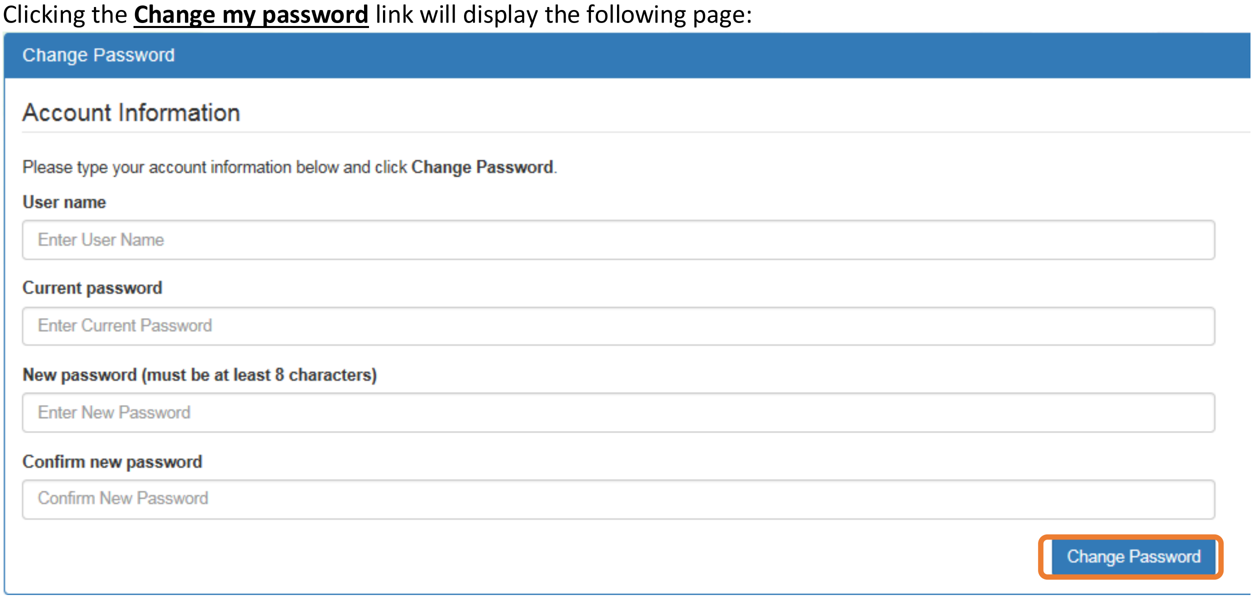


Change Password Process

A Coalition user can change the password at any point by clicking the **Change my password** link.

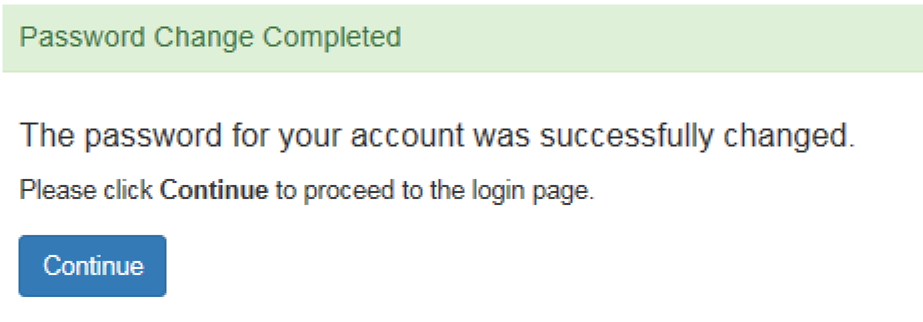


Clicking the **Change my password** link will display the following page:



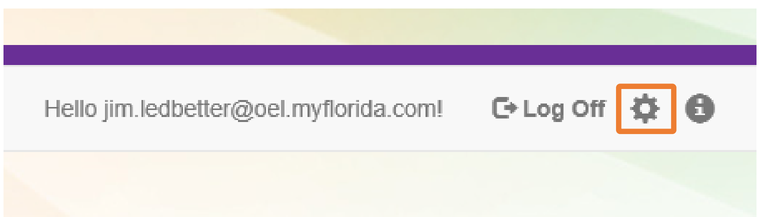
The Coalition user must enter the User Name (email address), current password, new password and confirm the new password. After entering the required fields, click the **Change Password** button to continue.

If the user successfully changes the password, the following page will display:

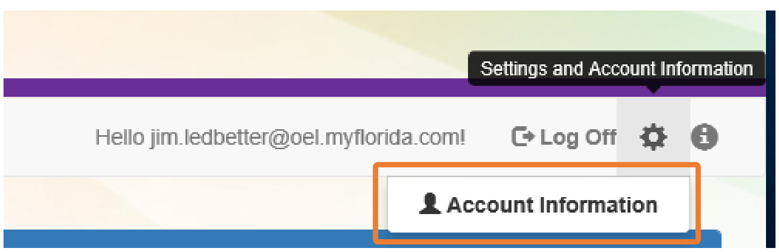


Updating Coalition User Account Information

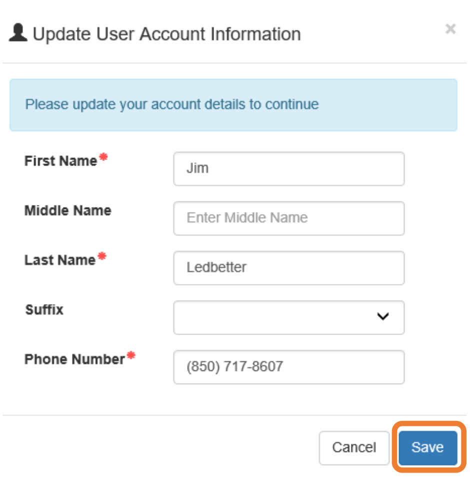
Coalition users are able to update their user information – name and phone number – associated with their email address. Click on the gear icon.



The following will display. Click the **Account Information** button.



Enter the additional information and click **Save**.



Password Complexity

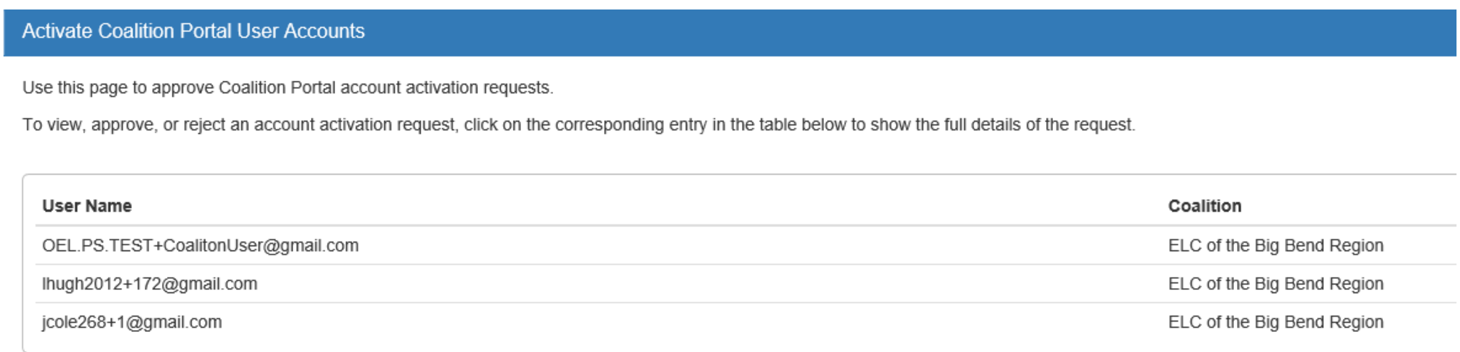
Password complexity requirements for the Coalition Portal:

- User will not be able to reuse their last 6 passwords
- Password is good for 90 days before user is required to update it
- User will not be able to change the password until 25 hours from when it is first set
- Minimum password length is 8 characters
- Passwords must use at least three of the four available character types
  - lowercase letters (a through z)
  - uppercase letters (A through Z)
  - numbers (0 through 9)
  - special characters: !, @, #, $, %, ^, &, +, =, ?, ~, -, _, /, ., \, |, :, ; (**NOTE:** quotes, commas, and brackets are NOT allowed)

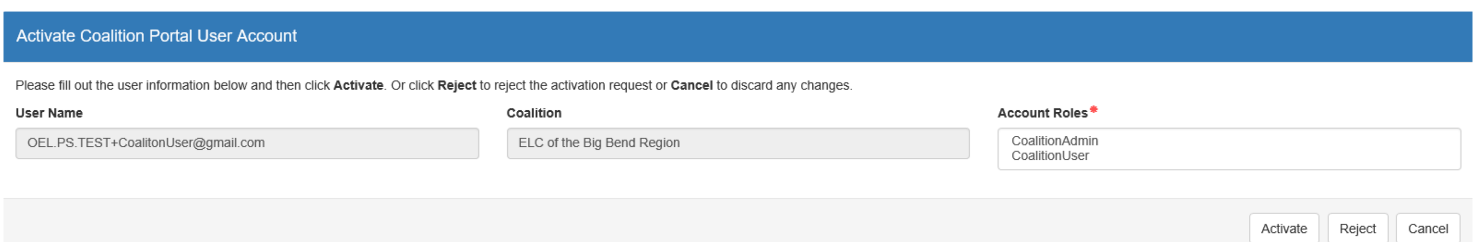
Coalition User Roles and Permissions

Coalition Services Portal User Types:

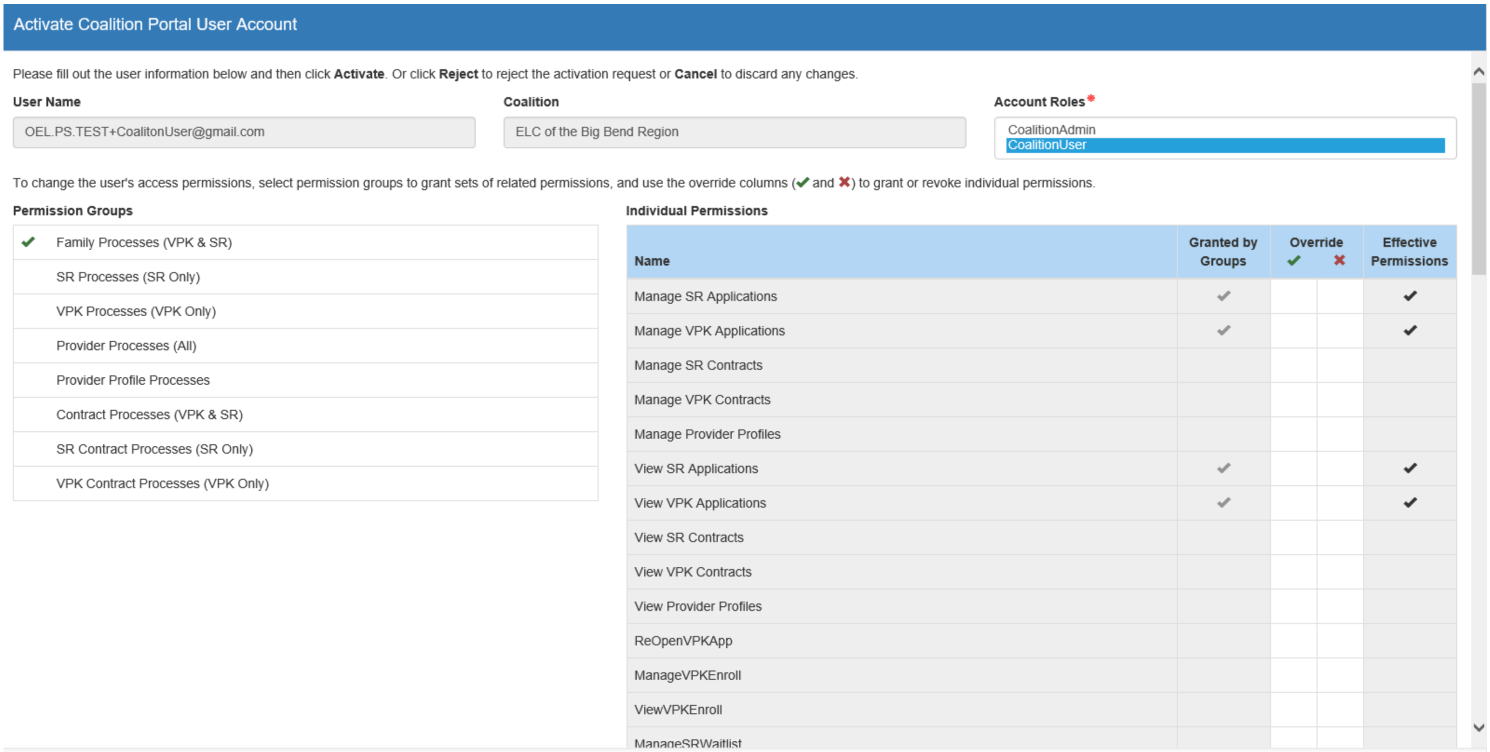
- Coalition User – Coalition Admin sets specific permissions to customize a user's access
- Coalition Admin – Full access to Coalition Services Portal



Click on CoalitionUser, in Account Roles.



To change a coalition user's access permissions, the coalition admin will select a permission groups to grant sets of related permissions, and use the Override columns to grant or revoke individual permissions, as needed.



Activate Coalition Portal User Account

Please fill out the user information below and then click **Activate**. Or click **Reject** to reject the activation request or **Cancel** to discard any changes.

User Name: OEL.PS.TEST+CoalitonUser@gmail.com

Coalition: ELC of the Big Bend Region

Account Roles*: CoalitionAdmin, CoalitionUser

To change the user's access permissions, select permission groups to grant sets of related permissions, and use the override columns (✔ and ✖) to grant or revoke individual permissions.

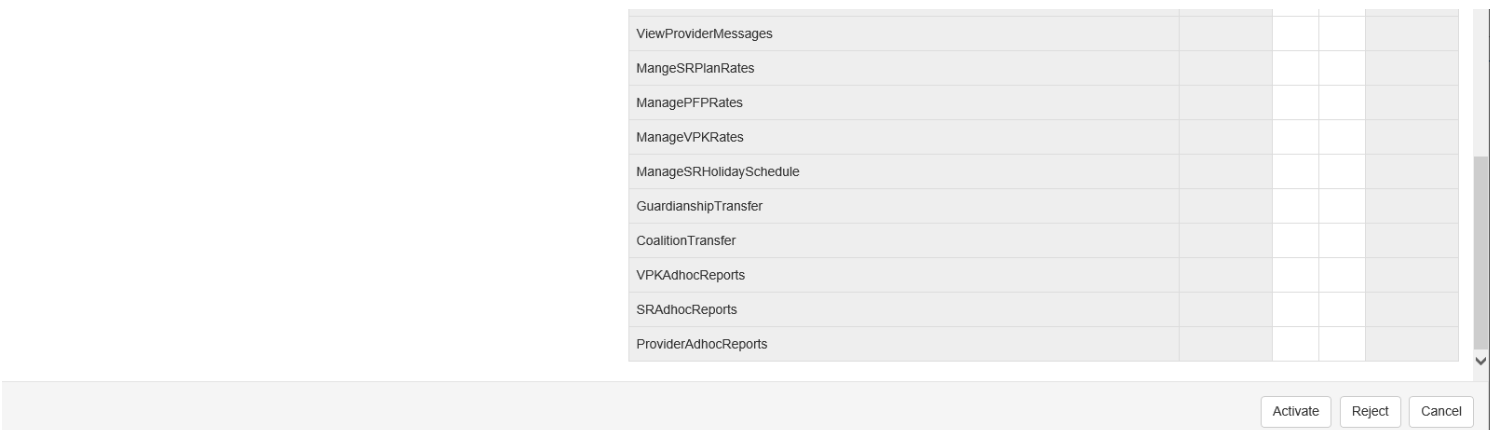
Permission Groups

- ✔ Family Processes (VPK & SR)
- SR Processes (SR Only)
- VPK Processes (VPK Only)
- Provider Processes (All)
- Provider Profile Processes
- Contract Processes (VPK & SR)
- SR Contract Processes (SR Only)
- VPK Contract Processes (VPK Only)

Individual Permissions

Name	Granted by Groups	Override ✔	Override ✖	Effective Permissions
Manage SR Applications	✔			✔
Manage VPK Applications	✔			✔
Manage SR Contracts				
Manage VPK Contracts				
Manage Provider Profiles				
View SR Applications	✔			✔
View VPK Applications	✔			✔
View SR Contracts				
View VPK Contracts				
View Provider Profiles				
ReOpenVPKApp				
ManageVPKEnroll				
ViewVPKEnroll				
ManageSRWaitlist				

…



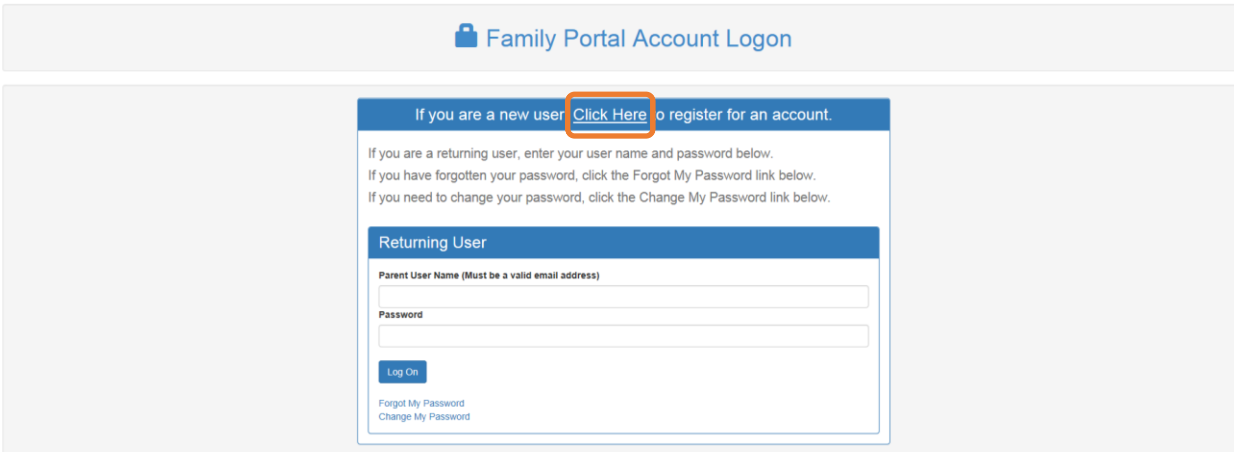
Name	Granted by Groups	Override ✔	Override ✖	Effective Permissions
ViewProviderMessages				
MangeSRPlanRates				
ManagePFPRates				
ManageVPKRates				
ManageSRHolidaySchedule				
GuardianshipTransfer				
CoalitionTransfer				
VPKAdhocReports				
SRAdhocReports				
ProviderAdhocReports				

Activate | Reject | Cancel

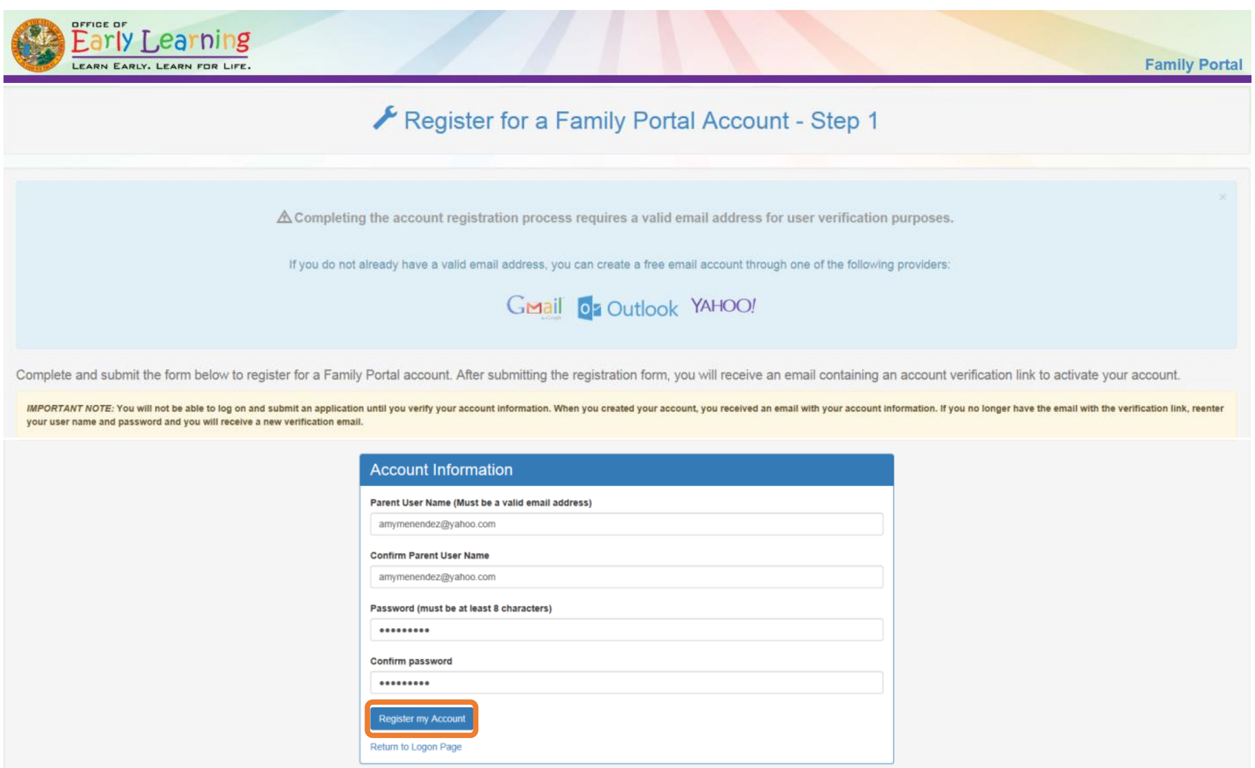
FAMILY PROCESSES

Creating a Family Portal Account

First-time users must register for an account to access the Family Portal.



Click the **Click Here** link to start the new account registration process and the following page will display:

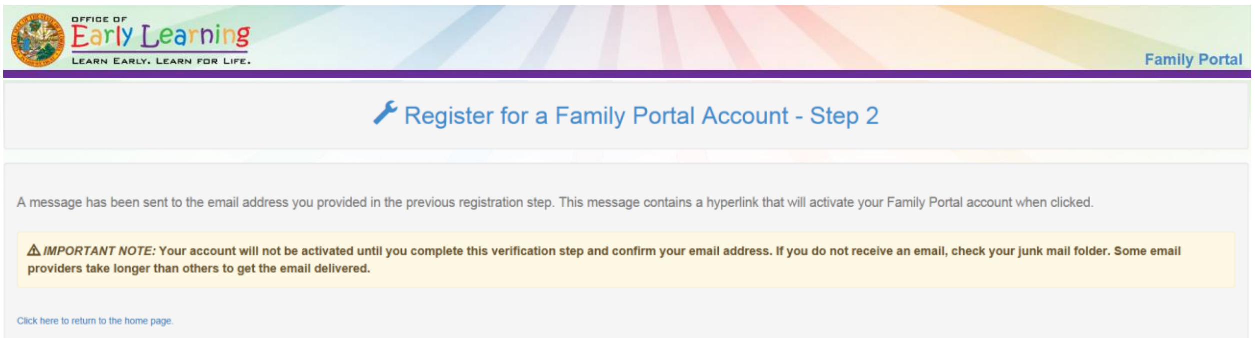


A valid email address is required for the registration process. If a Family Portal user does not have an email address, then the user can click one of the links to create an email address. Gmail Outlook YAHOO!

The user must create a password. The password must contain at least eight characters with no spaces.

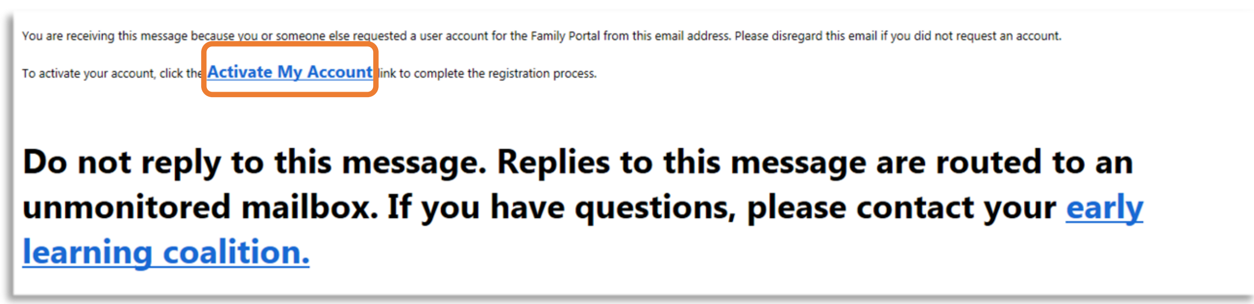
The user must click the **Register my Account** button to complete step 1 of the Family Portal account registration process.

Once the Family Portal user submits a request for an account registration, the following page will display:



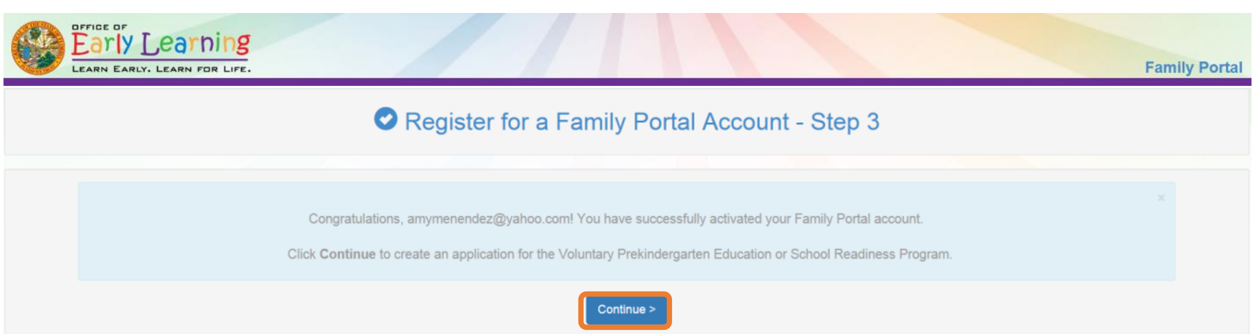
The Family Portal user should access an email account and find the email sent by **DONOTREPLY@oel.myflorida.com**.

Email Message:



The Family Portal user must click the **Activate My Account** link to validate the email address and complete the registration process.

After the Family Portal user clicks the activation link, the following page will display:



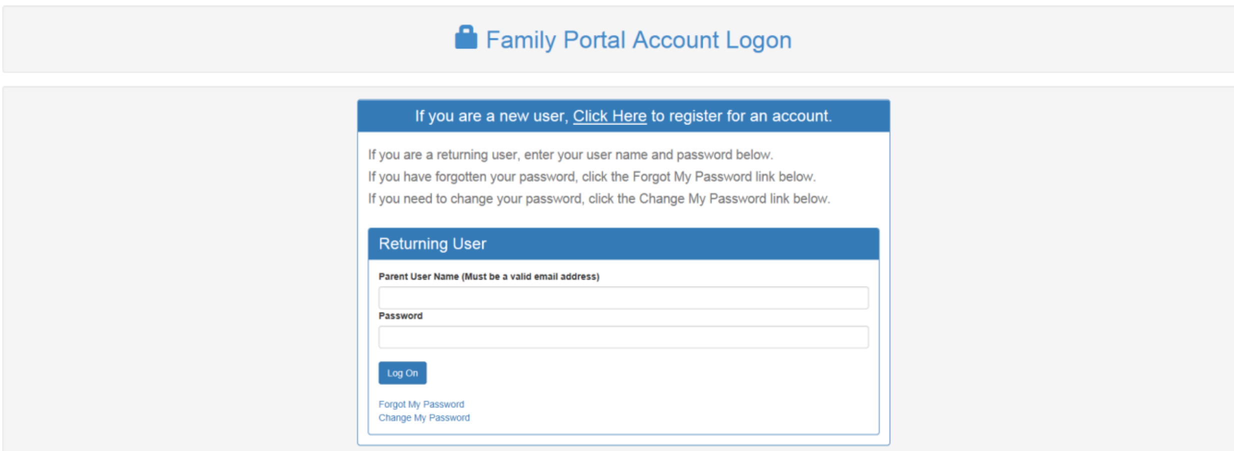
The Family Portal user must then click the **Continue** button to log on to the account.

Family Portal Returning User

Log on Process

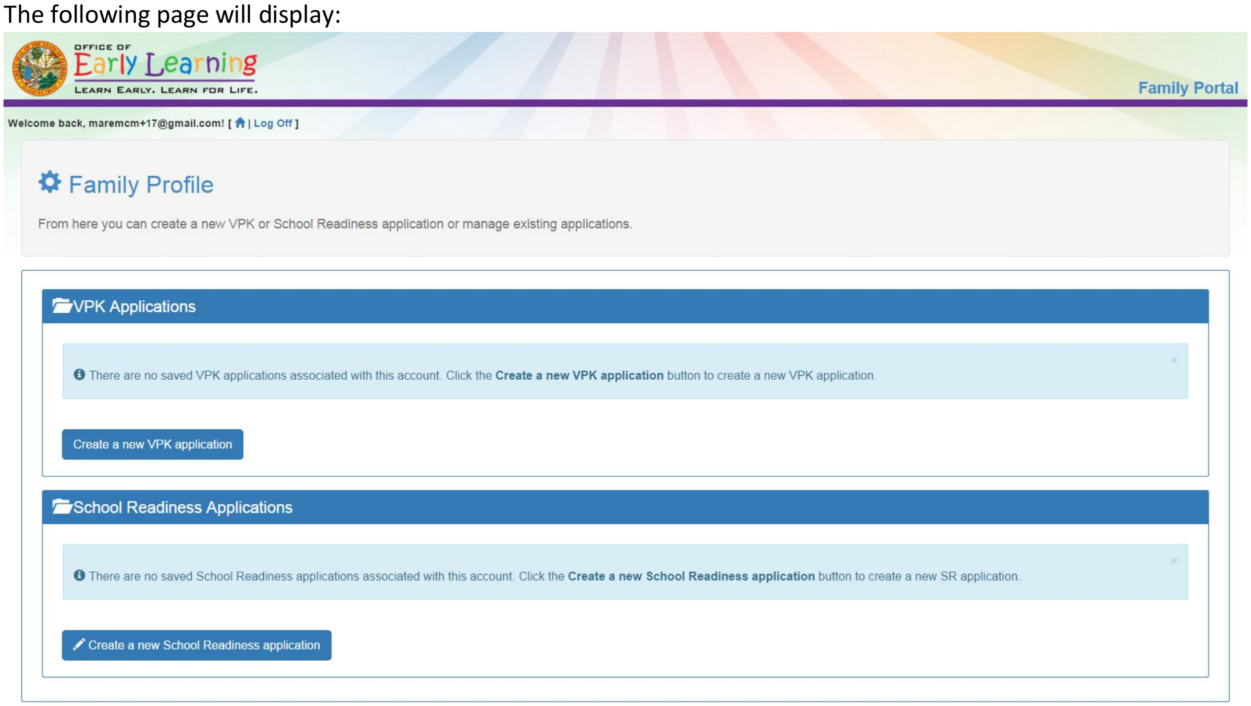
Family Portal users who have already created a Family Portal account can log on from the Family Portal welcome page by clicking the **Sign in <u>here</u>** link.

The following page will display:



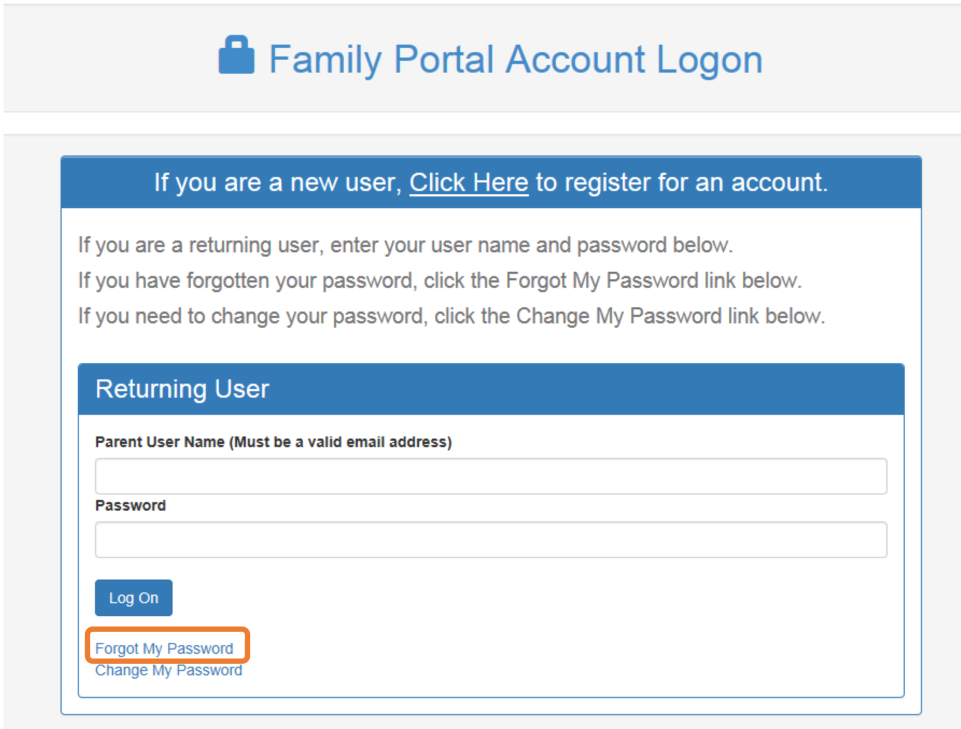
The Family Portal user must enter the User Name (email address) and Password and click the **<u>Log On</u>** button to sign in to the account.

The following page will display:

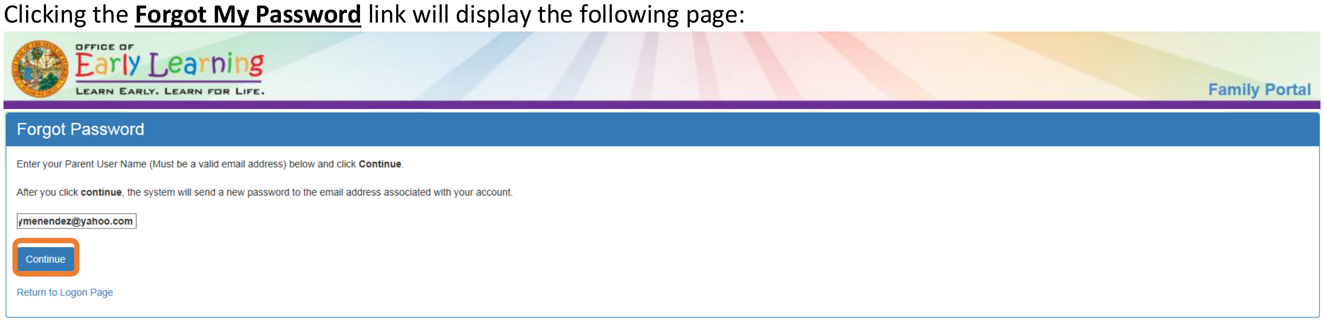


Password Recovery

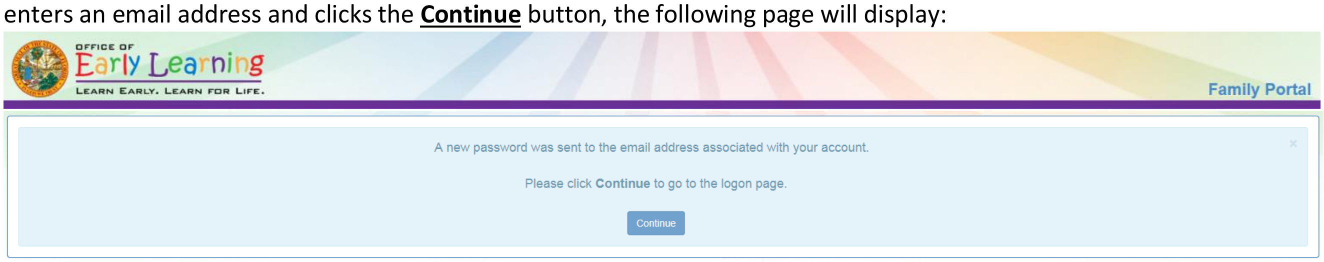
If the Family Portal user cannot remember the password, the user can click the **Forgot My Password** link on the Logon page.



Clicking the **Forgot My Password** link will display the following page:

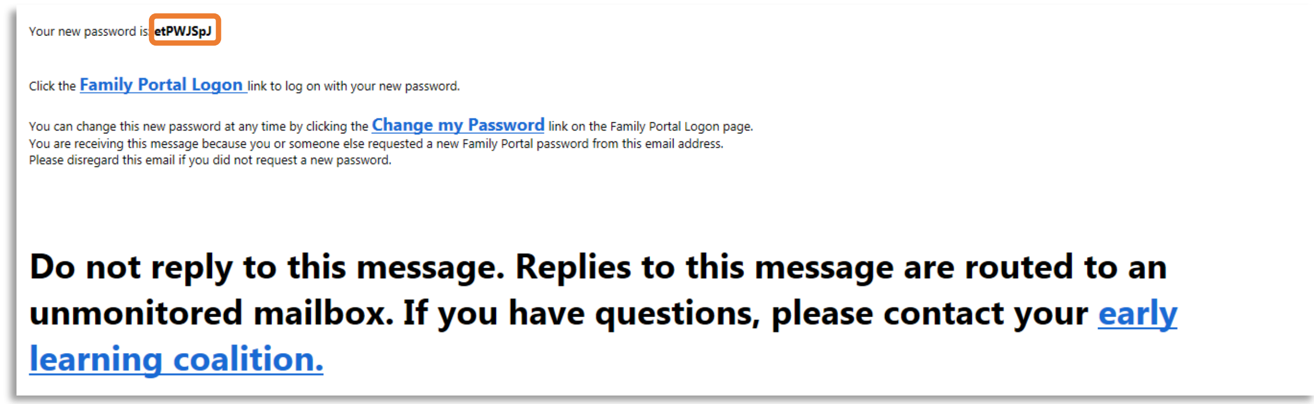


The Family Portal user must know the email address used to register for the account. Once the Family Portal user enters an email address and clicks the **Continue** button, the following page will display:



The Family Portal user should then access an email account and find the email sent by **DONOTREPLY@oel.myflorida.com**.

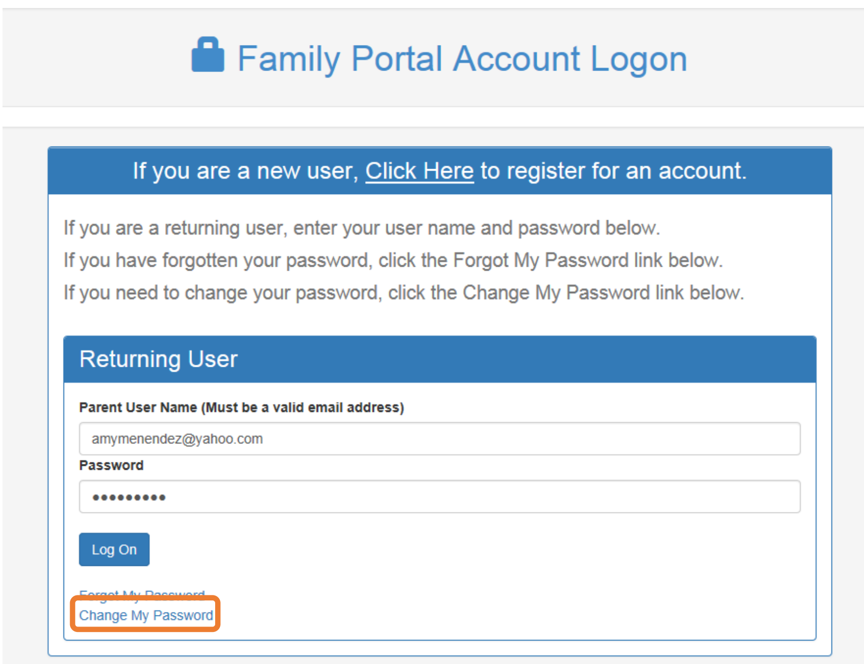
Email Message:



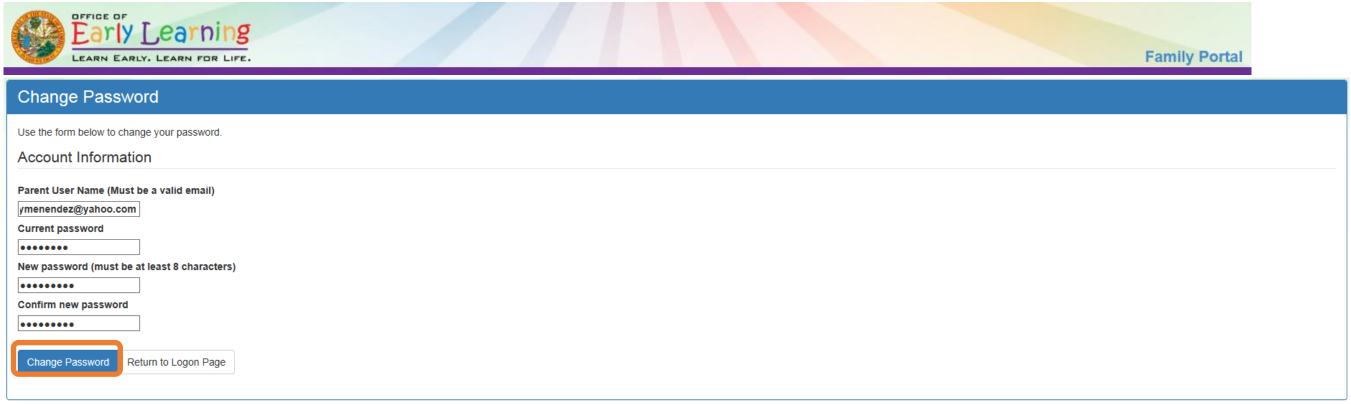
The Family Portal user will find the new password within the email. The Family Portal user can keep the new password and click the **Family Portal Logon** or click the **Change my Password** link within the email.

Change Password Process

A Family Portal user can change the password at any point by clicking the **Change my Password** link on the Logon page to start this process.

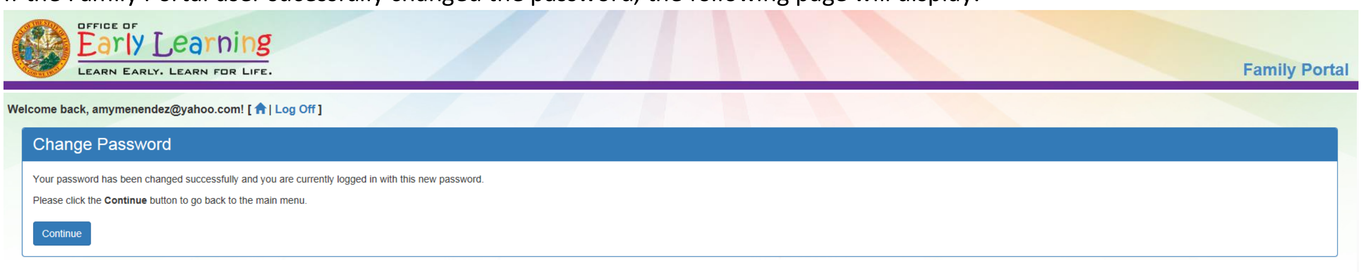


Clicking the **Change my Password** link will display the following page:



The Family Portal user must enter the User Name (email address), current password, new password and confirm new password. After entering the required fields, click the **Change Password** button to continue.

If the Family Portal user sucessfully changed the password, the following page will display:

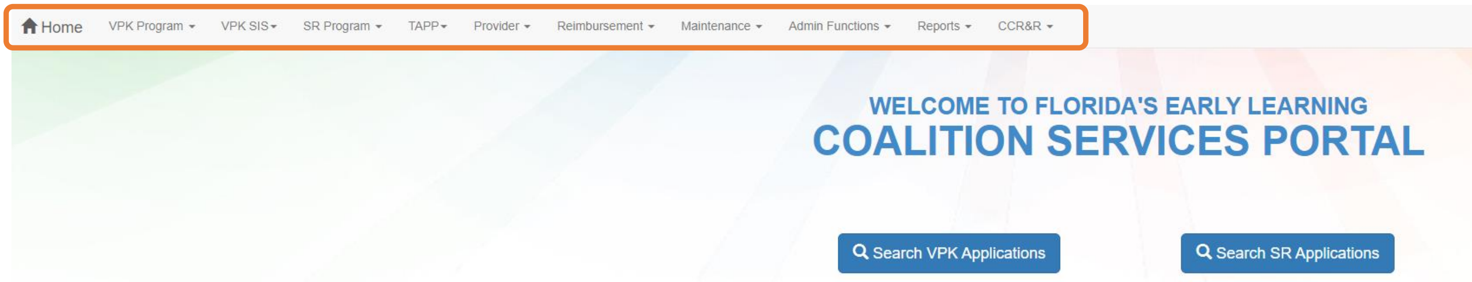


Change User Name Process

A Family Portal user can change the User Name (email address) at any point by sending an email request to early learning coalition, who will then verify the request and send an email request to the OEL Service Desk (service.desk@oel.myflorida.com), listing the old email address and the new email address for the Family Portal.

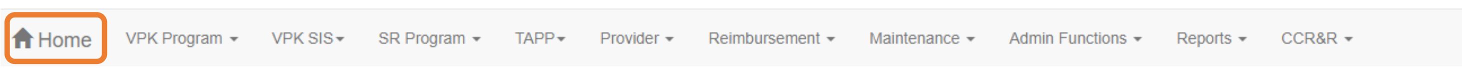
Coalition Services Portal Main Page Navigation

The Navigation Bar is near the top of the page.



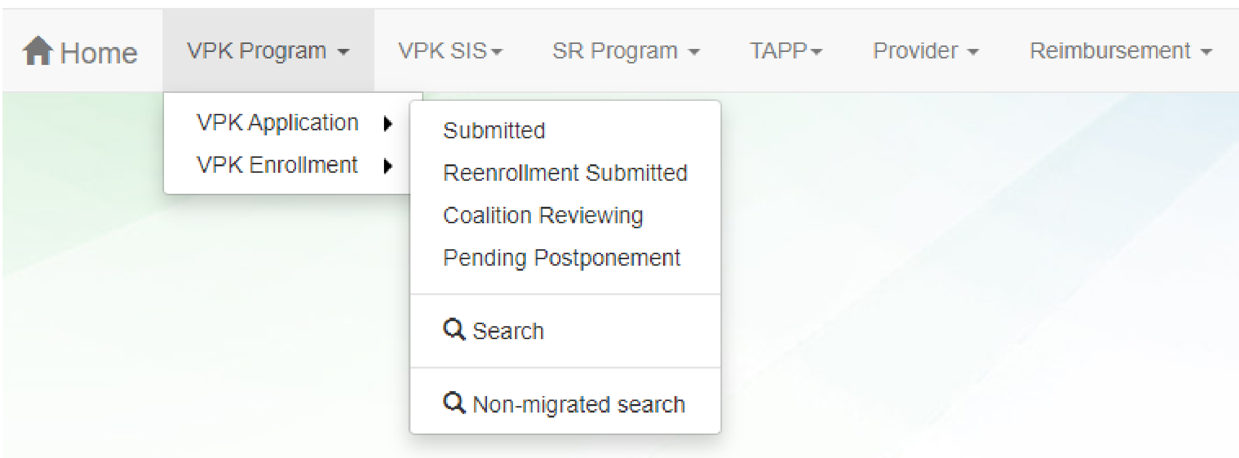
Home Button

The **<u>Home</u>** button will take the coalition user to the Coalition Services Portal main page.



VPK Program Tab

Click the *VPK Program* tab to activate the dropdown menu.

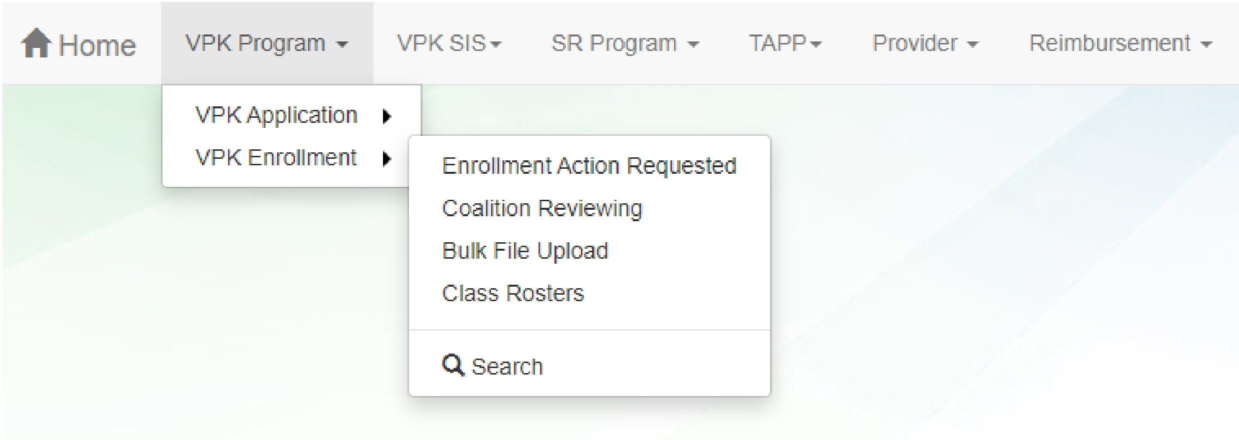


VPK Application > Submitted – Display all active VPK applications in Submitted status.

VPK Application > Reenrollment Submitted – Search for all VPK reenrollment applications in submitted status.

VPK Application > Coalition Reviewing – Search for all submitted VPK applications marked **Coalition Reviewing**.

VPK Application > Pending Postponement – Search for all VPK pending postponement applications.



VPK Enrollment > Enrollment Action Requested – Display all VPK enrollments that need coalition action.

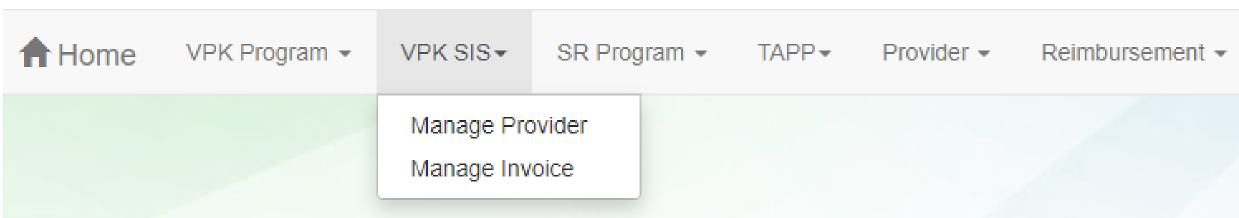
VPK Enrollment > Coalition Reviewing – Display VPK enrollments that need to be approved or rejected.

VPK Enrollment > Bulk File Upload – Upload VPK enrollment data for providers.

VPK Enrollment > Class Rosters – Allow a search for a provider's class roster.

VPK SIS Tab

Click the *VPK SIS* tab to activate the dropdown menu.

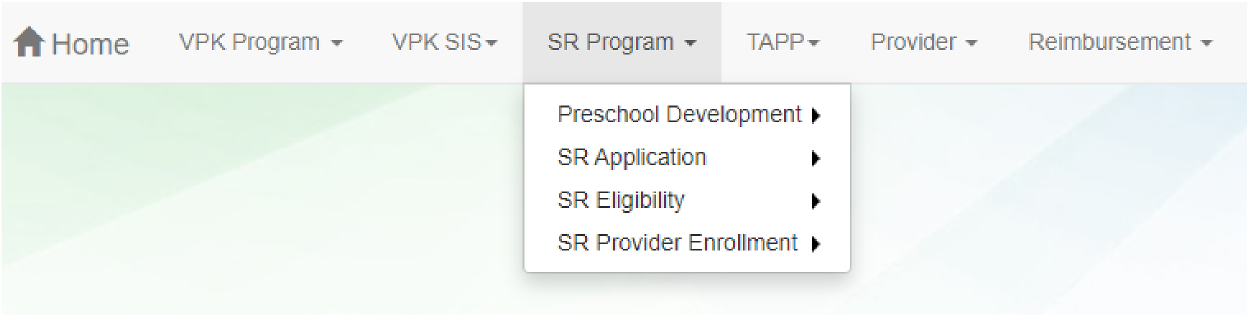


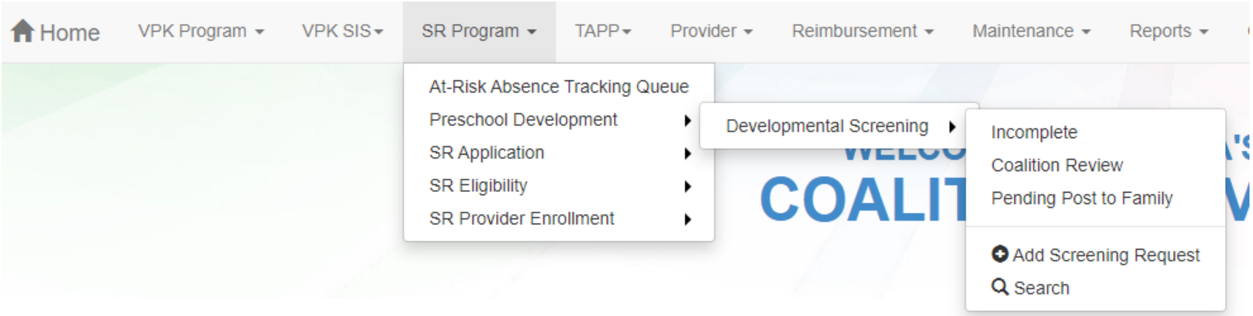
VPK SIS > Manage Provider – Add or edit existing VPK SIS providers.

VPK SIS > Manage Invoice – Create, manage, and process a VPK SIS invoice.

SR Program Tab

Click the *SR Program* tab to activate the dropdown menu.





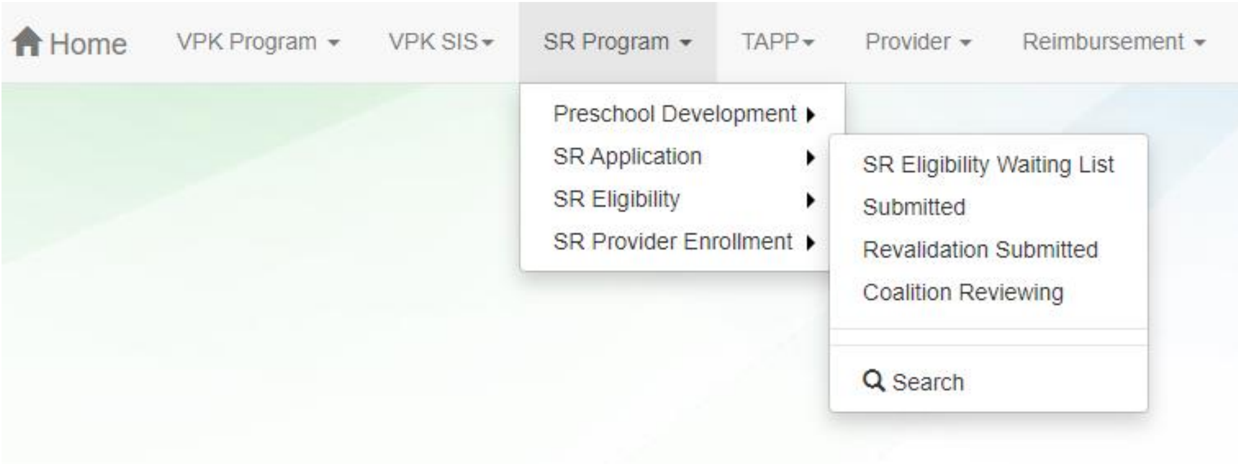
Preschool Development > Developmental Screening – Display all outstanding screening requests to be completed.

Preschool Development > Developmental Screening > Incomplete – Display the screenings that are incomplete.

Preschool Development > Developmental Screening > Coalition Review – Display all outstanding screening responses to be processed.

Preschool Development > Developmental Screening > Pending Post to Family – Display all approved screenings that need to be posted to the Family Portal.

Preschool Development > Developmental Screening > Add Screening Request – Allows coalition to initiate a screening.

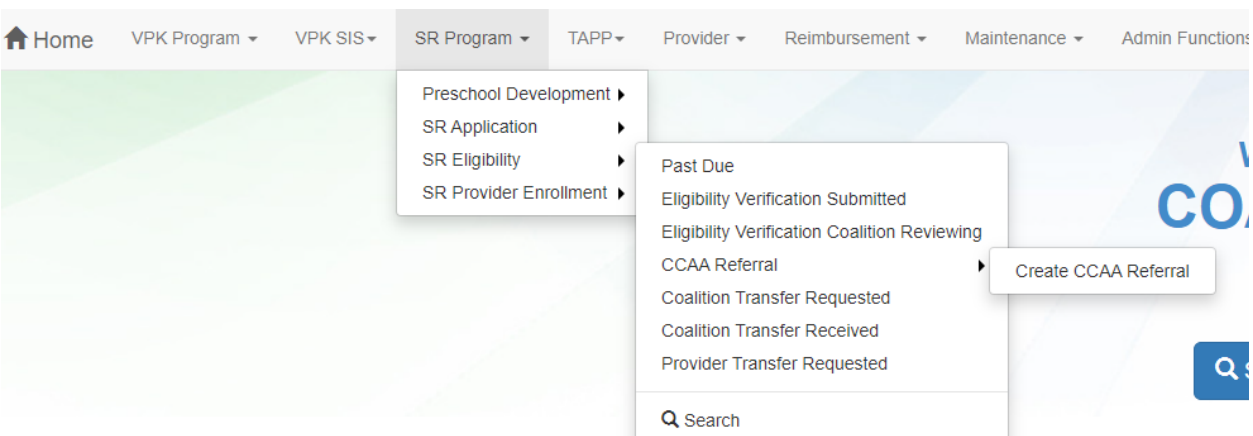


SR Application > SR Eligibility Waiting List – Display all applications in **Active** status that are awaiting funding notification. This was formerly the Waiting List that contained **Active-Waiting** applications.

SR Application > Submitted – Display all SR applications in **Submitted** status.

SR Application > Revalidation Submitted – Display all SR applications in **Revalidation Submitted** status.

SR Application > Coalition Reviewing – Display all SR applications awaiting coalition action.



SR Eligibility > Past Due – Display eligibility verifications with a **Past Due** status.

SR Eligibility > Eligibility Verification Submitted – Display eligibility verifications with a **Submitted** status.

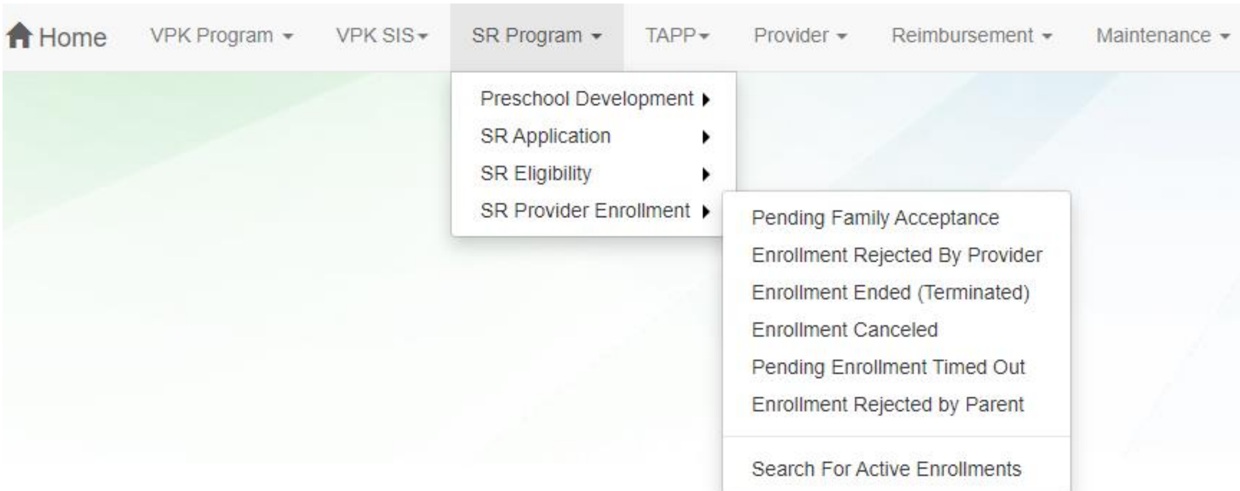
SR Eligibility > Eligibility Verification Coalition Reviewing – Display eligibility verifications with a **Coalition Reviewing** status.

SR Eligibility > CCAA Referral > Create CCAA Referral – Create a referral by completing an intake form.

SR Eligibility > Coalition Transfer Request – Display requests to transfer eligibility out of and into the coalition.

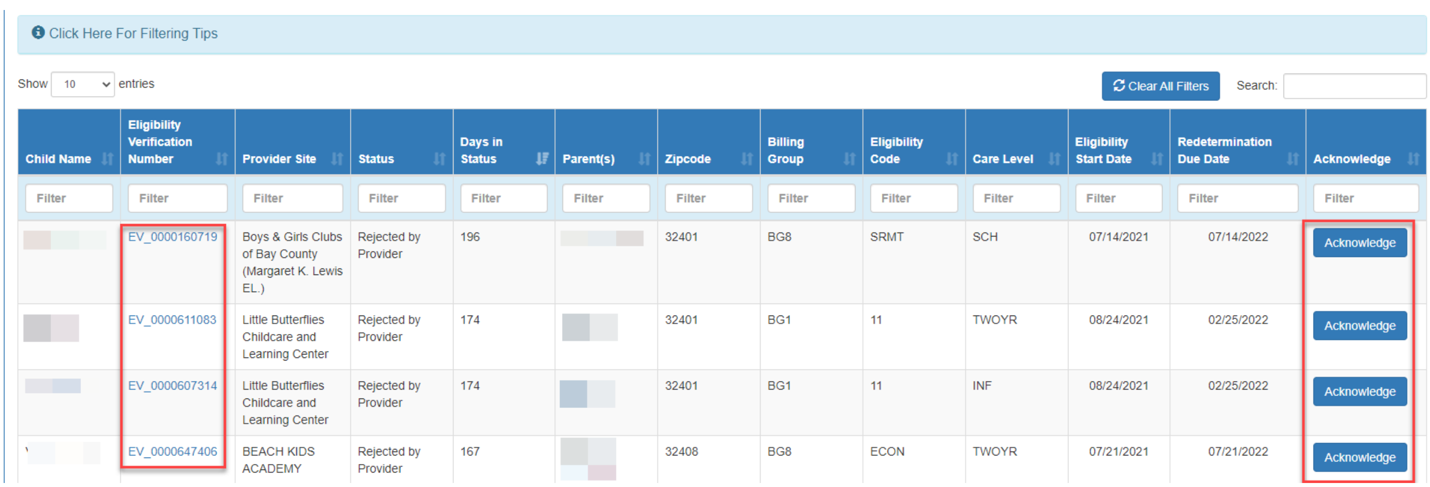
SR Eligibility > Coalition Transfer Received – Display requests to transfer eligibility out of the coalition or to another provider within the coalition with a status of **Transfer Received**.

SR Eligibility > Provider Transfer Requested – Display requests to transfer eligibility to another provider.



SR Program > SR Provider Enrollment - Display enrollments awaiting action from the Parent, Provider and/or Coalition:

- Pending Family Acceptance
- Enrollment Rejected By Provider
- Enrollment Ended
- Enrollment Canceled
- Pending Enrollment Timed Out (**NOTE:** after 5 days for the provider)
- Enrollment Rejected by Parent



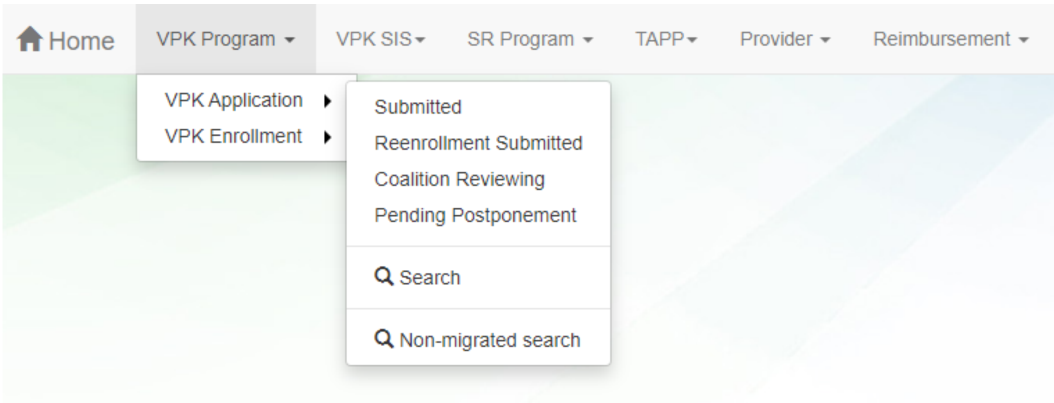
Click Here For Filtering Tips

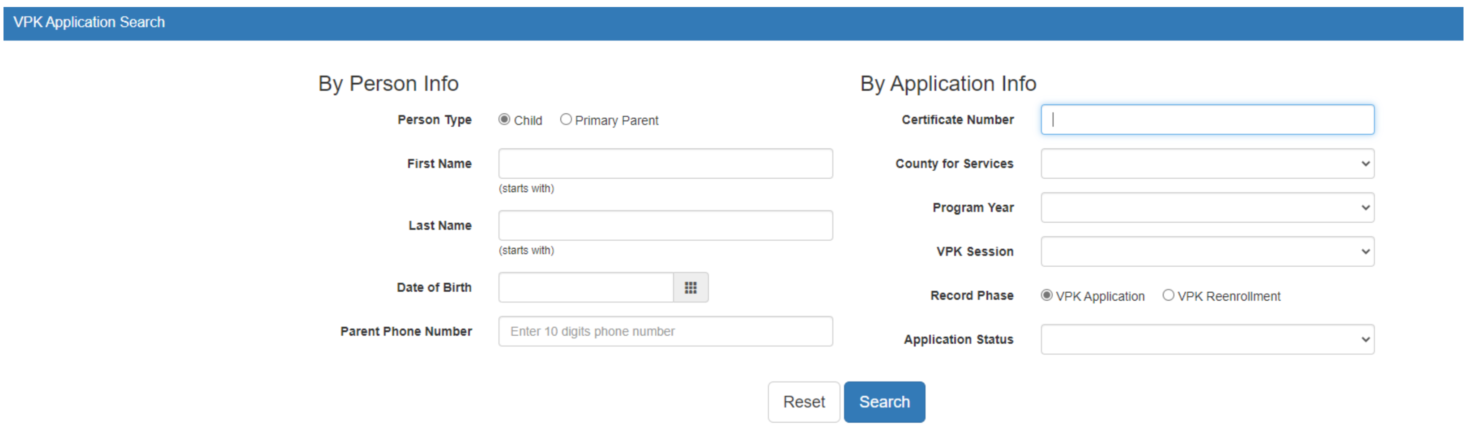
Show 10 entries | Clear All Filters | Search:

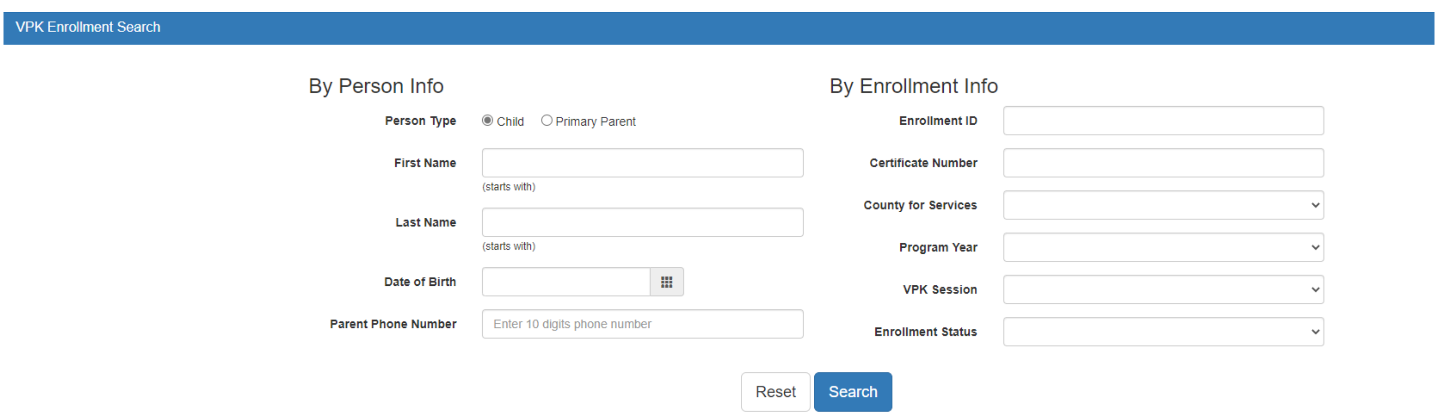
Child Name	Eligibility Verification Number	Provider Site	Status	Days in Status	Parent(s)	Zipcode	Billing Group	Eligibility Code	Care Level	Eligibility Start Date	Redetermination Due Date	Acknowledge
Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter
	EV_0000160719	Boys & Girls Clubs of Bay County (Margaret K. Lewis EL.)	Rejected by Provider	196		32401	BG8	SRMT	SCH	07/14/2021	07/14/2022	Acknowledge
	EV_0000611083	Little Butterflies Childcare and Learning Center	Rejected by Provider	174		32401	BG1	11	TWOYR	08/24/2021	02/25/2022	Acknowledge
	EV_0000607314	Little Butterflies Childcare and Learning Center	Rejected by Provider	174		32401	BG1	11	INF	08/24/2021	02/25/2022	Acknowledge
	EV_0000647406	BEACH KIDS ACADEMY	Rejected by Provider	167		32408	BG8	ECON	TWOYR	07/21/2021	07/21/2022	Acknowledge

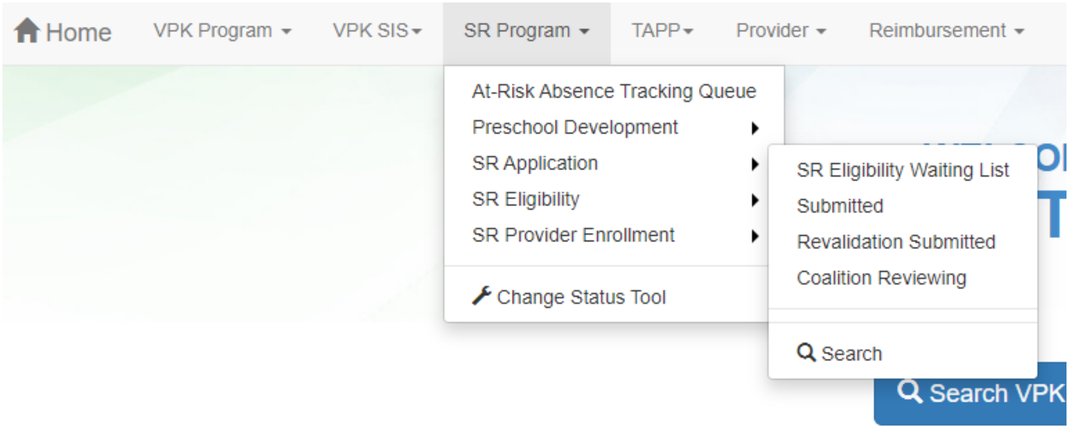
NOTE: Clicking the Eligibility Verification Number link will open the child's eligibility details. Clicking **Acknowledge** will remove the record from this queue.

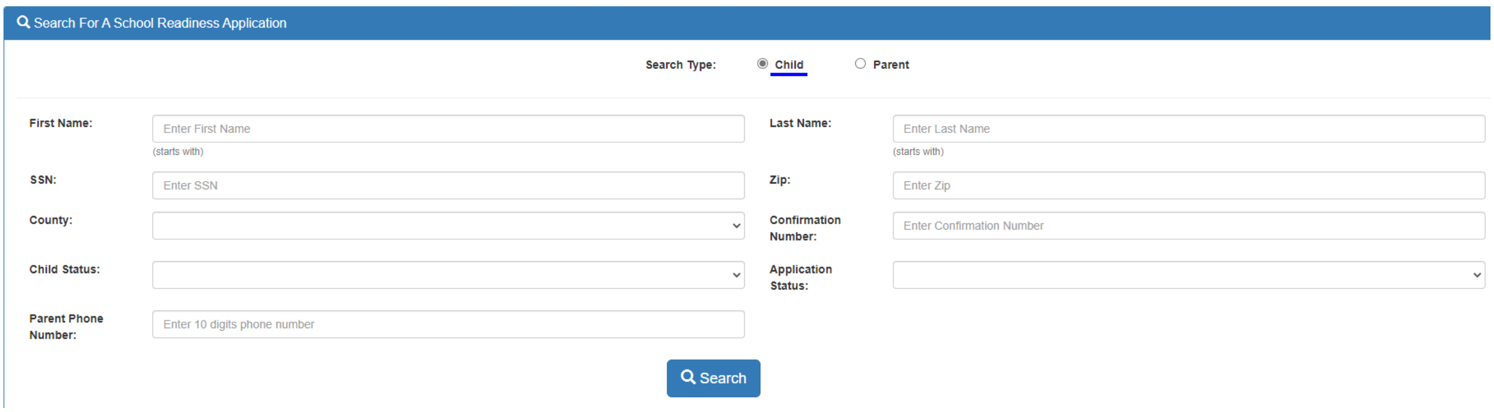
The **Search** function allows a coalition user to quickly search for VPK child applications/enrollments or School Readiness applications/eligibilities in any status.

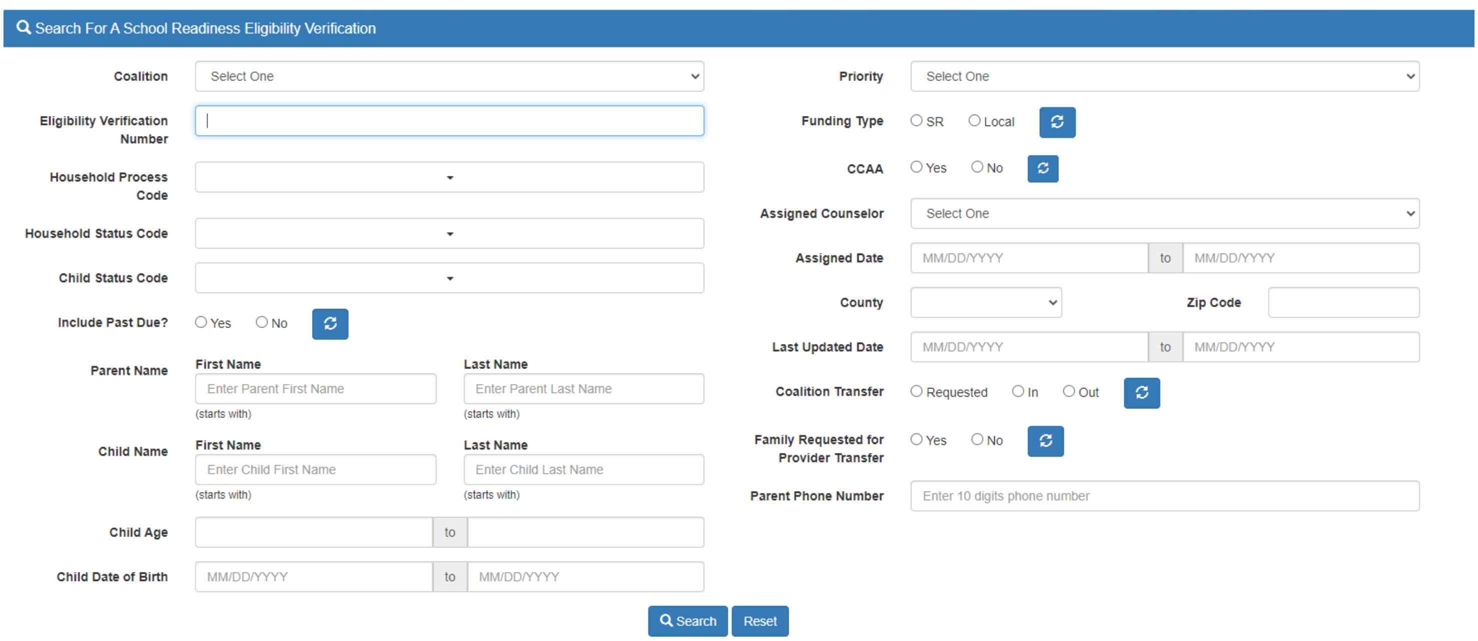








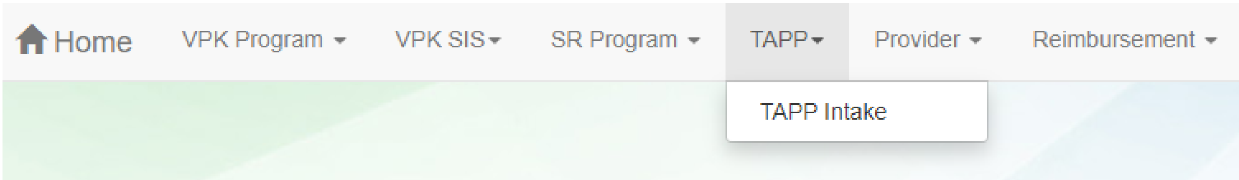




NOTE: To ensure accurate searches, click the work queues dropdown menu when changing search terms (child name, confirmation numbers, etc.) or starting a new search. Do not use the Back button on the internet browser.

TAPP Tab

Click the *TAPP* tab and then click **TAPP Intake** to capture Teenage Parent Program (TAPP) information.



Provider Tab

Click the *Provider* tab to display a dropdown menu. More information on *Provider* tab options is in the "Provider Portal User Guide."

Reimbursement Tab

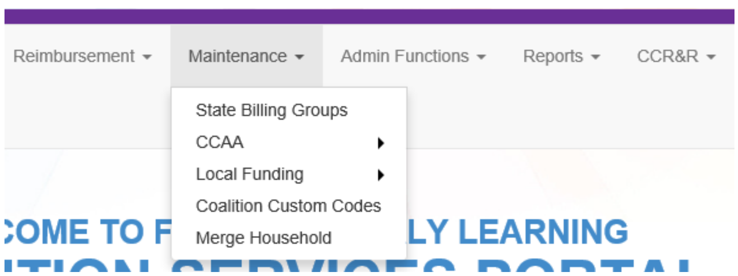
Click the *Reimbursement* tab to display a dropdown menu. More information on *Reimbursement* tab options is in the "Provider Portal User Guide."

Maintenance Tab

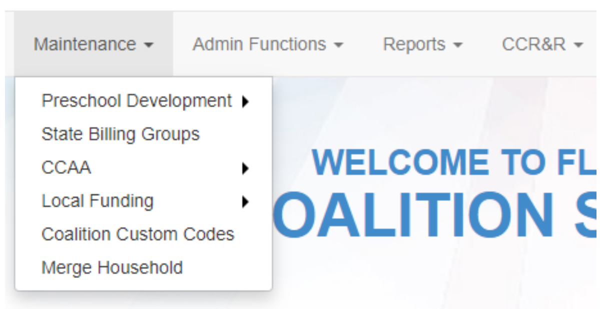
Click the *Maintenance* tab to display a dropdown menu.

State Billing Groups – Display available billing groups.

CCAA > Referring Agencies – Display local referring agencies in the coalition.



Coalition Custom Codes – Create custom codes for case notes, status records, and provider notes.

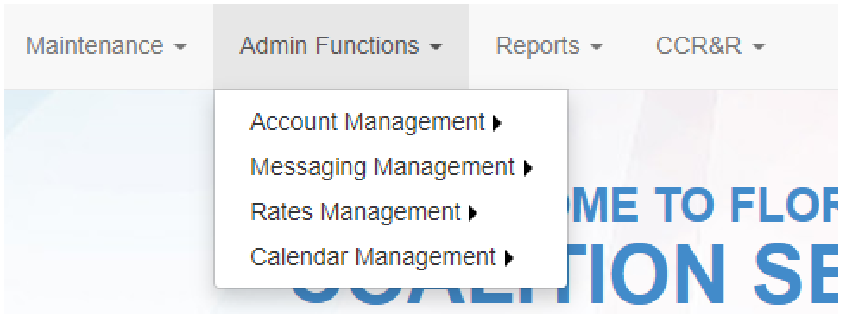


Local Funding > Local Funding Agencies – Display local and match funders within the coalition.

Local Funding > Local Funding County Settings – Display counties in a coalition with local funding opportunities for families that do not qualify for SR funding.

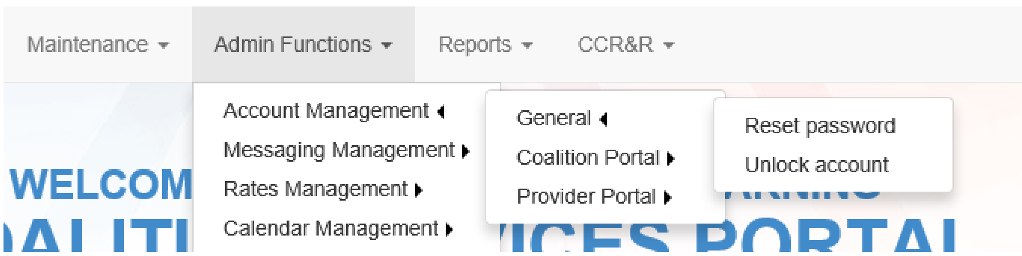
Admin Functions Tab

Only coalition admins or DEL admins will be able to view and access the *Admin Functions* tab.



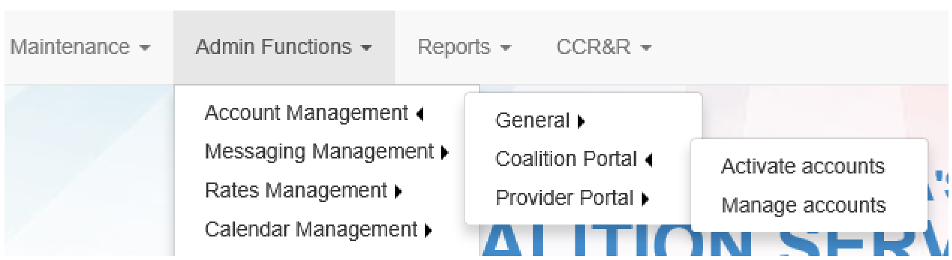
Account Management > General > Reset password – Reset coalition user and coalition admin passwords.

Account Management > General > Unlock account – Unlock locked coalition user and coalition admin accounts.

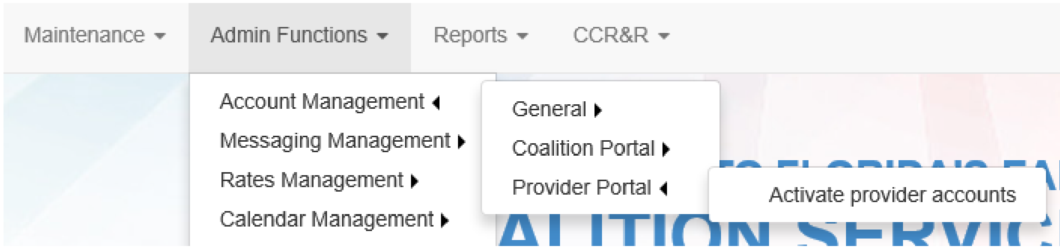


Account Management > Coalition Portal > Activate accounts – Activate coalition user and coalition admin accounts.

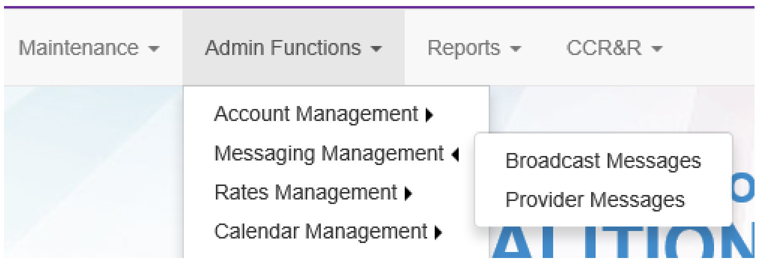
Account Management > Coalition Portal > Manage accounts – Modify coalition user and coalition admin accounts and inactivate accounts.



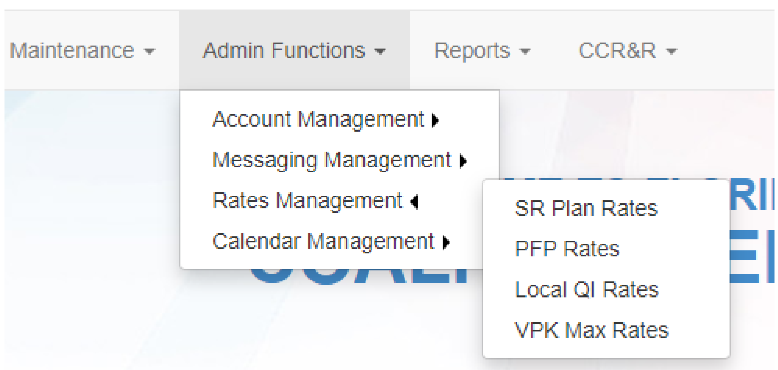
Account Management > Provider Portal > Activate provider accounts – Activate provider accounts.



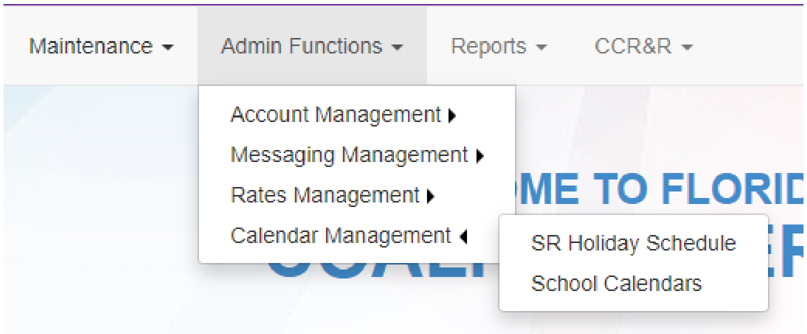
Messaging Management – Send messages to individual providers (Provider Messages), providers based on services (SR, VPK, CCR&R), or all providers in the coalition service area (Broadcast Messages).



Rates Management – Manage SR Plan, PFP, Local QI, and VPK rates.

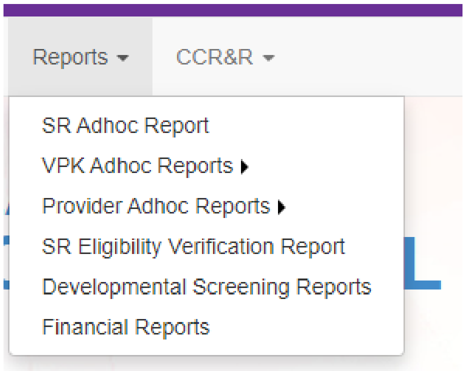


Calendar Management – Set reimbursable closure days for providers within the coalition service area and school district calendars.



Reports Tab

Click the *Reports* tab to display the list of available reports.



SR Adhoc Report – Create a detailed report of SR applications, using several filters.

VPK Adhoc Reports – Create a detailed report of VPK applications and VPK payments, using several filters.

Provider Adhoc Reports – See Provider Processes section.

SR Eligibility Verification Report – Create a detailed report of Eligibility Verifications.

Developmental Screening Reports – Create a detailed report of developmental screenings and follow ups.

Financial Reports – Create a 5045 report and coalition invoices from current and past service/payment periods, using several filters.

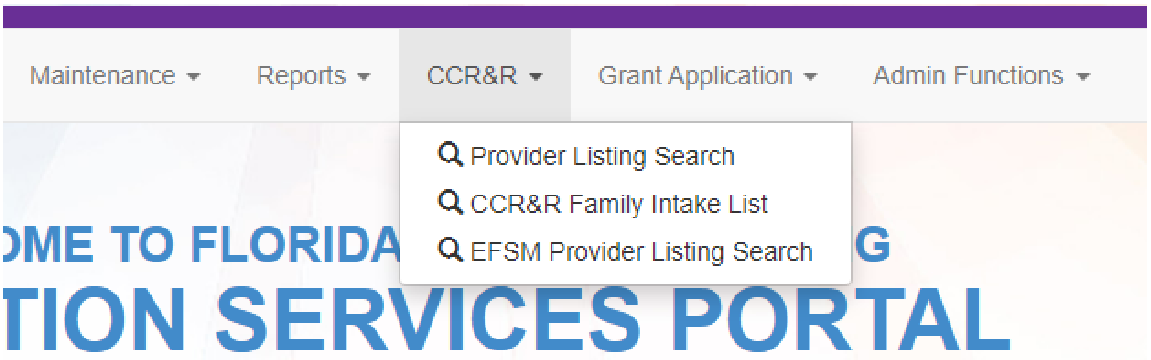
CCR&R Provider Listing

When a family completes the Eligibility Verification (EV) process, a provider can be selected. The list of providers available to the family comes from the CCR&R Provider Listing. For a provider to appear in a provider listing search, the profile status must have been Active at one point. If the provider has not had an Active profile, the provider will not appear in a provider listing search. For example, a provider completing a profile for the first time will have an Incomplete, then a Submitted profile, and then a Coalition Reviewing profile, but will not appear in the provider listing search until the profile status is Active. A provider who has an Active profile status but then makes edits to the profile, causing it to change to an Incomplete status, will still display in the provider listing search.

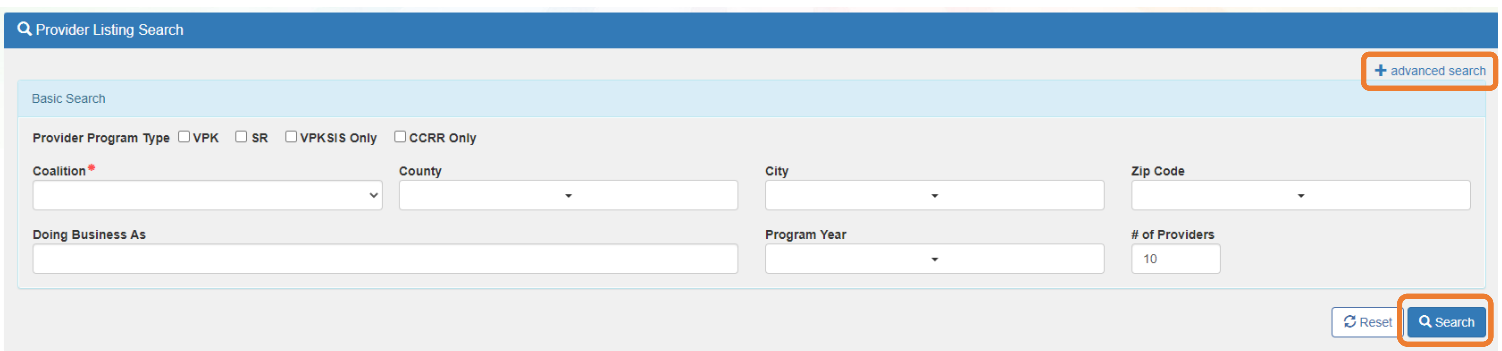
To view the CCR&R Provider Listing Search, currently there are 2 options:

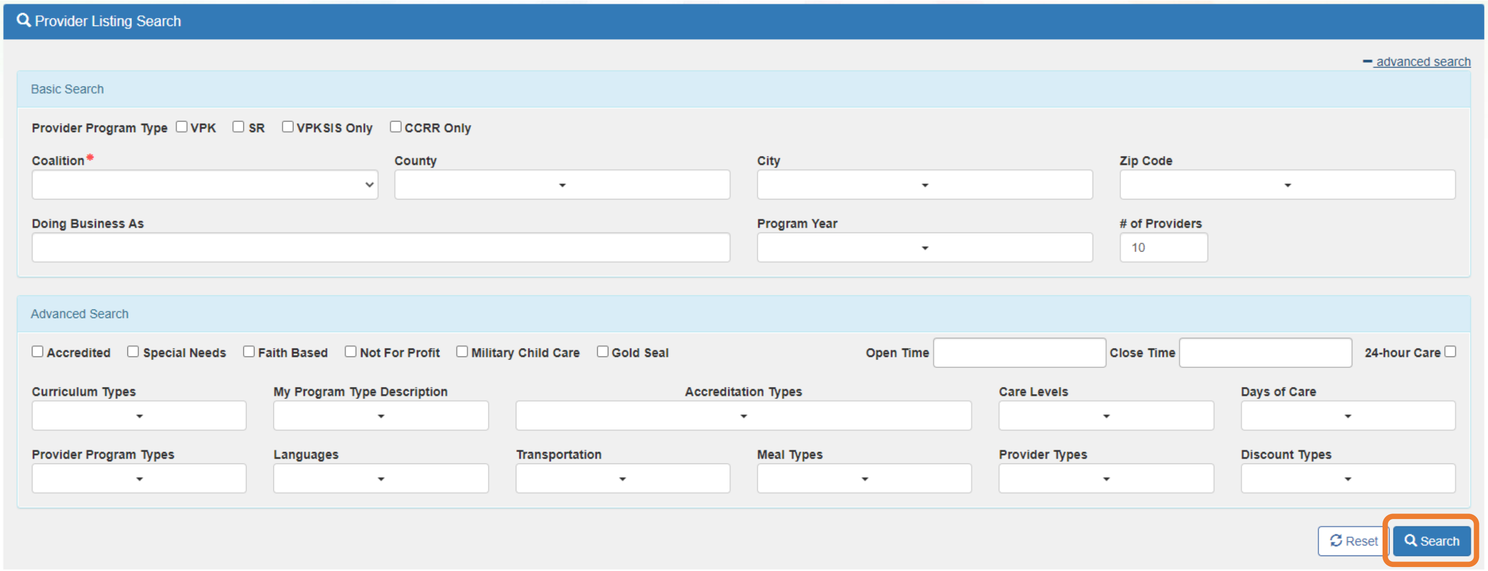
Option 1 – EFS-MOD

Click **CCR&R**, then **EFSM Provider Listing Search**.

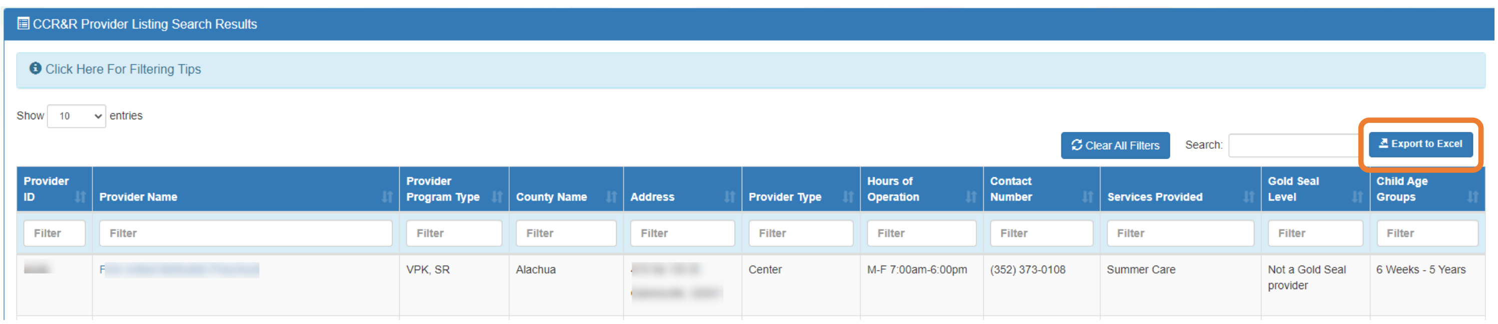


Select search parameters and click **Search**. Click **+ advanced search** for more search parameters.





After clicking **Search**, click on the provider's name in the search results to see provider details. The search results can be exported to Excel.



CCR&R Provider Details

Print

CCR&R Provider Details

[redacted]

Provider Type: Center

[redacted]

URL:
Email : [redacted]
Phone : [redacted]

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
✖	✔	✔	✔	✔	✔	✖

Hours of Operation	Early Dropoff	Extended Stay	Ages served
M-F 7:00am-6:00pm ;	✔	✔	6 Weeks - 5 Years

SR	VPK	Not for Profit	Faith based	Transportation
✔	✔	✔	✔	Near public transportation

› Gold Seal	✖
› Character Development Program	✔
› Therapeutic services offered	✔
› Military Childcare offered	✖
› Program equipped to care for children with special needs	✖
› Is facility wheelchair accessible	✖
› Program participates in a Quality Rating System	✖

Programs offered	Meals provided
› Summer Care	› Afternoon Snack
	› Morning Snack

Enhanced Schedule	Languages Spoken	Accreditation	Curriculum
› Full-time	› English		› Learn Every Day & Nemours BrightStart! Superset Preschool Curriculum (3 to K)
› Full Year			› Learn Every Day for Infant, Toddler & Twos (Birth to 3)
› Part time			
› Early/Extended Care			

My Program Type Description
- Faith-Based
- Fenced Yard
- Limited TV viewed
- On-site screenings
- School System Weather Days
- Smoke Free

Weekly rates and fees

	Infant	1 year old	2 year old	3 year old	4 year old	5 year old	School Age
Full Time	$199.77	$185.91	$169.75	$151.27	$151.27	$151.27	$0.00
Part Time	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00

VPK Rates

VPK Weekly	
Full Time	$118.94
Part Time	$80.83

Additional Fees

› Application Registration	One time	Per Child	$200.00
› Early Drop Off	Monthly	Per Child	$50.00
› Extended Stay	Monthly	Per Child	$50.00
› Late Payment	Weekly	Per Child	$10.00
› Late Pickup	Per minute	Per Child	$2.00
› Returned Check	As needed	Per Family	$25.00
› Supplies/Materials	Annual	Per Child	$100.00
› Waiting List Registration	One time	Per Child	$200.00

Discounts
- Scholarships
- Sibling Discount

Training / Education
- 40/45 HR INTRO CHILD CARE
- AA/AS EARLY CHILDHOOD OR RELATED FIELD
- BA EARLY CHILDHOOD OR RELATED FIELD
- DIRECTOR CREDENTIAL ADV
- DIRECTOR CREDENTIAL LEVEL 1
- EARLY (EMERGENT) LITERACY
- FCCH 30 HOUR TRAINING
- FCCPC/ECPC/CCAC/CDAE
- GED/HIGH SCHOOL
- MA DEGREE EARLY CHILDHOOD
- NATL EARLY CHILDHOOD CERT
- VPK DIRECTOR CREDENTIAL

Staff to Child Ratio

Infant	1 year old	2 year old	3 year old	4 year old	VPK	5 year old
1:4	1:6	1:9	1:12	1:15	1:11	1:15

SR CLASS® Composite Score

5.29

out of 7.00

This provider is a School Readiness (SR) Program provider. All School Readiness providers are required to have an annual program assessment using CLASS®.

CLASS® is an observation-based tool that measures the quality of teacher-child interactions in the classroom. Using trained, certified observers, the CLASS® tool measures how classroom interactions and experiences help children develop language and learn new concepts, how the classroom is organized to manage children's attention, time and behavior, and the responsiveness and senstivity of the classroom environment to children's emotions, wich helps develop their ability to interact with others. For more information about CLASS® and your School Readiness provider's composite score, please contact your local early learning coalition.

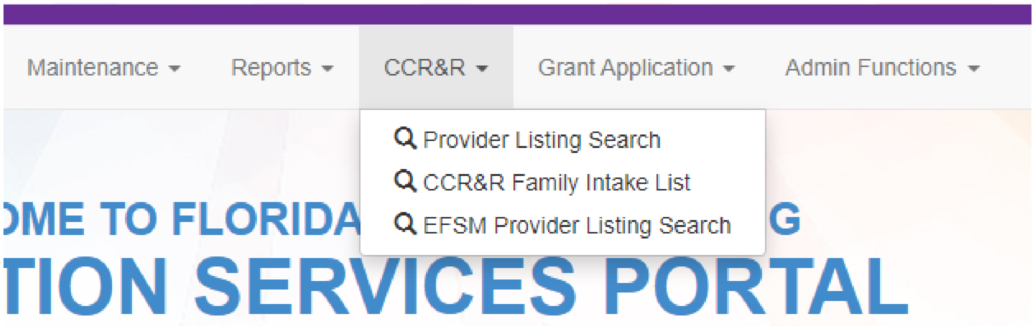
Participates in School Readiness Child Assessment: No

View Provider Inspection Report: https://caressearch.myflfamilies.com/PublicSearch

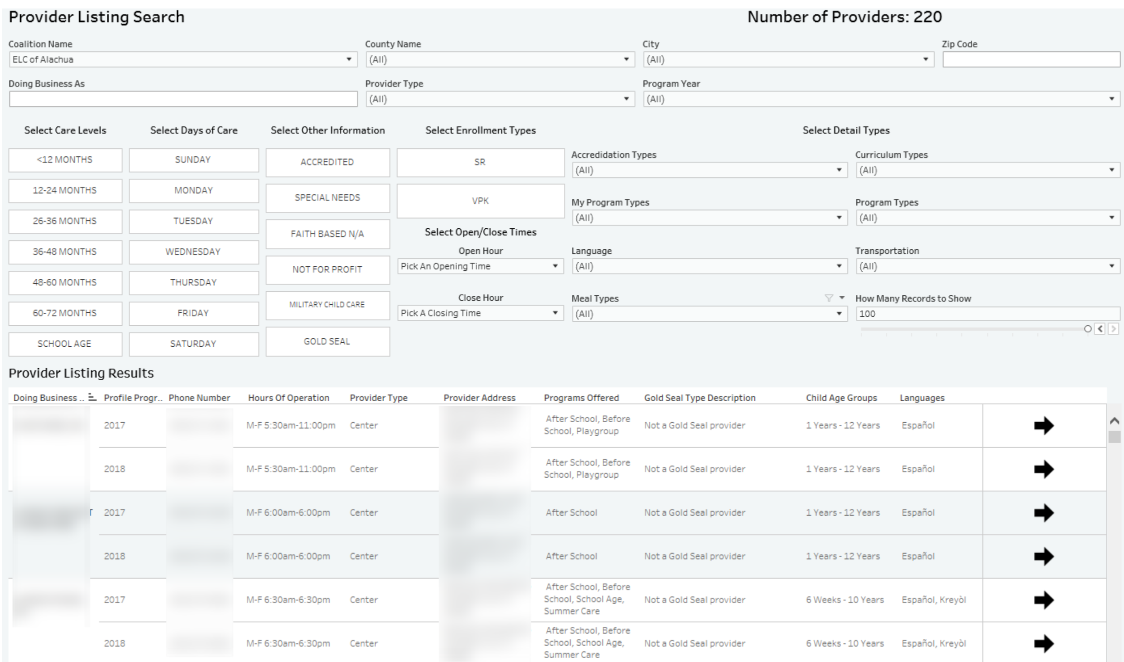
Close

Option 2 – Tableau

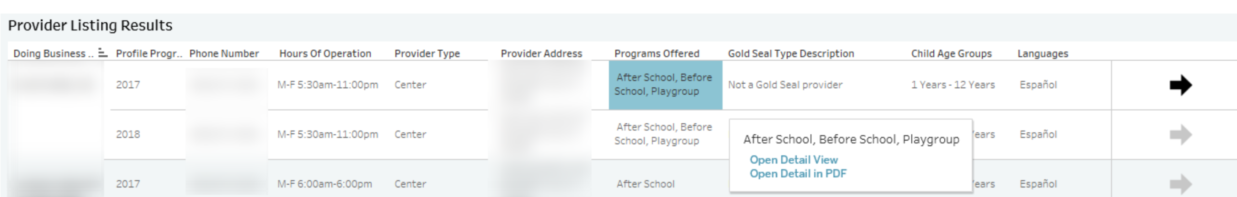
Click **CCR&R**, then **Provider Listing Search**.



Select a coalition, or (All) from the **Coalition Name** dropdown menu, and a report will display, presenting the providers for the coalition, along with many filters to select a provider that meets the family's needs.



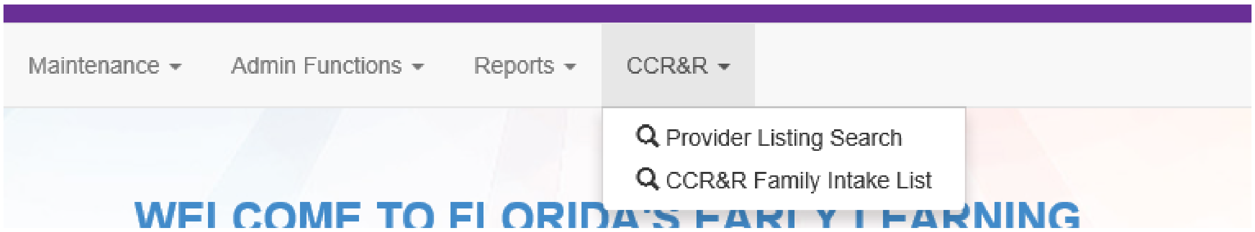
To see provider details, click a provider and links will display to **Open Detail View** or **Open Detail in PDF**.



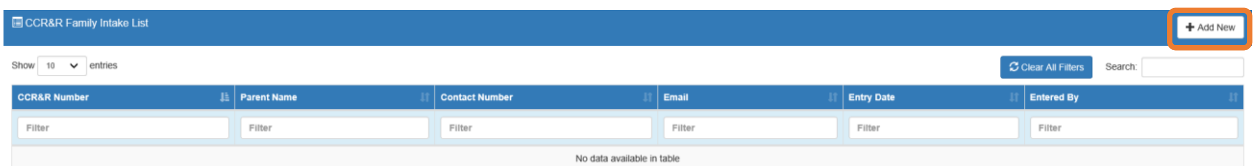
CCR&R Intake Process

CCR&R staff capture family data when contacted by families who are not yet being served. The coalition user is able to capture family information and child care request information for a family when the family contacts the coalition for information, but the family has not, and may not, complete an SR or VPK application.

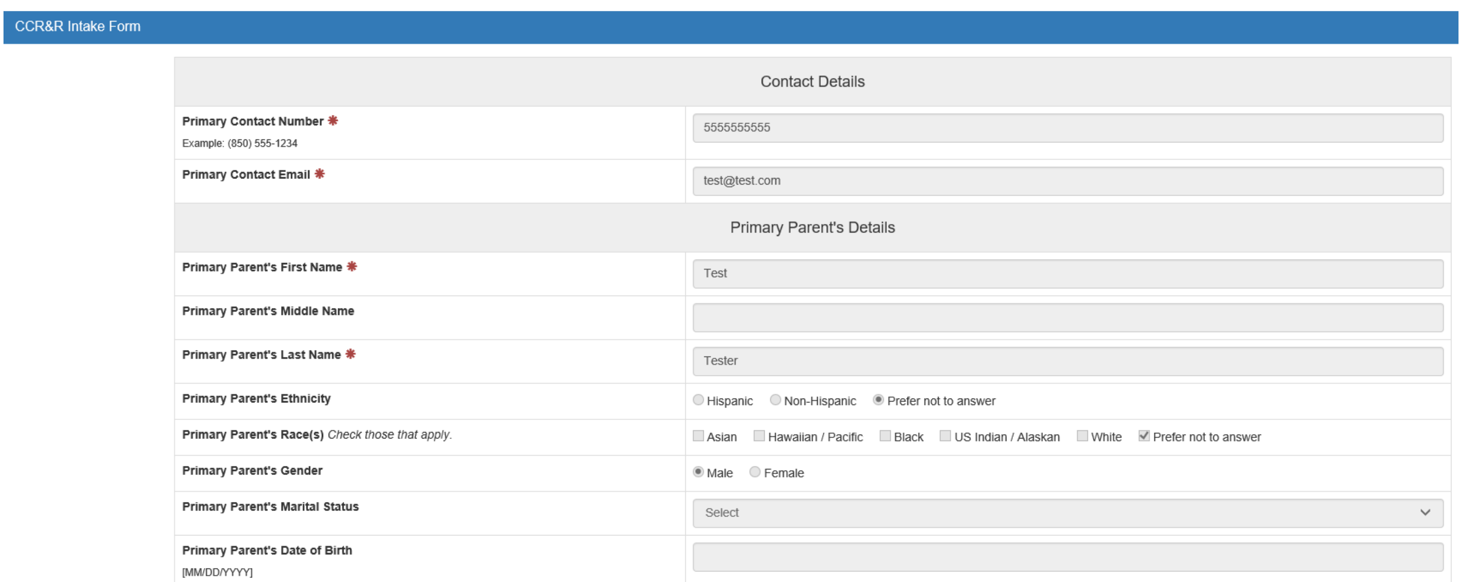
To capture family information, click **CCR&R Family Intake List**.

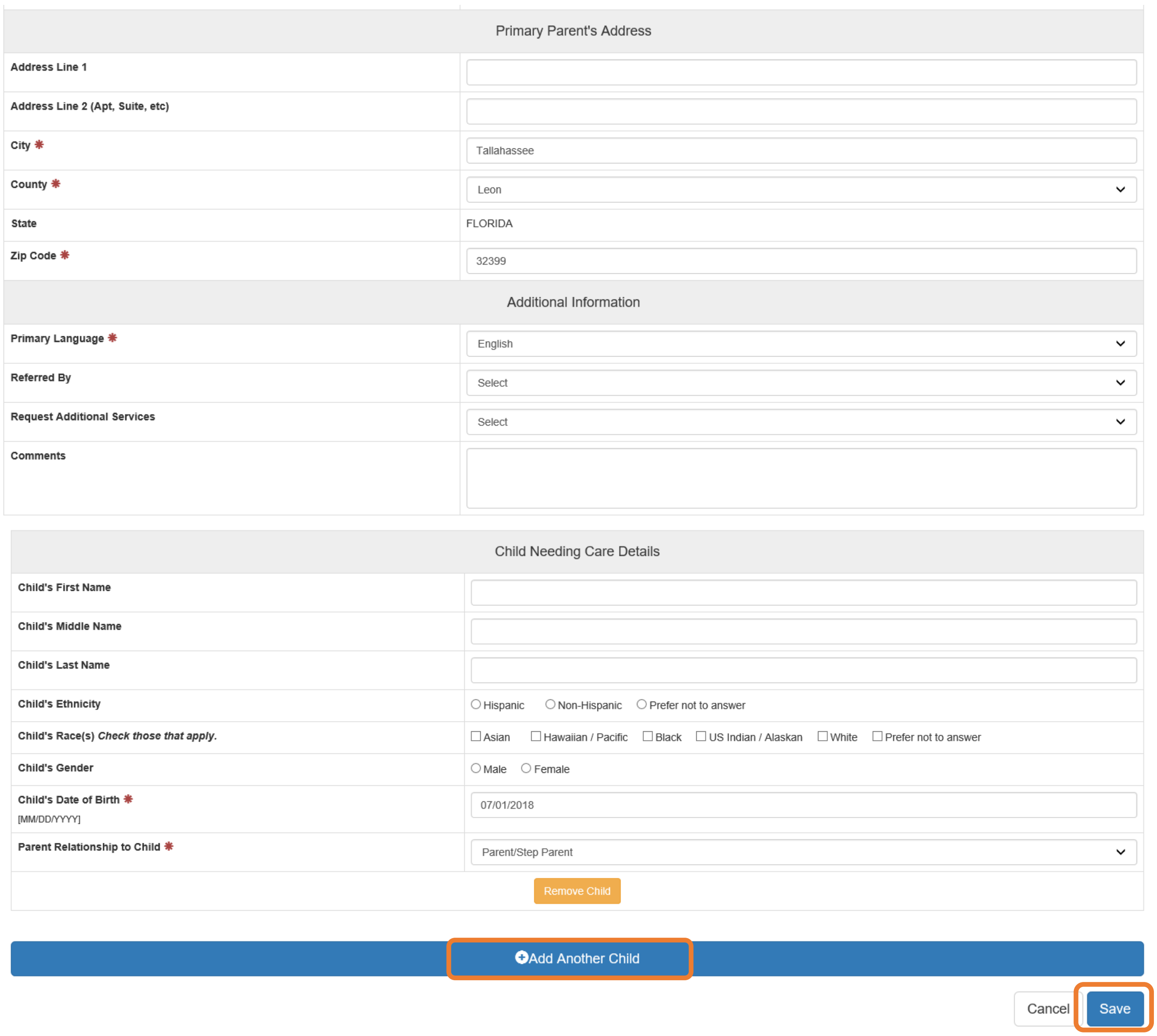


The following screen will display. Click the **Add New** button.



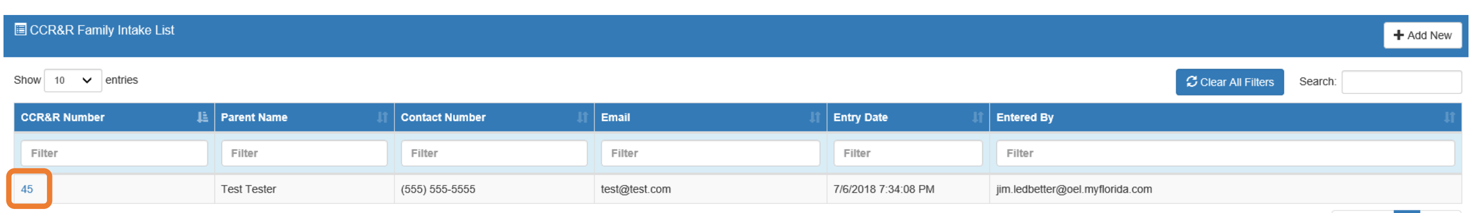
Complete the form and click **Save**. The **Add Another Child** button allows additional children to be added to the household.



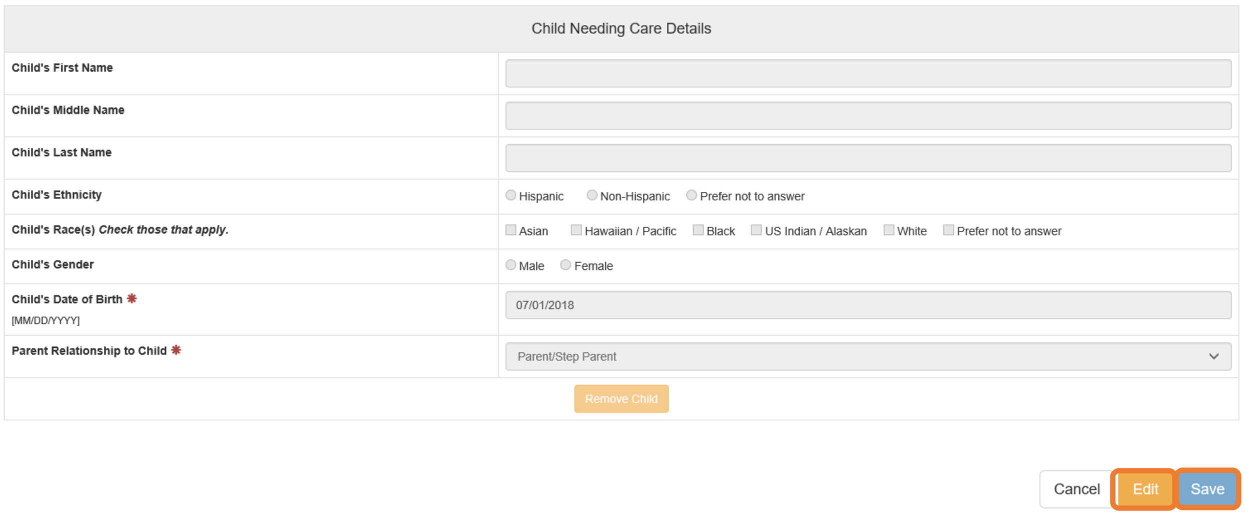


The saved form will display. Click **Cancel** to exit.

To edit a record, click a **CCR&R Number**.



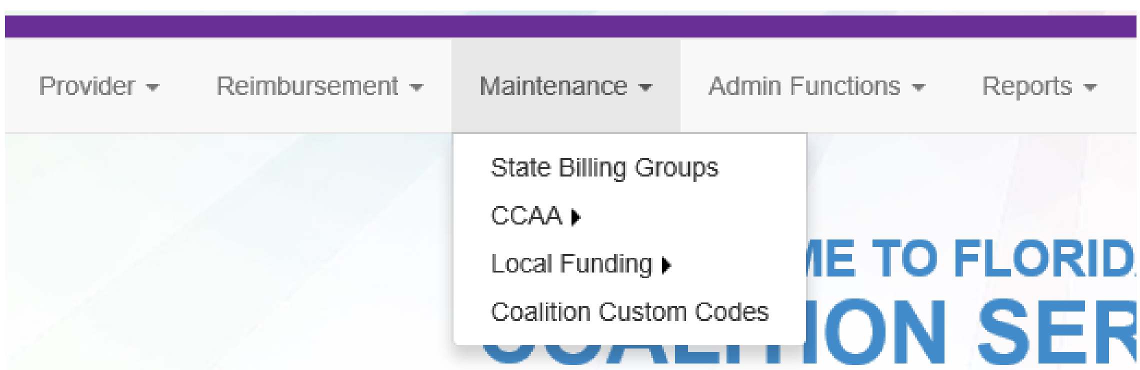
Click the **Edit** button at the bottom of the page to make edits, then click **Save**. Children can also be added and removed when editing a CCR&R record.



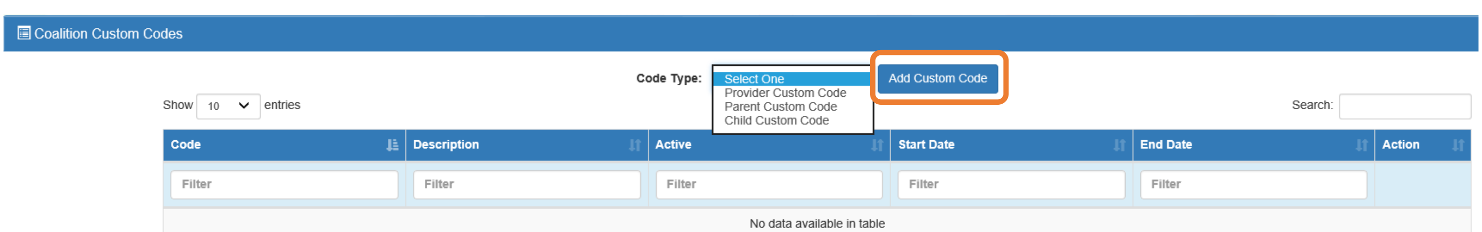
Coalition Custom Codes

Custom codes can be created by a coalition admin to allow flexibility in case notes, status records, and provider notes.

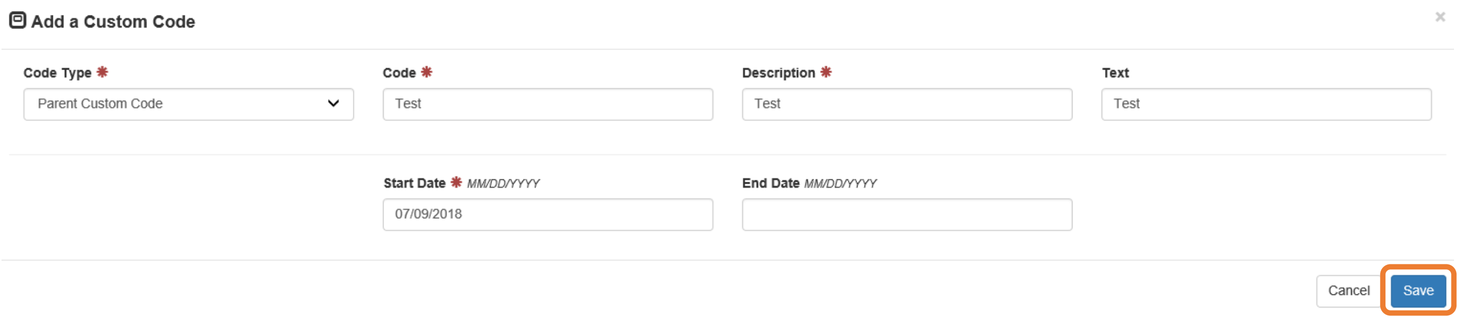
In the *Maintenance* tab, click **Coalition Custom Codes**.



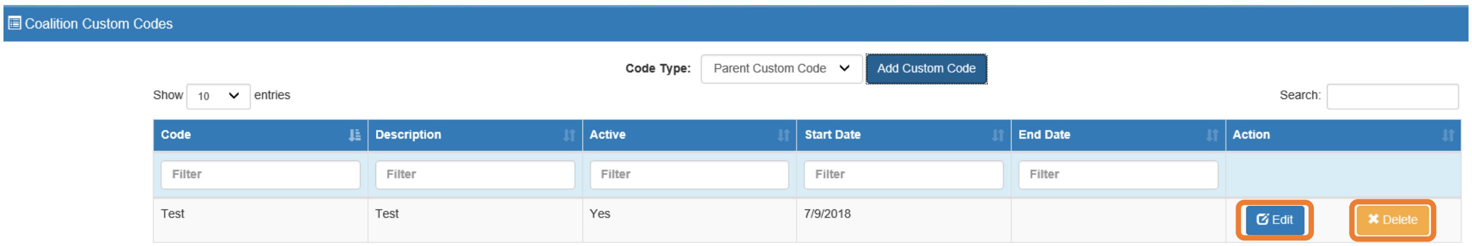
The following screen will display. Select a **Code Type** and click **Add Custom Code** to create a new code.



Complete the **Code** and **Description** fields and enter a **Start Date**. An **End Date** is not required. Click **Save**.



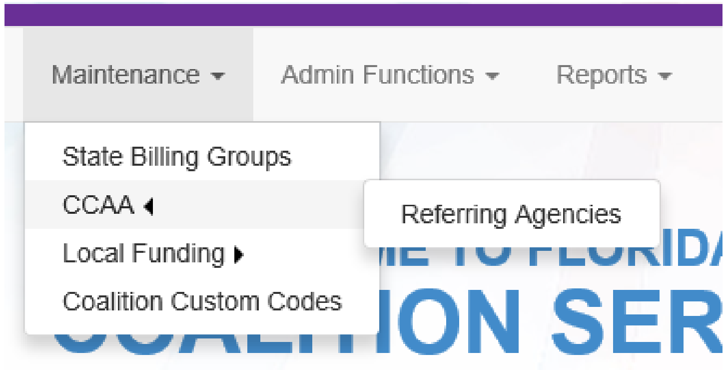
The new code is available. An **Edit** button and **Delete** button are displayed.



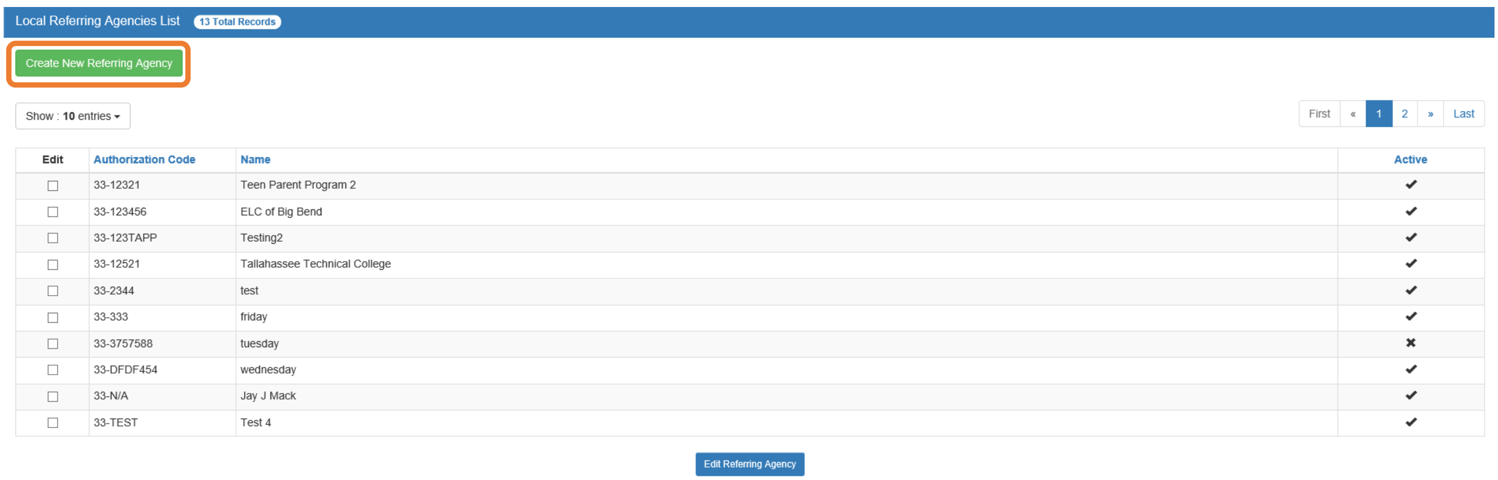
Child Care Application and Authorization (CCAA) Referring Agencies

Active referring agencies will appear in a dropdown list of referring agencies on the CCAA referral intake form.

In the *Maintenance* tab, click **CCAA**, then click **Referring Agencies**.

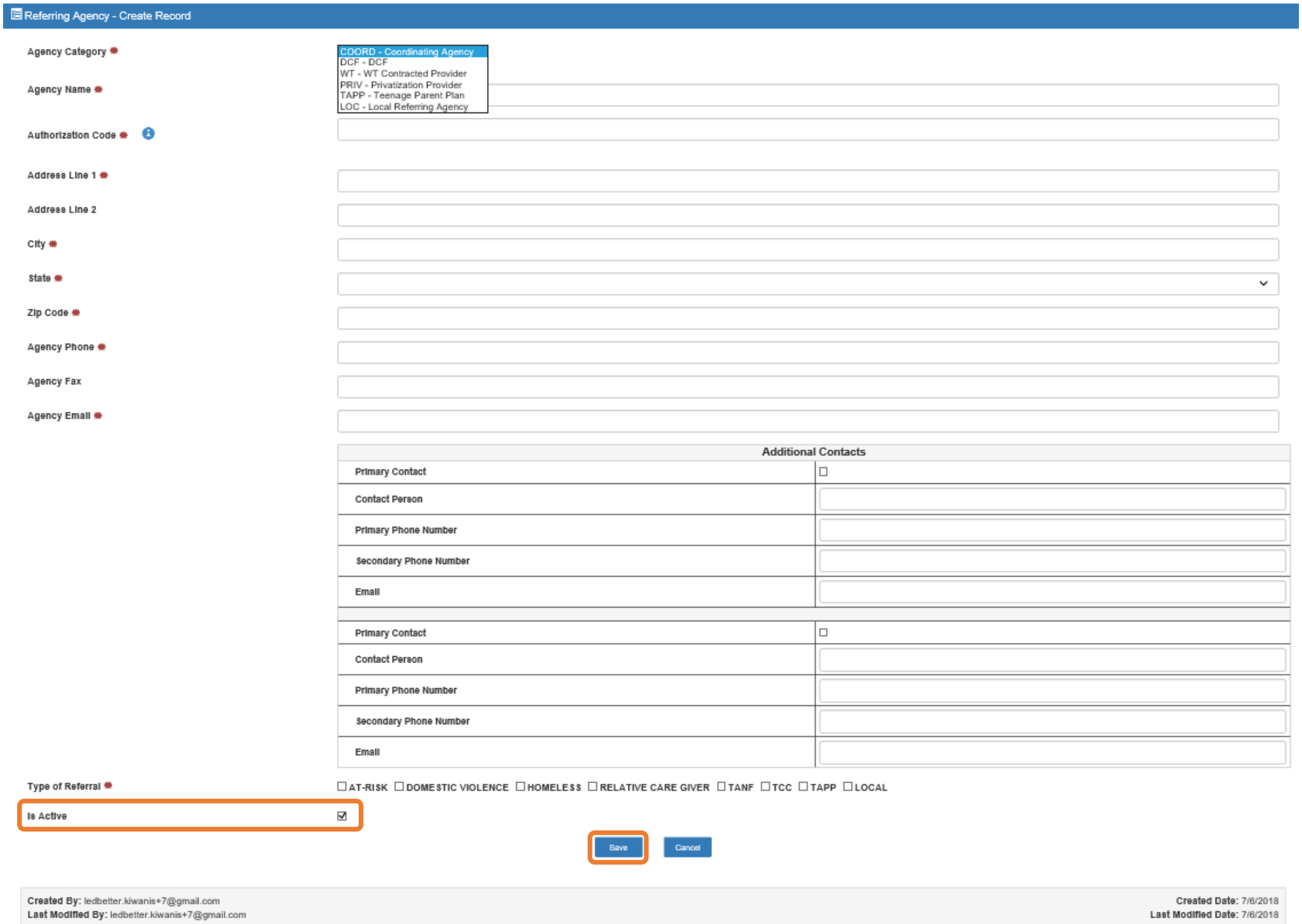


The following screen will display. Click **<u>Create New Referring Agency</u>**.



Edit	Authorization Code	Name	Active
☐	33-12321	Teen Parent Program 2	✔
☐	33-123456	ELC of Big Bend	✔
☐	33-123TAPP	Testing2	✔
☐	33-12521	Tallahassee Technical College	✔
☐	33-2344	test	✔
☐	33-333	friday	✔
☐	33-3757588	tuesday	✖
☐	33-DFDF454	wednesday	✔
☐	33-N/A	Jay J Mack	✔
☐	33-TEST	Test 4	✔

Select the Agency Category and complete the fields marked with a red asterisk. Click **Save**.



Referring Agency - Create Record

Agency Category

COORD - Coordinating Agency
DCF - DCF
WT - WT Contracted Provider
PRIV - Privatization Provider
TAPP - Teenage Parent Plan
LOC - Local Referring Agency

Agency Name

Authorization Code

Address Line 1

Address Line 2

City

State

Zip Code

Agency Phone

Agency Fax

Agency Email

Additional Contacts	
Primary Contact	☐
Contact Person	
Primary Phone Number	
Secondary Phone Number	
Email	
Primary Contact	☐
Contact Person	
Primary Phone Number	
Secondary Phone Number	
Email	

Type of Referral ☐ AT-RISK ☐ DOMESTIC VIOLENCE ☐ HOMELESS ☐ RELATIVE CARE GIVER ☐ TANF ☐ TCC ☐ TAPP ☐ LOCAL

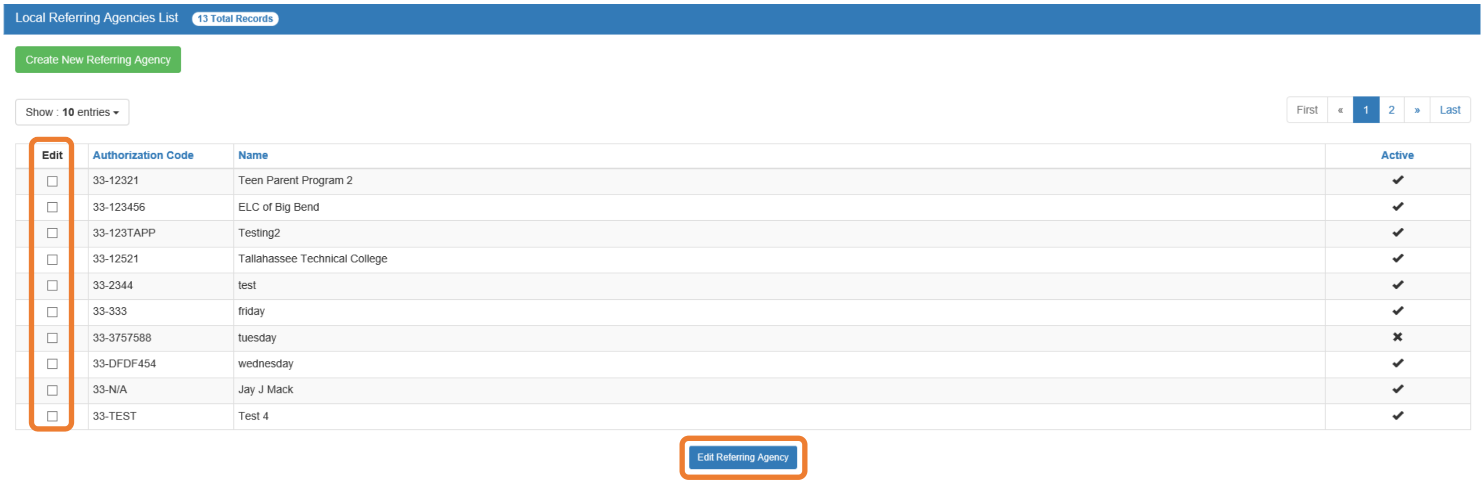
Is Active ☑

Save Cancel

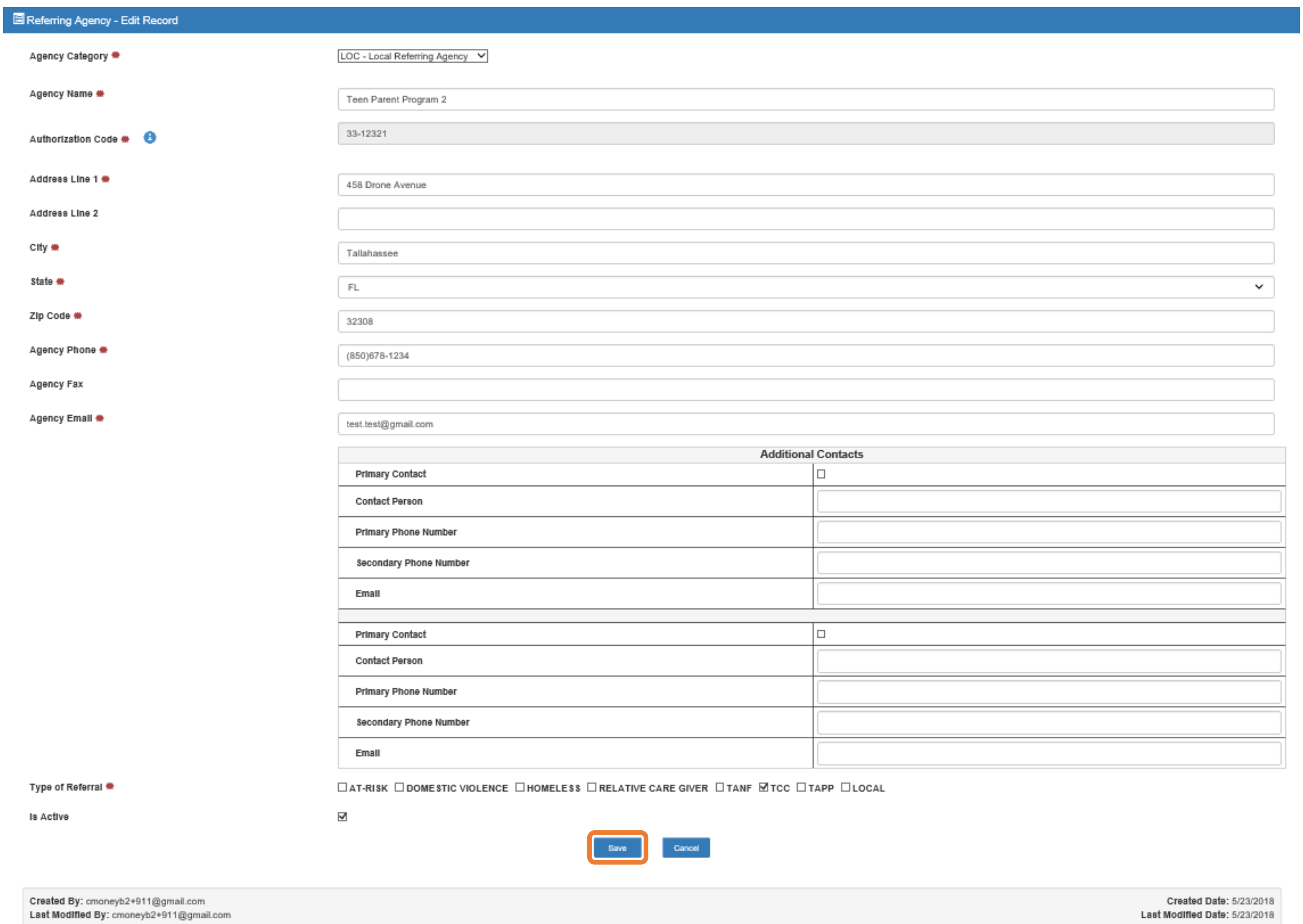
Created By: ledbetter.kiwanis+7@gmail.com Created Date: 7/6/2018
Last Modified By: ledbetter.kiwanis+7@gmail.com Last Modified Date: 7/6/2018

NOTE: The **Is Active** checkbox is automatically checked. If the referring agency is no longer active, uncheck the checkbox.

To edit an existing referring agency, check the **Edit** checkbox for an agency and click **Edit Referring Agency** to edit the agency.



Once edits are complete, click **Save**.

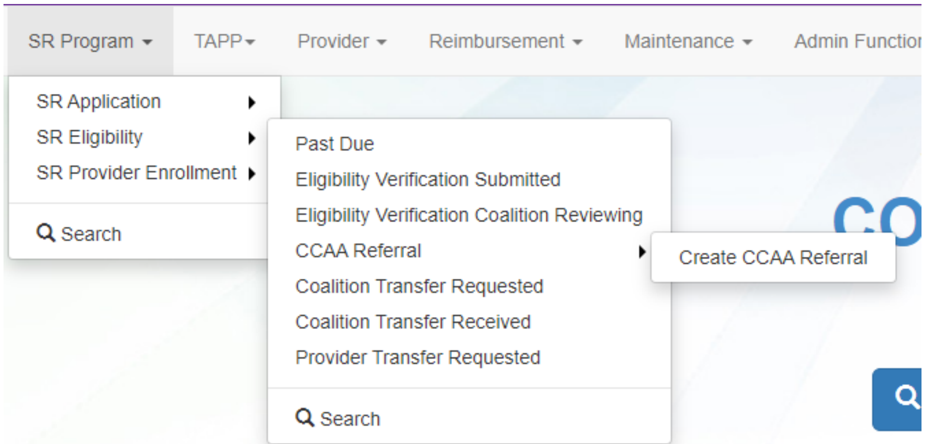


Child Care Application and Authorization (CCAA) Intake Process

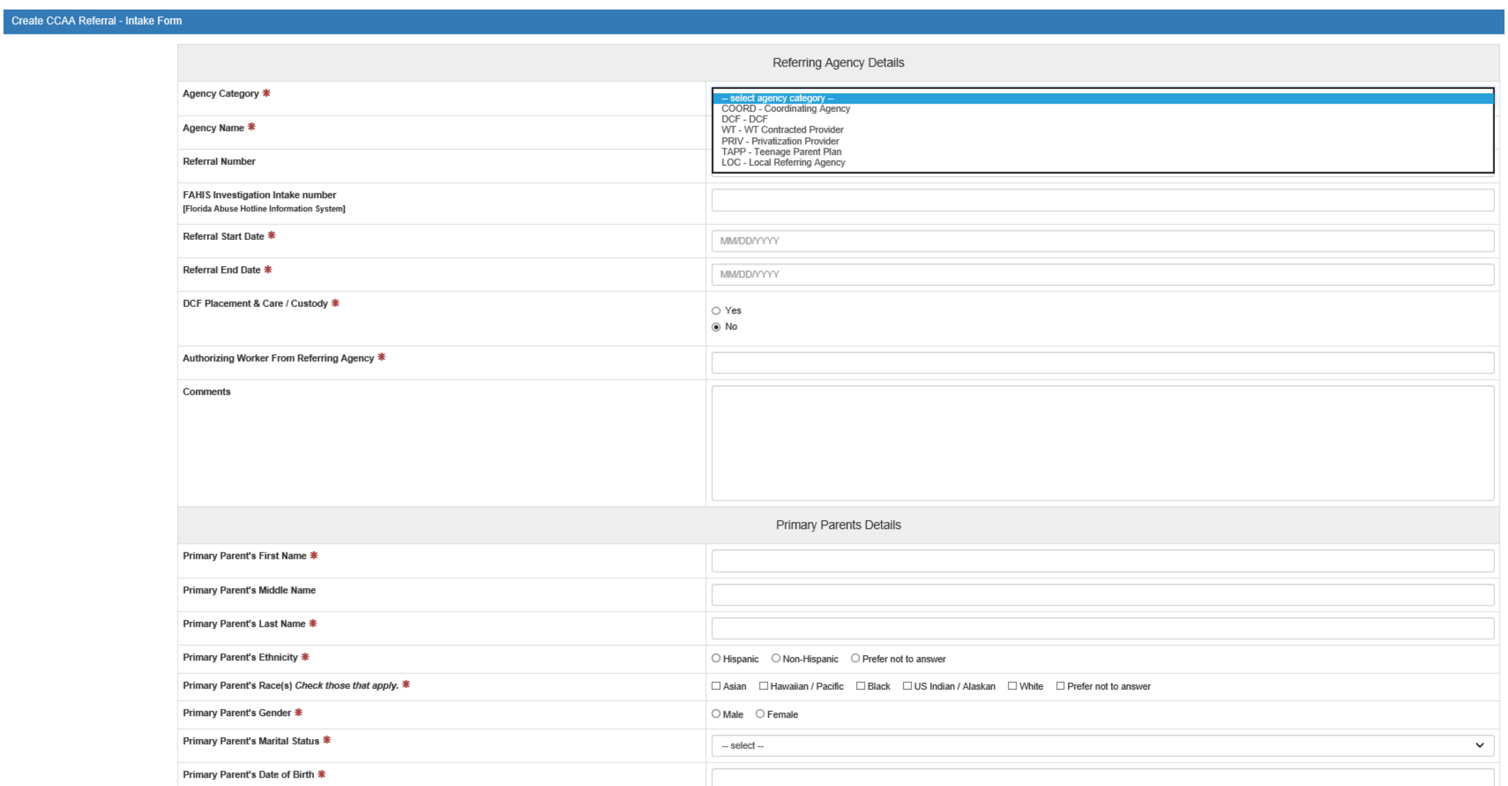
The CCAA Data Entry by Coalition feature is used in situations where the coalition receives a referral document from a referring agency on behalf of a family that does not have a profile in the EFS Modernization system. This is most common in At-Risk referral cases; however, this functionality can be used in any CCAA Referral scenario to create a household and assign eligibility for referred children and families.

NOTE: The CCAA intake process allows coalition users to identify the physical county of residence and families receiving RCMA services.

In the *SR Program* tab, click **SR Eligibility**, then **CCAA Referral**, and then **Create CCAA Referral**.

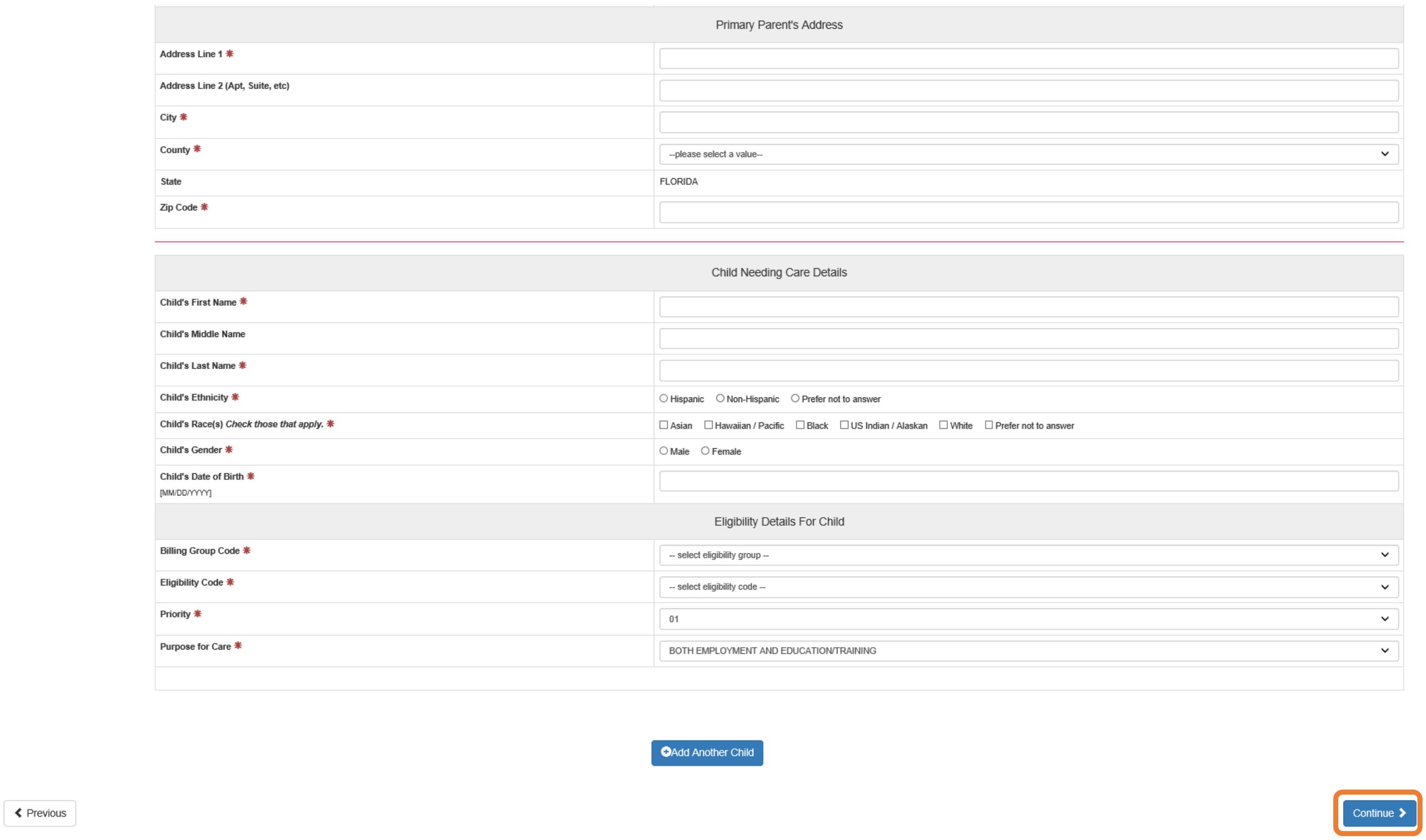


Select the **Agency Category** and complete the fields marked with a red asterisk. Click **<u>Continue</u>**.

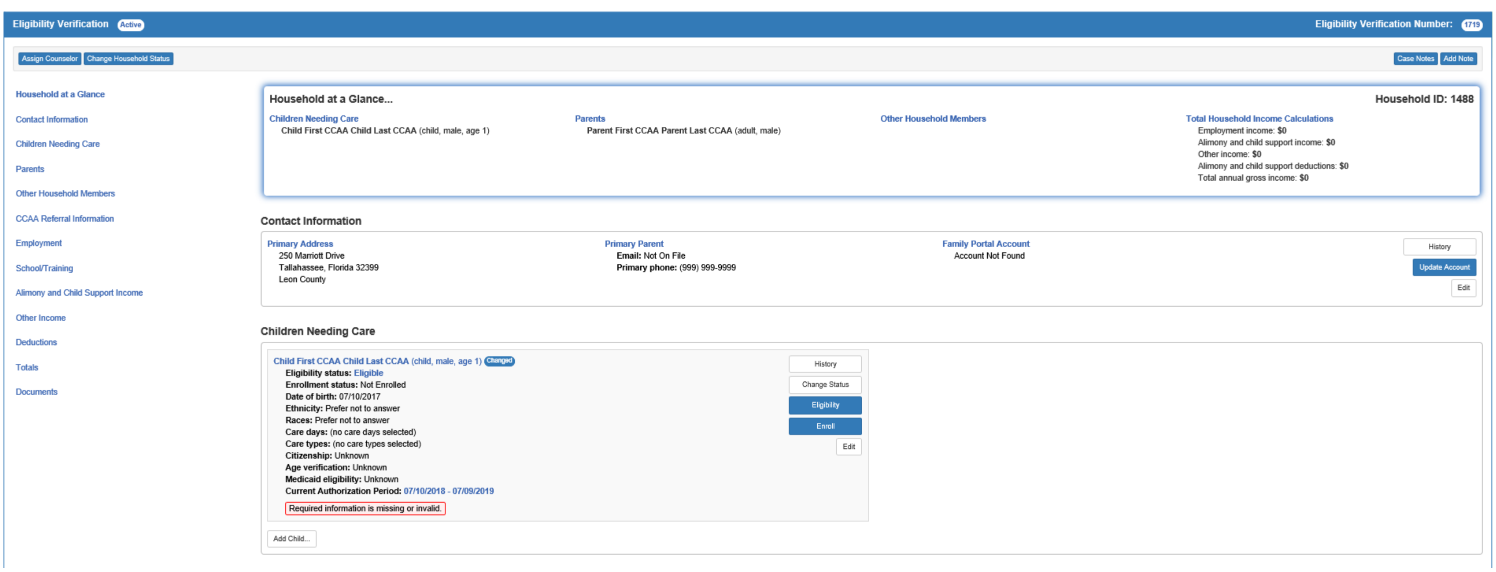


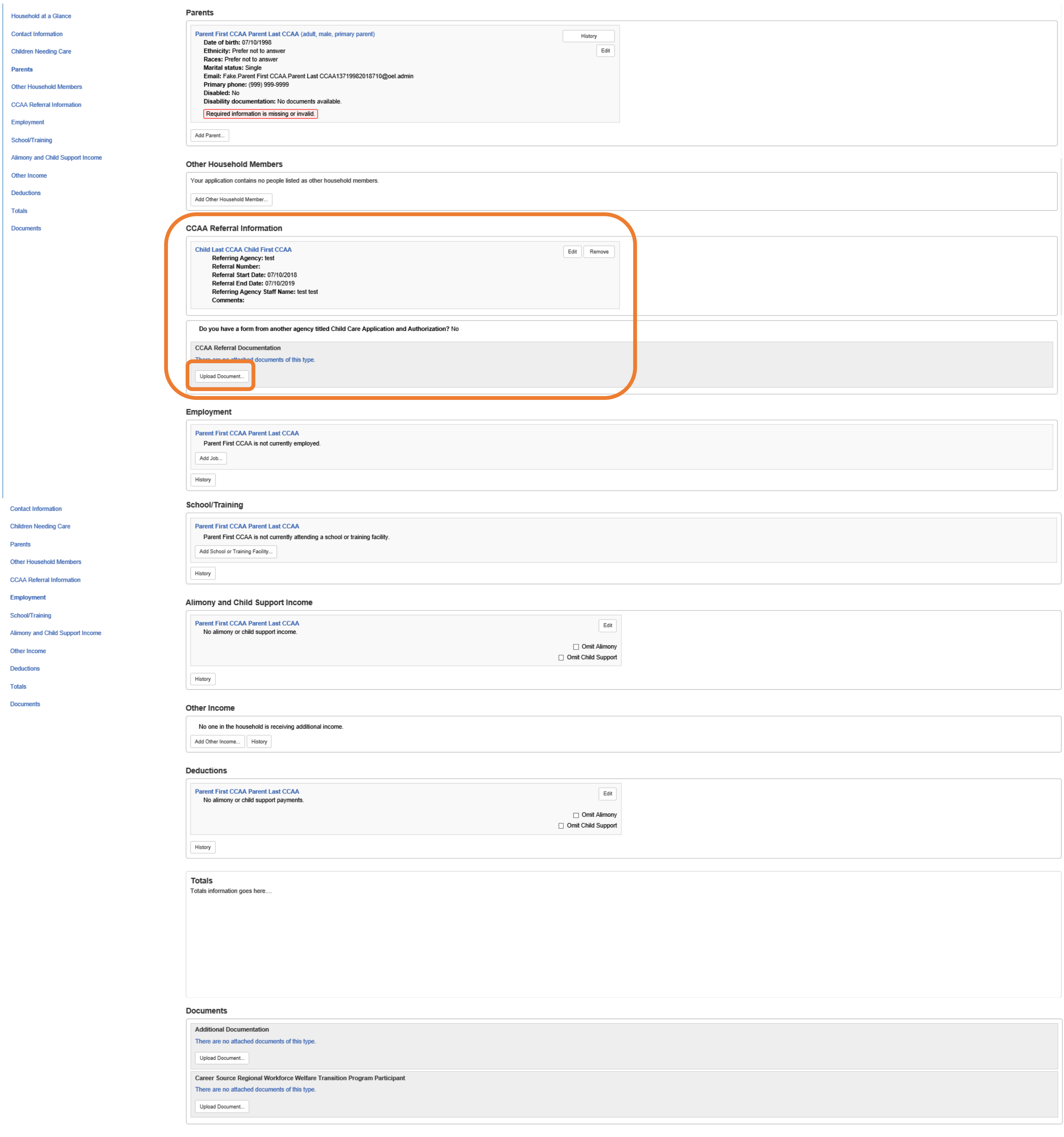
Create CCAA Referral - Intake Form

Referring Agency Details	
Agency Category *	-- select agency category -- COORD - Coordinating Agency DCF - DCF WT - WT Contracted Provider PRIV - Privatization Provider TAPP - Teenage Parent Plan LOC - Local Referring Agency
Agency Name *	
Referral Number	
FAHIS Investigation Intake number [Florida Abuse Hotline Information System]	
Referral Start Date *	MM/DD/YYYY
Referral End Date *	MM/DD/YYYY
DCF Placement & Care / Custody *	Yes No
Authorizing Worker From Referring Agency *	
Comments	
Primary Parents Details	
Primary Parent's First Name *	
Primary Parent's Middle Name	
Primary Parent's Last Name *	
Primary Parent's Ethnicity *	Hispanic Non-Hispanic Prefer not to answer
Primary Parent's Race(s) *Check those that apply.* *	Asian Hawaiian / Pacific Black US Indian / Alaskan White Prefer not to answer
Primary Parent's Gender *	Male Female
Primary Parent's Marital Status *	-- select --
Primary Parent's Date of Birth * [MM/DD/YYYY]	



The Household at a Glance screen displays. Click **Upload Document** and select a file.

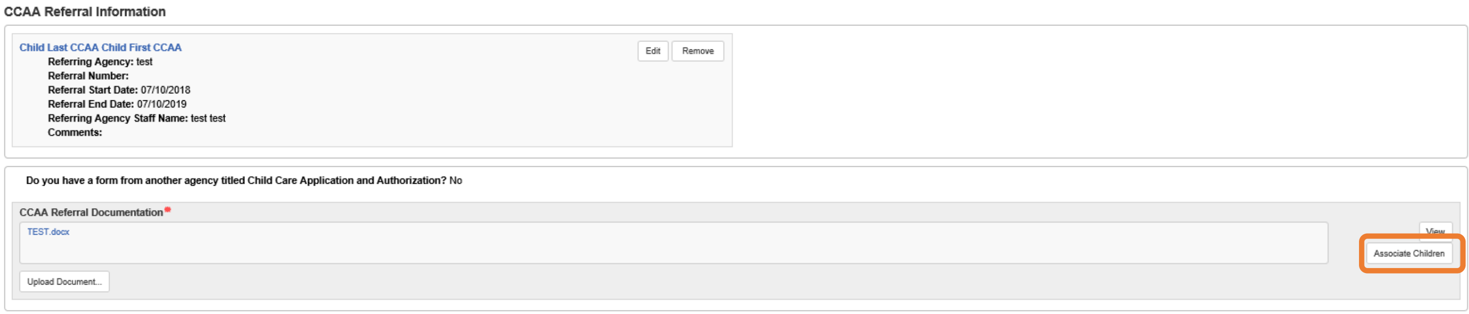




Household at a Glance
Contact Information
Children Needing Care
Parents
Other Household Members
CCAA Referral Information
Employment
School/Training
Alimony and Child Support Income
Other Income
Deductions
Totals
Documents
Parents
Parent First CCAA Parent Last CCAA (adult, male, primary parent)
History
Edit
Date of birth: 07/10/1998
Ethnicity: Prefer not to answer
Races: Prefer not to answer
Marital status: Single
Email: Fake.Parent First CCAA.Parent Last CCAA13719982018710@oel.admin
Primary phone: (999) 999-9999
Disabled: No
Disability documentation: No documents available.
Required information is missing or invalid.
Add Parent...
Other Household Members
Your application contains no people listed as other household members.
Add Other Household Member...
CCAA Referral Information
Child Last CCAA Child First CCAA
Edit
Remove
Referring Agency: test
Referral Number:
Referral Start Date: 07/10/2018
Referral End Date: 07/10/2019
Referring Agency Staff Name: test test
Comments:
Do you have a form from another agency titled Child Care Application and Authorization? No
CCAA Referral Documentation
There are no attached documents of this type.
Upload Document...
Employment
Parent First CCAA Parent Last CCAA
Parent First CCAA is not currently employed.
Add Job...
History
Contact Information
Children Needing Care
Parents
Other Household Members
CCAA Referral Information
Employment
School/Training
Alimony and Child Support Income
Other Income
Deductions
Totals
Documents
School/Training
Parent First CCAA Parent Last CCAA
Parent First CCAA is not currently attending a school or training facility.
Add School or Training Facility...
History
Alimony and Child Support Income
Parent First CCAA Parent Last CCAA
Edit
No alimony or child support income.
Omit Alimony
Omit Child Support
History
Other Income
No one in the household is receiving additional income.
Add Other Income...
History
Deductions
Parent First CCAA Parent Last CCAA
Edit
No alimony or child support payments.
Omit Alimony
Omit Child Support
History
Totals
Totals information goes here....
Documents
Additional Documentation
There are no attached documents of this type.
Upload Document...
Career Source Regional Workforce Welfare Transition Program Participant
There are no attached documents of this type.
Upload Document...

After a document is uploaded, an **Associate Children** button is displayed to enable additional children to be linked to the referral.

NOTE: Children added on the CCAA referral cannot be removed. Children added to the EV with an Eligibility status of "(new)" can be removed.



School Readiness Application Status Definitions

With the deployment of Release 3.0, School Readiness application and child statuses have changed. Also, the child status, not the application status (as in the past), indicates if the family is waiting for services or receiving services.

Here is a chart of the old and new statuses:

<table>
<tr><th>OLD SR APPLICATION STATUS</th><th>NEW SR APPLICATION STATUS</th></tr>
<tr><td>Active - Waiting</td><td rowspan="3">ACTIVE</td></tr>
<tr><td>Active - Pending Documents</td></tr>
<tr><td>Active - Eligible</td></tr>
<tr><td>Active - Pending Update</td><td>Active - Pending Update</td></tr>
<tr><td>Coalition Reviewing</td><td>Coalition Reviewing</td></tr>
<tr><td>Inactive</td><td>Inactive</td></tr>
<tr><td>Incomplete</td><td>Incomplete</td></tr>
<tr><td>Rejected</td><td>Rejected</td></tr>
<tr><td>Submitted</td><td>Submitted</td></tr>
<tr><td>Revalidation Submitted</td><td>Revalidation Submitted</td></tr>
<tr><td>Revalidation Incomplete</td><td>Revalidation Incomplete</td></tr>
</table>

OLD CHILD STATUS	NEW CHILD STATUS
Active - Waiting	Waiting
Active - Pending Documents	Pending
Active - Eligible	Eligible
Terminated	Terminated

Application Statuses

Incomplete

The application is not complete. The parent has to complete the required fields, upload the required document, certify, sign and submit the application.

Coalitions cannot change the status of an **Incomplete** application; however, coalition users have read-only access to look at an incomplete school readiness application to assist the parent in completing the application if needed.

No child status is assigned to a child listed on an application that is in **Incomplete** status.

Revalidation Incomplete

The parent has started an application to revalidate their eligibility to remain on the waiting list. The parent has to complete the required fields, upload the required document, certify, sign and submit the application.

Coalitions cannot change the status of a **Revalidation Incomplete** application; however, they have read-only access to look at an incomplete application to assist the parent in completing the application if needed.

The child status assigned to a child listed on an application that is in **Revalidation Incomplete** status will default to the child status that is assigned to the child on the **Active** application.

Submitted

The application has been completed and submitted by the parent for the coalition to review. The application is not editable by the parent while in **Submitted** status.

No child status is assigned to a child listed on an application that is in **Submitted** status.

Revalidation Submitted

The application has been completed and submitted by the parent for the coalition to review. The application is not editable by the parent while in **Revalidation Submitted** status.

The status of the child will carry over from the previous application.

When the status of this application is changed, the previous application status will automatically change to **Inactive**.

Coalition Reviewing

Upon opening a **Submitted** application, the system will automatically change the status of the application to **Coalition Reviewing**.

No child status is assigned while the application is in a **Coalition Reviewing** status.

Active (Previously Active – Waiting, Active – Pending Documents, Active – Eligible)

The **Active – Waiting** application status is no longer needed, as this occurs when the child status is set to **Waiting**.

The **Active – Eligible** application status is no longer needed, as this occurs when the child status is set to **Eligible**.

The **Active – Pending Documents** application status is no longer needed, as this occurs when the child status is set to Pending.

Active – Pending Update

Active – Pending Update is used when a change needs to be made to the application by the family.

If a parent calls the coalition to report they have changed jobs or moved, the coalition can manually change the status of the application to **Active – Pending Update**, and this will allow the parent to update their application. If the coalition manually changes the application status to **Active – Pending Update**, the family has 15 days to make changes, and after 15 days, the application will become **Coalition Reviewing**.

When an application status is set to **Active**, the system will calculate a revalidation notification date of 180 days.

On day 150, the system will change the status of the **Active** application to **Active – Pending Update** and will send the parent an email notifying them they have 30 days to update their application to remain on the waiting list.

When the parent submits an updated application, the status will change to **Revalidation Submitted**.

Inactive

The application is no longer active. Inactivating an application should only occur when an application has been placed in **Active** status.

Prior to the changing the status of an application to **Inactive**, the child status must be changed to **Terminated**.

Rejected

The application is missing information that is necessary to make a decision regarding a customer's potential eligibility. Upon rejection, the application is editable only by the parent.

After 30 days, a **Rejected** application will automatically be set to **Inactive** and the children **Terminated**.

Rejected status is used to return the application to the parent for edits prior to placing the application in one of the **Active** statuses.

Child Statuses

Waiting

The coalition has reviewed the application and determined that the family may meet eligibility requirements based on the information submitted, but the coalition does not have funding to authorize eligibility for the family; therefore, the application is placed on a list of families who are waiting for funding.

A nightly automated process at DEL checks for 13-year-olds with a **Waiting** child status and automatically sets the child status to **Terminated**.

Pending

Authorization of eligibility can be established without placing a child on the waiting list for funding, pending the parent submitting the required documents in an eligibility interview.

Eligible

The coalition has reviewed the application and supporting document(s), and determined the family meets program requirements and eligibility can be authorized.

A nightly automated process at DEL checks for 13-year-olds with an **Active** child status and automatically sets the child status to **Terminated**.

Terminated

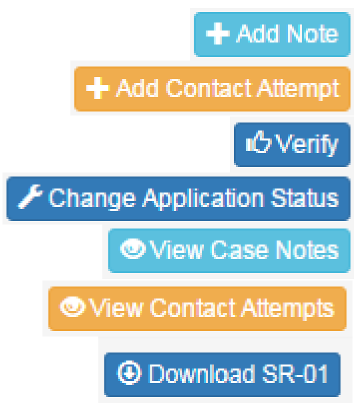
If the parent fails to revalidate the application, the system will automatically change the child status to **Terminated** on day 181 and will change the application status to **Inactive**.

After 30 days, a **Rejected** application will automatically be set to **Inactive** and the children **Terminated**.

A nightly automated process at DEL checks for 13-year-olds with an **Active** child status and automatically sets the child status to **Terminated**.

Coalition User Task Bar

At the top and bottom of the application is a list of buttons used to maintain and process School Readiness applications.



Click to add a case note.

Click to log an application owner contact attempt.

Click to verify user uploaded documents.

Click to change the status of an application.

Click to view all case notes regarding the application.

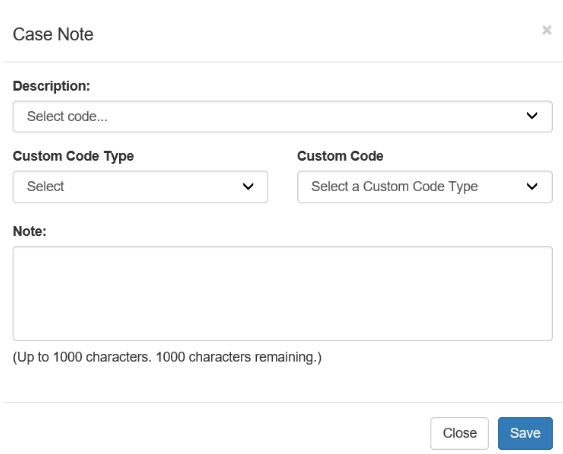
Click to view all contact attempts.

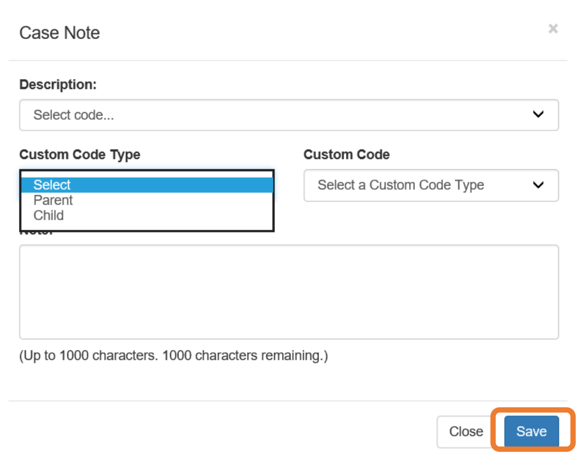
Click to download the family's SR application.

Adding a Case Note

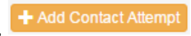
The coalition user must click the **<u>Add Note</u>** button to add a Case Note. 

The Case Note entry window will pop up, allowing the coalition user to add a description and a note up to 1,000 characters. Select a **Custom Code Type** and **Custom Code**. If no custom codes are available in the dropdown, see the Custom Codes section. Click the **<u>Save</u>** button to add the Case Note.

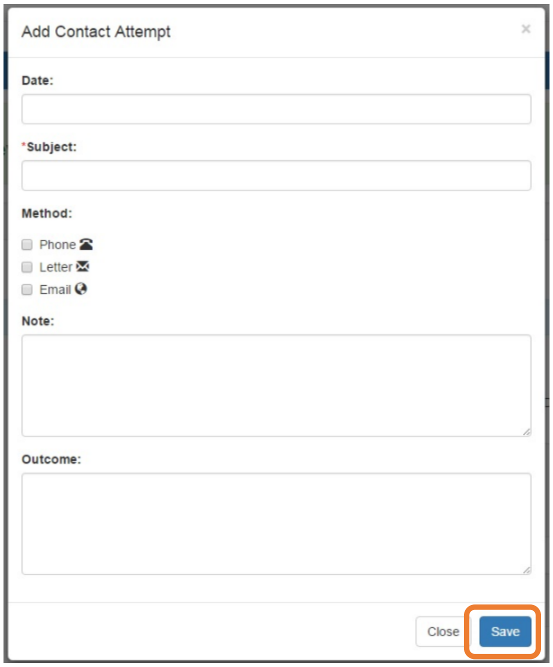




Adding a Contact Attempt

The coalition user must click the **<u>Add Contact Attempt</u>** button to add a Contact Attempt entry. 

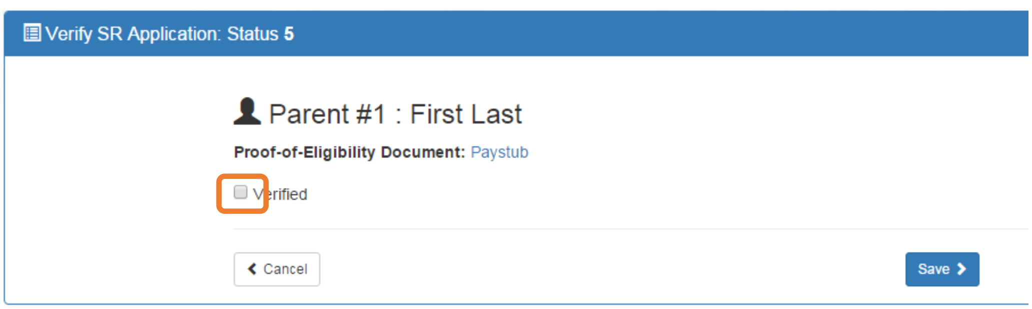
The contact attempt entry window will pop up, allowing you to add a date, subject, method, note and outcome. Click the **<u>Save</u>** button to add the Contact Attempt.



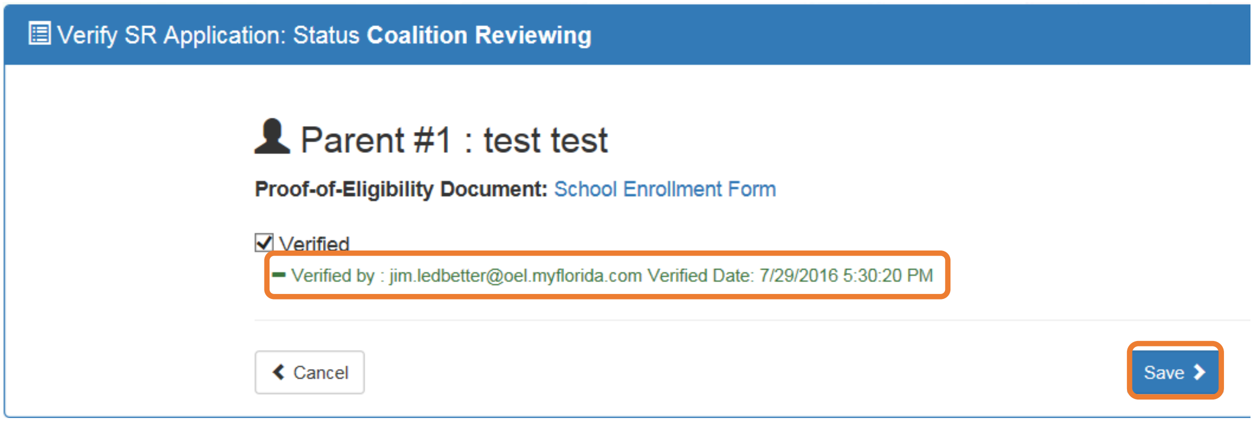
Verify Attached Documents

The coalition user can view and verify attached documents by clicking the **<u>Verify</u>** button. 

To view the Proof-of-Eligibility Document, click the link to open the document in a new browser tab. The coalition user will also have the option to click the **<u>Verified</u>** checkbox.



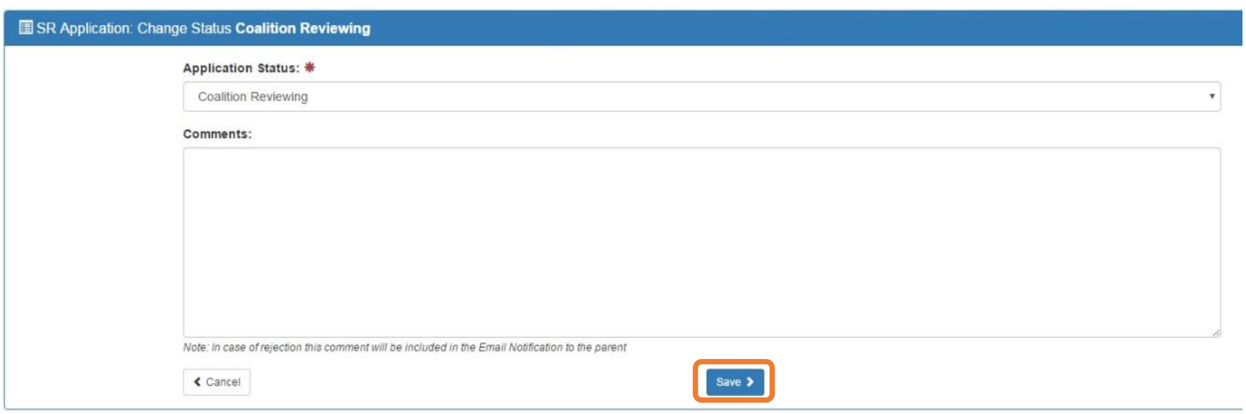
Once verified, the date and time of the verification, as well as the coalition user will appear. Once the coalition user is finished, click the **Save** button to return to the application.



Change Application Status

Once the coalition user is ready to update the status of an application, click the **Change Application Status** button.

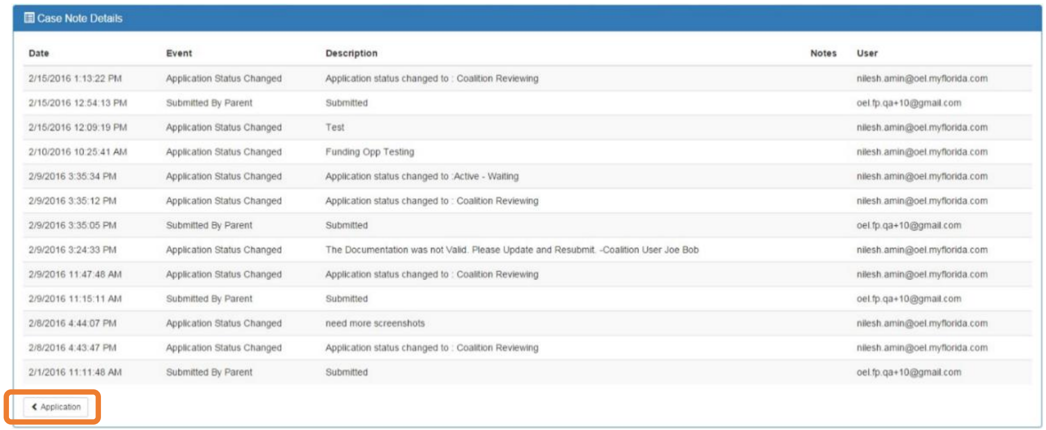
Once the new status is selected, the coalition has the ability to add a comment and click the **Save** button.



View Case Notes

The coalition user can view Case Notes by clicking the **View Case Notes** button. 

To get back to the School Readiness Application, the coalition user will click the **<Application** button. Do not use the Back button on the internet browser.


Case Note Details

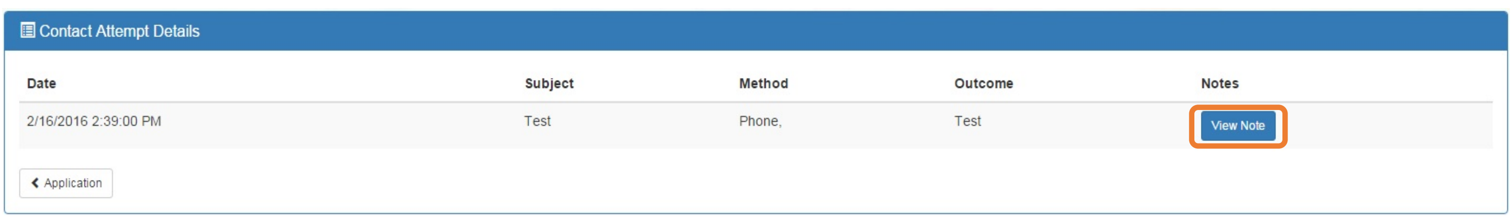
Date	Event	Description	Notes	User
2/15/2016 1:13:22 PM	Application Status Changed	Application status changed to : Coalition Reviewing		nilesh.amin@oel.myflorida.com
2/15/2016 12:54:13 PM	Submitted By Parent	Submitted		oel.fp.qa+10@gmail.com
2/15/2016 12:09:19 PM	Application Status Changed	Test		nilesh.amin@oel.myflorida.com
2/10/2016 10:25:41 AM	Application Status Changed	Funding Opp Testing		nilesh.amin@oel.myflorida.com
2/9/2016 3:35:34 PM	Application Status Changed	Application status changed to :Active - Waiting		nilesh.amin@oel.myflorida.com
2/9/2016 3:35:12 PM	Application Status Changed	Application status changed to : Coalition Reviewing		nilesh.amin@oel.myflorida.com
2/9/2016 3:35:05 PM	Submitted By Parent	Submitted		oel.fp.qa+10@gmail.com
2/9/2016 3:24:33 PM	Application Status Changed	The Documentation was not Valid. Please Update and Resubmit. -Coalition User Joe Bob		nilesh.amin@oel.myflorida.com
2/9/2016 11:47:48 AM	Application Status Changed	Application status changed to : Coalition Reviewing		nilesh.amin@oel.myflorida.com
2/9/2016 11:15:11 AM	Submitted By Parent	Submitted		oel.fp.qa+10@gmail.com
2/8/2016 4:44:07 PM	Application Status Changed	need more screenshots		nilesh.amin@oel.myflorida.com
2/8/2016 4:43:47 PM	Application Status Changed	Application status changed to : Coalition Reviewing		nilesh.amin@oel.myflorida.com
2/1/2016 11:11:48 AM	Submitted By Parent	Submitted		oel.fp.qa+10@gmail.com

Application

View Contact Attempts

The coalition user can view Contact Attempts by clicking the **View Contact Attempts** button. 

Once on the Contact Attempt Details page, click the **View Note** button to view any notes regarding the contact attempt. To get back to the School Readiness application, the coalition user will click the **<Application** button. Do not use the Back button on the internet browser.

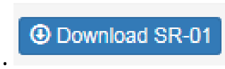

Contact Attempt Details

Date	Subject	Method	Outcome	Notes
2/16/2016 2:39:00 PM	Test	Phone,	Test	View Note

Application

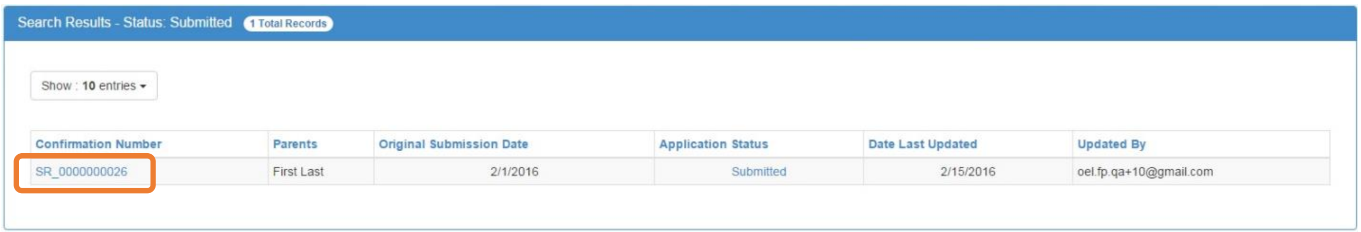
Clicking the **View Note** button should display the following:

Download SR-01

The coalition user can view the family's SR application by clicking the **Download SR-01** button. 

Processing a School Readiness Application

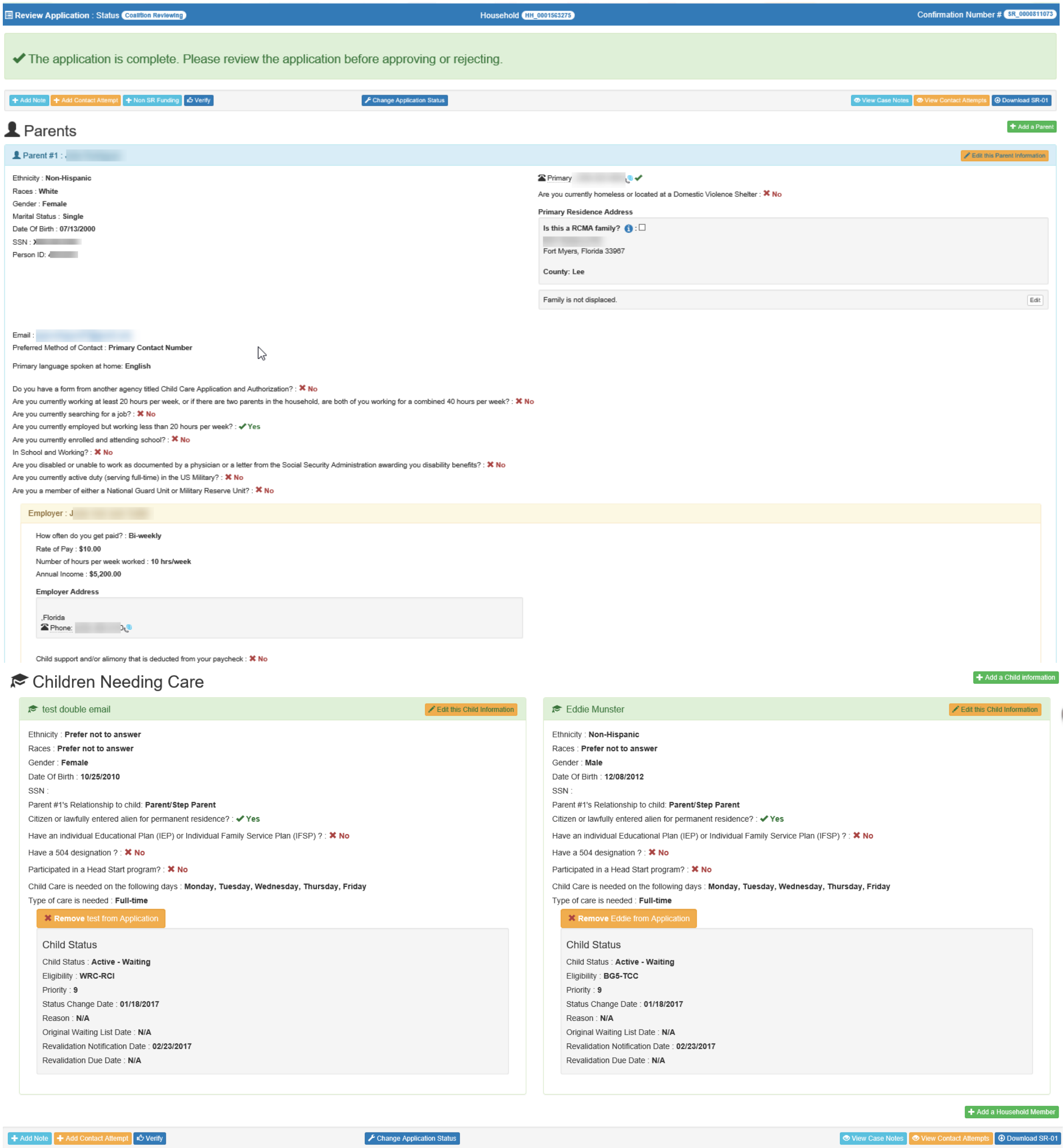
The first step in processing a School Readiness Application is to search for **Submitted** applications. To begin the review, the coalition user will click the **Confirmation Number** link of the record assigned to review.


Search Results - Status: Submitted 1 Total Records

Show : 10 entries

Confirmation Number	Parents	Original Submission Date	Application Status	Date Last Updated	Updated By
SR_0000000026	First Last	2/1/2016	Submitted	2/15/2016	oel.fp.qa+10@gmail.com

The following page will display:



Coalition Reviewing Status

Once the coalition user clicks the **Confirmation Number** link, the status of the application is systematically changed to **Coalition Reviewing**. An automated email message from **DONOTREPLY@oel.myflorida.com** is sent to the Family Portal user's email address, notifying them that the application is being reviewed by the early learning coalition.

Also, an automated Case Note will be recorded to reflect the status change and user name of the user who is reviewing the application.

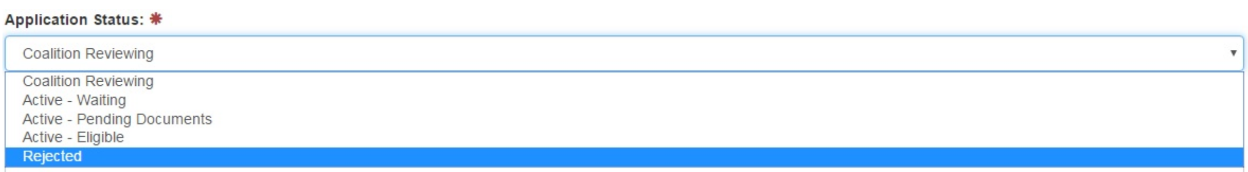
The application can be changed to **Rejected** or set to one of the **Active** statuses, based on local application processes. If the application does not have the information needed to determine if the family is potentially eligible for funding, the application should be **Rejected.** If the application appears to meet eligibility requirements and no funding is available in the coalition services area, the child status should be changed to **Waiting.** If funding is available but additional documents are needed to authorize eligibility during an eligibility interview, the child status should be changed to **Pending.** If funding is available and eligibility and enrollment have been entered, the child status should be changed to **Active.**

NOTE: With Release 4.5, coalition users can select families receiving RCMA services with a "Is this a RCMA family" checkbox under Primary Residence Address.

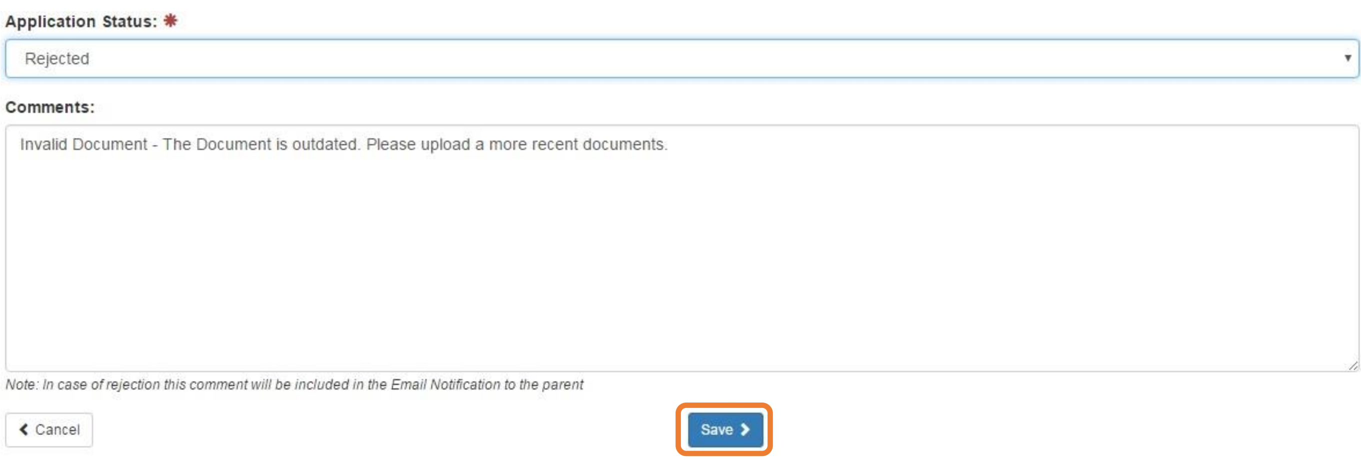
Rejected Status

To reject an application, the coalition user must click the **Change Application Status** button.

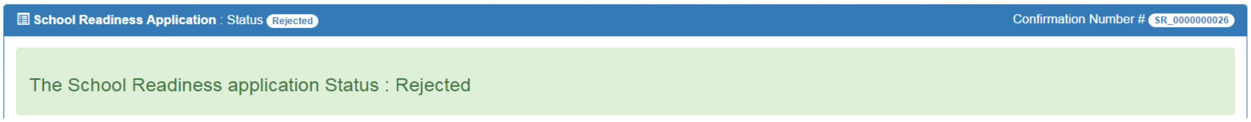
Once on the Change Application Status page, select **Rejected** in the Application Status dropdown menu.



Enter the reason for the rejection in the comments section; the comment will be included in the automated email sent to the Family Portal user from **DONOTREPLY@oel.myflorida.com**. After entering all required fields, click **Save** to proceed.



The status has been updated at the top of the application.

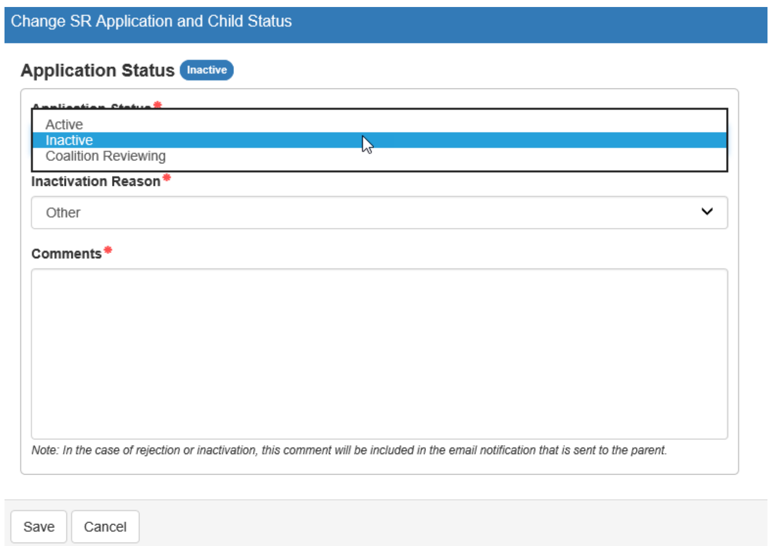


Once in **Rejected** status, the coalition user or coalition admin will not be able to edit the application until the application is resubmitted by the family.

Inactive Status

To change an application status from **Inactive** to **Active** or **Coalition Reviewing**, the coalition user must click the **Change Application Status** button.

Once on the Change Application Status page, select **Active** or **Coalition Reviewing** in the Application Status dropdown menu.



Click **Save** to proceed.

Active Statuses

To activate services for a child, the coalition user must click the **Change Household Status** button.

Select one of the **Active** child status types:

- Waiting: Puts the children listed in need of care on the application on the waiting list until funding is available.
- Pending: Contact has been made to the parent that funding is available and additional documentation is required during an eligibility interview to authorize services.
- Active: Eligibility has been authorized and child enrollment(s) have been made.

Changing Child Statuses

When a child is removed from the waiting list due to authorization of eligibility, the child status should be changed from **Waiting** to **Active**.

When a child is removed from the waiting list due to non-compliance or ineligibility, the child status should be changed from **Waiting** to **Terminated**.

If a child's eligibility and enrollment are terminated, the child status must be **Terminated** and the application status changed to **Inactive**.

The Revalidation Notification Date will system-populate based on the original waiting list date entered when the application status was changed to **Waiting**. This process should display 150 days from the original waiting list date entered, and will change to reflect a new 150-day period each time a revalidation occurs.

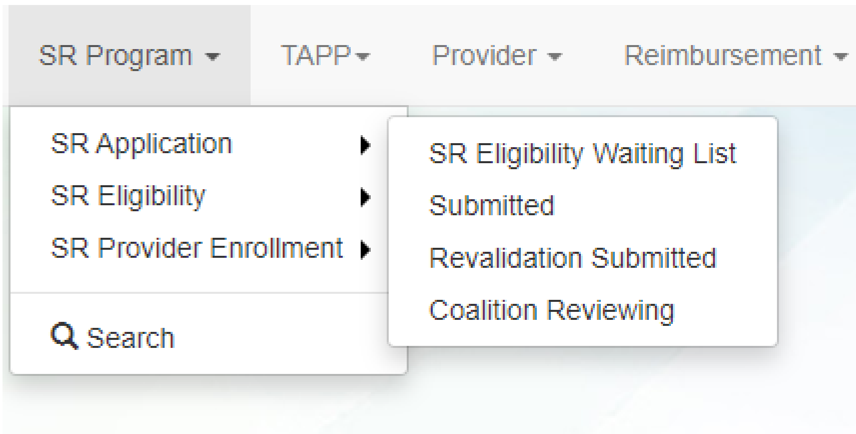
SR Eligibility Process

Once funding becomes available for a child, the coalition user will send a funding notification to the family.

Generate Funding Notification

Under the **SR Program** dropdown menu, select **SR Application**, then **SR Eligibility Waiting List**.

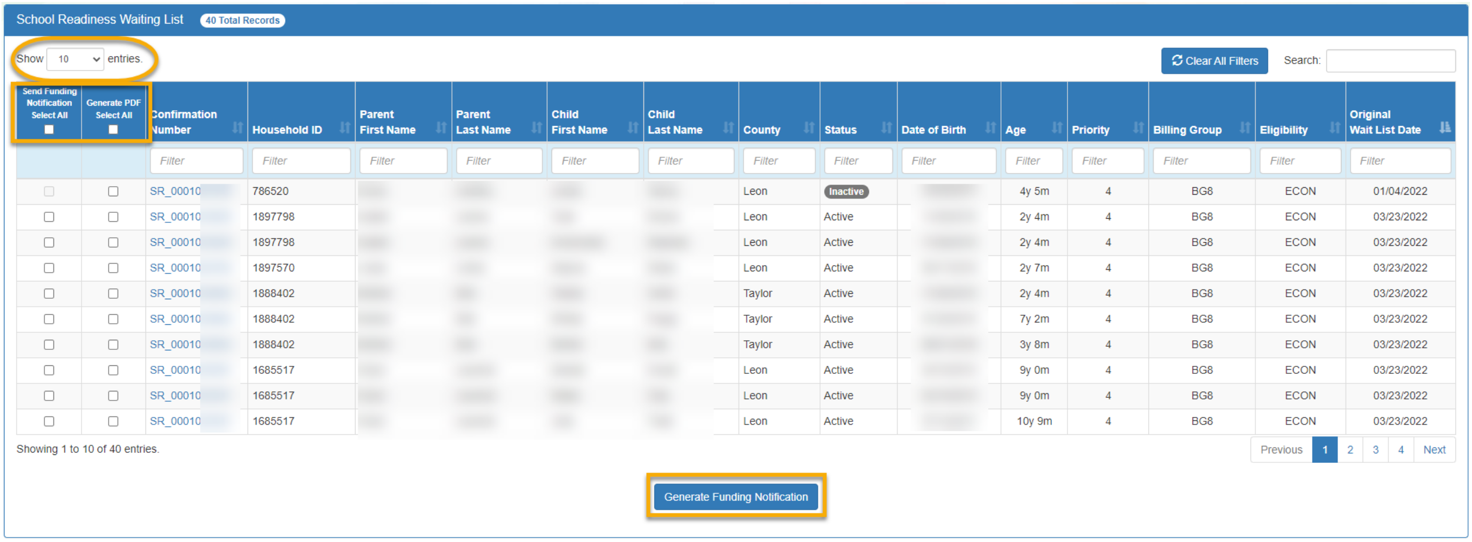
NOTE: All household statuses will display, but the child status must be **Waiting** for the application to display on the Waiting List. A funding notification can be sent to household statuses of Coalition Reviewing, Active, and Active – Pending Update. Household statuses of Inactive, Revalidation Incomplete, or No Status will display on the waiting list, but cannot be sent a funding notification.



NOTE: All household statuses will display, but the child status must be **Waiting** for the application to display on the Waiting List. A funding notification can be sent to household statuses of **Coalition Reviewing, Active,** and **Active – Pending Update**. Household statuses of **Inactive, Revalidation Incomplete,** or **No Status** (see below with a grayed-out status and a grayed-out checkbox) will display on the waiting list, but cannot be sent a funding notification.

☐	SR_0000001883	P1 CT03	C1 CT03	Leon	Revalidation Incomplete
☐	SR_0000001883	P1 CT03	C2 CT02	Leon	Revalidation Incomplete
☐	SR_0000001873	Jamie York	Clarence york	Leon	Inactive
☐	SR_0000001861	Thomas Scott	Michael Carter	Leon	Inactive
☐	SR_0000001853	Pamela Smith	Jamie Smith	Leon	Active
☐	SR_0000001839	P1 TS04	C2 TS04	Leon	Active
☐	SR_0000001836	Brick City	Onion Latham	Leon	Active

The SR Waiting List will display. For each child that has available funding, check the **Send Funding Notification** checkbox, and check the **Generate PDF** box, if a physical copy of the notification is needed. Then, click the **Generate Funding Notification** button. The **Show entries** dropdown displays 10, 25, 50, 100, 1000, or all records.



Once a funding notification has been generated for a child, the child will be removed from the School Readiness Waiting List screen.

The parent will receive an email from DONOTREPLY@oel.myflorida.com.

NOTE: Due to continuing updates, the email text displayed below may differ from the email the parent receives.

Notice of School Readiness Funding From The ELC of the Big Bend Region

Hello,

The ELC of the Big Bend Region would like you to know they now have funding to assist you with paying for child care.

IMPORTANT NOTE: You must respond by 08/05/2018 or your application will expire and you will have to reapply for the waitlist.

You will need to provide the following documents to determine your eligibility as well as your parent copayment. Please remember, you may be asked for additional documents to support your eligibility for services.

Identity

Please provide one of the following documents to verify your identity:

- Florida Driver's License
- Valid picture identification (must be government issued)

Child Documentation

Provide at least one of the following documents to verify the child's age:

- An original or certified copy of the child's birth record,
- An original or certified copy of the child's certificate of baptism or other religious record of the child's birth, with an affidavit stating that the certificate is true and correct,
- An insurance policy on the child's life which has been in force for at least 2 years,
- A passport or certificate of the child's arrival in the United States,
- An immunization record signed by a public health officer or licensed practicing physician, or A valid military dependent identification card.
- Proof of guardianship – court ordered documents (if applicable)

Family Size

Please provide at least one of the following documents to verify your family size:

- Documentation of civil status (proof of separation/divorce), if applicable.
- Child Care Authorization form from referring agency
- Food Stamp Award Letter

Residency

Provide at least one of the following documents to verify residency:

- Utility bill (electric, gas, water), cable, internet or home phone bill dated within 12 months of the date the child application is submitted.
- Current and signed residential rental agreement or receipt from rental payment dated within 12 months of the date the child application is submitted.
- Government-issued document (e.g., Florida driver?s license, Florida identification card, property tax assessment showing a homestead exemption), or
- Military order showing that the child?s parent is a service member in the United States Armed Forces and is assigned to duty and resides in Florida when the child attends the school readiness program (e.g., permanent change of station).
- Current proof of residence with your name (examples: lease/mortgage statement signed by all parties, property taxes, current utility bill, current mail from FOOD Stamps/Medicaid (within the last 30 days), paystubs).
- If living with someone - Provide their residency document and a notarized statement written by homeowner confirming their address and that you and child(ren) live in their home, if applicable

Education/Academic Activity

If you are currently enrolled in school, please provide the following documents:

- Current school schedule with your name on official school letterhead
- Proof of enrollment from an accredited educational institution.

Employment

If you are currently employed, please provide the following (as applicable):

Current and consecutive paystubs from employment income (must be working at least 20 hours per week):

- four (4) weekly paystubs, or
- two (2) biweekly paystubs, or
- two (2) semi-monthly paystubs, or
- one (1) monthly paystub, or
- Self-Employment-
  - Business account ledgers, or
  - Written documentation from customers or contractors, or
  - Federal tax returns

Verification of Employment (VOE) and Loss of Income form completed by your employer. Verification of Employment may be submitted if applicant has been working less than 4 weeks with current employer.

State employees may submit a printout of hours worked from People First website.

Earned/ Unearned Income

Please provide the following documents as applicable:

- Proof of all other earned and unearned income within the last four (4) weeks (child support, alimony, social security, veterans' benefits, unemployment, or adoption subsidy, etc.)
- Social security letter must be dated for current year and give a description of the reason the income is awarded (i.e. disabled child; dependent of wage earner; survivors' benefits, etc)
- Physician disability statement confirming the parent is exemption from work requirement and providing recommendation for child care (MUST be dated and signed by the physician only).
- If income such as child support or alimony is ordered but not received, submit current documentation/printout confirming non-receipt.
- Proof of Relative Caregivers/Relative Caretaker (TANF) funds by obtaining the current printout from DCF Access web account (must print detail pages that show the names of the children served)
- For self-employment and cash payment jobs ? call the office and ask to speak with a specialist for more information.

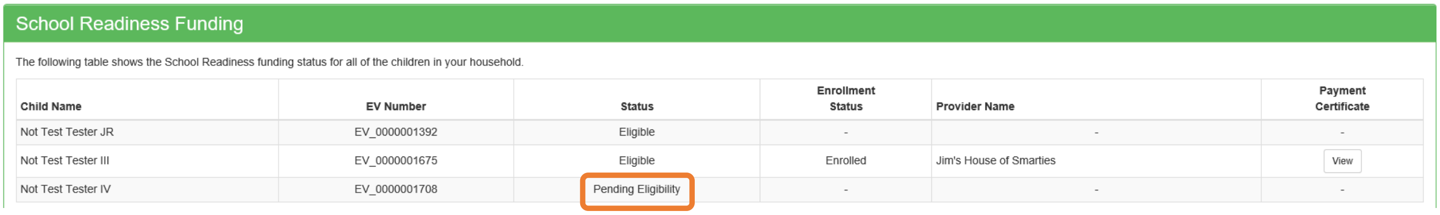
If the above documents are not available, you have any questions about the required documents, or need assistance with uploading the documents, please call the ELC of the Big Bend Region and ask to speak with a specialist for more information.

If you have any questions about the required documents or need assistance uploading documents, please contact the early learning coalition at the number listed below. The ELC of the Big Bend Region also provides Child Care Resource and Referral (CCR&R) services. CCR&R is the front door for family services in your county. CCR&R staff will let you know about community resources, child care options and other information that may be of assistance to you. Please contact your early learning coalition and ask to speak to a CCR&R specialist for further assistance.

Thank you,

ELC of the Big Bend Region
(866) 973-9030
http://www.elcbigbend.org/

The child status changes to **Pending Eligibility**. The family has 30 days to respond to the funding notification by completing the Eligibility Verification Wizard or the notification will expire, and the coalition will determine if the child should be placed back on the waiting list or terminate the SR Application.



School Readiness Funding

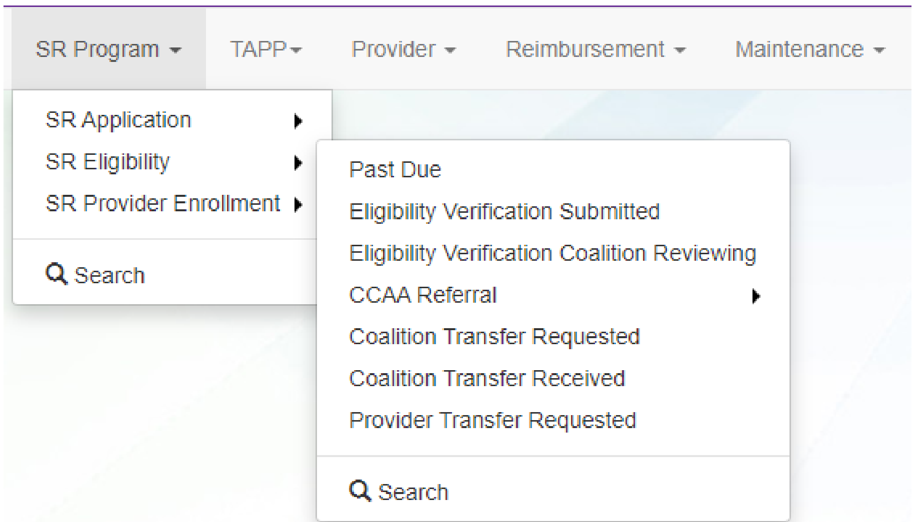
The following table shows the School Readiness funding status for all of the children in your household.

Child Name	EV Number	Status	Enrollment Status	Provider Name	Payment Certificate
Not Test Tester JR	EV_0000001392	Eligible	-	-	-
Not Test Tester III	EV_0000001675	Eligible	Enrolled	Jim's House of Smarties	View
Not Test Tester IV	EV_0000001708	Pending Eligibility	-	-	-

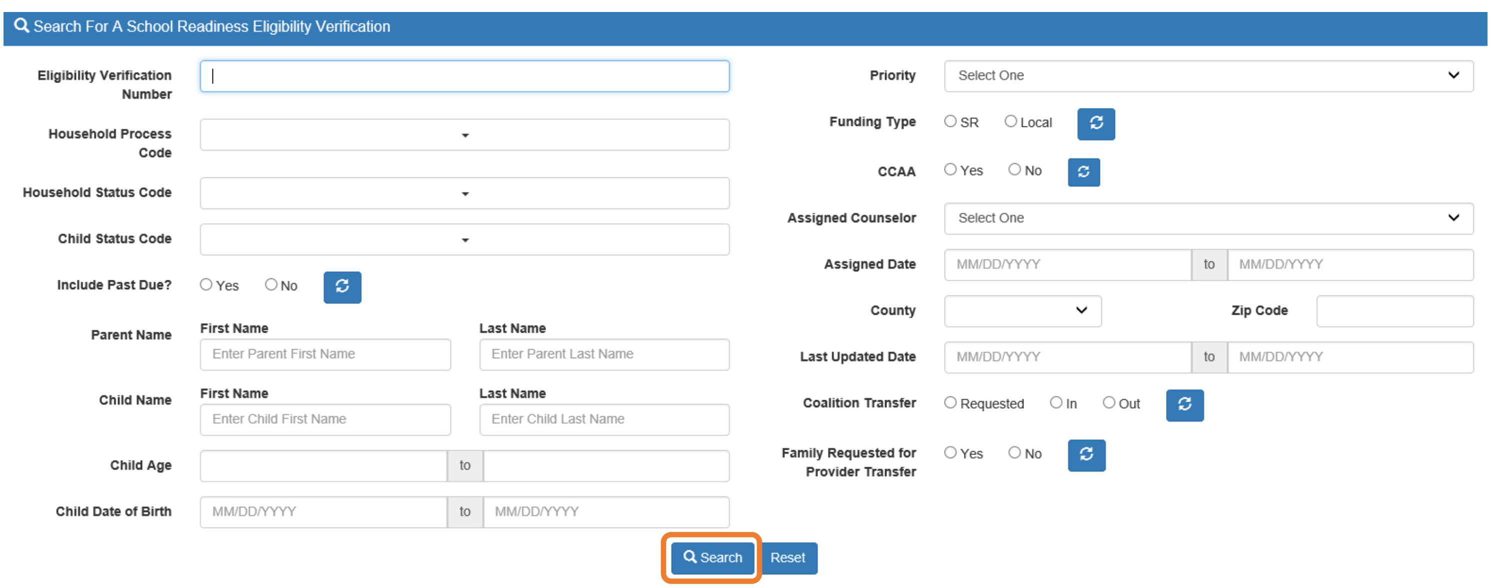
Eligibility Verification

Once a parent responds to the funding notification, the eligibility must be verified.

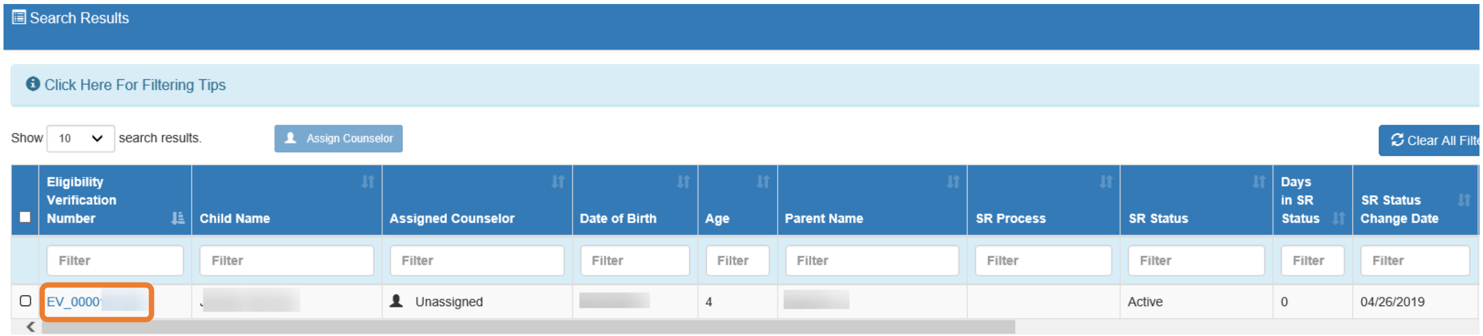
From the *SR Program* tab, select **SR Eligibility**, then **Search**.



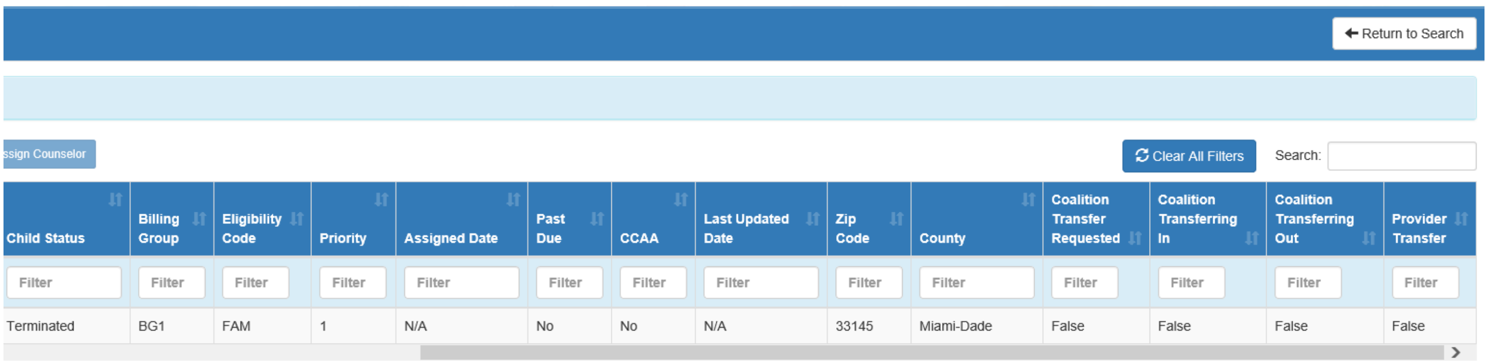
Enter the first and/or last name of the parent or child, and click **Search**.



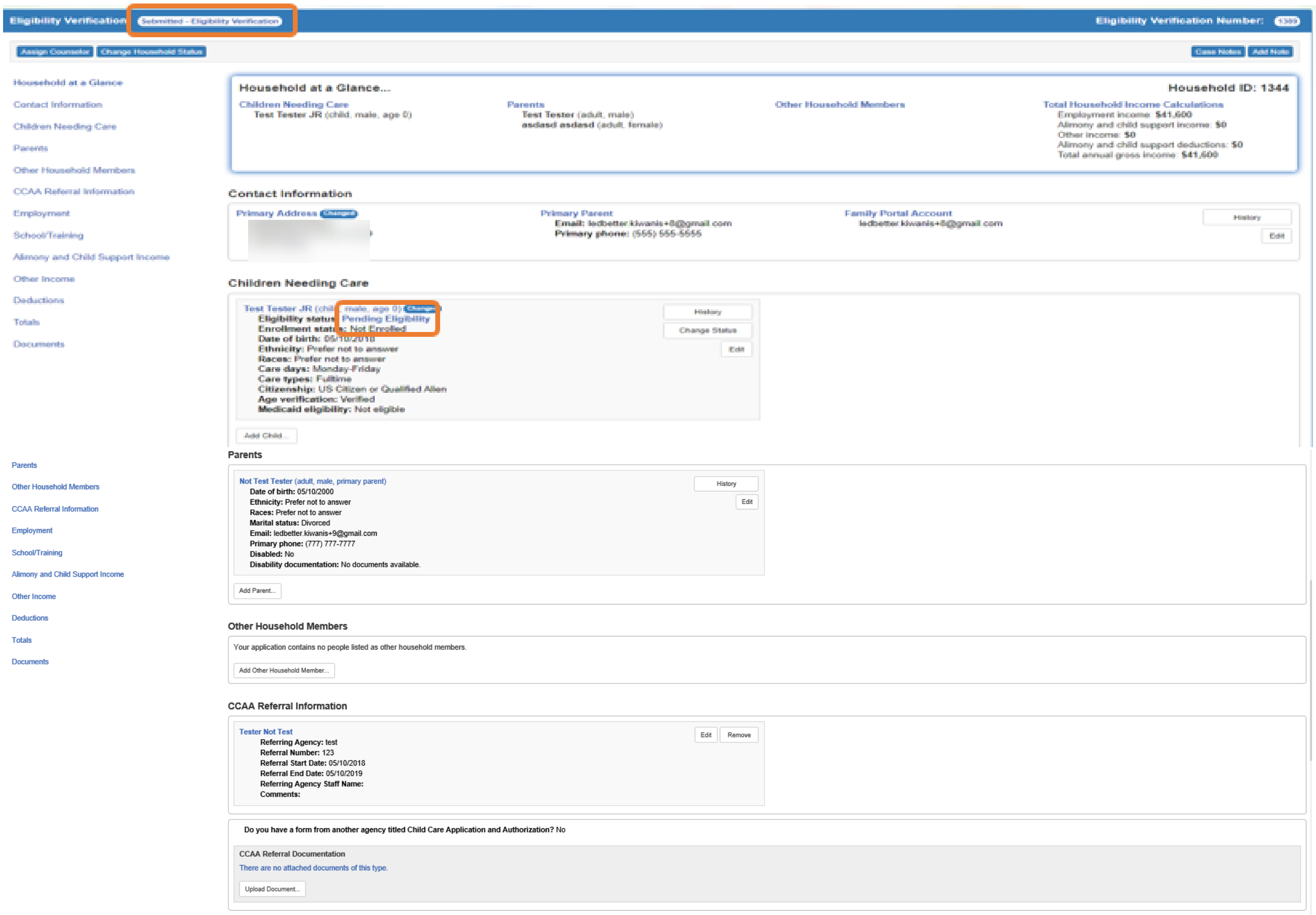
Click the **Eligibility Verification (EV) Number** of the child for whom the funding notification was sent.

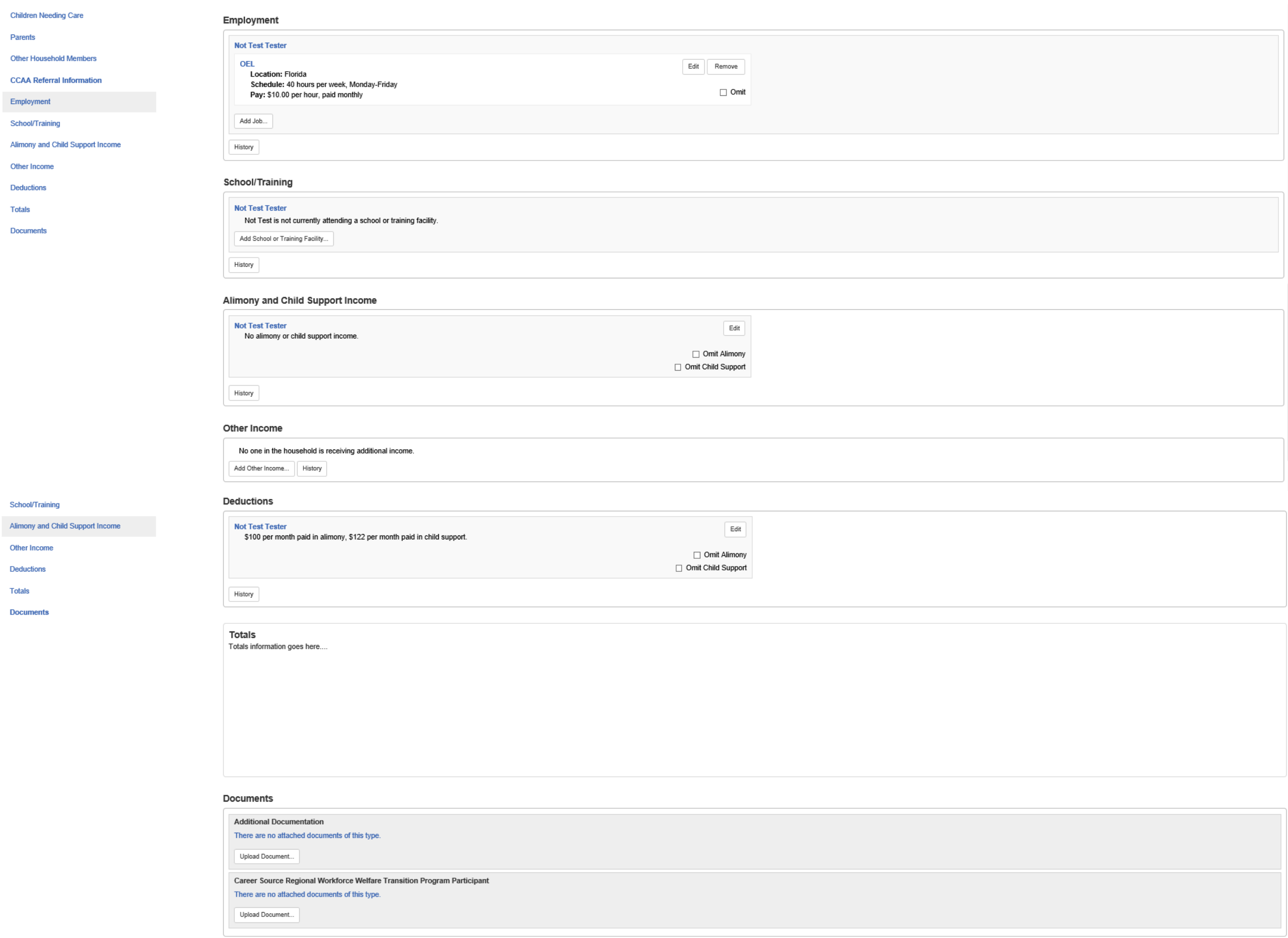


…



The EV status is **Submitted – Eligibility Verification**, and the child status is **Pending Eligibility**.



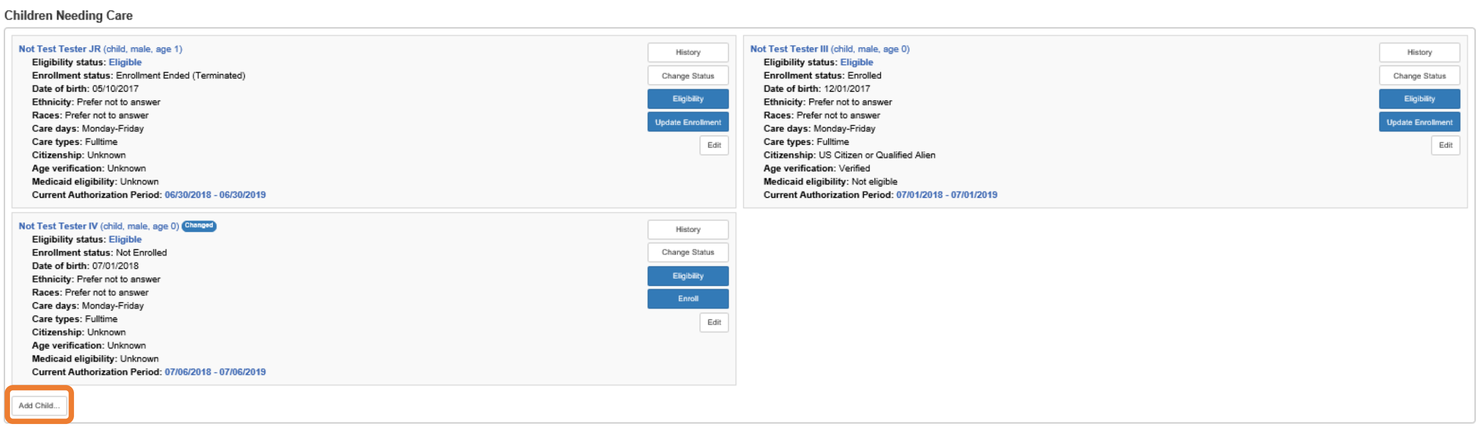


NOTE: Coalition users can determine if families receive RCMA services with an “RCMA Family” Yes or No answer under Primary Address.

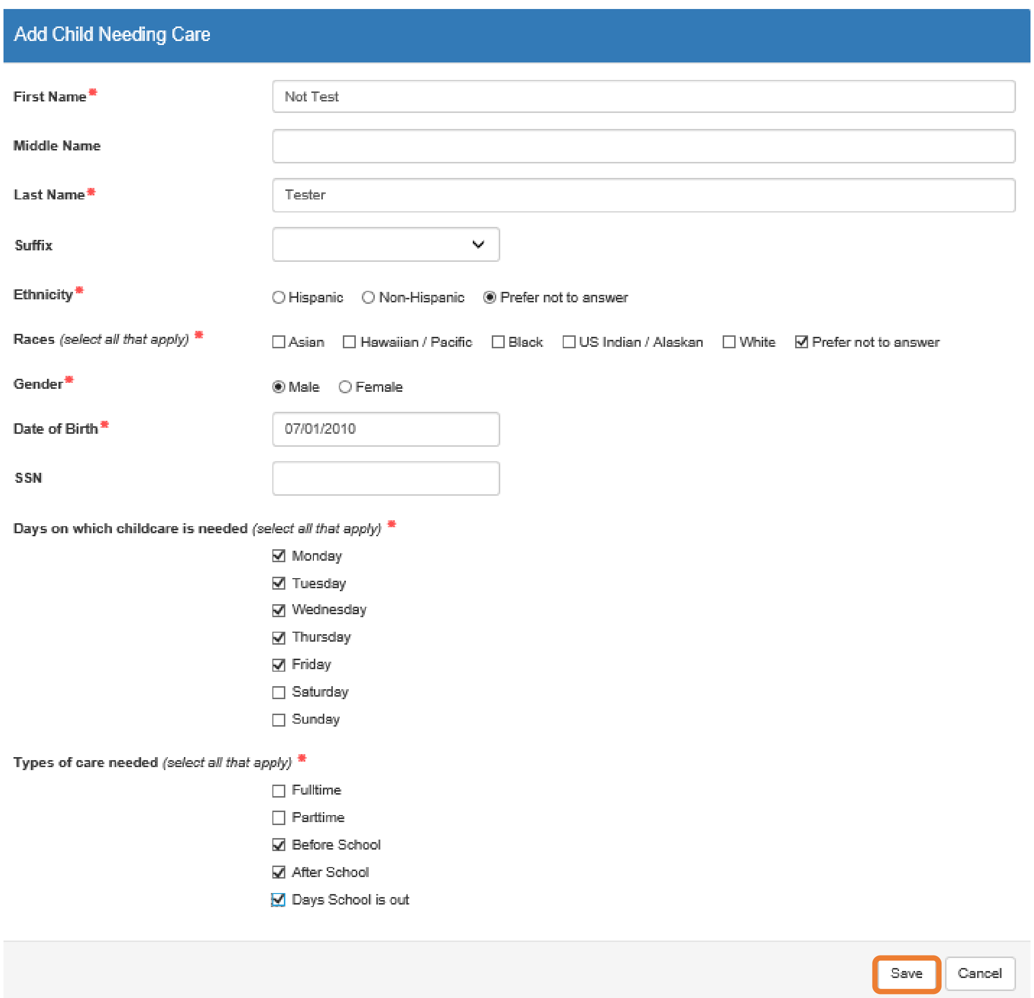
Add a Child to an Eligibility Verification

Scenario 1

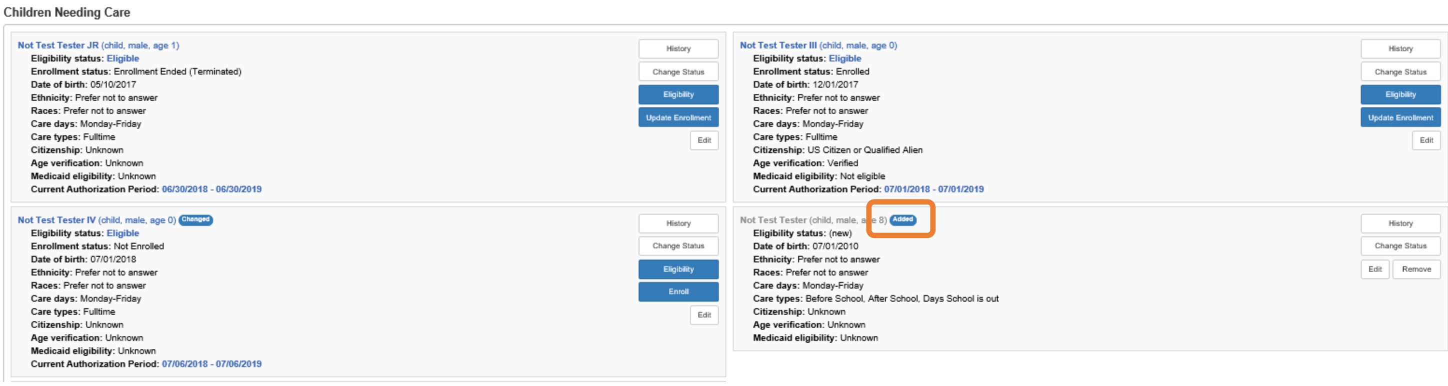
To add a new child, the coalition can trigger the Eligibility Verification Wizard for the family to complete. Click the **Add Child...** button to add a child to the Children Needing Care section.



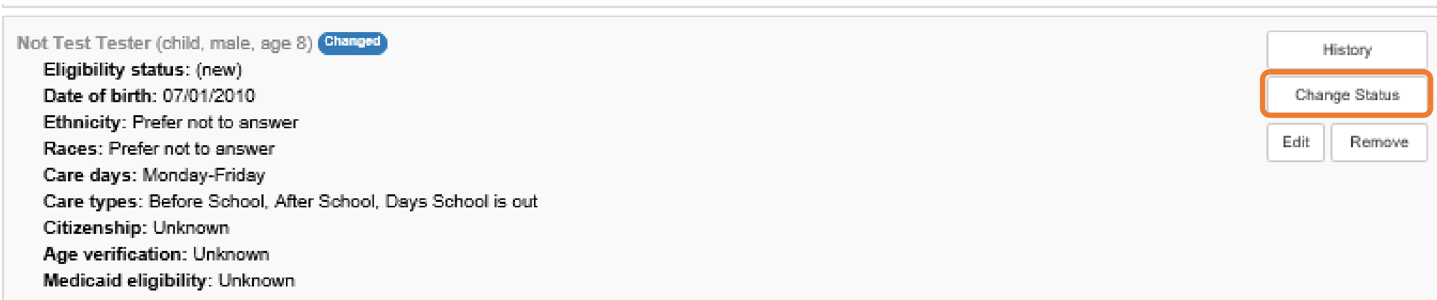
Enter the required child information and click **Save**.



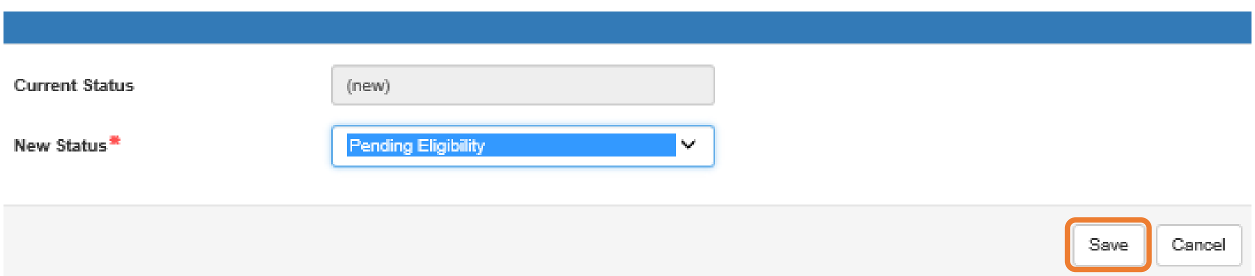
The child now has a status of **Added**.

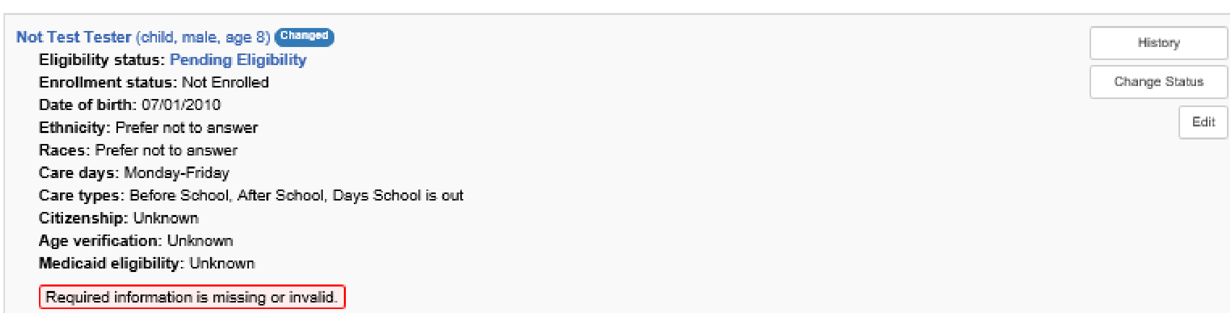


Click **Change Status** for the child.

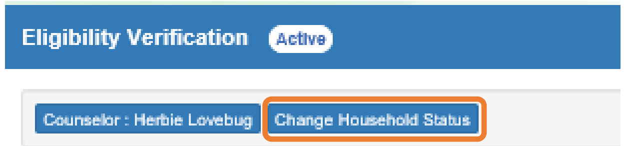


Change the New Status to **Pending Eligibility** and click **Save**.

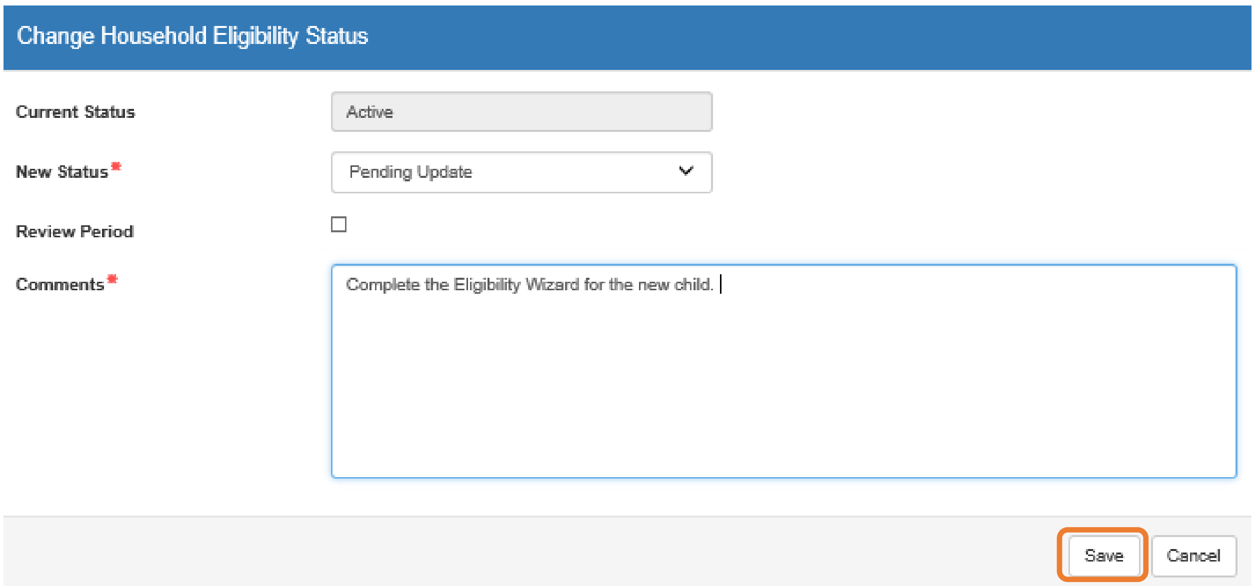




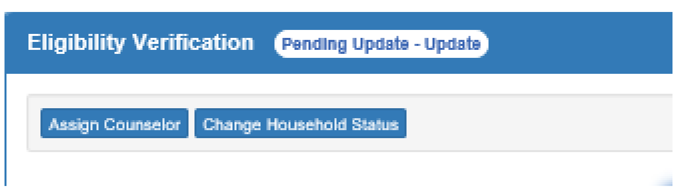
To allow the family to update the EV, set the EV Household Status to **Pending Update**. Click **Change Household Status**.



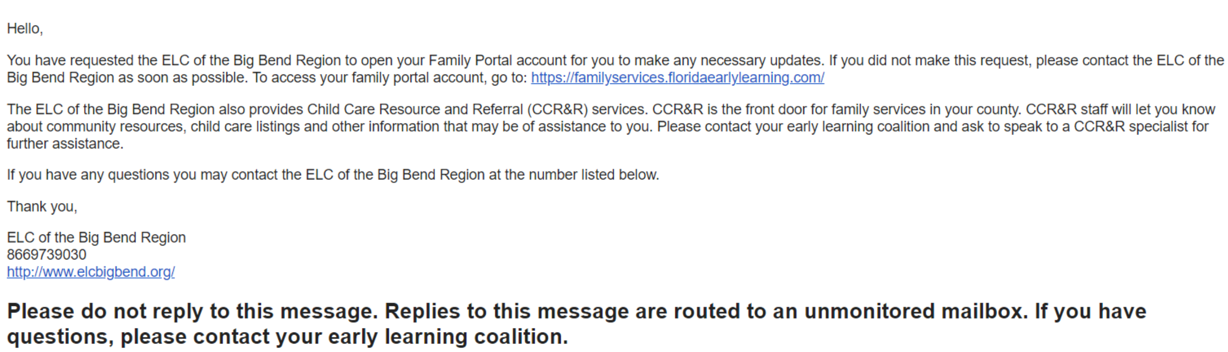
Select **Pending Update** for the New Status, enter Comments, and click **Save**.



The EV Household Status is now **Pending Update – Update**.



The family will receive an email from **DONOTREPLY@oel.myflorida.com**.


Hello,

You have requested the ELC of the Big Bend Region to open your Family Portal account for you to make any necessary updates. If you did not make this request, please contact the ELC of the Big Bend Region as soon as possible. To access your family portal account, go to: https://familyservices.floridaearlylearning.com/

The ELC of the Big Bend Region also provides Child Care Resource and Referral (CCR&R) services. CCR&R is the front door for family services in your county. CCR&R staff will let you know about community resources, child care listings and other information that may be of assistance to you. Please contact your early learning coalition and ask to speak to a CCR&R specialist for further assistance.

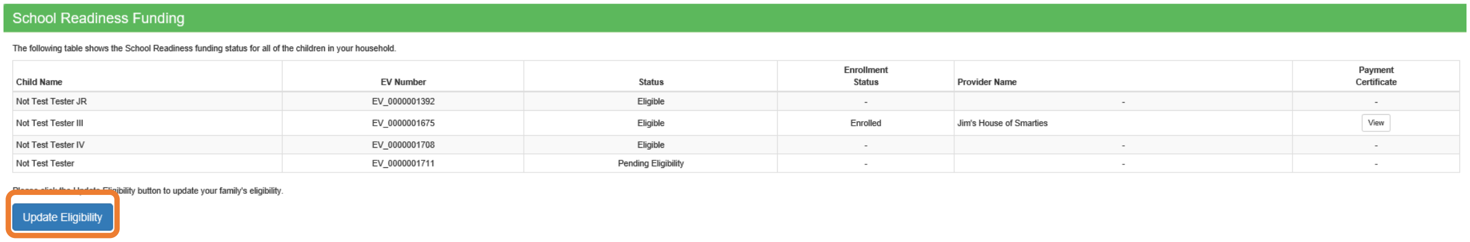
If you have any questions you may contact the ELC of the Big Bend Region at the number listed below.

Thank you,

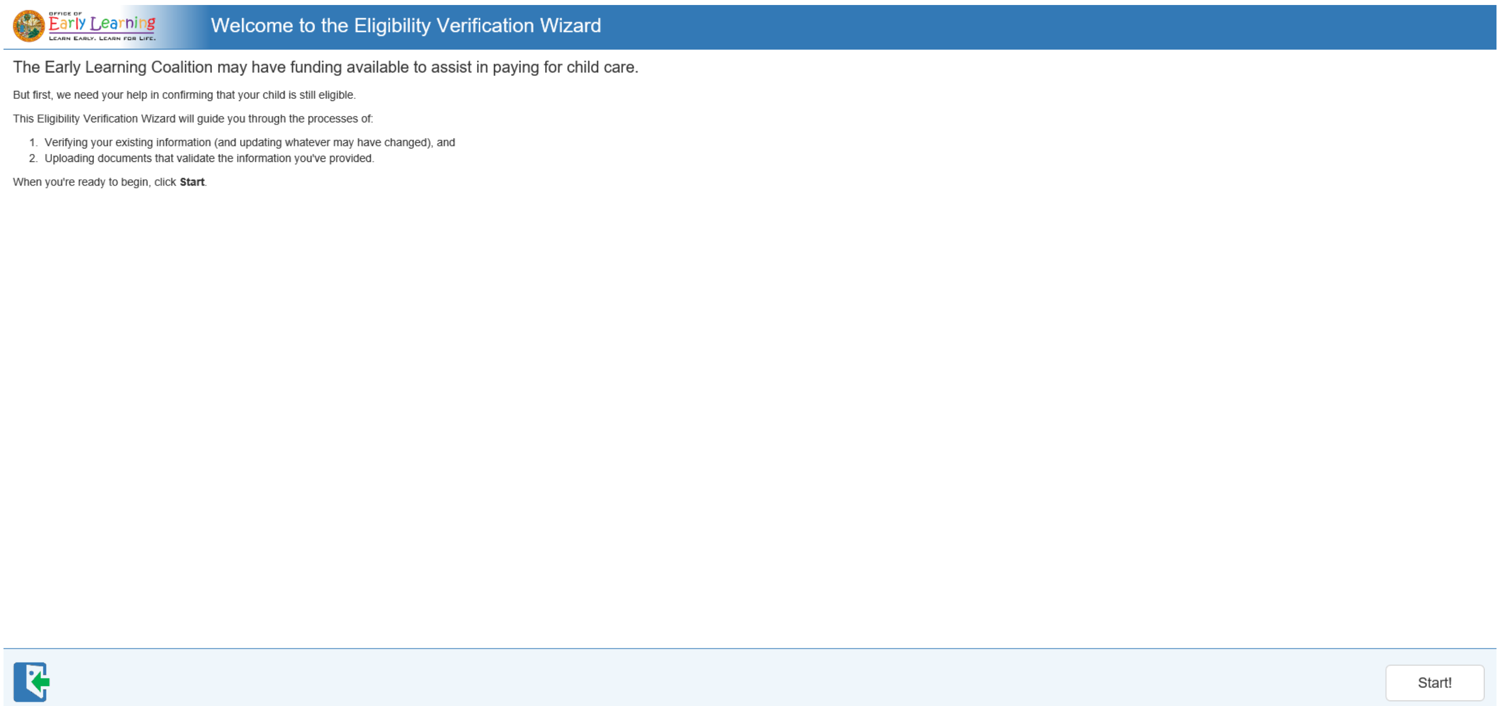
ELC of the Big Bend Region
8669739030
http://www.elcbigbend.org/

Please do not reply to this message. Replies to this message are routed to an unmonitored mailbox. If you have questions, please contact your early learning coalition.

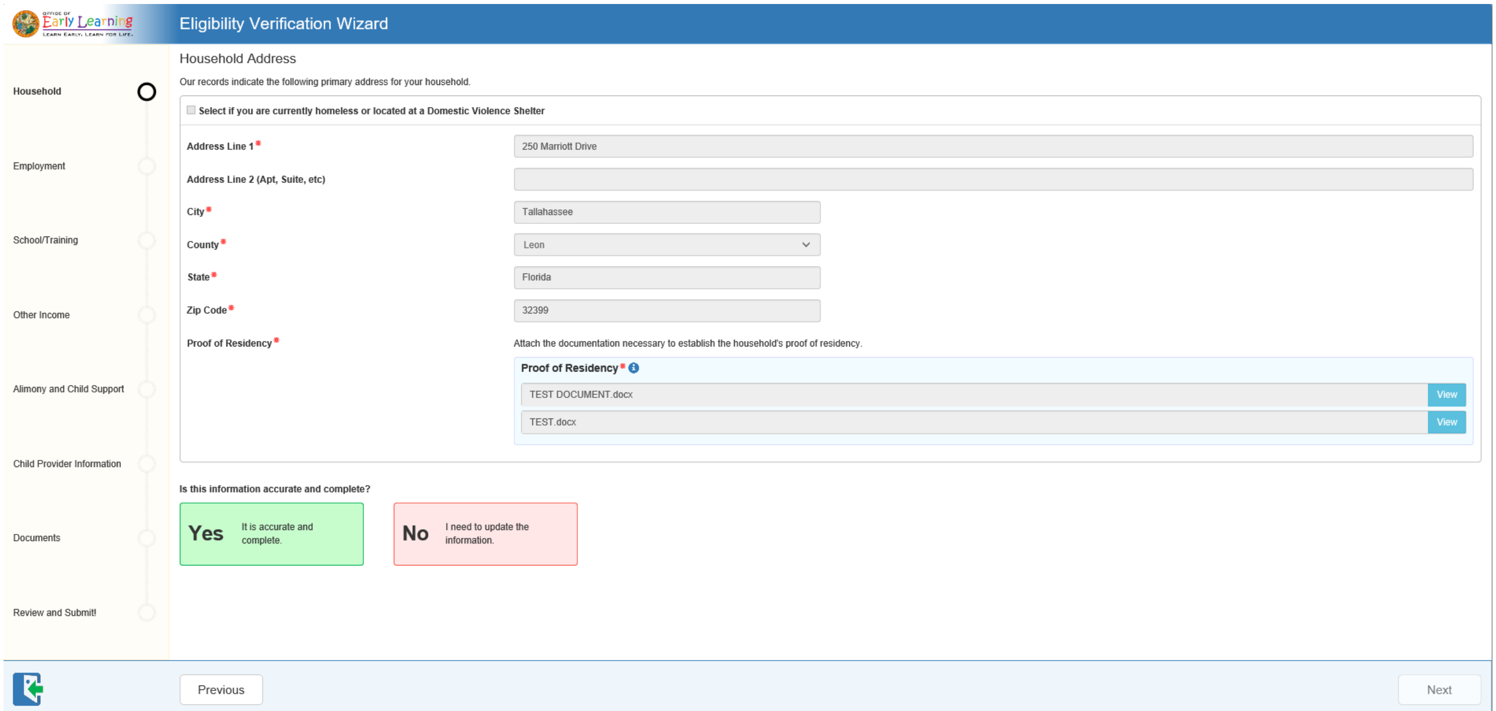
The family will see an **Update Eligibility** button on their Family Portal Profile page.



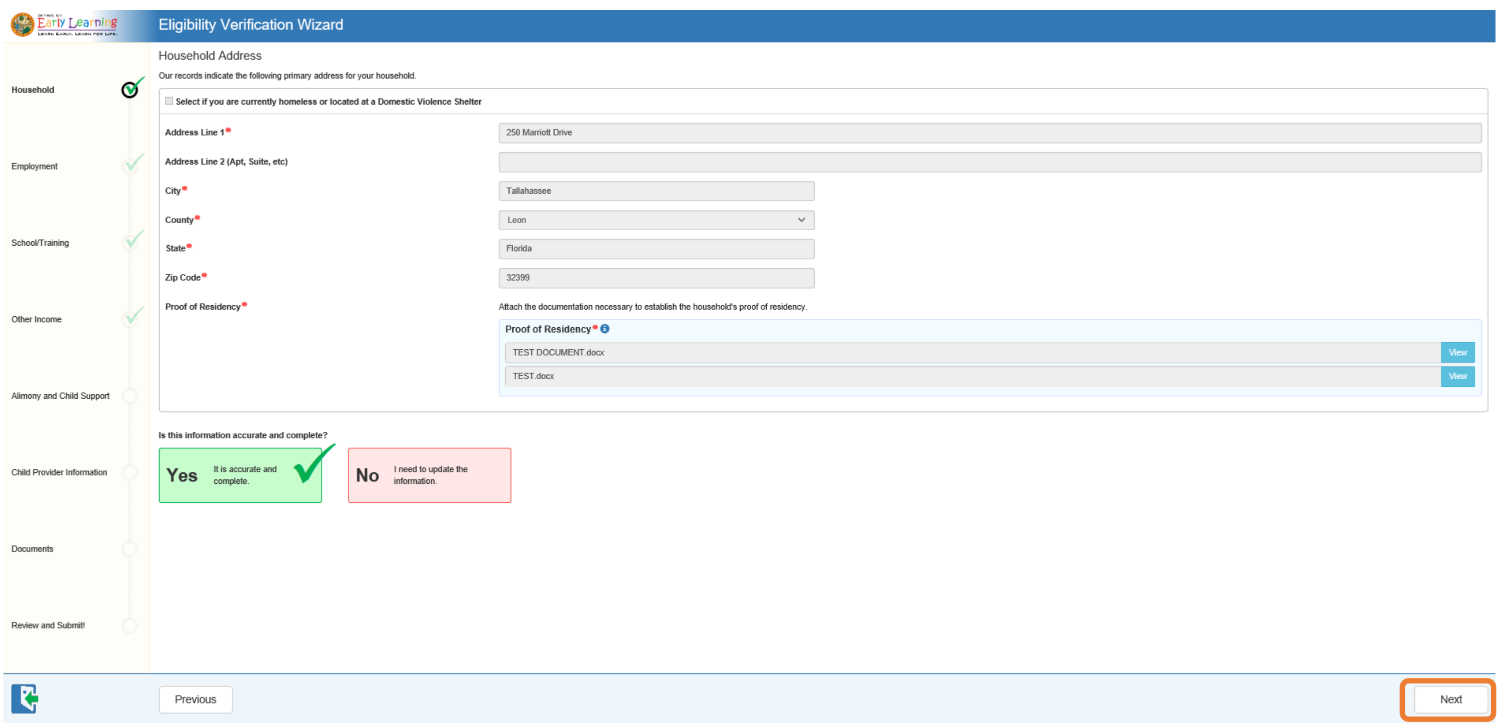
When the family clicks **Update Eligibility**, the Eligibility Verification Wizard is launched.

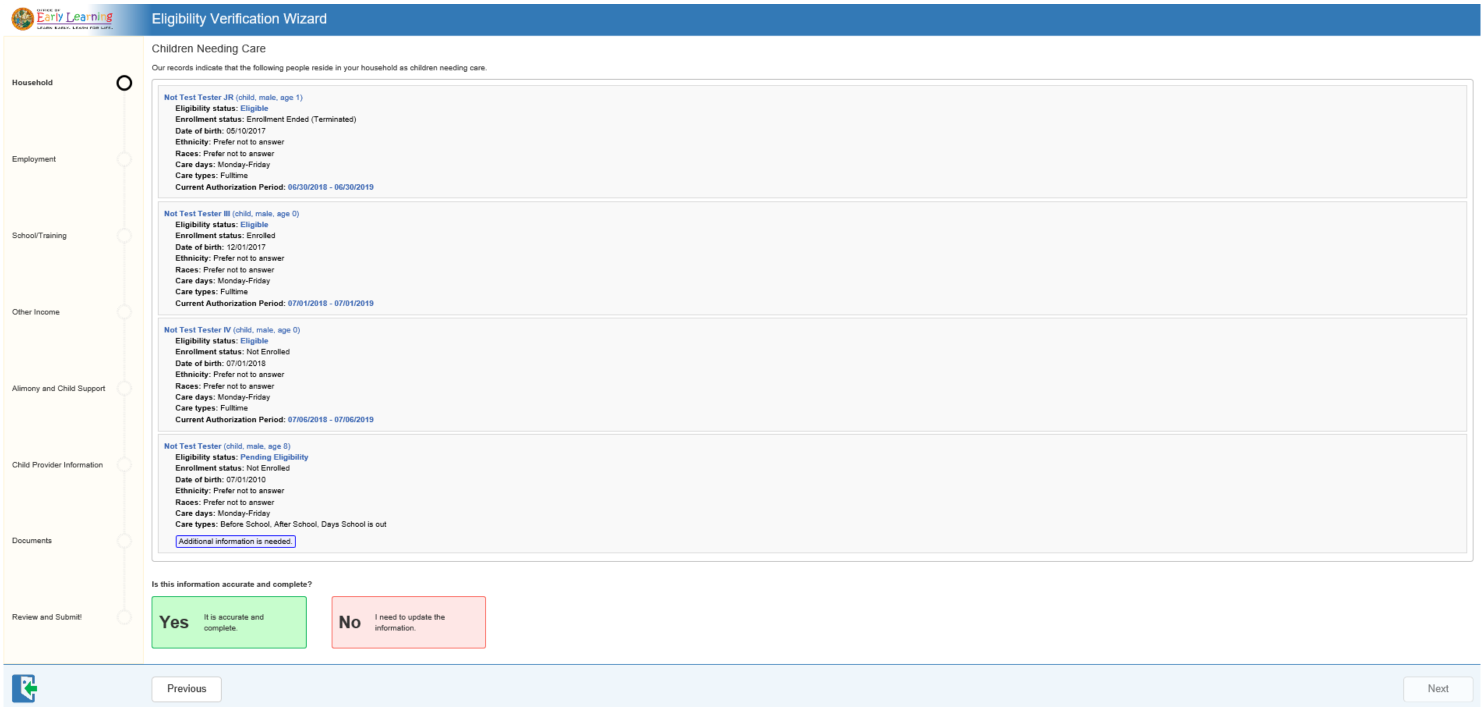


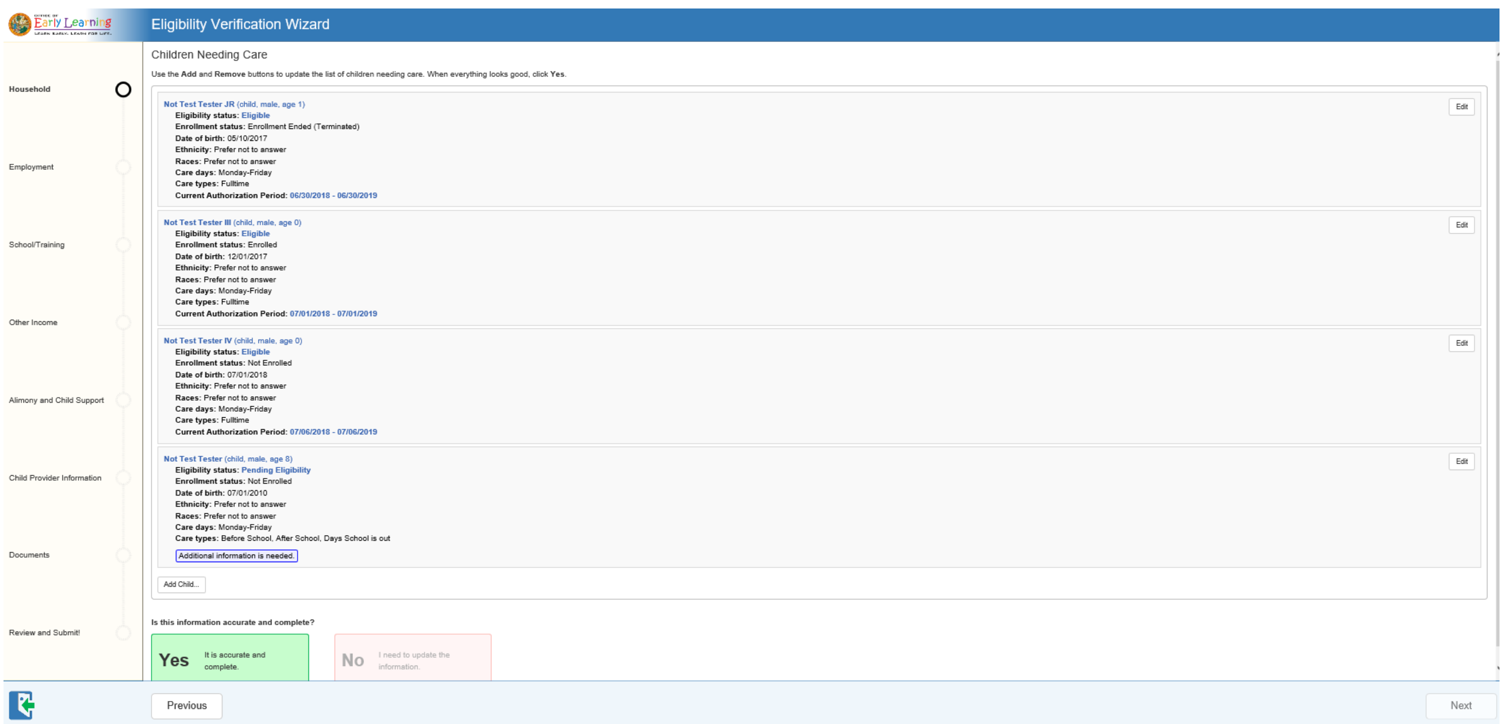
The family will click the green **Yes** or red **No** button in each section.

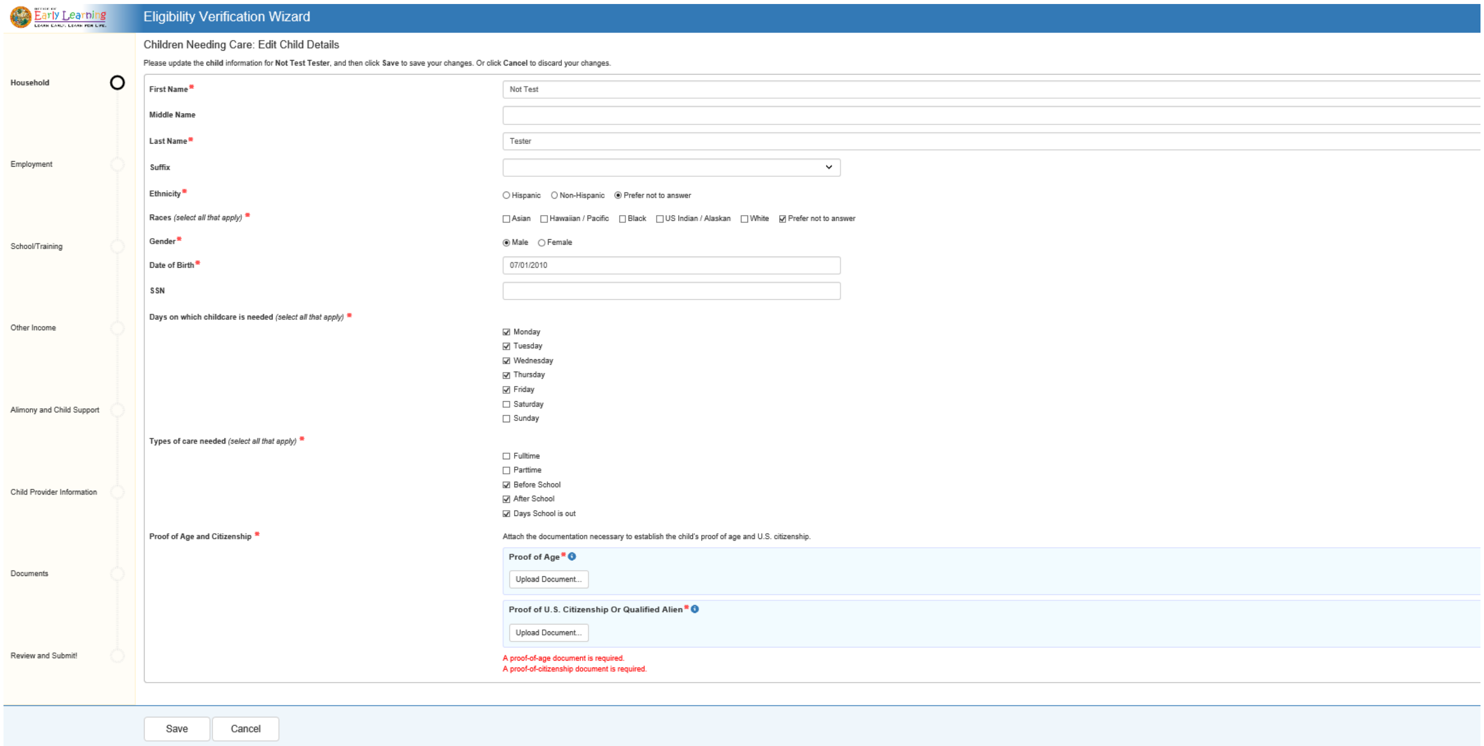


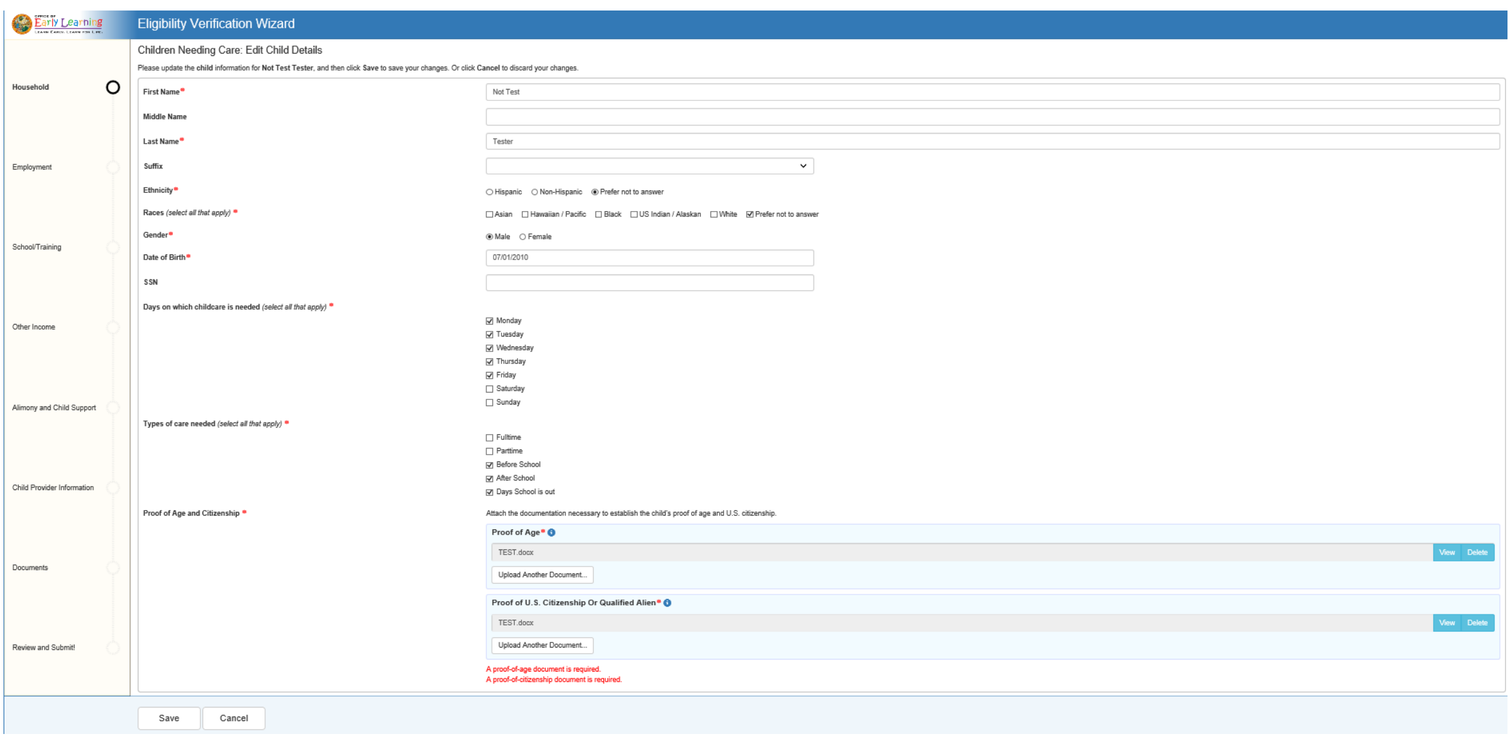
The **Next** button is disabled until the family chooses a **Yes** or **No** button.

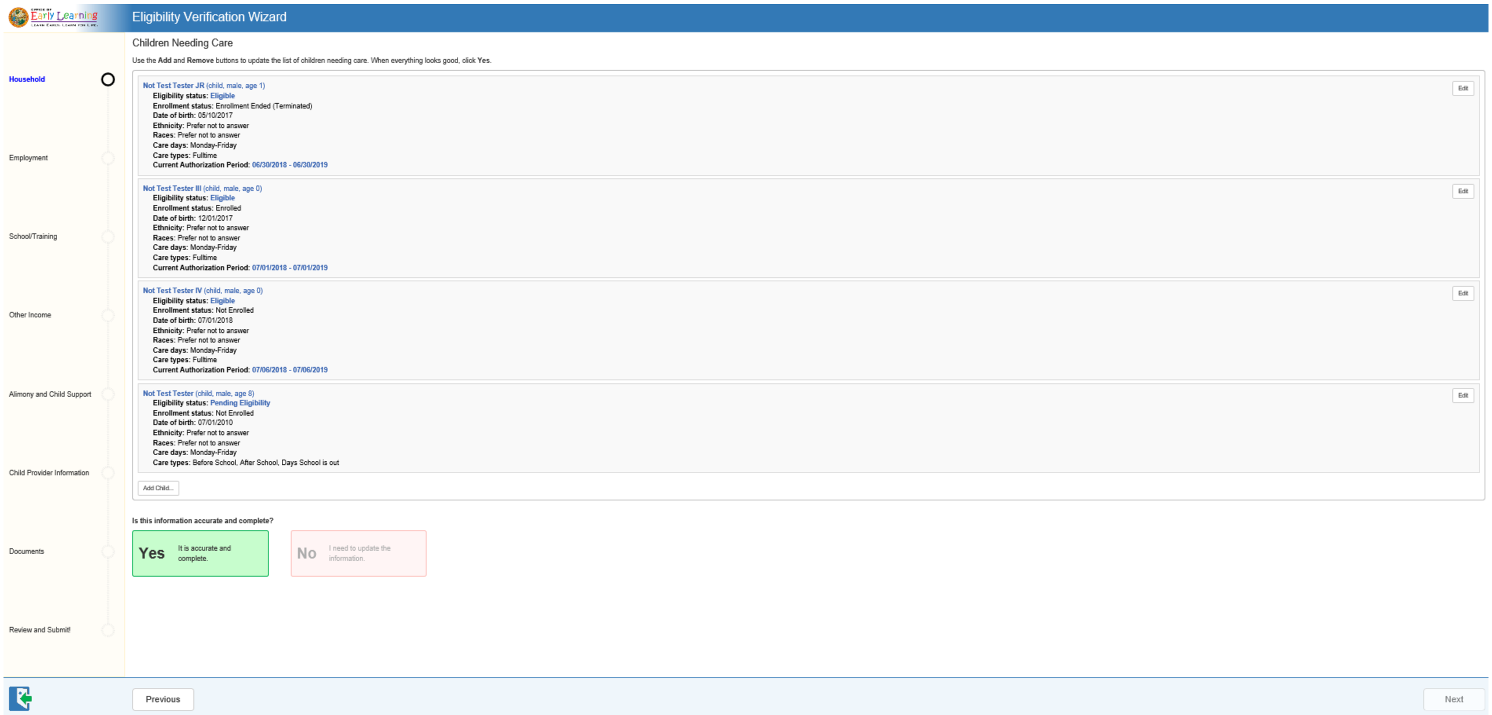


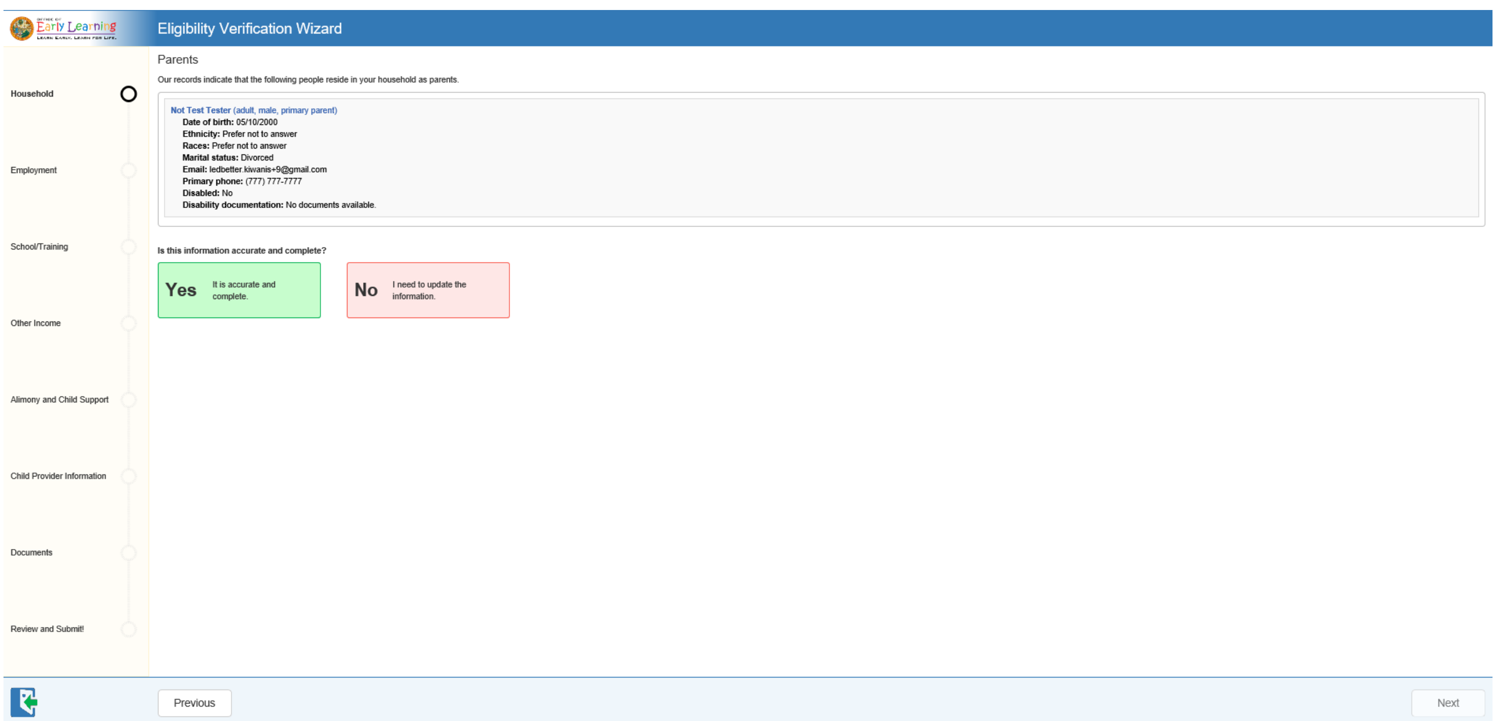

Early Learning
Eligibility Verification Wizard
Household
Employment
School/Training
Other Income
Alimony and Child Support
Child Provider Information
Documents
Review and Submit!
Children Needing Care
Our records indicate that the following people reside in your household as children needing care.
Not Test Tester JR (child, male, age 1)
Eligibility status: Eligible
Enrollment status: Enrollment Ended (Terminated)
Date of birth: 05/10/2017
Ethnicity: Prefer not to answer
Races: Prefer not to answer
Care days: Monday-Friday
Care types: Fulltime
Current Authorization Period: 06/30/2018 - 06/30/2019
Not Test Tester III (child, male, age 0)
Eligibility status: Eligible
Enrollment status: Enrolled
Date of birth: 12/01/2017
Ethnicity: Prefer not to answer
Races: Prefer not to answer
Care days: Monday-Friday
Care types: Fulltime
Current Authorization Period: 07/01/2018 - 07/01/2019
Not Test Tester IV (child, male, age 0)
Eligibility status: Eligible
Enrollment status: Not Enrolled
Date of birth: 07/01/2018
Ethnicity: Prefer not to answer
Races: Prefer not to answer
Care days: Monday-Friday
Care types: Fulltime
Current Authorization Period: 07/06/2018 - 07/06/2019
Not Test Tester (child, male, age 8)
Eligibility status: Pending Eligibility
Enrollment status: Not Enrolled
Date of birth: 07/01/2010
Ethnicity: Prefer not to answer
Races: Prefer not to answer
Care days: Monday-Friday
Care types: Before School, After School, Days School is out
Additional information is needed.
Is this information accurate and complete?
Yes It is accurate and complete.
No I need to update the information.
Previous
Next

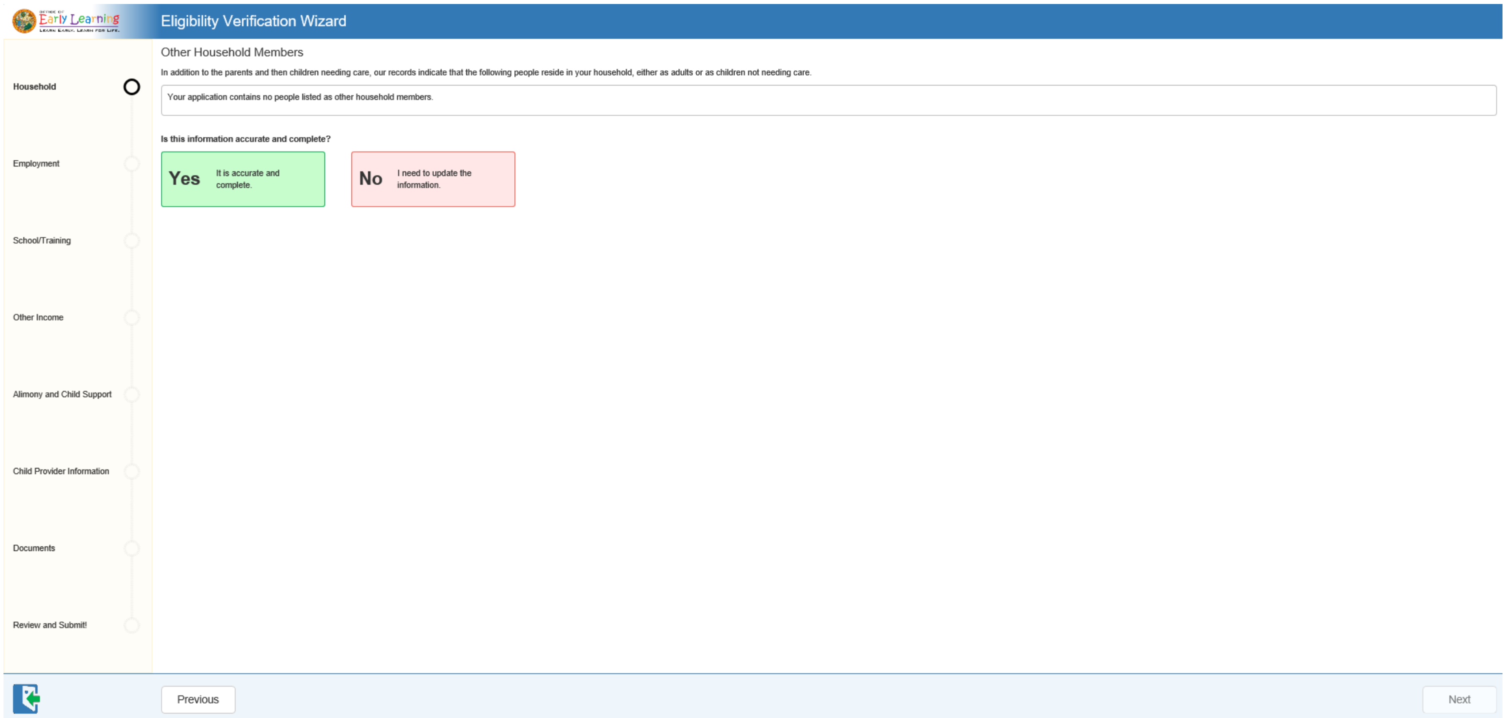

Early Learning
Eligibility Verification Wizard
Household
Employment
School/Training
Other Income
Alimony and Child Support
Child Provider Information
Documents
Review and Submit!
Children Needing Care
Use the Add and Remove buttons to update the list of children needing care. When everything looks good, click Yes.
Not Test Tester JR (child, male, age 1)
Edit
Eligibility status: Eligible
Enrollment status: Enrollment Ended (Terminated)
Date of birth: 05/10/2017
Ethnicity: Prefer not to answer
Races: Prefer not to answer
Care days: Monday-Friday
Care types: Fulltime
Current Authorization Period: 06/30/2018 - 06/30/2019
Not Test Tester III (child, male, age 0)
Edit
Eligibility status: Eligible
Enrollment status: Enrolled
Date of birth: 12/01/2017
Ethnicity: Prefer not to answer
Races: Prefer not to answer
Care days: Monday-Friday
Care types: Fulltime
Current Authorization Period: 07/01/2018 - 07/01/2019
Not Test Tester IV (child, male, age 0)
Edit
Eligibility status: Eligible
Enrollment status: Not Enrolled
Date of birth: 07/01/2018
Ethnicity: Prefer not to answer
Races: Prefer not to answer
Care days: Monday-Friday
Care types: Fulltime
Current Authorization Period: 07/06/2018 - 07/06/2019
Not Test Tester (child, male, age 8)
Edit
Eligibility status: Pending Eligibility
Enrollment status: Not Enrolled
Date of birth: 07/01/2010
Ethnicity: Prefer not to answer
Races: Prefer not to answer
Care days: Monday-Friday
Care types: Before School, After School, Days School is out
Additional information is needed.
Add Child...
Is this information accurate and complete?
Yes It is accurate and complete.
No I need to update the information.
Previous
Next

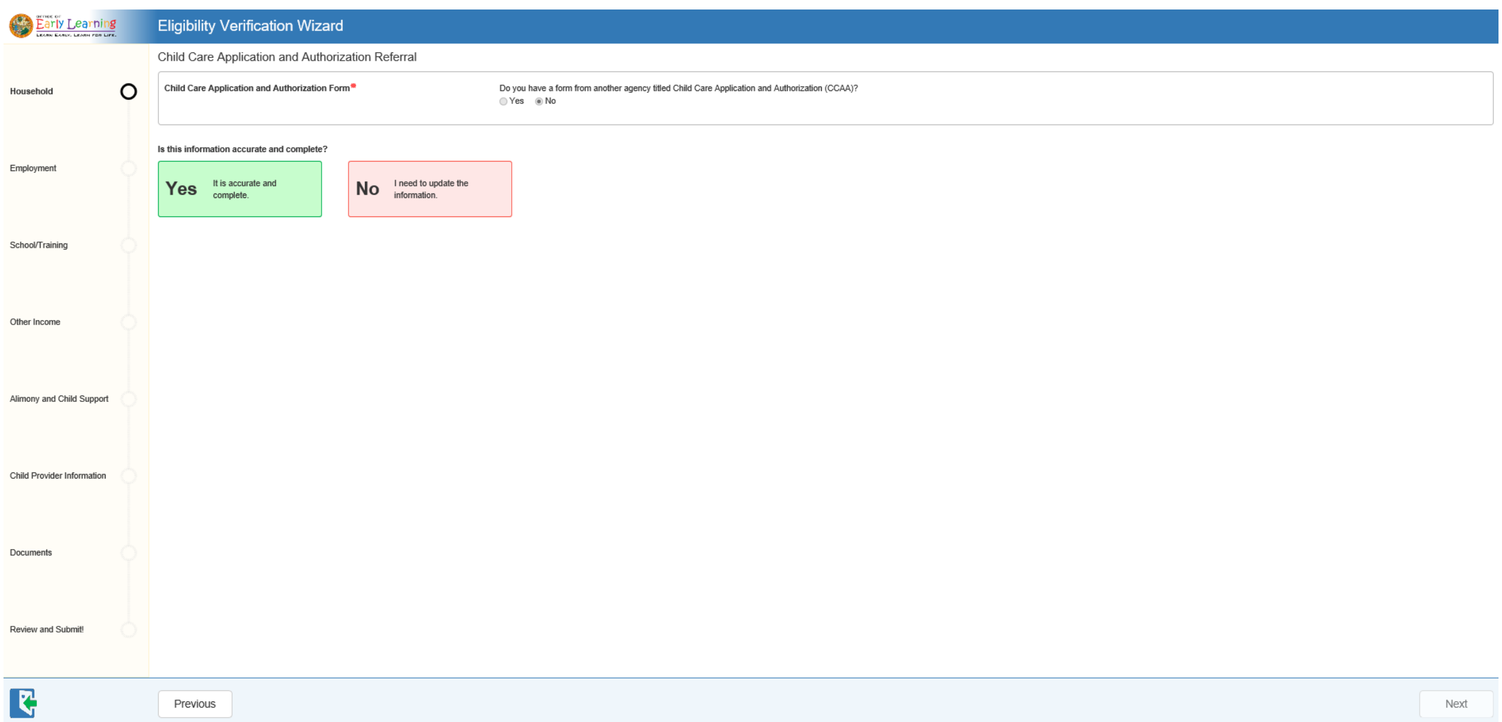

Early Learning
Eligibility Verification Wizard
Children Needing Care: Edit Child Details
Please update the child information for Not Test Tester, and then click Save to save your changes. Or click Cancel to discard your changes.
Household
Employment
School/Training
Other Income
Alimony and Child Support
Child Provider Information
Documents
Review and Submit!
First Name*
Not Test
Middle Name
Last Name*
Tester
Suffix
Ethnicity*
Hispanic
Non-Hispanic
Prefer not to answer
Races (select all that apply) *
Asian
Hawaiian / Pacific
Black
US Indian / Alaskan
White
Prefer not to answer
Gender*
Male
Female
Date of Birth*
07/01/2010
SSN
Days on which childcare is needed (select all that apply) *
Monday
Tuesday
Wednesday
Thursday
Friday
Saturday
Sunday
Types of care needed (select all that apply) *
Fulltime
Parttime
Before School
After School
Days School is out
Proof of Age and Citizenship *
Attach the documentation necessary to establish the child's proof of age and U.S. citizenship.
Proof of Age*
Upload Document...
Proof of U.S. Citizenship Or Qualified Alien*
Upload Document...
A proof-of-age document is required.
A proof-of-citizenship document is required.
Save
Cancel

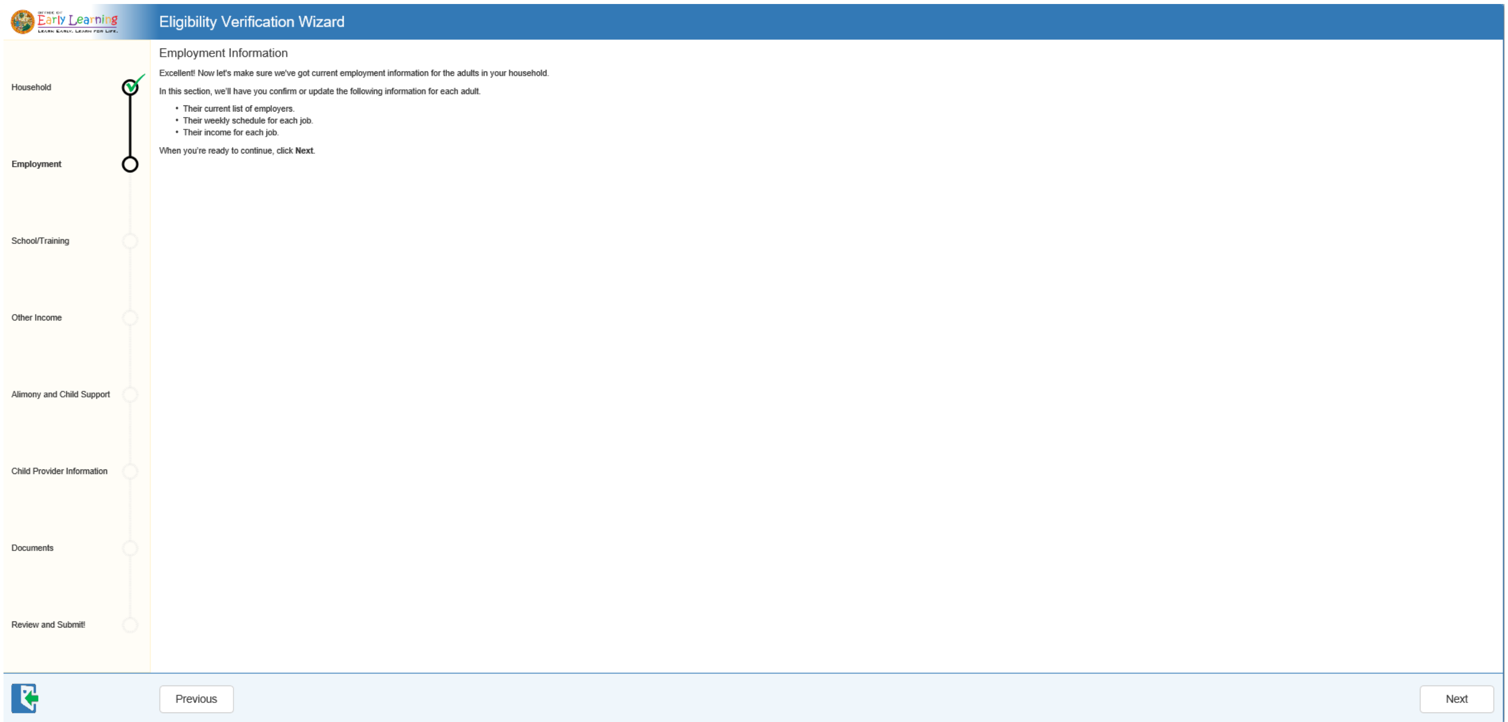

Early Learning
Eligibility Verification Wizard
Children Needing Care: Edit Child Details
Please update the child information for Not Test Tester, and then click Save to save your changes. Or click Cancel to discard your changes.
Household
Employment
School/Training
Other Income
Alimony and Child Support
Child Provider Information
Documents
Review and Submit!
First Name*
Not Test
Middle Name
Last Name*
Tester
Suffix
Ethnicity*
Hispanic
Non-Hispanic
Prefer not to answer
Races (select all that apply) *
Asian
Hawaiian / Pacific
Black
US Indian / Alaskan
White
Prefer not to answer
Gender*
Male
Female
Date of Birth*
07/01/2010
SSN
Days on which childcare is needed (select all that apply) *
Monday
Tuesday
Wednesday
Thursday
Friday
Saturday
Sunday
Types of care needed (select all that apply) *
Fulltime
Parttime
Before School
After School
Days School is out
Proof of Age and Citizenship *
Attach the documentation necessary to establish the child's proof of age and U.S. citizenship.
Proof of Age*
TEST.docx
View
Delete
Upload Another Document...
Proof of U.S. Citizenship Or Qualified Alien*
TEST.docx
View
Delete
Upload Another Document...
A proof-of-age document is required.
A proof-of-citizenship document is required.
Save
Cancel

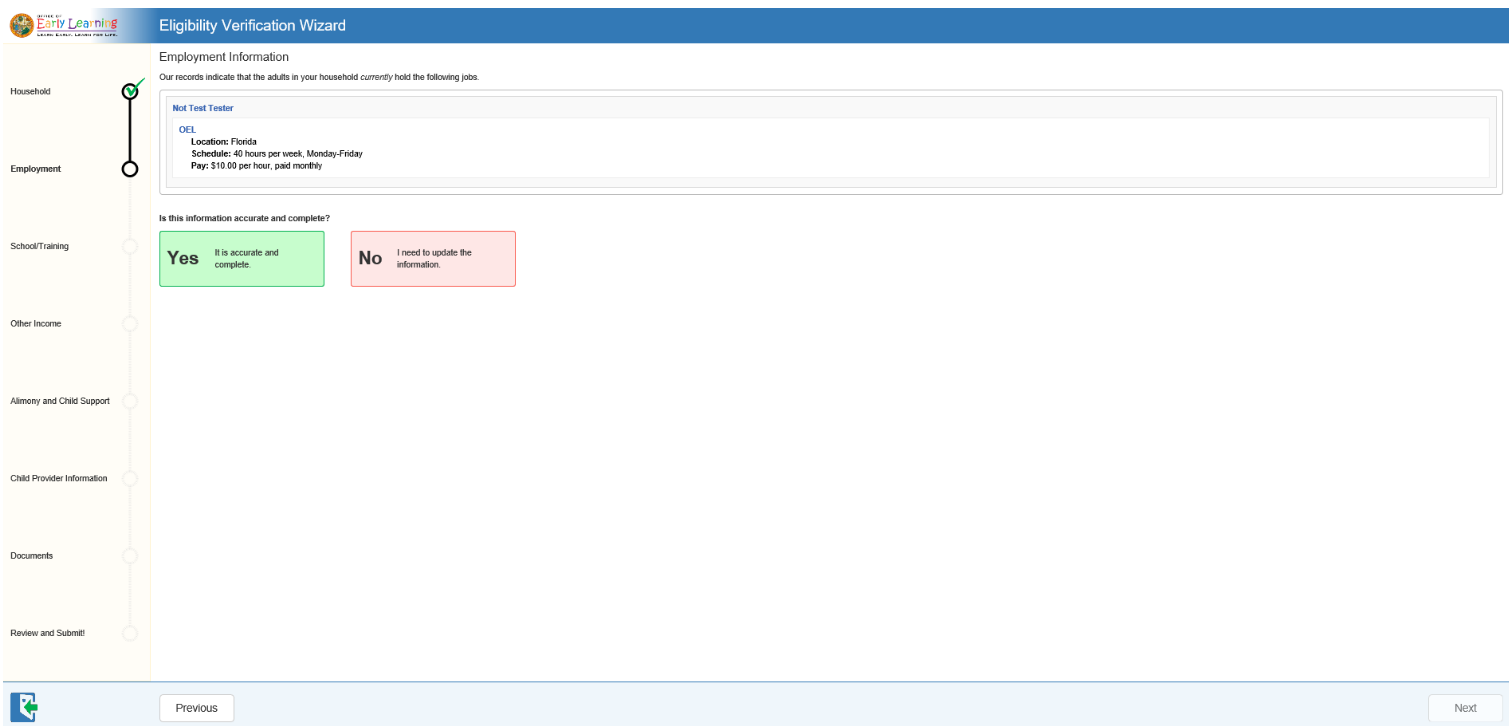

Eligibility Verification Wizard
Children Needing Care
Use the Add and Remove buttons to update the list of children needing care. When everything looks good, click Yes.
Household
Employment
School/Training
Other Income
Alimony and Child Support
Child Provider Information
Documents
Review and Submit!
Not Test Tester JR (child, male, age 1)
Eligibility status: Eligible
Enrollment status: Enrollment Ended (Terminated)
Date of birth: 05/10/2017
Ethnicity: Prefer not to answer
Races: Prefer not to answer
Care days: Monday-Friday
Care types: Fulltime
Current Authorization Period: 06/30/2018 - 06/30/2019
Edit
Not Test Tester III (child, male, age 0)
Eligibility status: Eligible
Enrollment status: Enrolled
Date of birth: 12/01/2017
Ethnicity: Prefer not to answer
Races: Prefer not to answer
Care days: Monday-Friday
Care types: Fulltime
Current Authorization Period: 07/01/2018 - 07/01/2019
Edit
Not Test Tester IV (child, male, age 0)
Eligibility status: Eligible
Enrollment status: Not Enrolled
Date of birth: 07/01/2018
Ethnicity: Prefer not to answer
Races: Prefer not to answer
Care days: Monday-Friday
Care types: Fulltime
Current Authorization Period: 07/06/2018 - 07/06/2019
Edit
Not Test Tester (child, male, age 8)
Eligibility status: Pending Eligibility
Enrollment status: Not Enrolled
Date of birth: 07/01/2010
Ethnicity: Prefer not to answer
Races: Prefer not to answer
Care days: Monday-Friday
Care types: Before School, After School, Days School is out
Edit
Add Child...
Is this information accurate and complete?
Yes It is accurate and complete.
No I need to update the information.
Previous
Next

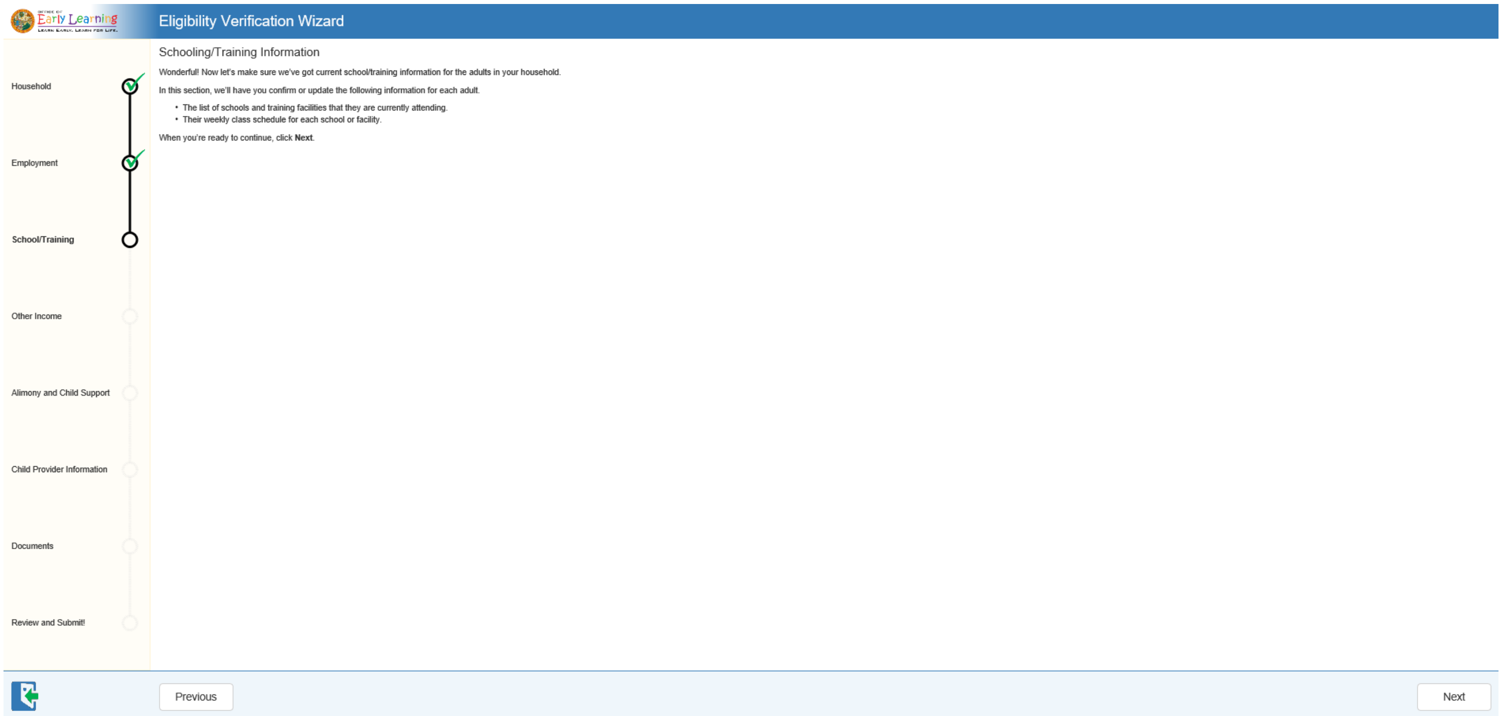

Eligibility Verification Wizard
Parents
Our records indicate that the following people reside in your household as parents.
Household
Employment
School/Training
Other Income
Alimony and Child Support
Child Provider Information
Documents
Review and Submit!
Not Test Tester (adult, male, primary parent)
Date of birth: 05/10/2000
Ethnicity: Prefer not to answer
Races: Prefer not to answer
Marital status: Divorced
Email: ledbetter.kiwanis+9@gmail.com
Primary phone: (777) 777-7777
Disabled: No
Disability documentation: No documents available.
Is this information accurate and complete?
Yes It is accurate and complete.
No I need to update the information.
Previous
Next

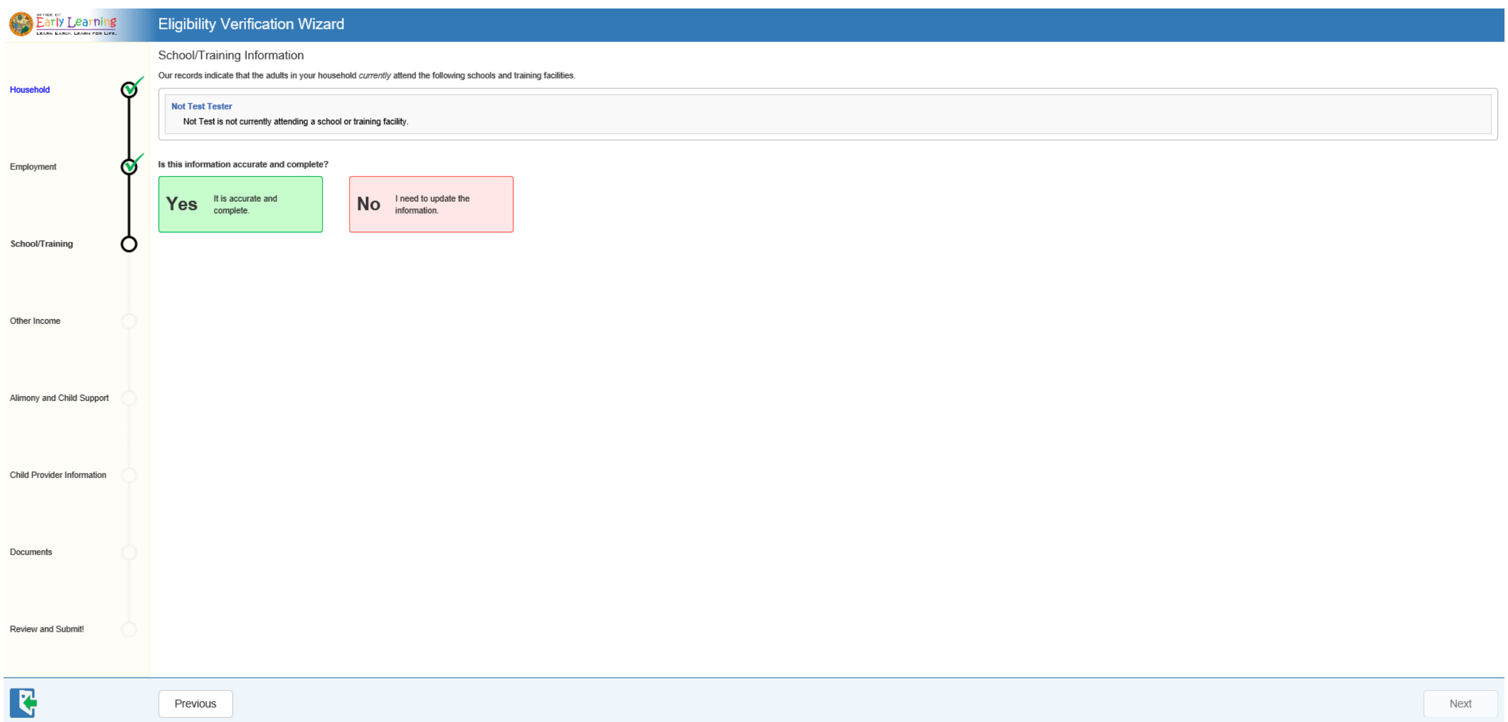

Early Learning
Eligibility Verification Wizard
Household
Employment
School/Training
Other Income
Alimony and Child Support
Child Provider Information
Documents
Review and Submit!
Other Household Members
In addition to the parents and then children needing care, our records indicate that the following people reside in your household, either as adults or as children not needing care.
Your application contains no people listed as other household members.
Is this information accurate and complete?
Yes It is accurate and complete.
No I need to update the information.
Previous
Next

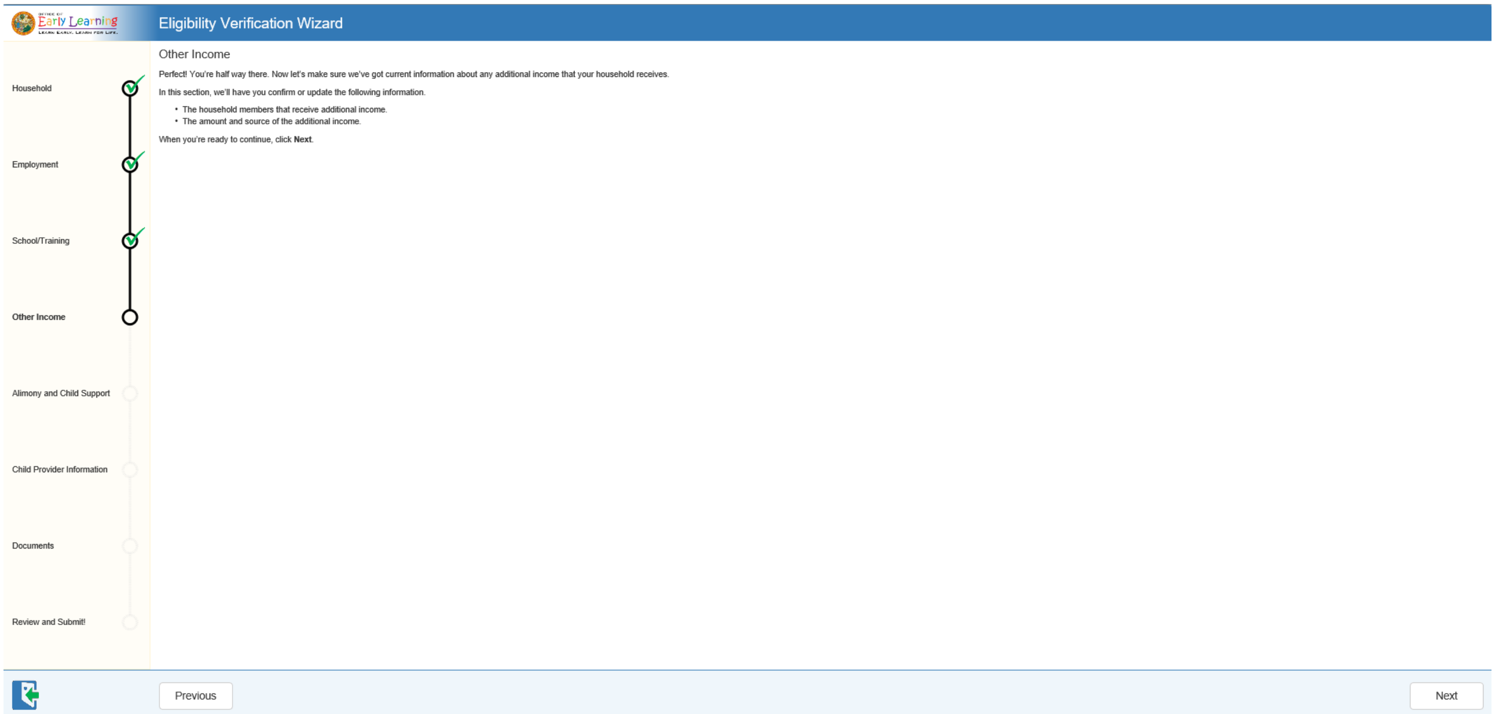

Early Learning
Eligibility Verification Wizard
Household
Employment
School/Training
Other Income
Alimony and Child Support
Child Provider Information
Documents
Review and Submit!
Child Care Application and Authorization Referral
Child Care Application and Authorization Form*
Do you have a form from another agency titled Child Care Application and Authorization (CCAA)?
Yes No
Is this information accurate and complete?
Yes It is accurate and complete.
No I need to update the information.
Previous
Next


Early Learning
Eligibility Verification Wizard
Employment Information
Excellent! Now let's make sure we've got current employment information for the adults in your household.
In this section, we'll have you confirm or update the following information for each adult.
• Their current list of employers.
• Their weekly schedule for each job.
• Their income for each job.
When you're ready to continue, click Next.
Household
Employment
School/Training
Other Income
Alimony and Child Support
Child Provider Information
Documents
Review and Submit!
Previous
Next


Early Learning
Eligibility Verification Wizard
Employment Information
Our records indicate that the adults in your household currently hold the following jobs.
Not Test Tester
OEL
Location: Florida
Schedule: 40 hours per week, Monday-Friday
Pay: $10.00 per hour, paid monthly
Is this information accurate and complete?
Yes
It is accurate and complete.
No
I need to update the information.
Household
Employment
School/Training
Other Income
Alimony and Child Support
Child Provider Information
Documents
Review and Submit!
Previous
Next


Early Learning
Eligibility Verification Wizard
Schooling/Training Information
Wonderful! Now let's make sure we've got current school/training information for the adults in your household.
In this section, we'll have you confirm or update the following information for each adult.
• The list of schools and training facilities that they are currently attending.
• Their weekly class schedule for each school or facility.
When you're ready to continue, click Next.
Household
Employment
School/Training
Other Income
Alimony and Child Support
Child Provider Information
Documents
Review and Submit!
Previous
Next


Early Learning
Eligibility Verification Wizard
School/Training Information
Our records indicate that the adults in your household currently attend the following schools and training facilities.
Not Test Tester
Not Test is not currently attending a school or training facility.
Is this information accurate and complete?
Yes It is accurate and complete.
No I need to update the information.
Household
Employment
School/Training
Other Income
Alimony and Child Support
Child Provider Information
Documents
Review and Submit!
Previous
Next


Eligibility Verification Wizard

Household
Employment
School/Training
Other Income
Alimony and Child Support
Child Provider Information
Documents
Review and Submit!

Other Income

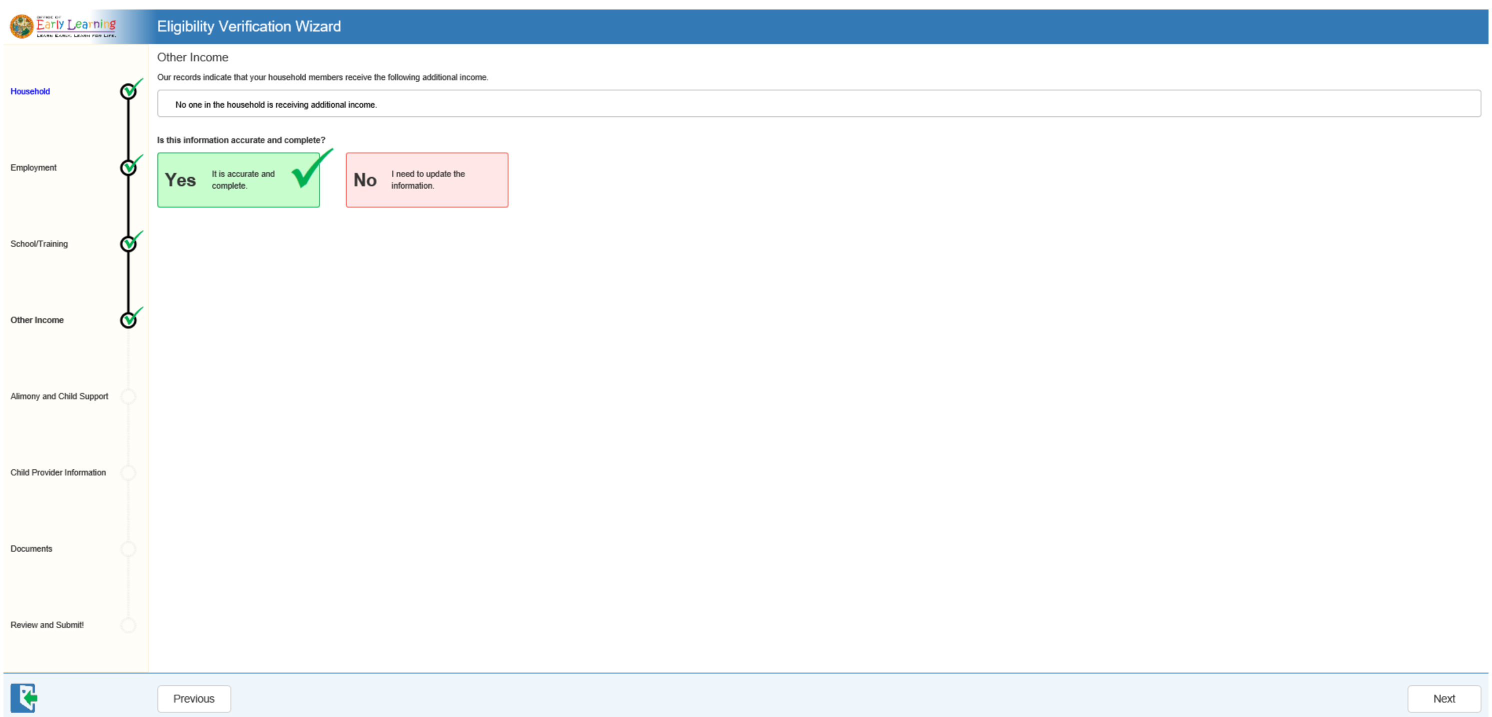
Perfect! You're half way there. Now let's make sure we've got current information about any additional income that your household receives.

In this section, we'll have you confirm or update the following information.

- The household members that receive additional income.
- The amount and source of the additional income.

When you're ready to continue, click **Next**.

Previous
Next


Eligibility Verification Wizard

Household
Employment
School/Training
Other Income
Alimony and Child Support
Child Provider Information
Documents
Review and Submit!

Other Income

Our records indicate that your household members receive the following additional income.

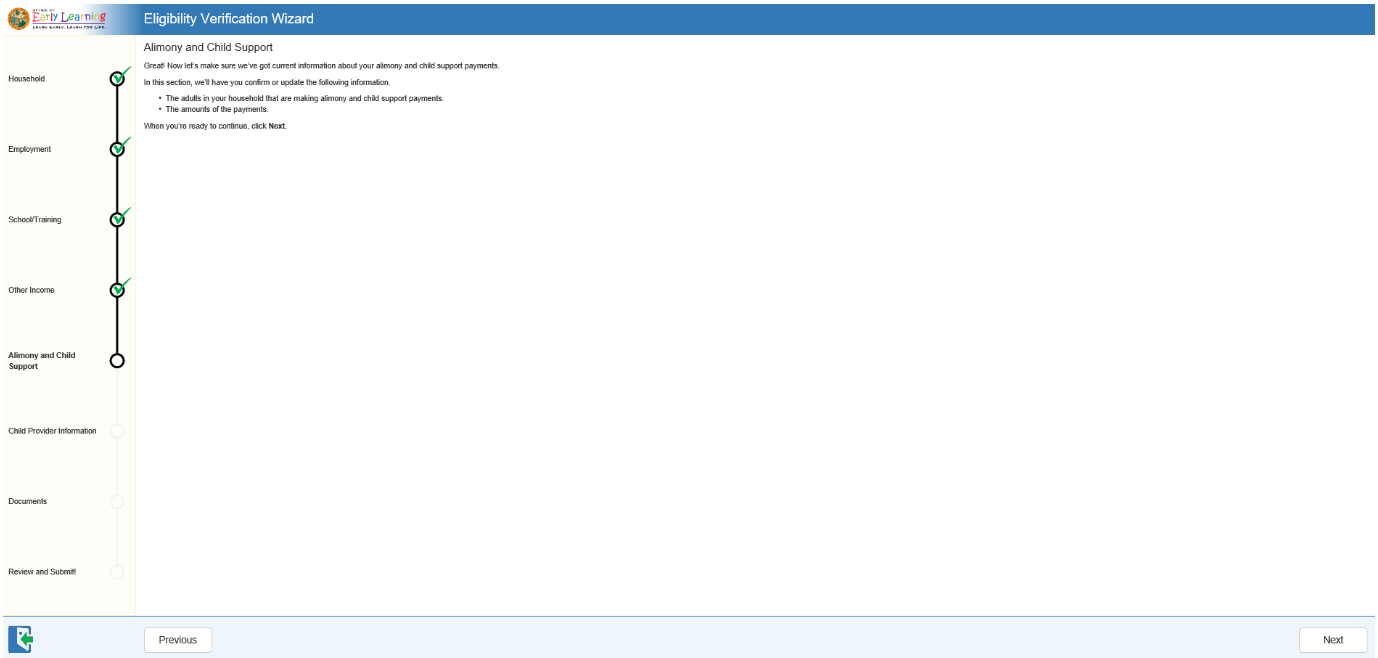
No one in the household is receiving additional income.

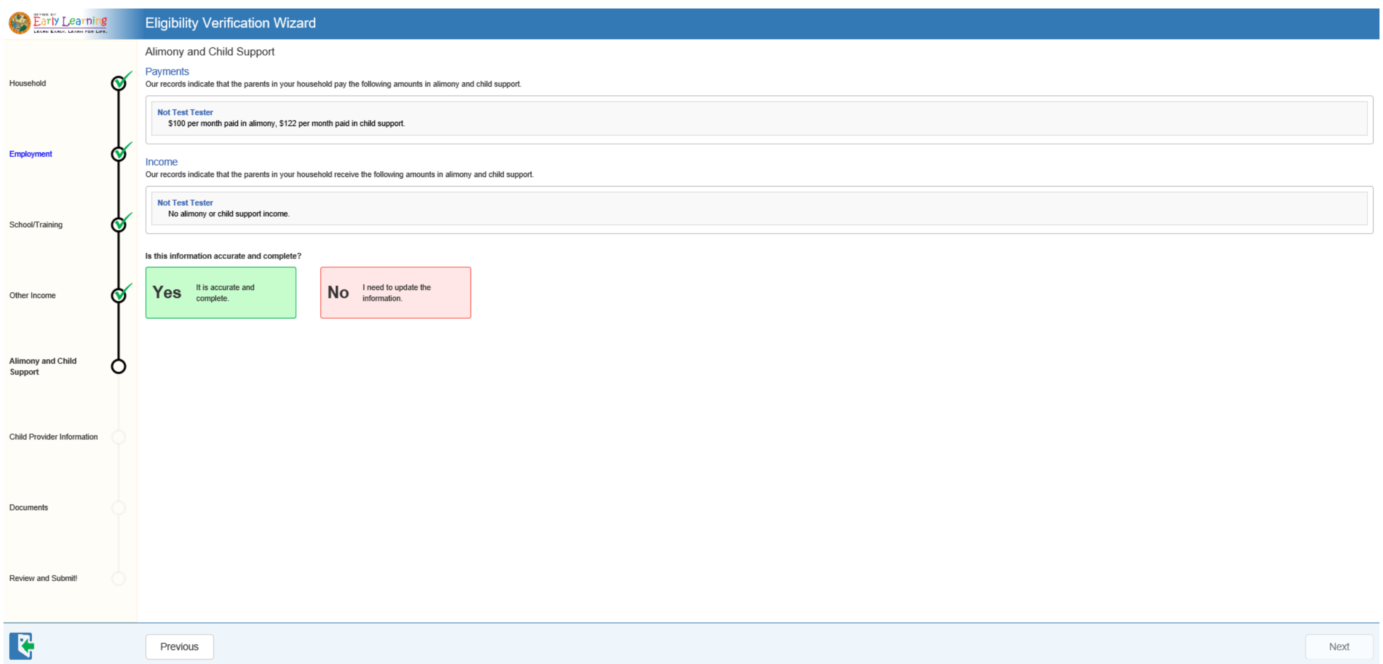
Is this information accurate and complete?

Yes It is accurate and complete.

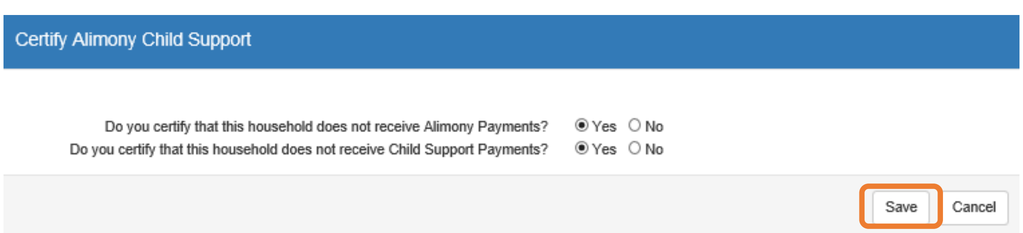
No I need to update the information.

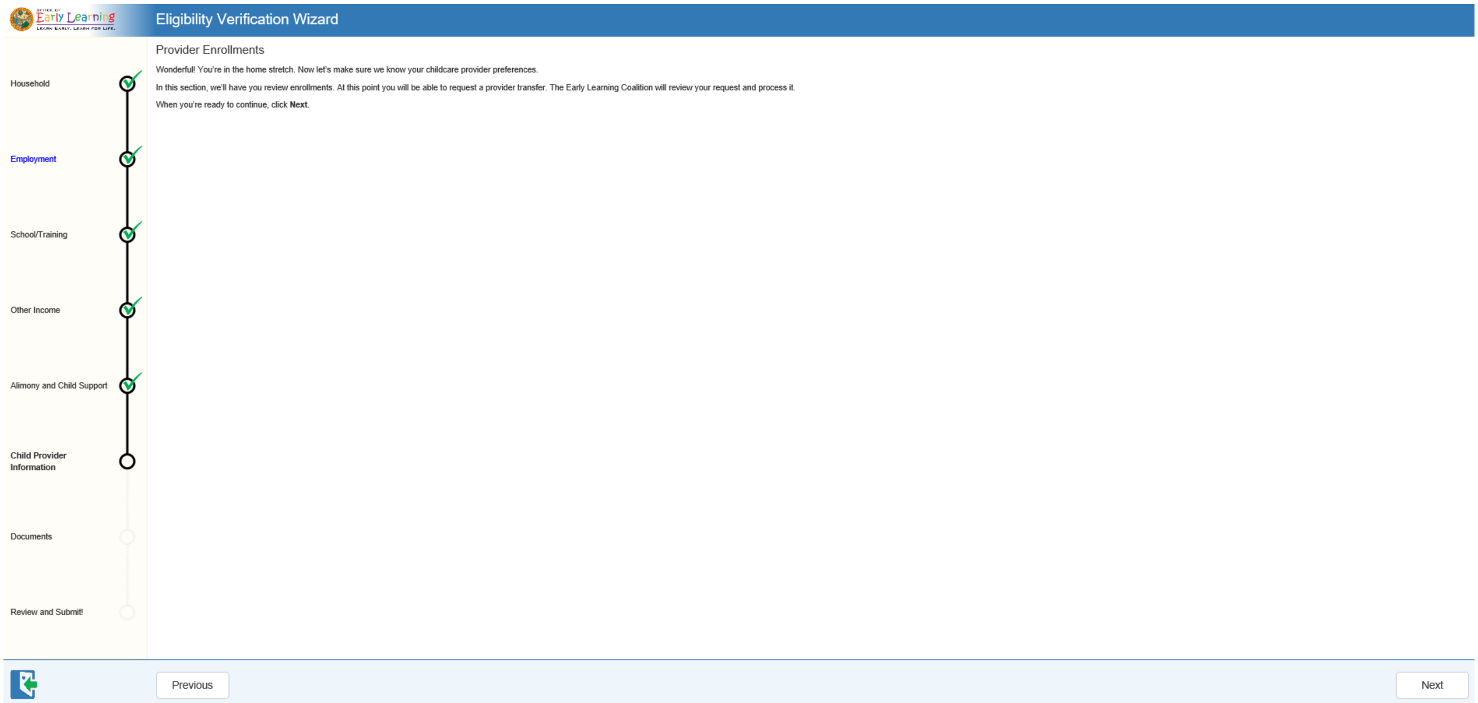
Previous
Next



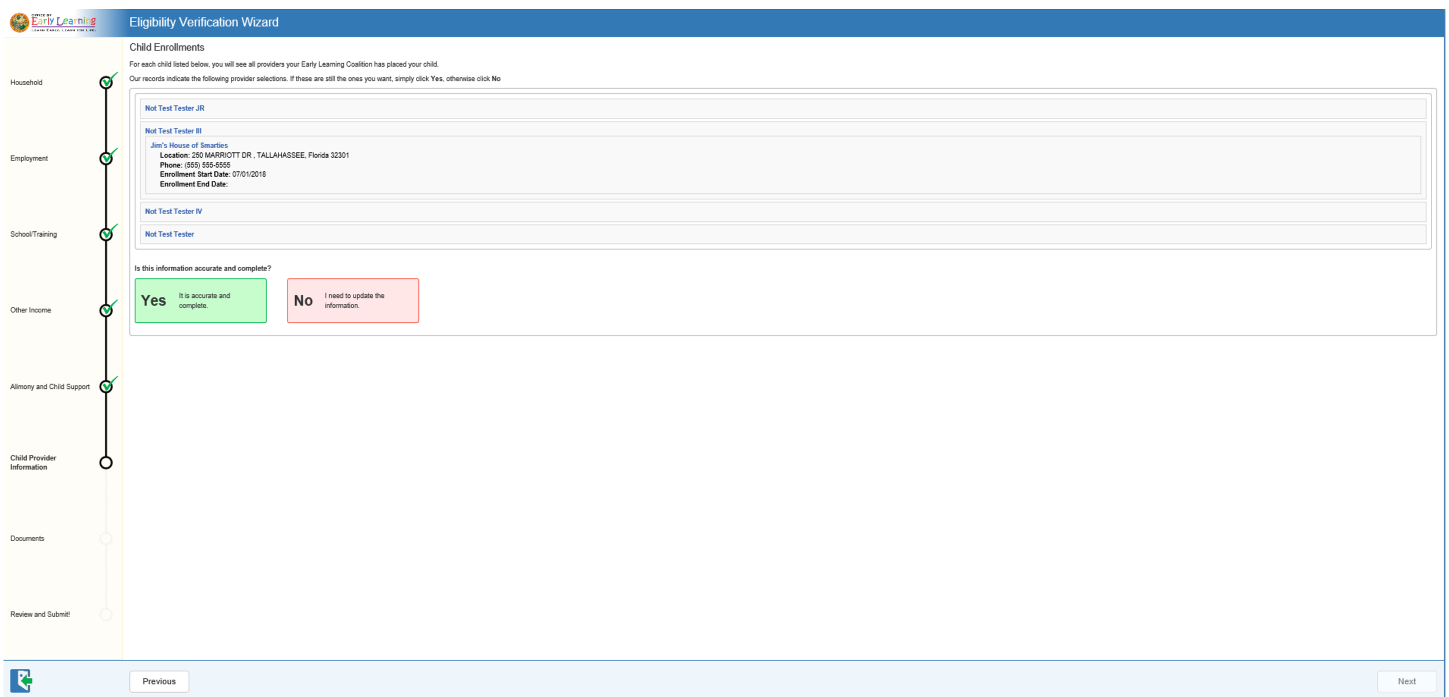


When the parent clicks **Yes**, the following confirmation message will display. Click **Save**.

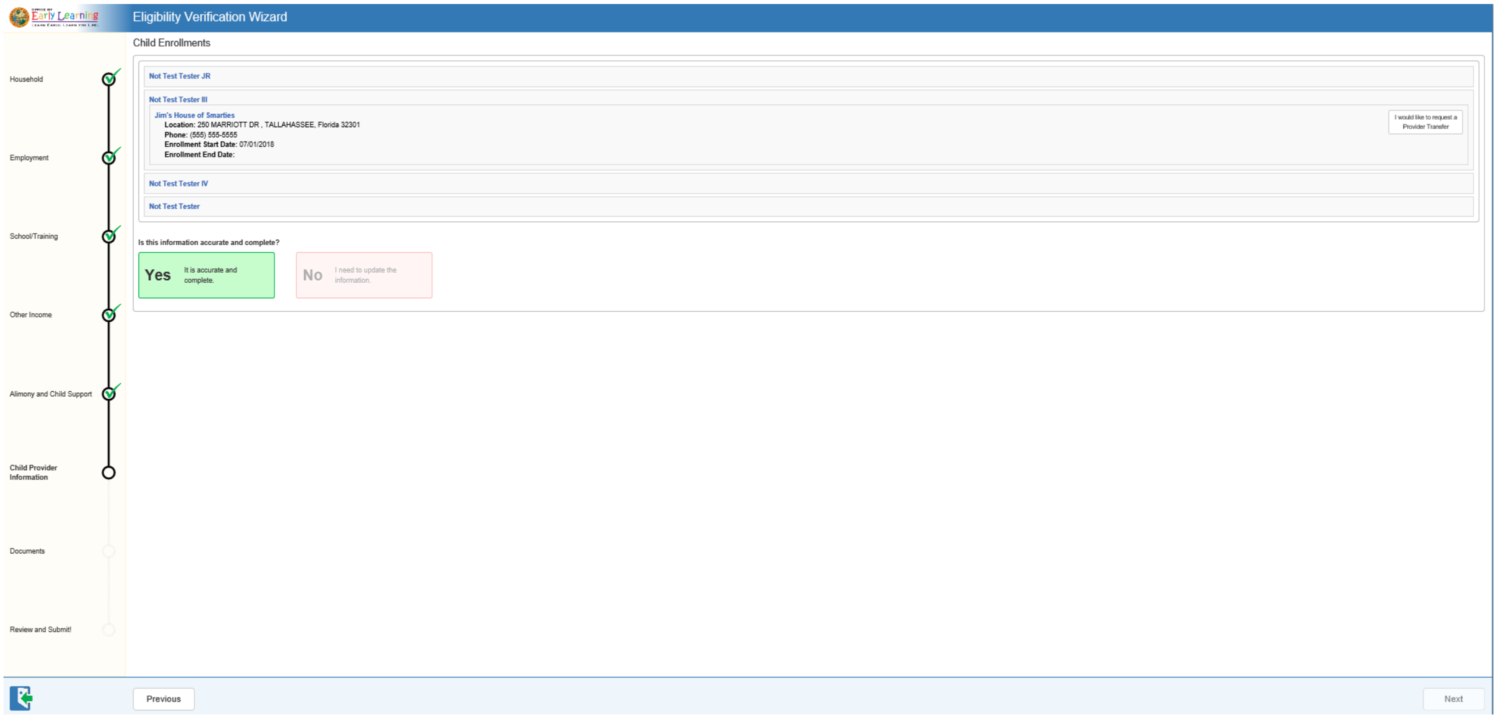


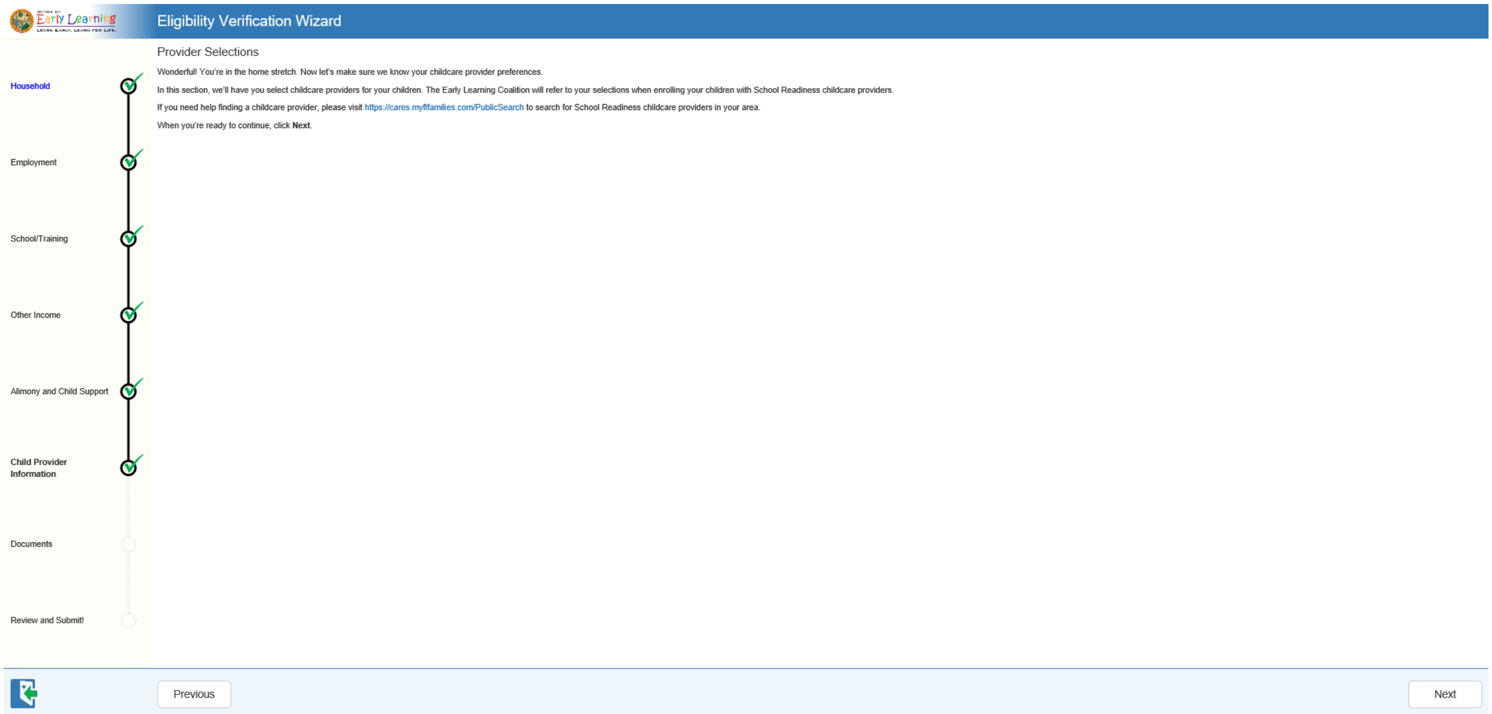


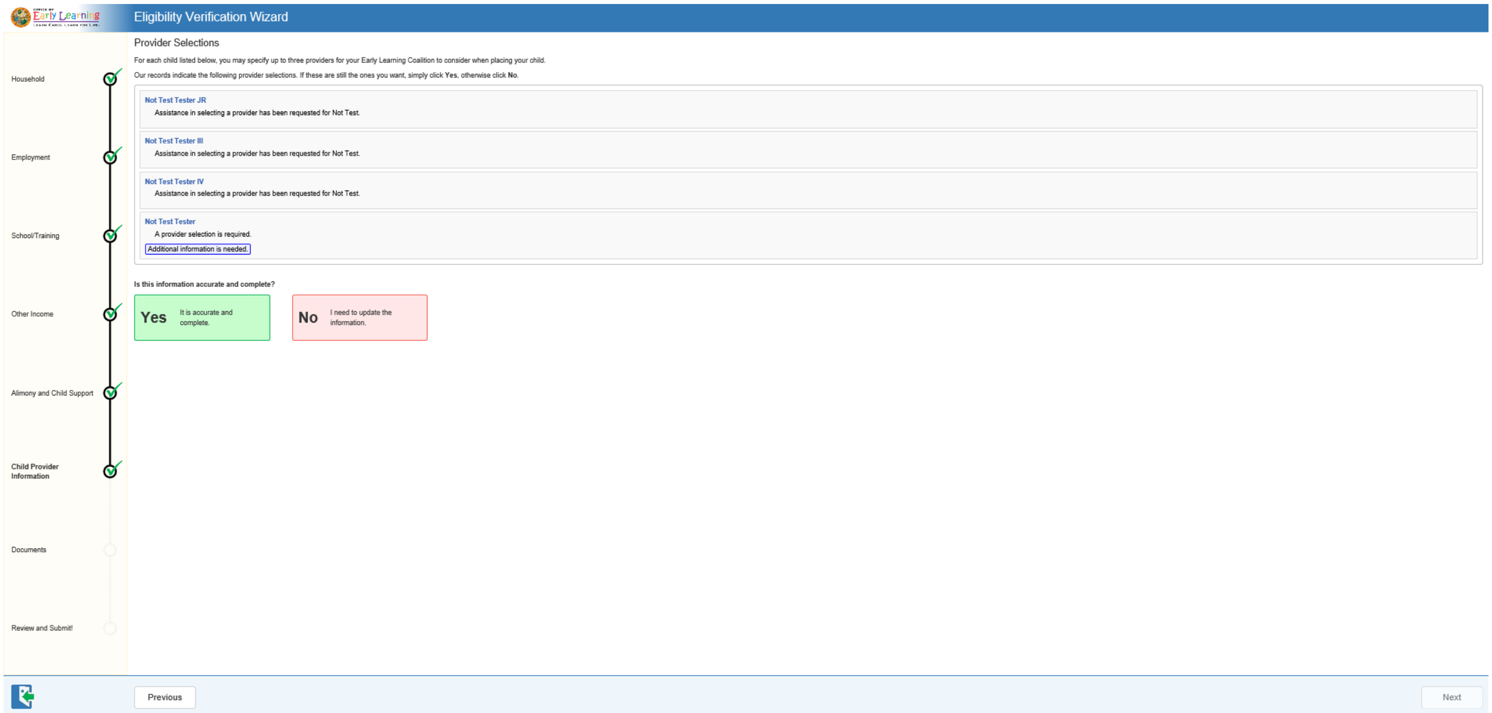
Eligibility Verification Wizard
Provider Enrollments
Wonderful! You're in the home stretch. Now let's make sure we know your childcare provider preferences.
In this section, we'll have you review enrollments. At this point you will be able to request a provider transfer. The Early Learning Coalition will review your request and process it.
When you're ready to continue, click Next.
Household
Employment
School/Training
Other Income
Alimony and Child Support
Child Provider Information
Documents
Review and Submit!
Previous
Next

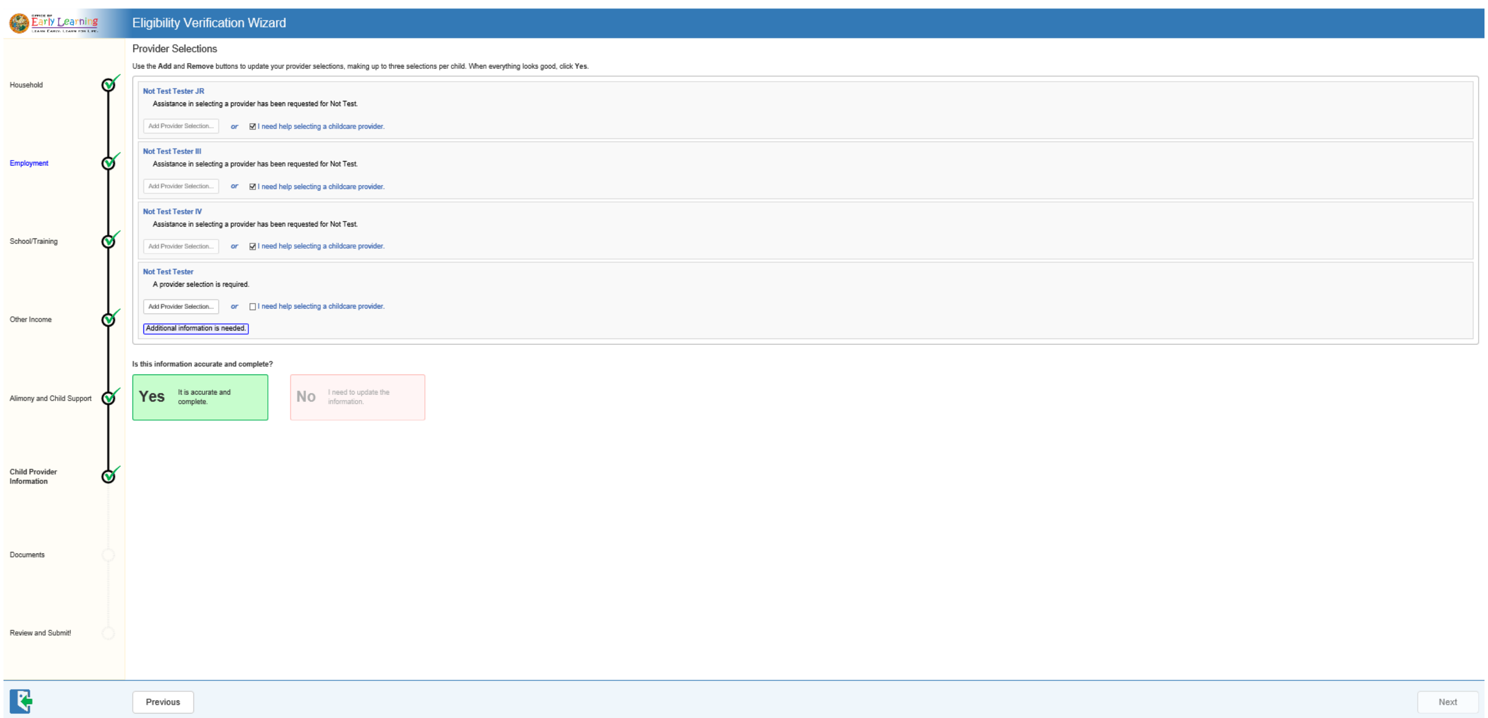


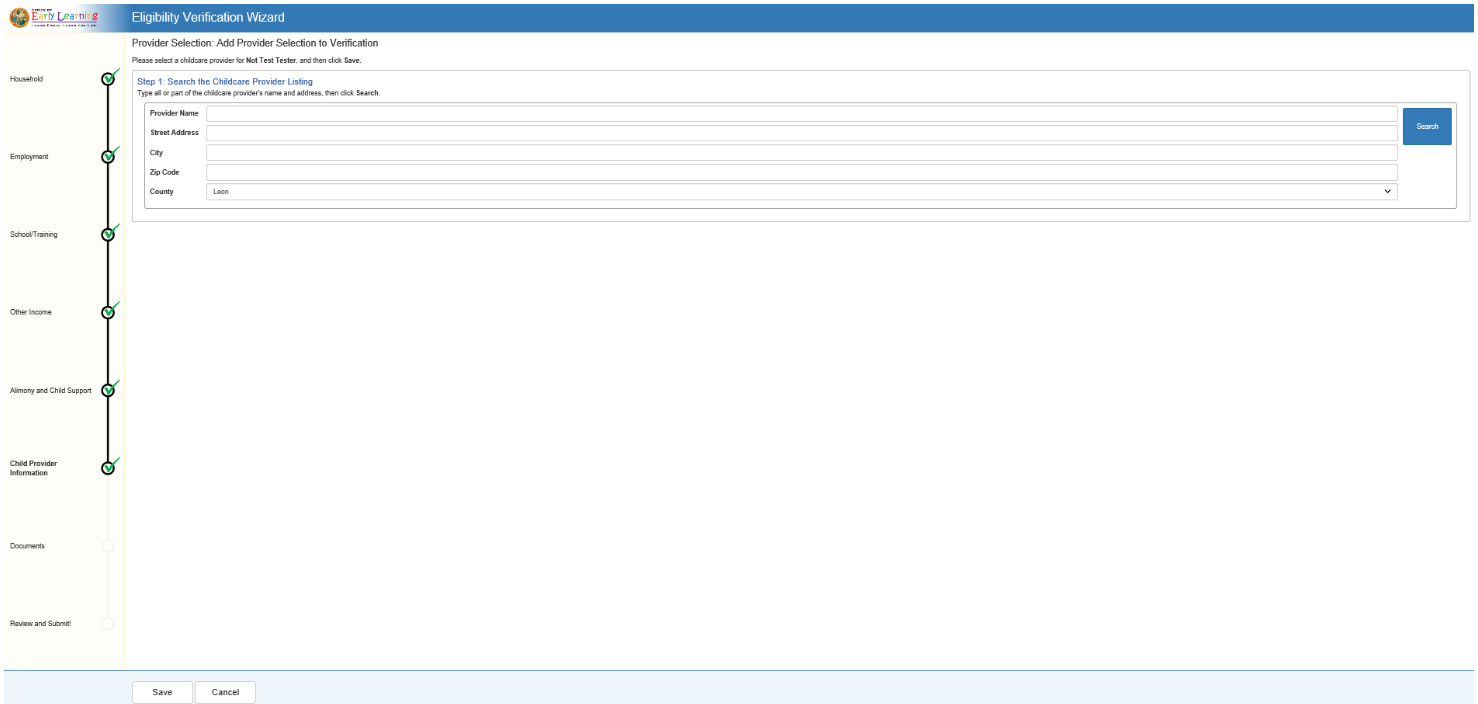
Eligibility Verification Wizard
Child Enrollments
For each child listed below, you will see all providers your Early Learning Coalition has placed your child.
Our records indicate the following provider selections. If these are still the ones you want, simply click Yes, otherwise click No
Not Test Tester JR
Not Test Tester III
Jim's House of Smarties
Location: 250 MARRIOTT DR , TALLAHASSEE, Florida 32301
Phone: (555) 555-5555
Enrollment Start Date: 07/01/2018
Enrollment End Date:
Not Test Tester IV
Not Test Tester
Is this information accurate and complete?
Yes It is accurate and complete.
No I need to update the information.
Household
Employment
School/Training
Other Income
Alimony and Child Support
Child Provider Information
Documents
Review and Submit!
Previous
Next


Early Learning
Eligibility Verification Wizard
Child Enrollments
Household
Employment
School/Training
Other Income
Alimony and Child Support
Child Provider Information
Documents
Review and Submit!
Not Test Tester JR
Not Test Tester III
Jim's House of Smarties
Location: 250 MARRIOTT DR , TALLAHASSEE, Florida 32301
Phone: (555) 555-5555
Enrollment Start Date: 07/01/2018
Enrollment End Date:
I would like to request a Provider Transfer
Not Test Tester IV
Not Test Tester
Is this information accurate and complete?
Yes It is accurate and complete.
No I need to update the information.
Previous
Next

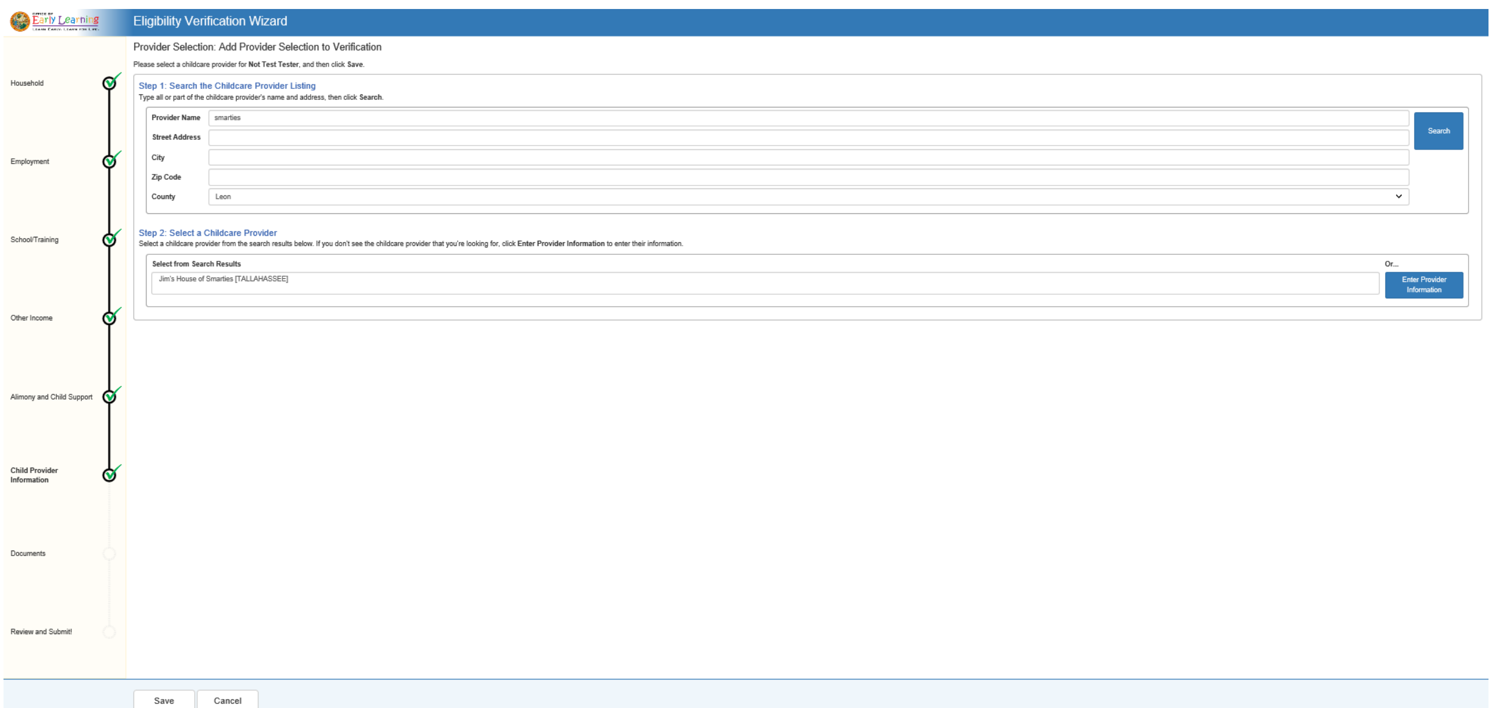

Early Learning
Eligibility Verification Wizard
Provider Selections
Wonderful! You're in the home stretch. Now let's make sure we know your childcare provider preferences.
In this section, we'll have you select childcare providers for your children. The Early Learning Coalition will refer to your selections when enrolling your children with School Readiness childcare providers.
If you need help finding a childcare provider, please visit https://cares.myflfamilies.com/PublicSearch to search for School Readiness childcare providers in your area.
When you're ready to continue, click Next.
Household
Employment
School/Training
Other Income
Alimony and Child Support
Child Provider Information
Documents
Review and Submit!
Previous
Next


Early Learning
Eligibility Verification Wizard
Household
Employment
School/Training
Other Income
Alimony and Child Support
Child Provider Information
Documents
Review and Submit!
Provider Selections
For each child listed below, you may specify up to three providers for your Early Learning Coalition to consider when placing your child.
Our records indicate the following provider selections. If these are still the ones you want, simply click Yes, otherwise click No.
Not Test Tester JR
Assistance in selecting a provider has been requested for Not Test.
Not Test Tester III
Assistance in selecting a provider has been requested for Not Test.
Not Test Tester IV
Assistance in selecting a provider has been requested for Not Test.
Not Test Tester
A provider selection is required.
Additional information is needed.
Is this information accurate and complete?
Yes It is accurate and complete.
No I need to update the information.
Previous
Next

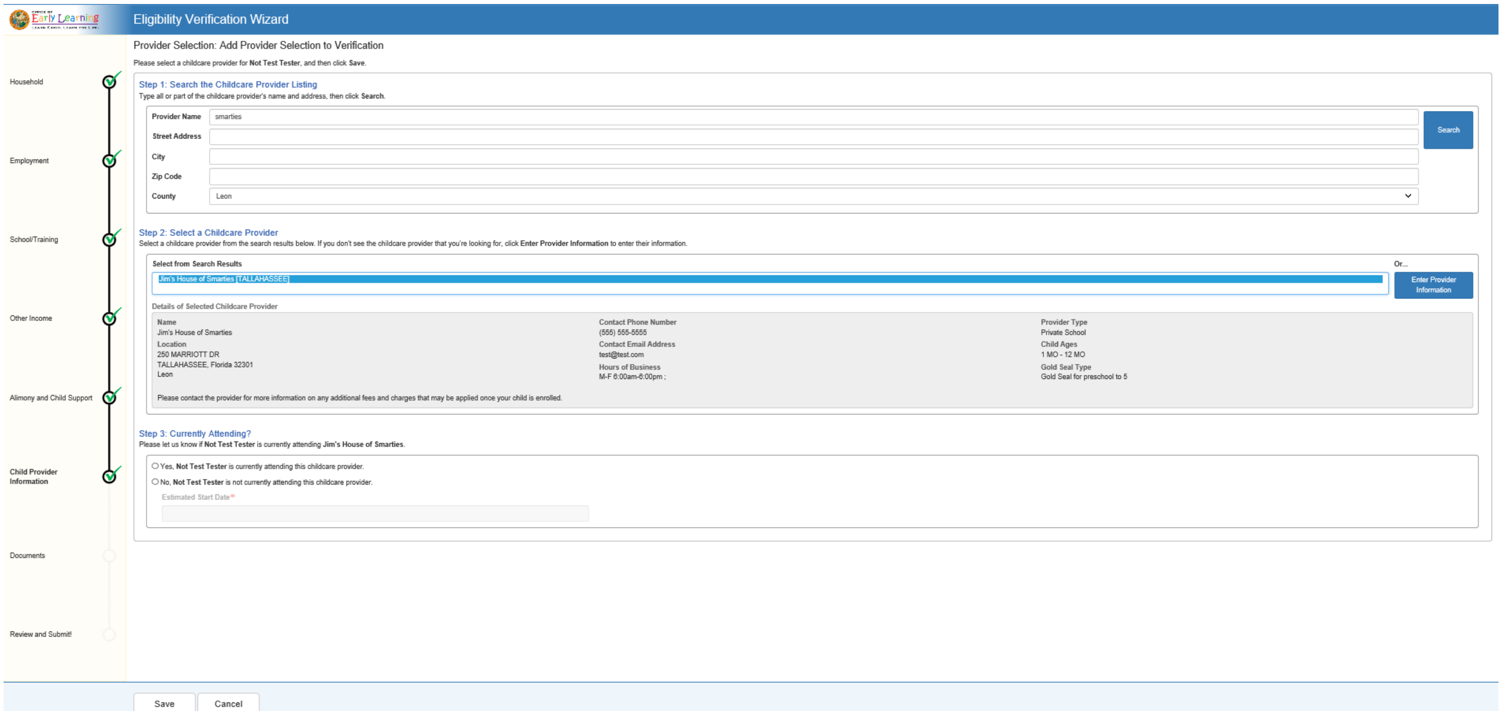

Early Learning
Eligibility Verification Wizard
Household
Employment
School/Training
Other Income
Alimony and Child Support
Child Provider Information
Documents
Review and Submit!
Provider Selections
Use the Add and Remove buttons to update your provider selections, making up to three selections per child. When everything looks good, click Yes.
Not Test Tester JR
Assistance in selecting a provider has been requested for Not Test.
Add Provider Selection... or I need help selecting a childcare provider.
Not Test Tester III
Assistance in selecting a provider has been requested for Not Test.
Add Provider Selection... or I need help selecting a childcare provider.
Not Test Tester IV
Assistance in selecting a provider has been requested for Not Test.
Add Provider Selection... or I need help selecting a childcare provider.
Not Test Tester
A provider selection is required.
Add Provider Selection... or I need help selecting a childcare provider.
Additional information is needed.
Is this information accurate and complete?
Yes It is accurate and complete.
No I need to update the information.
Previous
Next



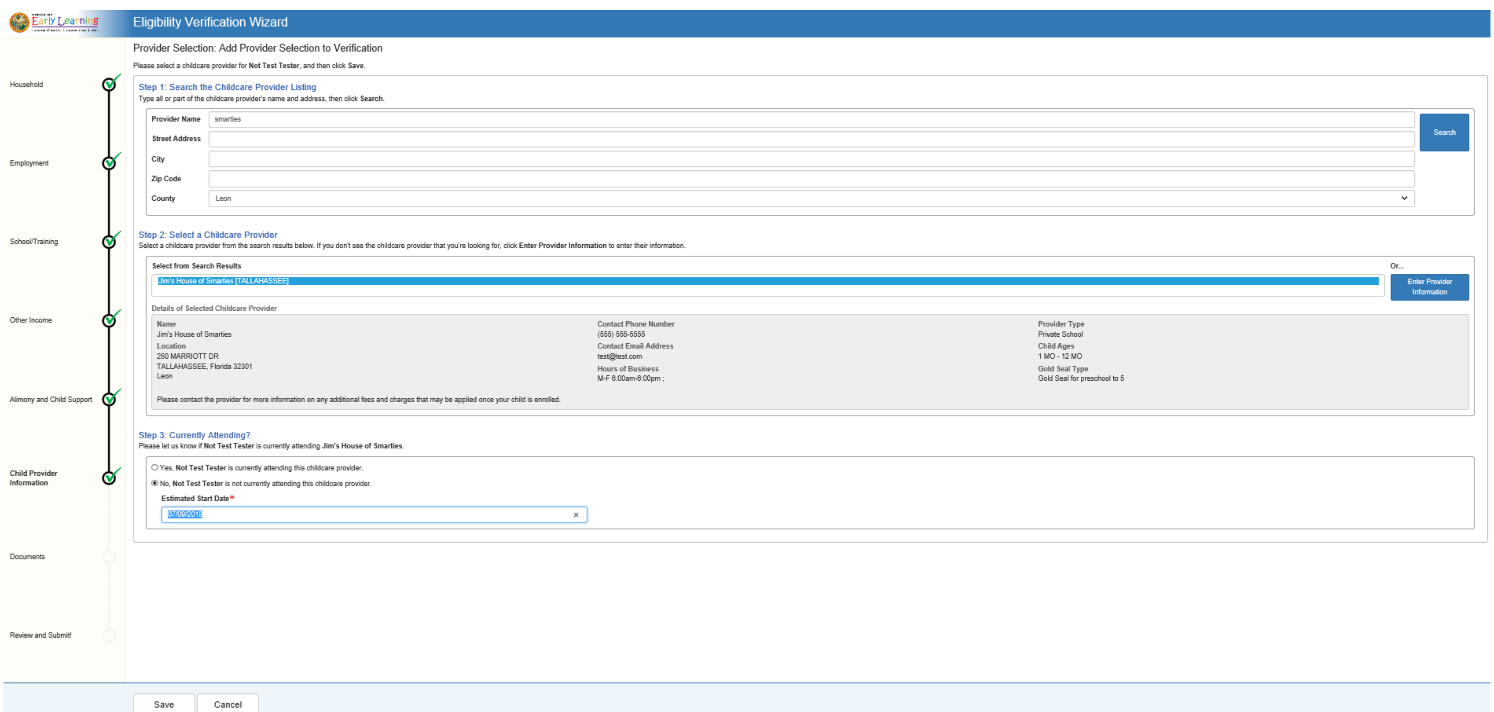
The family can enter a search parameter and click **Search** to find a provider.

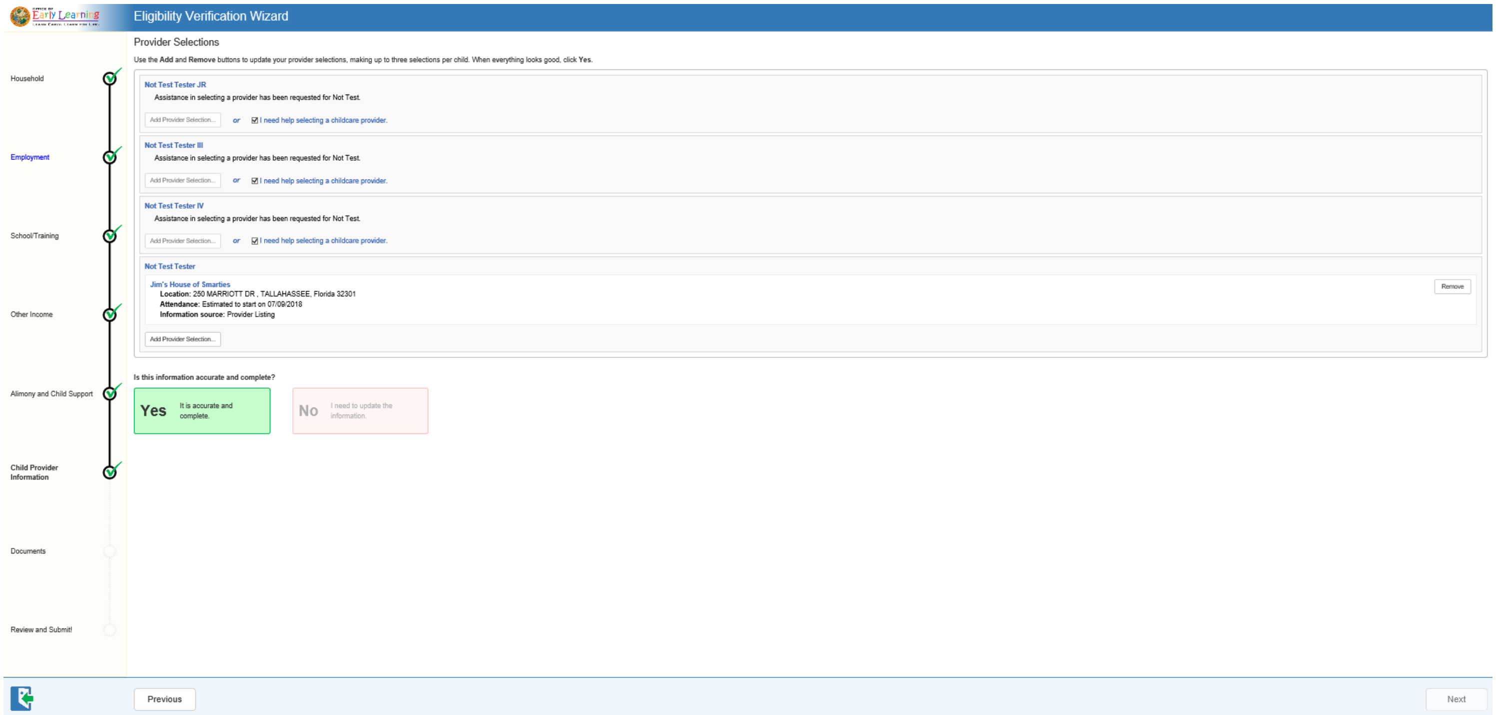


The family will select the provider returned from the search and select if the child is currently attending the provider.

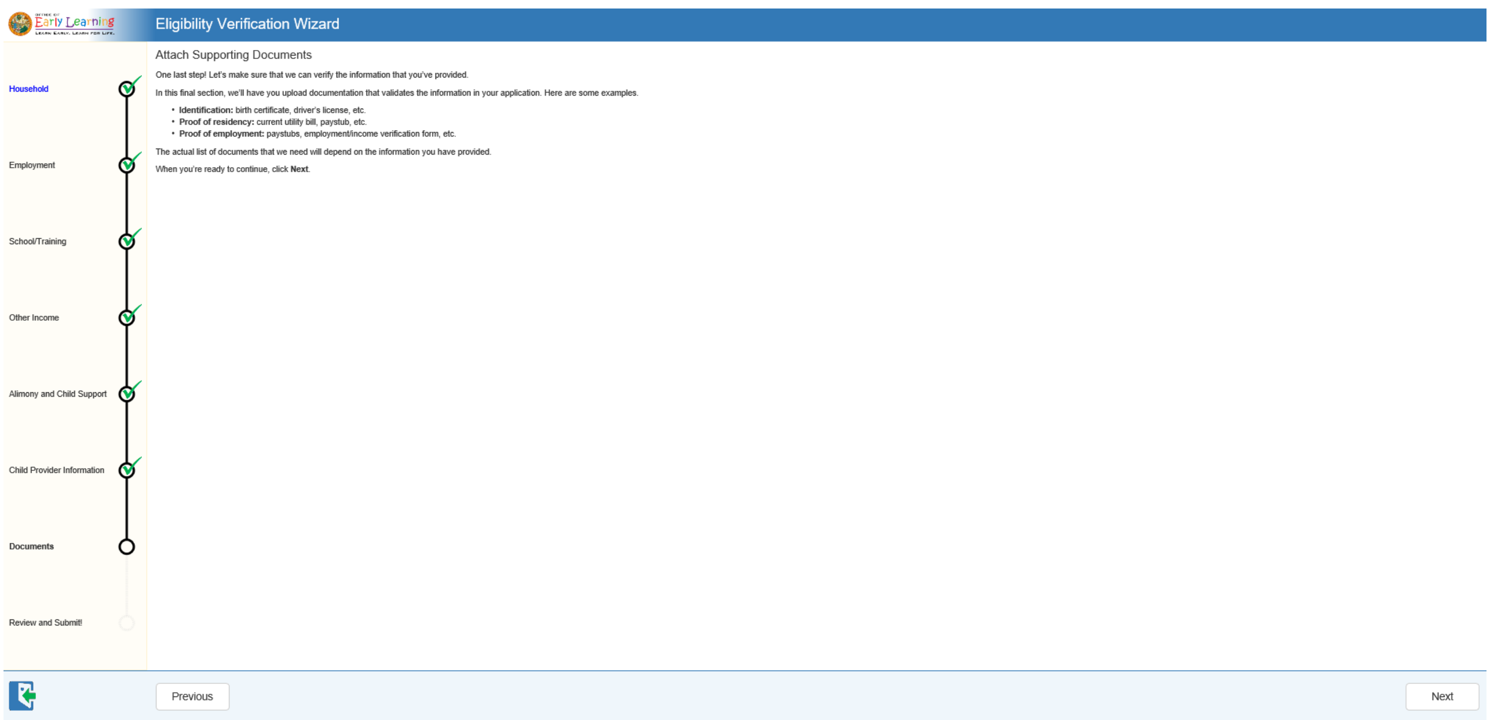


If the family selects that the child is not currently attending the provider, an Estimated Start Date must be entered.

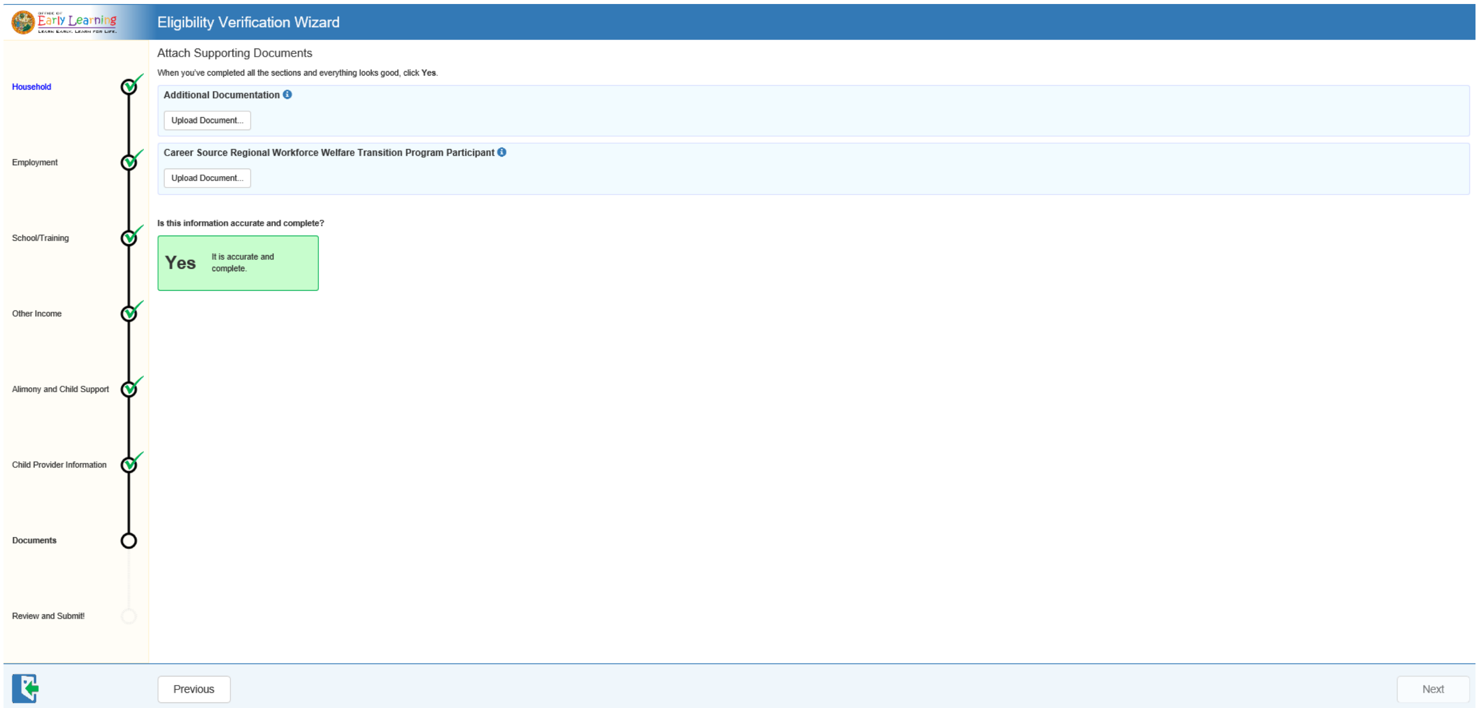


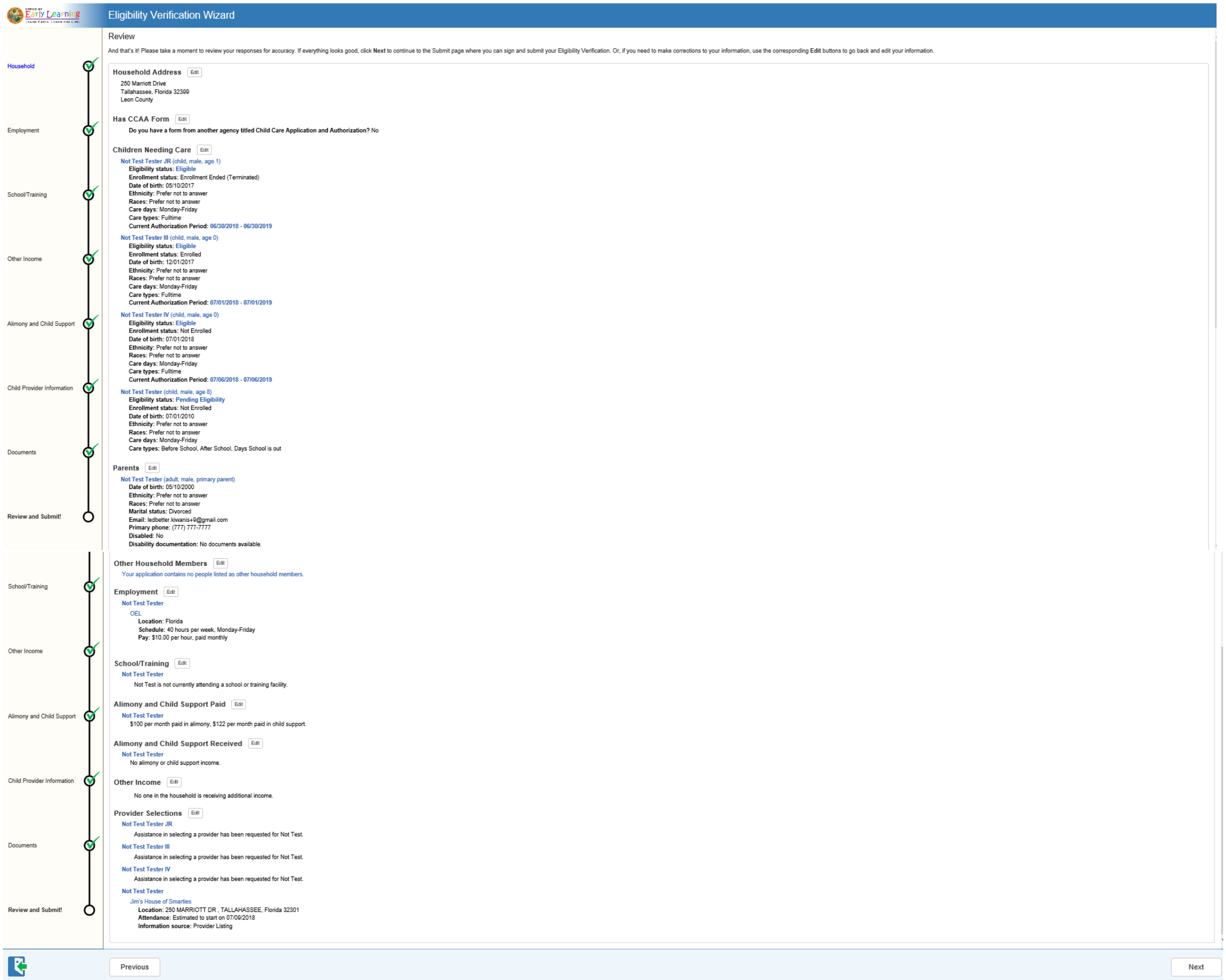


Eligibility Verification Wizard
Household
Employment
School/Training
Other Income
Alimony and Child Support
Child Provider Information
Documents
Review and Submit!
Provider Selections
Use the Add and Remove buttons to update your provider selections, making up to three selections per child. When everything looks good, click Yes.
Not Test Tester JR
Assistance in selecting a provider has been requested for Not Test.
Add Provider Selection...
or
I need help selecting a childcare provider.
Not Test Tester III
Assistance in selecting a provider has been requested for Not Test.
Add Provider Selection...
or
I need help selecting a childcare provider.
Not Test Tester IV
Assistance in selecting a provider has been requested for Not Test.
Add Provider Selection...
or
I need help selecting a childcare provider.
Not Test Tester
Jim's House of Smarties
Location: 250 MARRIOTT DR , TALLAHASSEE, Florida 32301
Attendance: Estimated to start on 07/09/2018
Information source: Provider Listing
Remove
Add Provider Selection...
Is this information accurate and complete?
Yes
It is accurate and complete.
No
I need to update the information.
Previous
Next



Eligibility Verification Wizard
Household
Employment
School/Training
Other Income
Alimony and Child Support
Child Provider Information
Documents
Review and Submit!
Attach Supporting Documents
One last step! Let's make sure that we can verify the information that you've provided.
In this final section, we'll have you upload documentation that validates the information in your application. Here are some examples.
Identification: birth certificate, driver's license, etc.
Proof of residency: current utility bill, paystub, etc.
Proof of employment: paystubs, employment/income verification form, etc.
The actual list of documents that we need will depend on the information you have provided.
When you're ready to continue, click Next.
Previous
Next


Eligibility Verification Wizard
Attach Supporting Documents
When you've completed all the sections and everything looks good, click Yes.
Additional Documentation
Upload Document...
Career Source Regional Workforce Welfare Transition Program Participant
Upload Document...
Is this information accurate and complete?
Yes
It is accurate and complete.
Household
Employment
School/Training
Other Income
Alimony and Child Support
Child Provider Information
Documents
Review and Submit!
Previous
Next



Eligibility Verification Wizard

Household
Employment
School/Training
Other Income
Alimony and Child Support
Child Provider Information
Documents
Review and Submit!

Review

And that's it! Please take a moment to review your responses for accuracy. If everything looks good, click **Next** to continue to the Submit page where you can sign and submit your Eligibility Verification. Or, if you need to make corrections to your information, use the corresponding **Edit** buttons to go back and edit your information.

Household Address Edit
250 Marriott Drive
Tallahassee, Florida 32399
Leon County

Has CCAA Form Edit
Do you have a form from another agency titled Child Care Application and Authorization? No

Children Needing Care Edit
Not Test Tester JR (child, male, age 1)
Eligibility status: Eligible
Enrollment status: Enrollment Ended (Terminated)
Date of birth: 05/10/2017
Ethnicity: Prefer not to answer
Races: Prefer not to answer
Care days: Monday-Friday
Care types: Fulltime
Current Authorization Period: 06/30/2018 - 06/30/2019

Not Test Tester III (child, male, age 0)
Eligibility status: Eligible
Enrollment status: Enrolled
Date of birth: 12/01/2017
Ethnicity: Prefer not to answer
Races: Prefer not to answer
Care days: Monday-Friday
Care types: Fulltime
Current Authorization Period: 07/01/2018 - 07/01/2019

Not Test Tester IV (child, male, age 0)
Eligibility status: Eligible
Enrollment status: Not Enrolled
Date of birth: 07/01/2018
Ethnicity: Prefer not to answer
Races: Prefer not to answer
Care days: Monday-Friday
Care types: Fulltime
Current Authorization Period: 07/06/2018 - 07/06/2019

Not Test Tester (child, male, age 8)
Eligibility status: Pending Eligibility
Enrollment status: Not Enrolled
Date of birth: 07/01/2010
Ethnicity: Prefer not to answer
Races: Prefer not to answer
Care days: Monday-Friday
Care types: Before School, After School, Days School is out

Parents Edit
Not Test Tester (adult, male, primary parent)
Date of birth: 05/10/2000
Ethnicity: Prefer not to answer
Races: Prefer not to answer
Marital status: Divorced
Email: ledbetter.kiwanis+9@gmail.com
Primary phone: (777) 777-7777
Disabled: No
Disability documentation: No documents available.

School/Training
Other Income
Alimony and Child Support
Child Provider Information
Documents
Review and Submit!

Other Household Members Edit
Your application contains no people listed as other household members.

Employment Edit
Not Test Tester
OEL
Location: Florida
Schedule: 40 hours per week, Monday-Friday
Pay: $10.00 per hour, paid monthly

School/Training Edit
Not Test Tester
Not Test is not currently attending a school or training facility.

Alimony and Child Support Paid Edit
Not Test Tester
$100 per month paid in alimony, $122 per month paid in child support.

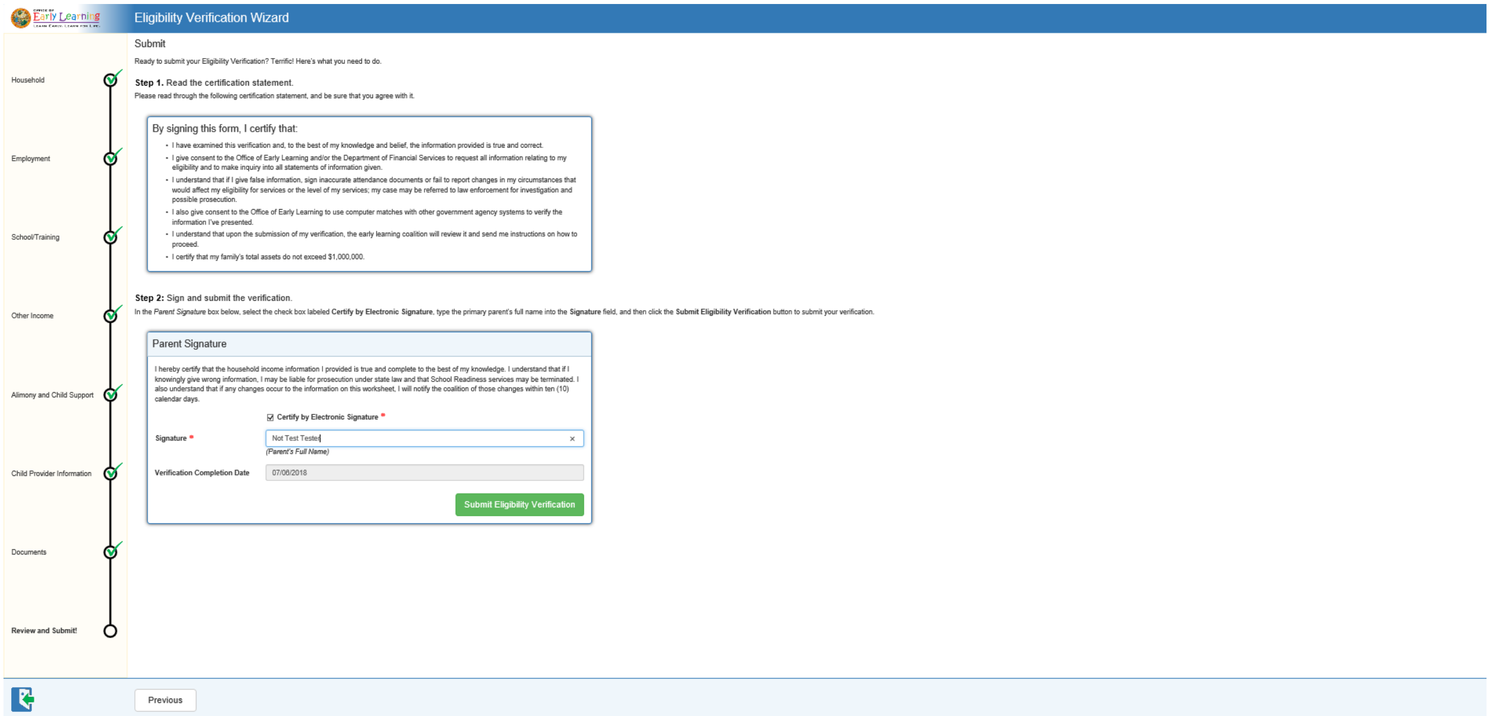
Alimony and Child Support Received Edit
Not Test Tester
No alimony or child support income.

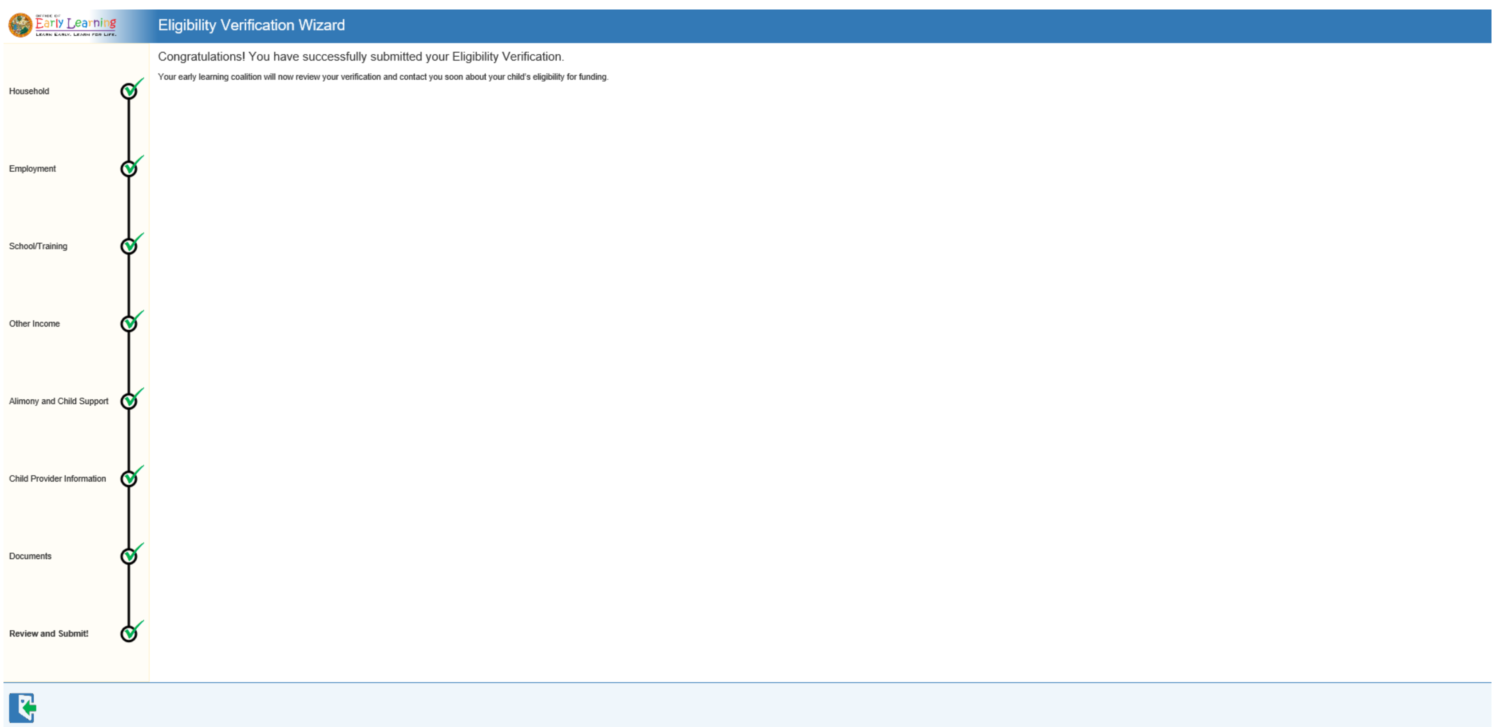
Other Income Edit
No one in the household is receiving additional income.

Provider Selections Edit
Not Test Tester JR
Assistance in selecting a provider has been requested for Not Test.
Not Test Tester III
Assistance in selecting a provider has been requested for Not Test.
Not Test Tester IV
Assistance in selecting a provider has been requested for Not Test.
Not Test Tester
Jim's House of Smarties
Location: 250 MARRIOTT DR , TALLAHASSEE, Florida 32301
Attendance: Estimated to start on 07/09/2018
Information source: Provider Listing

Previous | Next

To submit the Eligibility Verification, the family must check the **Certify by Electronic Signature** checkbox, enter a parent name, and click **Submit Eligibility Verification**.





The family will receive an email from **DONOTREPLY@oel.myflorida.com**.

Hello,

The ELC of the Big Bend Region has received the documents you submitted in the Family Portal to assist you with child care payments.

The ELC will review these documents and notify you on the status of your application within in 10 calendar days through the Family Portal account or your preferred contact method listed in your application.

The ELC of the Big Bend Region also provides Child Care Resource and Referral (CCR&R) services. CCR&R is the front door for family services in your county. CCR&R staff will let you know about community resources, child care listings and other information that may be of assistance to you. Please contact your early learning coalition and ask to speak to a CCR&R specialist for further assistance.

If you have any questions please contact the ELC of the Big Bend Region at the number listed below.

Thank you,

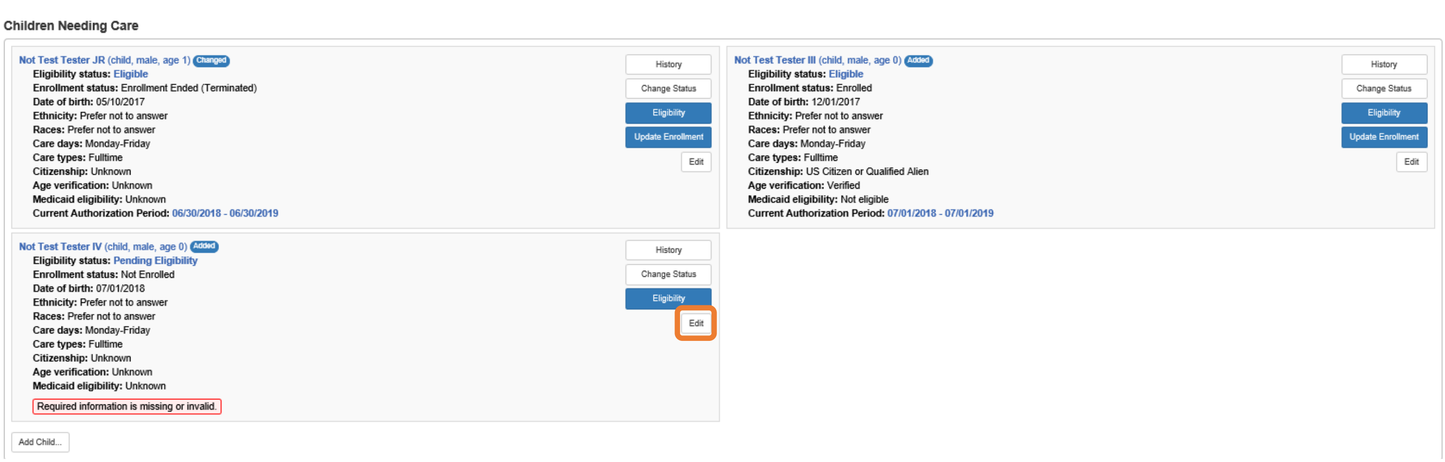
ELC of the Big Bend Region
8669739030
http://www.elcbigbend.org/

Please do not reply to this message. Replies to this message are routed to an unmonitored mailbox. If you have questions, please contact your early learning coalition.

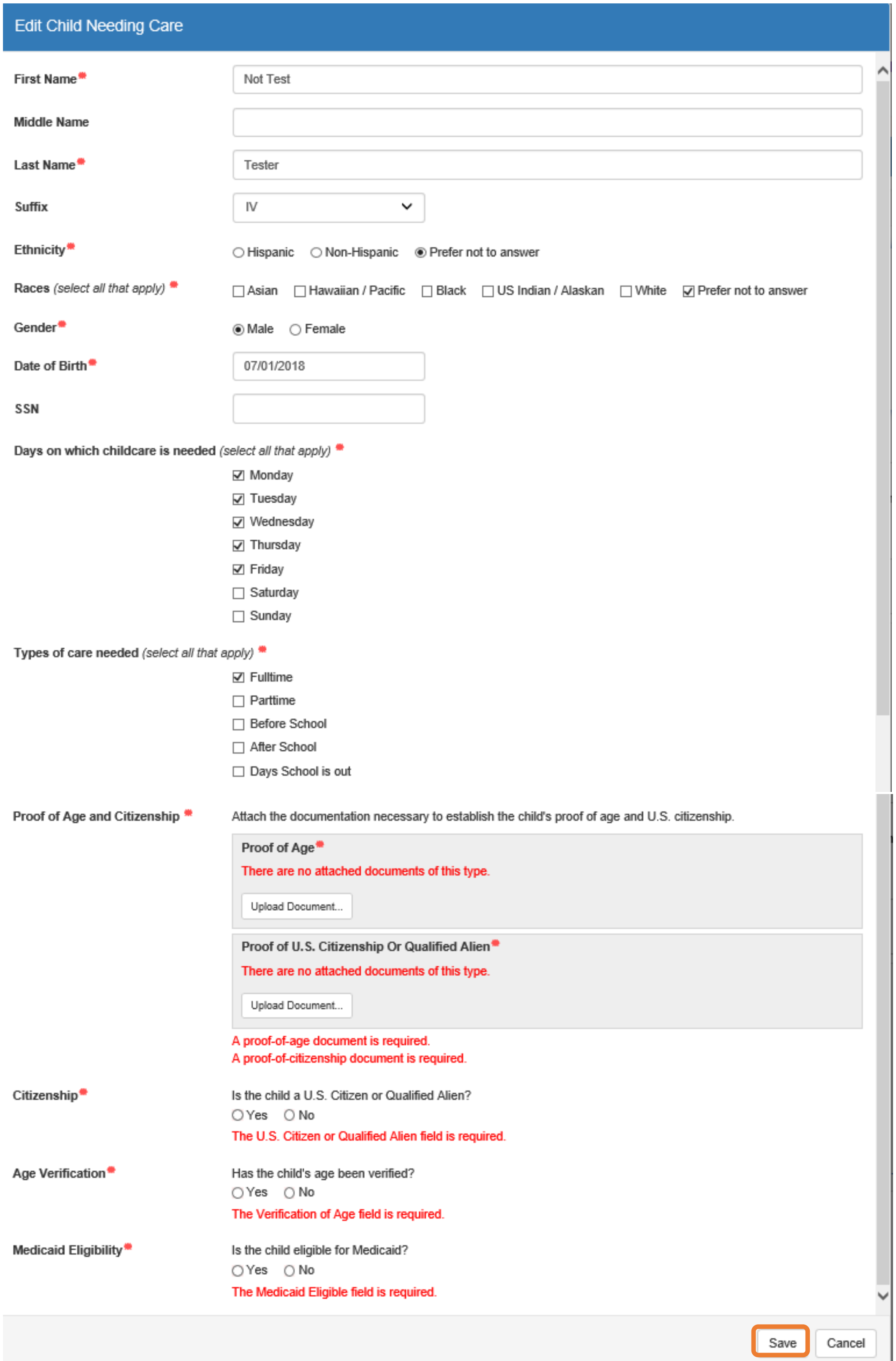
Scenario 2

If the SR application was set to **Pending Update**, the household was updated by the family, the child was added to the Waiting List by the coalition, and then a Funding Notification was sent, the Eligibility Verification Wizard has been skipped. To update the EV, there are two options: the family comes in to the coalition to update the EV, or the coalition sets the EV Household Status to **Pending Update** to allow the family to update the EV.

To update the EV at the coalition, click the **Edit** button for the new child.



Then, complete the missing required information in red and click **Save**.


Edit Child Needing Care

First Name* Not Test

Middle Name

Last Name* Tester

Suffix IV

Ethnicity* ○ Hispanic ○ Non-Hispanic ◉ Prefer not to answer

Races *(select all that apply)** ☐ Asian ☐ Hawaiian / Pacific ☐ Black ☐ US Indian / Alaskan ☐ White ☑ Prefer not to answer

Gender* ◉ Male ○ Female

Date of Birth* 07/01/2018

SSN

Days on which childcare is needed *(select all that apply)**

- ☑ Monday
- ☑ Tuesday
- ☑ Wednesday
- ☑ Thursday
- ☑ Friday
- ☐ Saturday
- ☐ Sunday

Types of care needed *(select all that apply)**

- ☑ Fulltime
- ☐ Parttime
- ☐ Before School
- ☐ After School
- ☐ Days School is out

Proof of Age and Citizenship * Attach the documentation necessary to establish the child's proof of age and U.S. citizenship.

Proof of Age*

There are no attached documents of this type.

Upload Document...

Proof of U.S. Citizenship Or Qualified Alien*

There are no attached documents of this type.

Upload Document...

A proof-of-age document is required.

A proof-of-citizenship document is required.

Citizenship* Is the child a U.S. Citizen or Qualified Alien?

○ Yes ○ No

The U.S. Citizen or Qualified Alien field is required.

Age Verification* Has the child's age been verified?

○ Yes ○ No

The Verification of Age field is required.

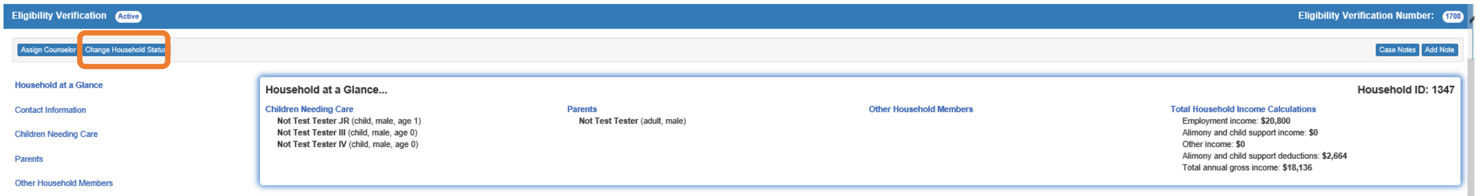
Medicaid Eligibility* Is the child eligible for Medicaid?

○ Yes ○ No

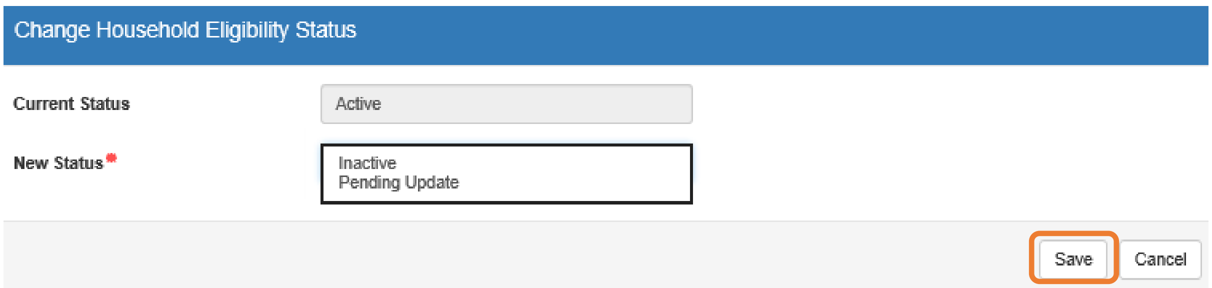
The Medicaid Eligible field is required.

Save Cancel

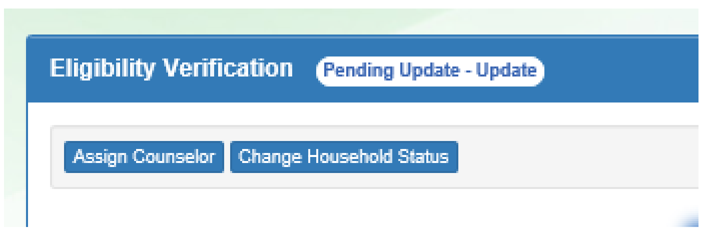
To allow the family to update the EV, set the EV Household Status to **Pending Update**. Click **Change Household Status**.



Select **Pending Update** for the New Status and click **Save**.



The EV Household Status is now **Pending Update – Update**.



The family will receive an email from **DONOTREPLY@oel.myflorida.com**.

Hello,

You have requested the ELC of the Big Bend Region to open your Family Portal account for you to make any necessary updates. If you did not make this request, please contact the ELC of the Big Bend Region as soon as possible. To access your family portal account, go to: https://familyservices.floridaearlylearning.com/

The ELC of the Big Bend Region also provides Child Care Resource and Referral (CCR&R) services. CCR&R is the front door for family services in your county. CCR&R staff will let you know about community resources, child care listings and other information that may be of assistance to you. Please contact your early learning coalition and ask to speak to a CCR&R specialist for further assistance.

If you have any questions you may contact the ELC of the Big Bend Region at the number listed below.

Thank you,

ELC of the Big Bend Region
8669739030
http://www.elcbigbend.org/

Please do not reply to this message. Replies to this message are routed to an unmonitored mailbox. If you have questions, please contact your early learning coalition.

The family will see an **Update Eligibility** button on their Family Portal Profile page.

School Readiness Funding

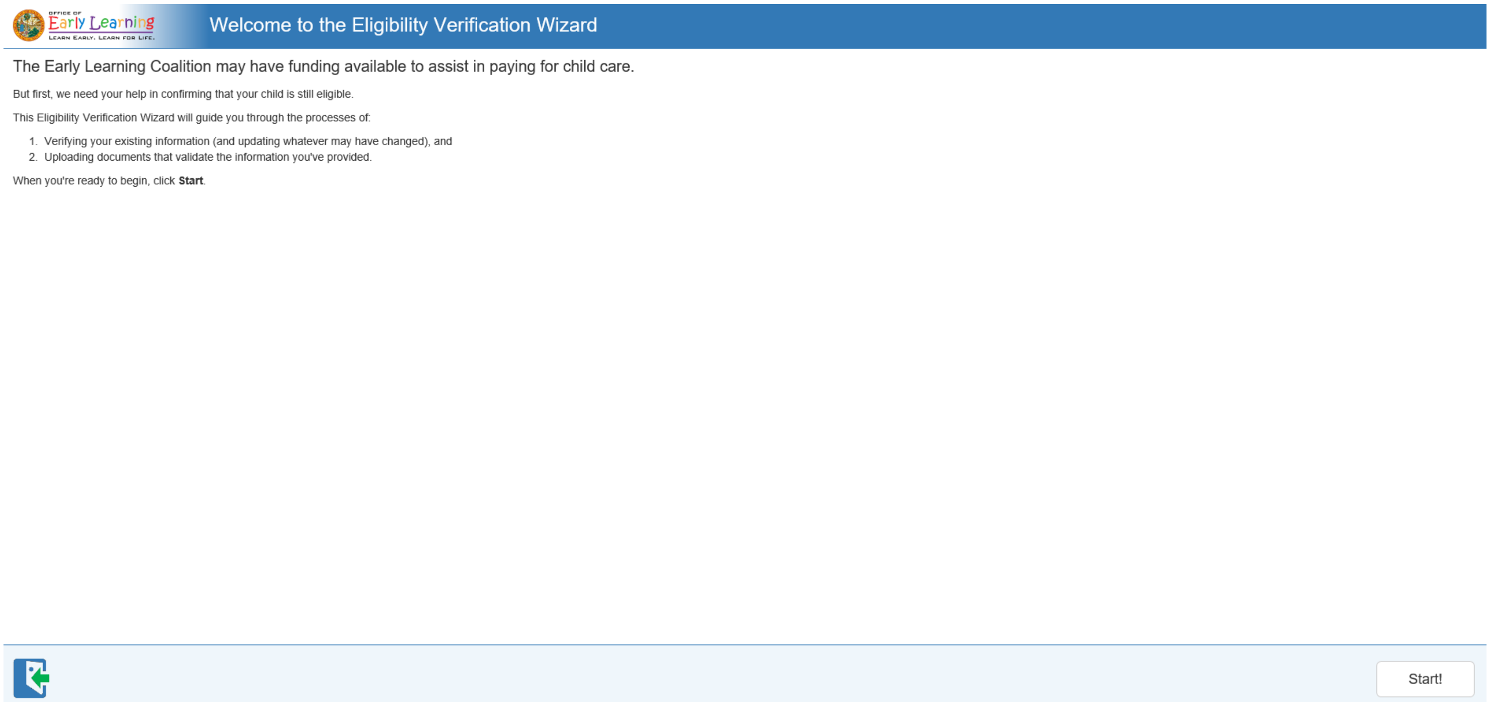
The following table shows the School Readiness funding status for all of the children in your household.

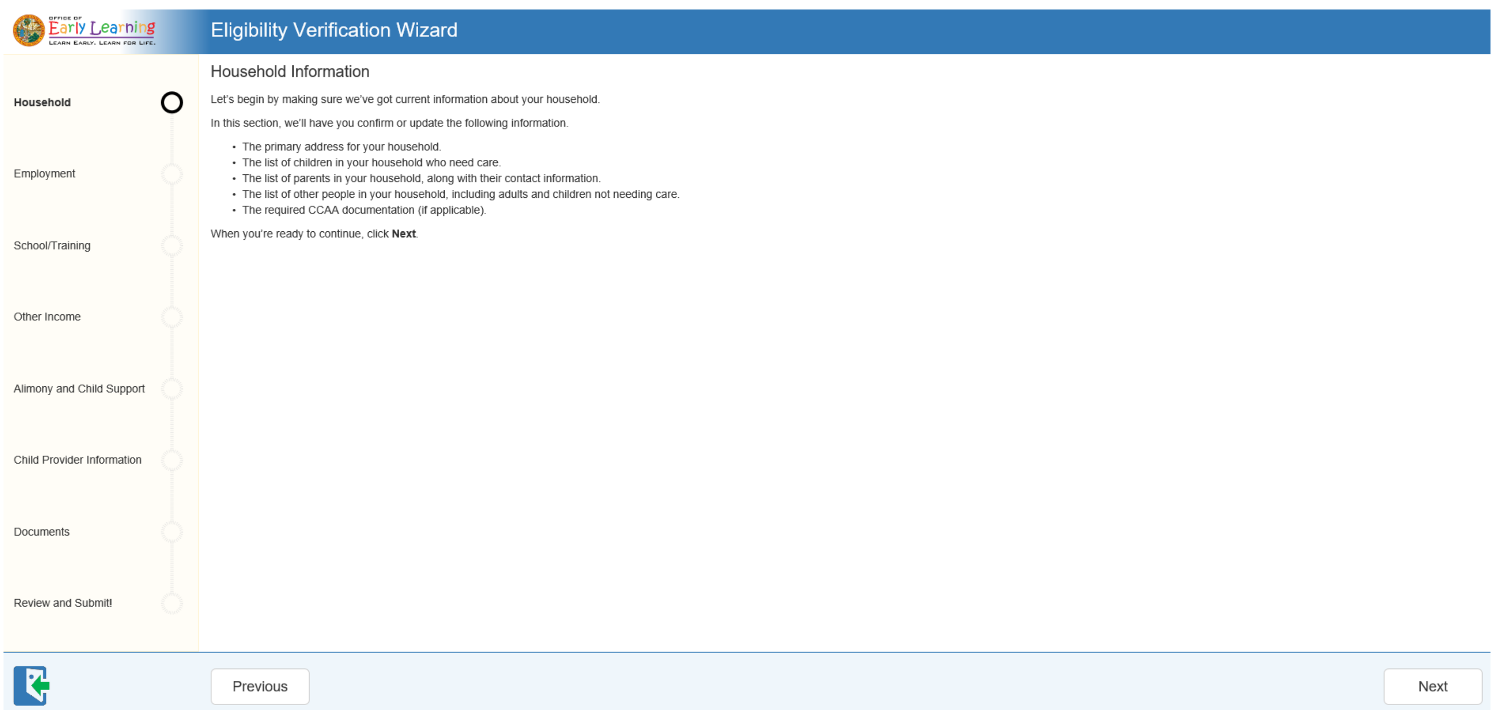
Child Name	EV Number	Status	Enrollment Status	Provider Name	Payment Certificate
Not Test Tester JR	EV_0000001392	Eligible	-	-	-
Not Test Tester III	EV_0000001675	Eligible	Enrolled	Jim's House of Smarties	View
Not Test Tester IV	EV_0000001708	Pending Eligibility	-	-	-

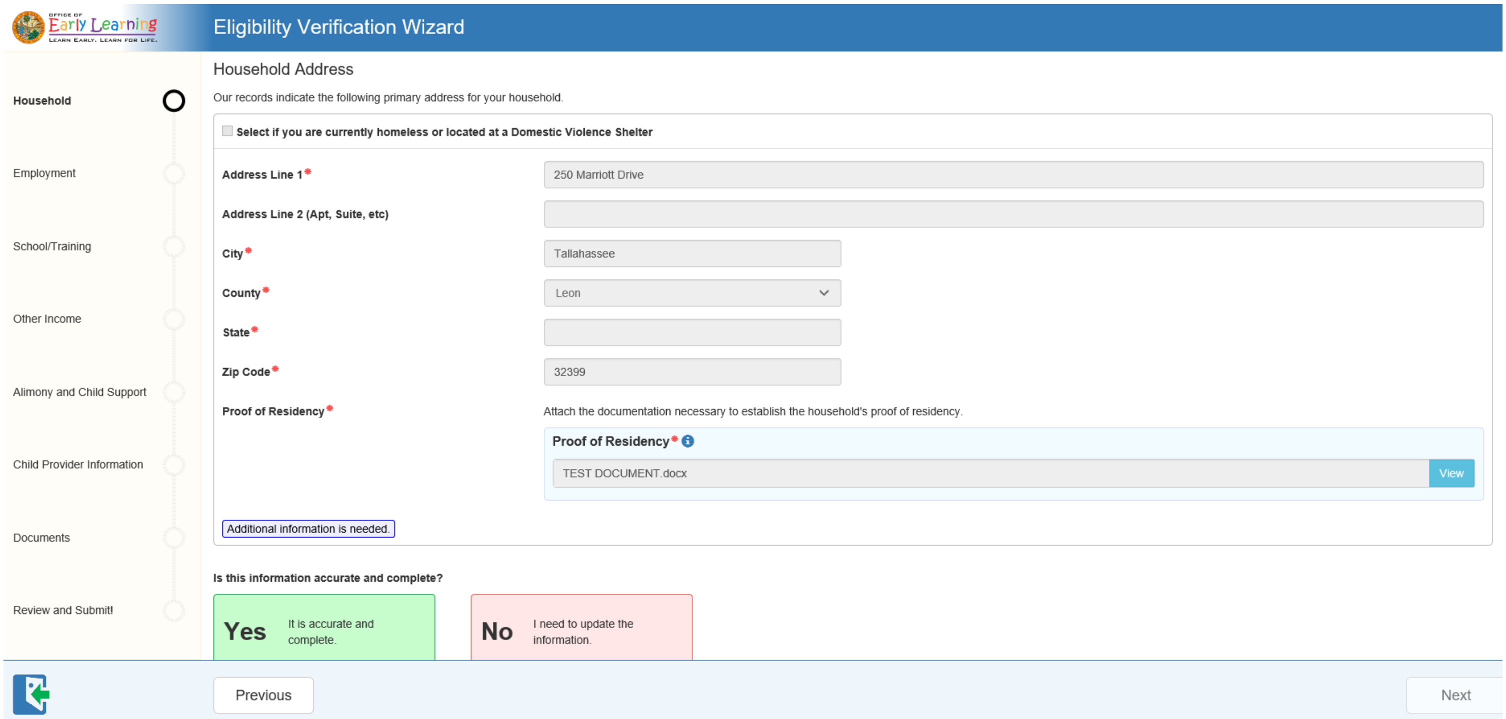
Please click the Update Eligibility button to update your family's eligibility.

Update Eligibility

When the family clicks **Update Eligibility**, the Eligibility Verification Wizard is launched.







Eligibility Verification Wizard

Household Address

Our records indicate the following primary address for your household.

Select if you are currently homeless or located at a Domestic Violence Shelter

Address Line 1*	250 Marriott Drive
Address Line 2 (Apt, Suite, etc)	
City*	Tallahassee
County*	Leon
State*	
Zip Code*	32399
Proof of Residency*	Attach the documentation necessary to establish the household's proof of residency.

Proof of Residency*

TEST DOCUMENT.docx View

Additional information is needed.

Is this information accurate and complete?

Yes It is accurate and complete.

No I need to update the information.

Household

Employment

School/Training

Other Income

Alimony and Child Support

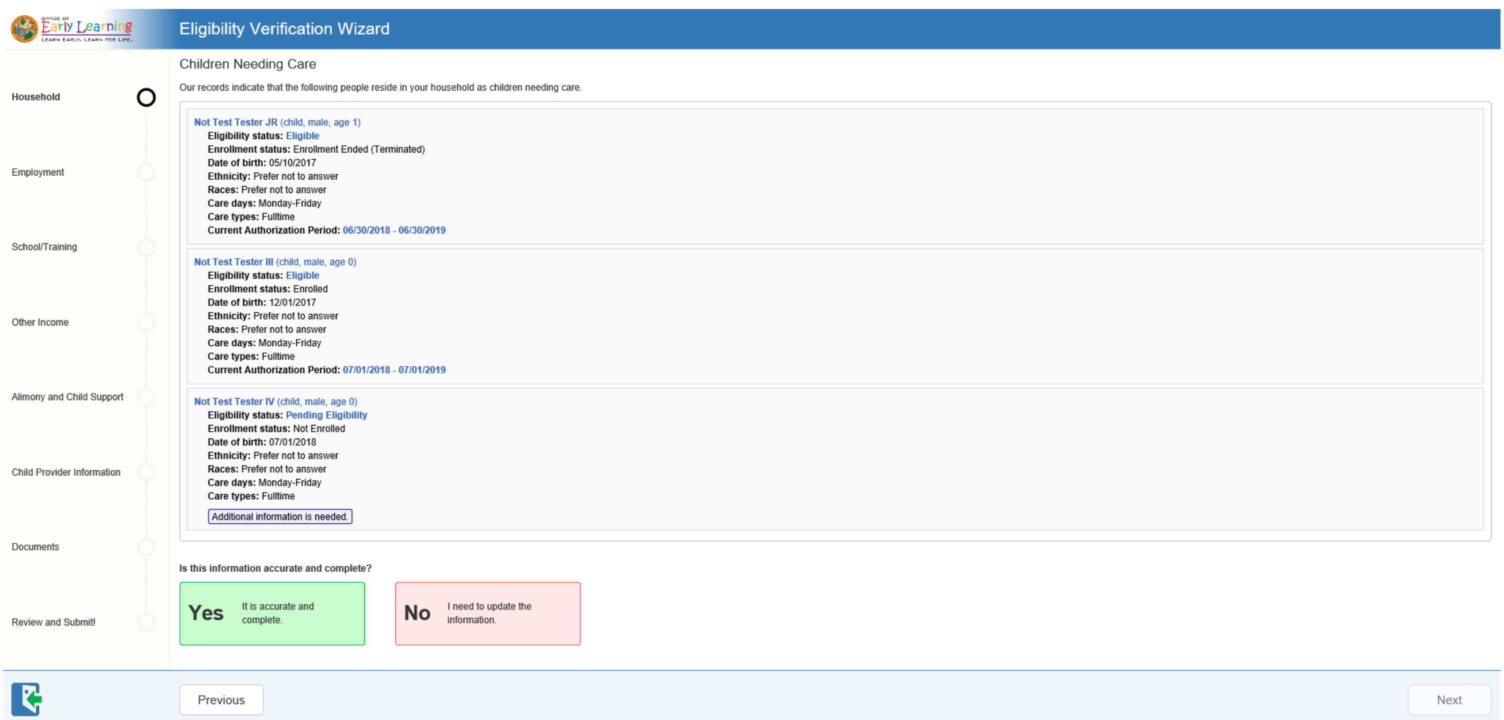
Child Provider Information

Documents

Review and Submit!

Previous

Next



Eligibility Verification Wizard

Children Needing Care

Our records indicate that the following people reside in your household as children needing care.

Not Test Tester JR (child, male, age 1)
Eligibility status: Eligible
Enrollment status: Enrollment Ended (Terminated)
Date of birth: 05/10/2017
Ethnicity: Prefer not to answer
Races: Prefer not to answer
Care days: Monday-Friday
Care types: Fulltime
Current Authorization Period: 06/30/2018 - 06/30/2019

Not Test Tester III (child, male, age 0)
Eligibility status: Eligible
Enrollment status: Enrolled
Date of birth: 12/01/2017
Ethnicity: Prefer not to answer
Races: Prefer not to answer
Care days: Monday-Friday
Care types: Fulltime
Current Authorization Period: 07/01/2018 - 07/01/2019

Not Test Tester IV (child, male, age 0)
Eligibility status: Pending Eligibility
Enrollment status: Not Enrolled
Date of birth: 07/01/2018
Ethnicity: Prefer not to answer
Races: Prefer not to answer
Care days: Monday-Friday
Care types: Fulltime

Additional information is needed.

Is this information accurate and complete?

Yes It is accurate and complete.

No I need to update the information.

Household

Employment

School/Training

Other Income

Alimony and Child Support

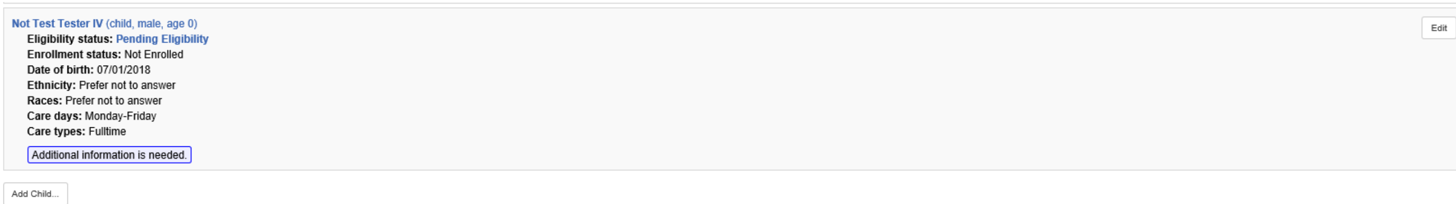
Child Provider Information

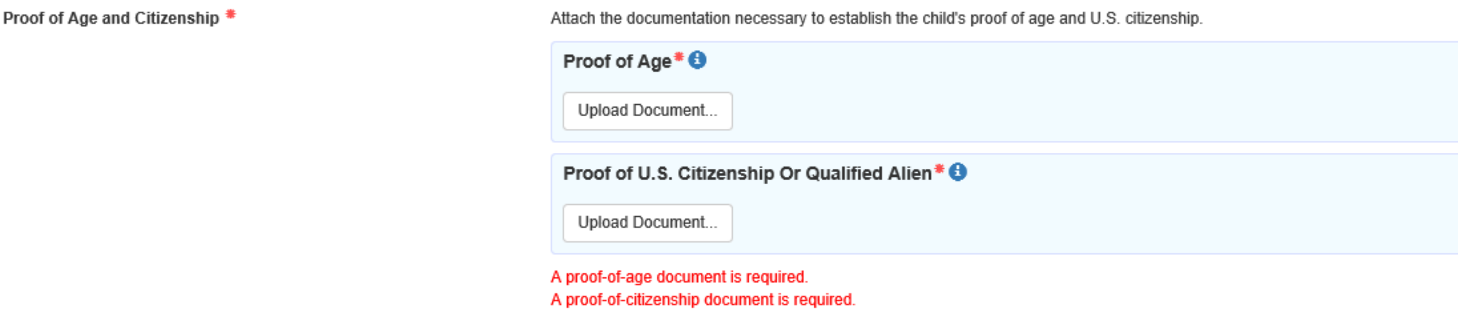
Documents

Review and Submit!

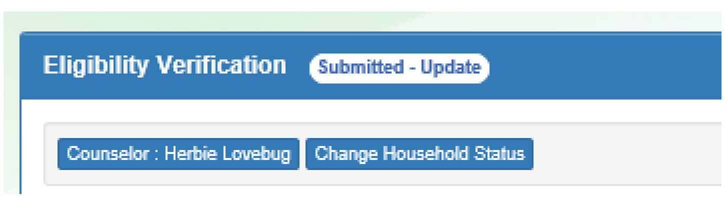
Previous

Next





After the family completes and submits the Eligibility Verification Wizard, the EV Household Status is **Submitted – Update**.



The family will receive an email from **DONOTREPLY@oel.myflorida.com**.

Hello,

The ELC of the Big Bend Region has received the documents you submitted in the Family Portal to assist you with child care payments.

The ELC will review these documents and notify you on the status of your application within in 10 calendar days through the Family Portal account or your preferred contact method listed in your application.

The ELC of the Big Bend Region also provides Child Care Resource and Referral (CCR&R) services. CCR&R is the front door for family services in your county. CCR&R staff will let you know about community resources, child care listings and other information that may be of assistance to you. Please contact your early learning coalition and ask to speak to a CCR&R specialist for further assistance.

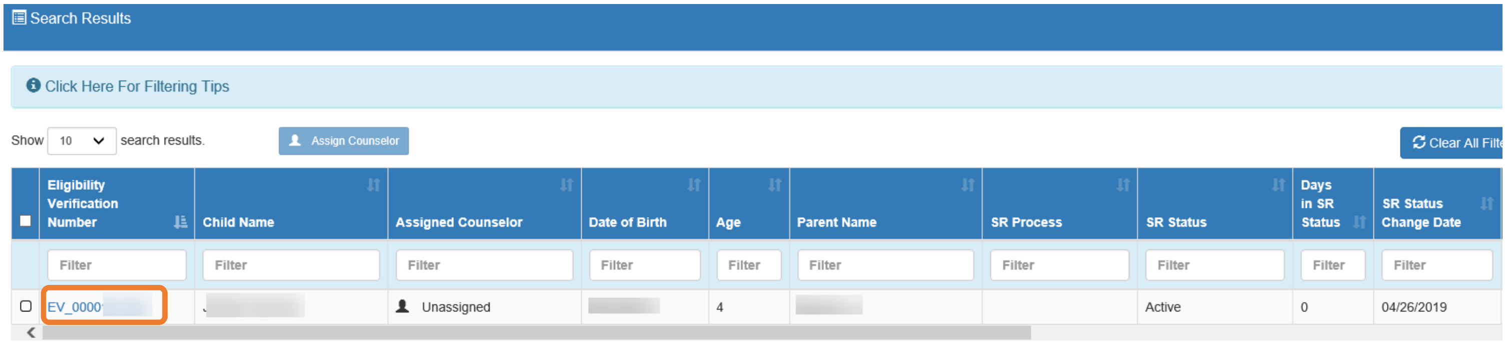
If you have any questions please contact the ELC of the Big Bend Region at the number listed below.

Thank you,

ELC of the Big Bend Region
8669739030
http://www.elcbigbend.org/

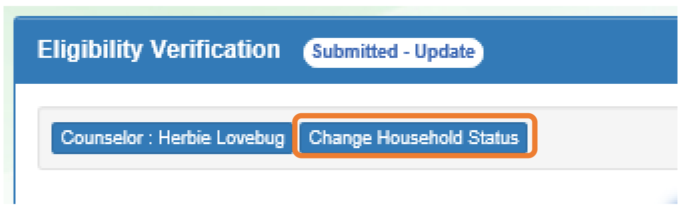
Please do not reply to this message. Replies to this message are routed to an unmonitored mailbox. If you have questions, please contact your early learning coalition.

Use the search feature and enter the first and last name of the parent or child or the EV Number. Click the **EV Number**.

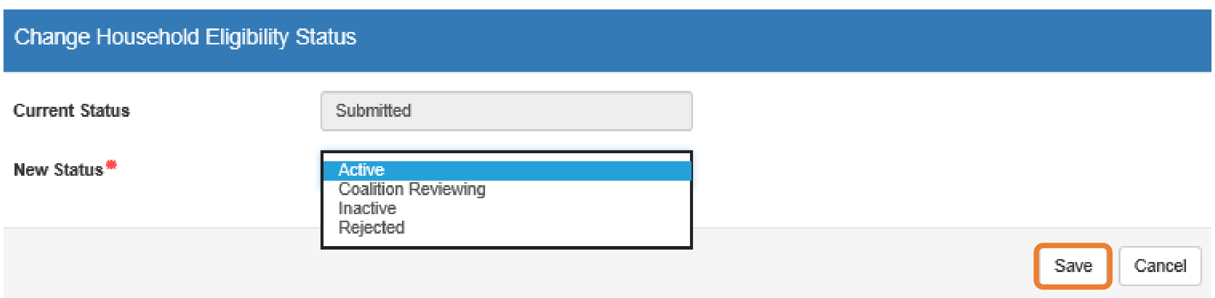


Eligibility Verification Review

Once the family has completed the EV Wizard, the coalition must review the EV. Click **Change Household Status**.

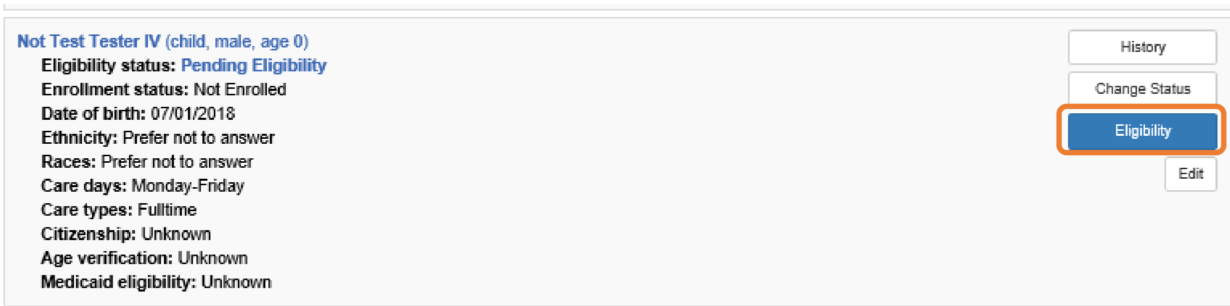


Select Active, or Coalition Reviewing if more review is needed. Click **Save**.

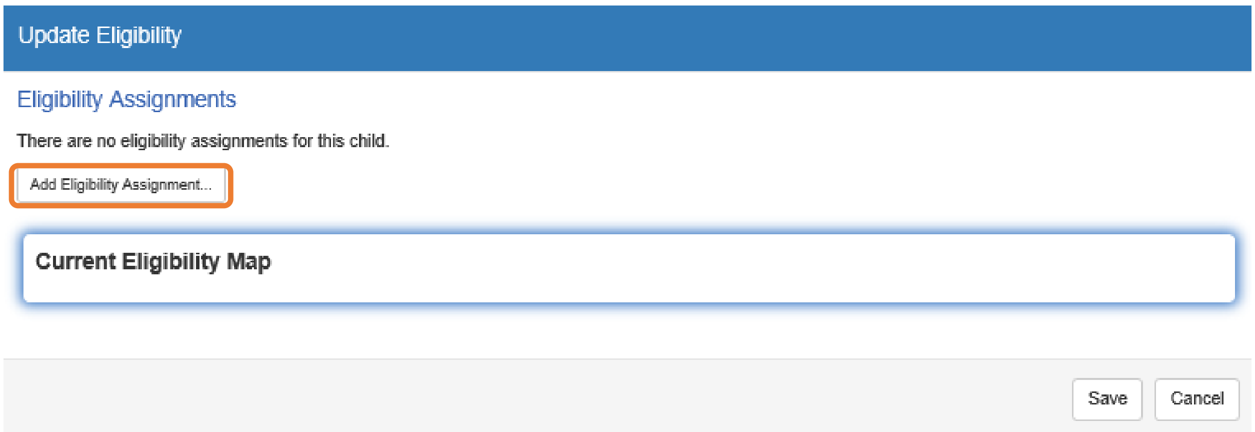


Assign Eligibility

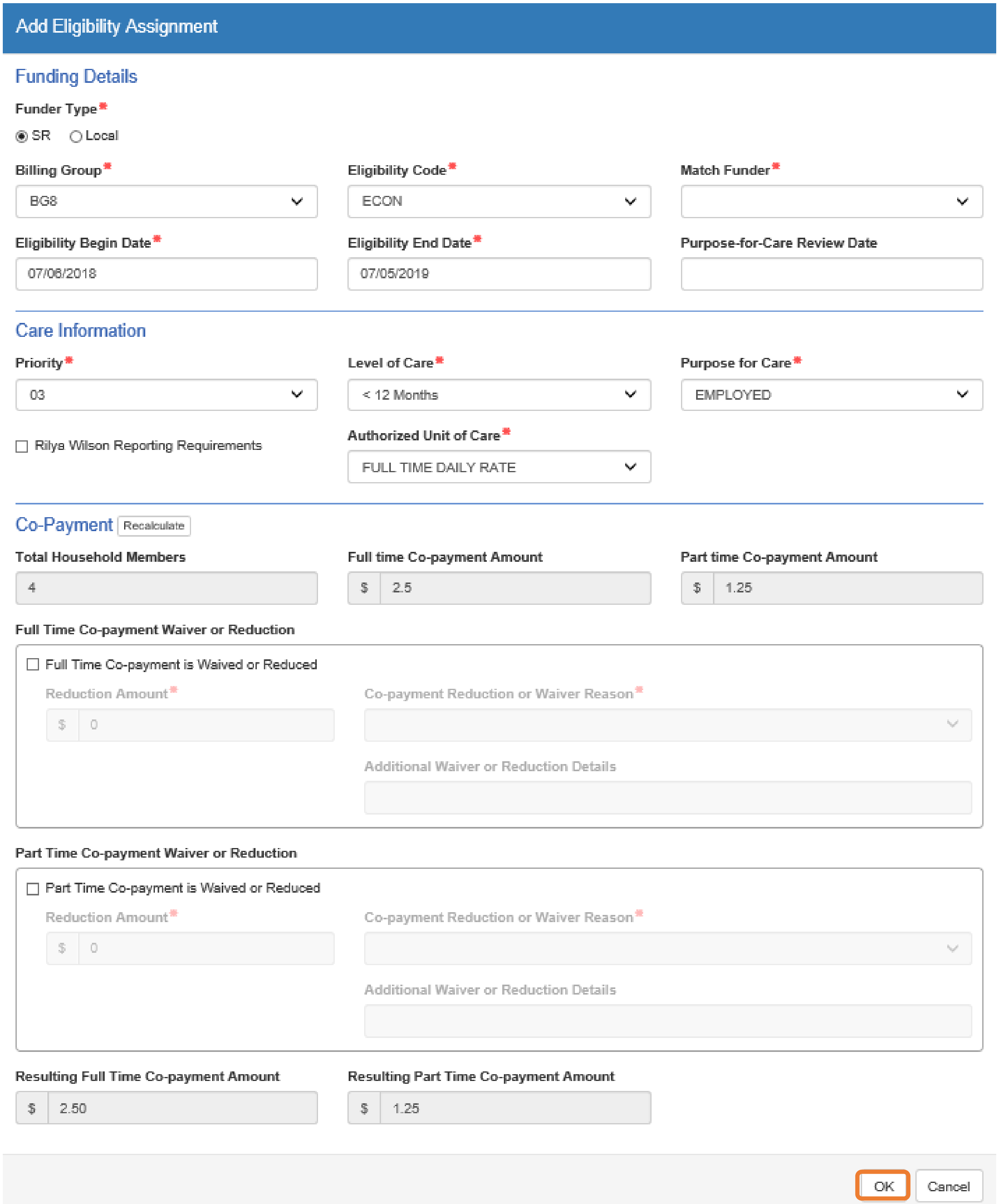
Set the Household Status to **Active**. The **Eligibility** button will then display. Click the **Eligibility** button.



Click **Add Eligibility Assignment…**



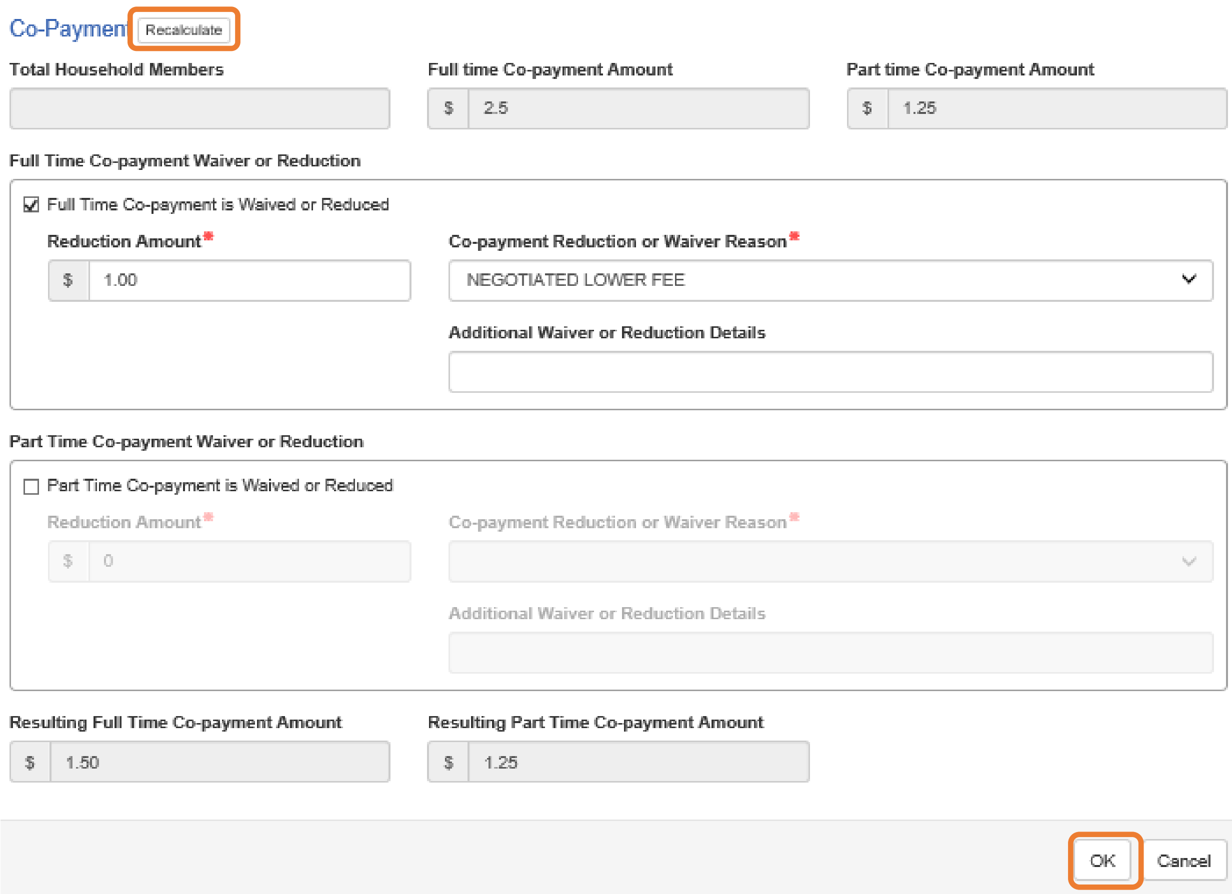
Complete the Add Eligibility Assignment screen, and click **OK**.



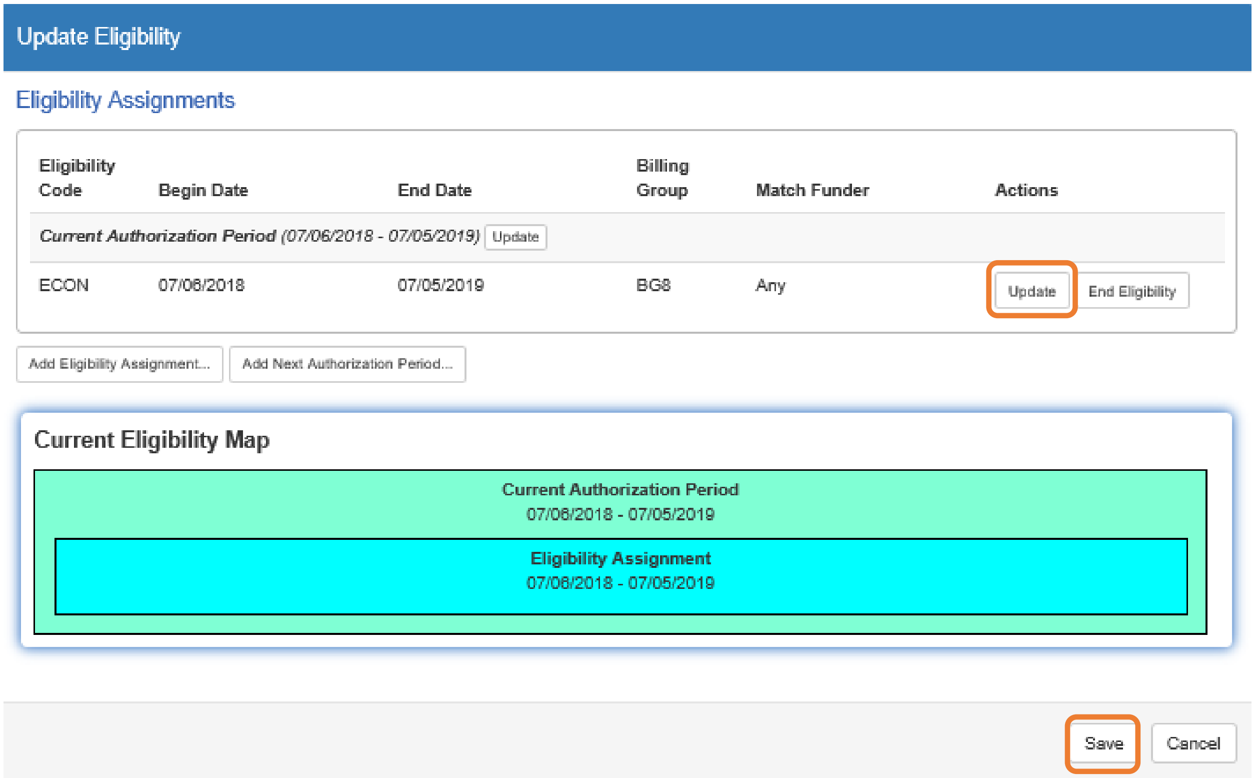
The Full-Time and Part-Time co-payment amounts are calculated based on the number of people in the household and the total annual household income. If changes are made to either the household size or the annual income, click the **<u>Recalculate</u>** button to update the assessed co-payment amounts.

If a co-payment waiver or reduction is approved, enter the Reduction Amount, and <u>select the reduction or waiver reason for both the Full-Time and Part-Time amounts</u>. Click **<u>OK</u>**.

NOTE: The amount entered in the Reduction Amount field is not the new total for the co-payment, but the actual amount of the reduced co-payment. Amounts that result in a negative full-time and part-time copayment amount (ex: -1.00) cannot be saved. Resulting copayment amounts that are greater than the highest approved full-time and part-time amounts for the program year cannot be saved. Resulting copayment amounts must be between $0.00 and the highest approved amount in the coalition sliding fee schedule.



After the **OK** button is clicked, the Update Eligibility screen will display. Click **Save**, or click the **Update** button to continue making edits.



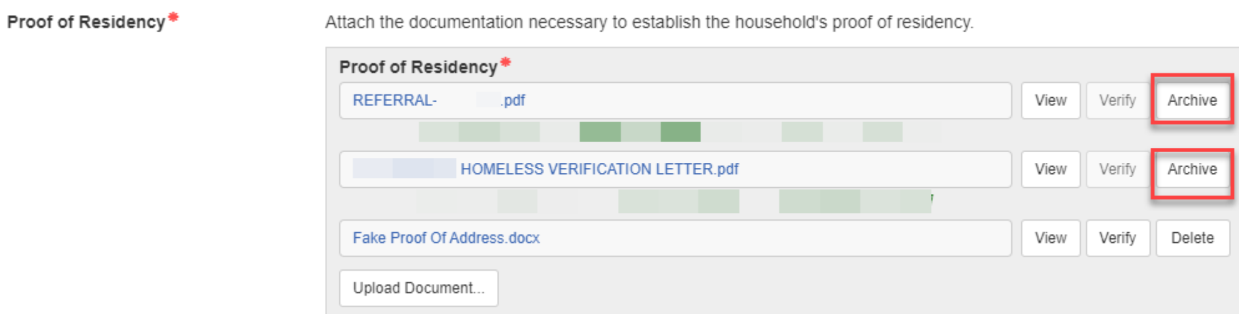
Archiving Eligibility Documents

An Archive button is available for all Eligibility documents on the Eligibility Verification screen.

<u>**Eligibility Documents Sections**</u>

- Contact Information – Proof of Residency
- Child Edit Info – Proof of Age and Citizenship
- Parent Edit Info – Required Document
- Other Household Member – Proof of Identify
- Employment – Proof of Employment
- School Training – Proof of School/Training
- Other Income – Proof of Other Household Income
- Documents – All types

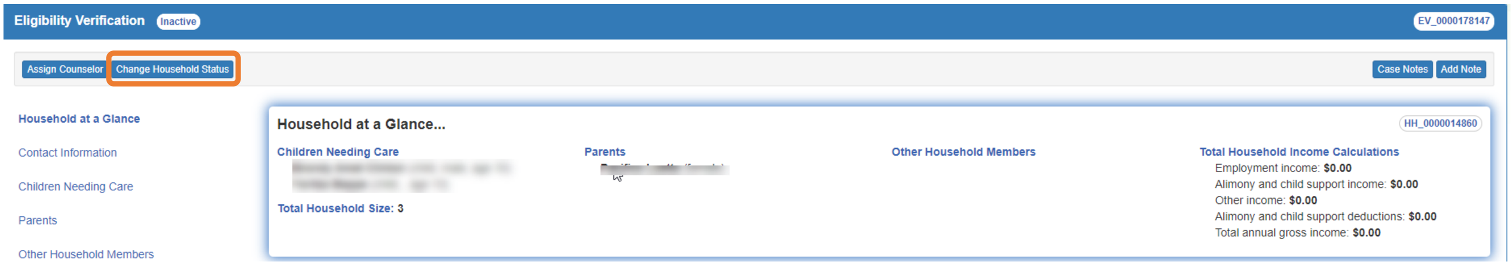
Users are able to click <u>**Archive**</u> and remove the document from the documents listed on the EV. When the user hovers over <u>**Archive**</u>, a Tool Tip displays stating: "**Document will be removed from this list and stored in the Household Document Hub.**" Archiving the document will also create a household case note.



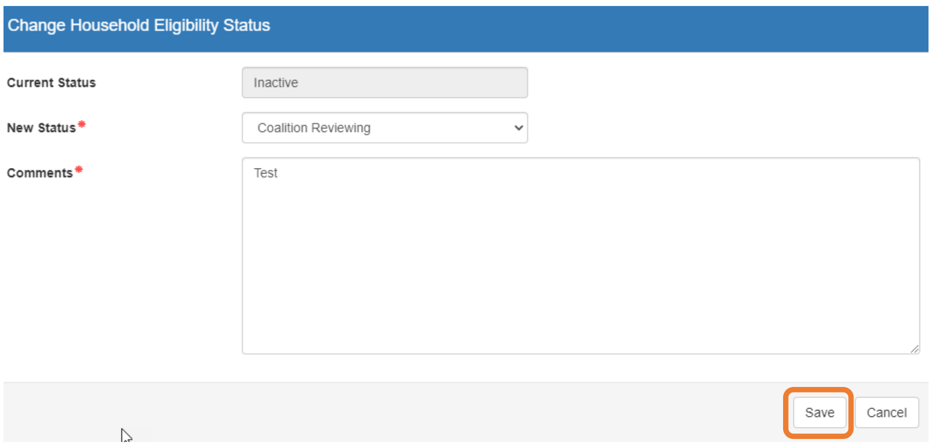
Reactivating a Household

An **Inactive** household can be reactivated to allow the creation of a new eligibility verification number, eligibility assignment, and SR enrollment for children needing care.

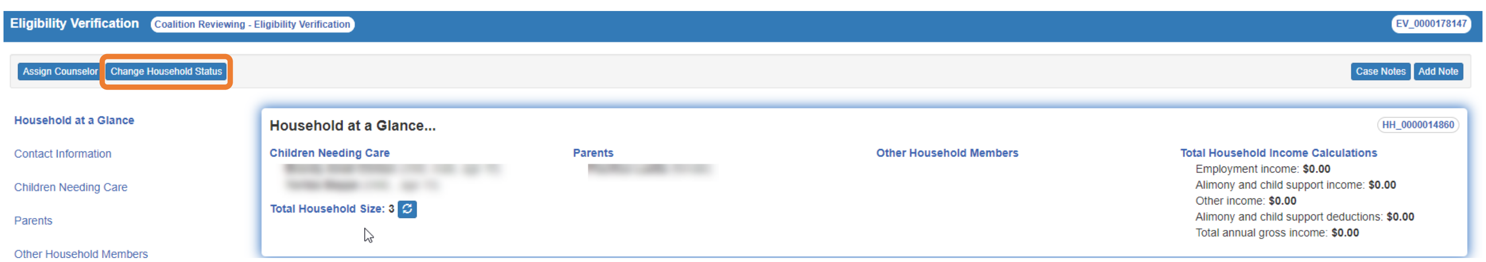
From the Eligibility Verification screen, click **Change Household Status**.



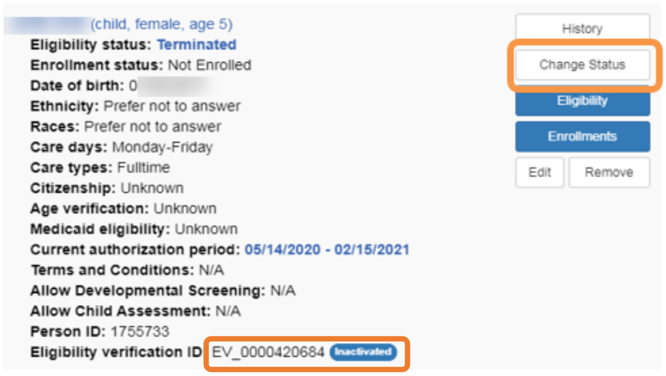
The only household status option is **Coalition Reviewing**. Enter a Comment, and click **Save**.



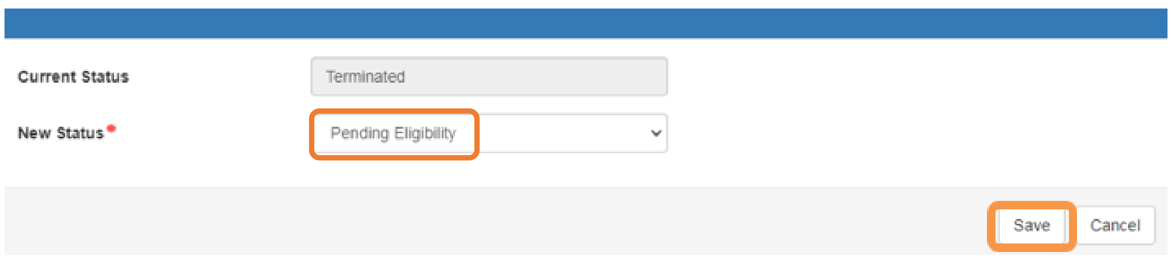
The status is now **Coalition Reviewing – Eligibility Verification**. After review, click **Change Household Status** to change the status.



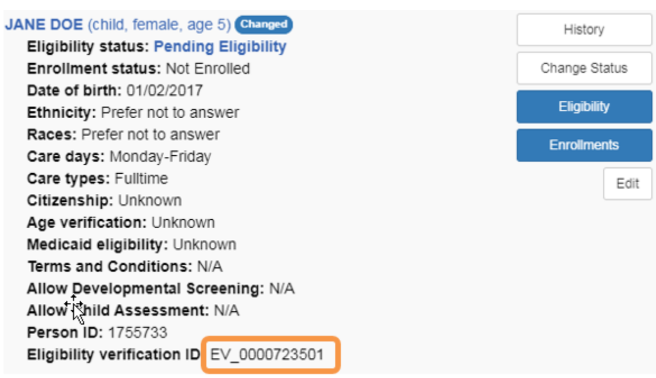
Each child's Eligibility Verification status is **Inactivated**, so the applicable child(ren) in the Children Needing Care section must be reactivated. Click **Change Status**.



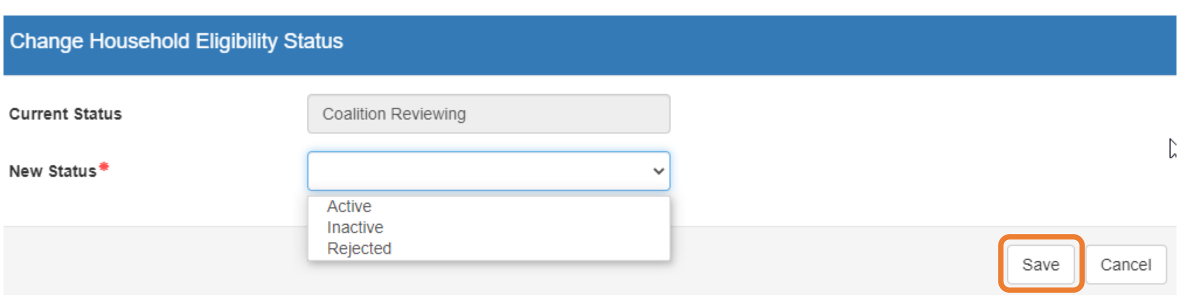
Select **Pending Eligibility** under New Status and click **Save**.



The child's status is now **Pending Eligibility**. A new EV number is generated for the child. Repeat the process for any additional children who are eligible for services.

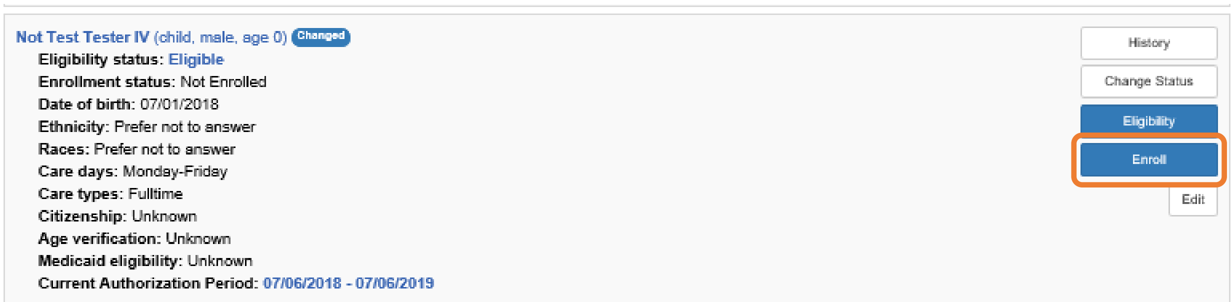


Now, the available household statuses are **Active**, **Inactive**, and **Rejected**. Select the new status and click **Save**.

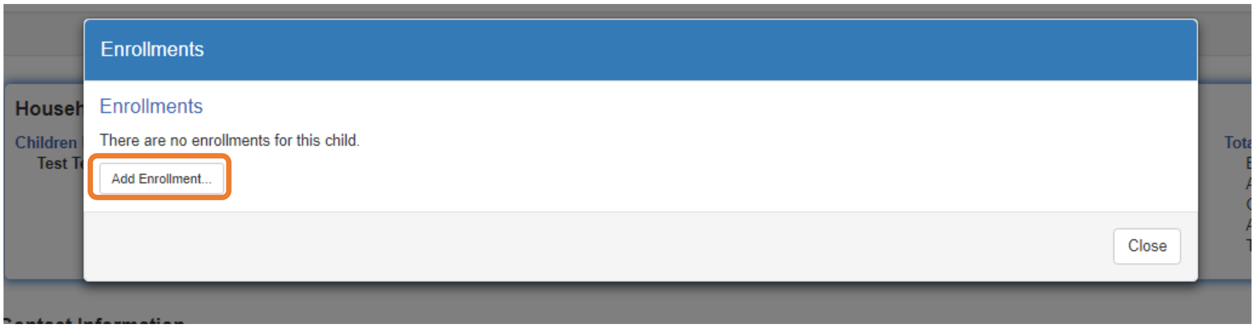


SR Enrollment Process

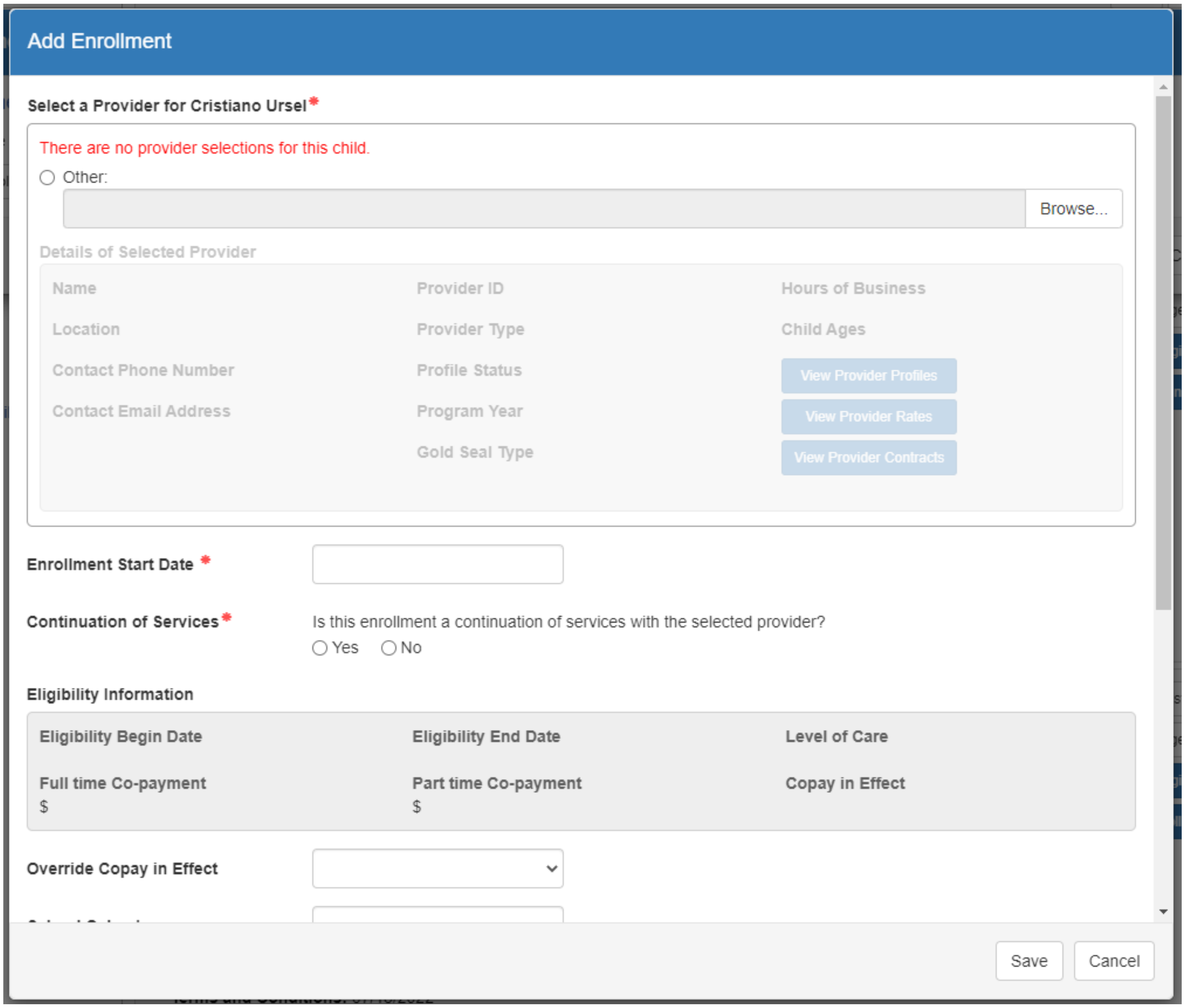
Now, an **Enroll** button is displayed for the child. Click **Enroll**. The Enrollments window will display. This window displays all of the child's provider enrollments.



Click **Add Enrollment**...



The Add Enrollments window will display. If the family selected a provider when on the Eligibility Verification Wizard, the provider selection will display. If the family did not select a provider, the coalition user is able to search and select a provider on behalf of the family.

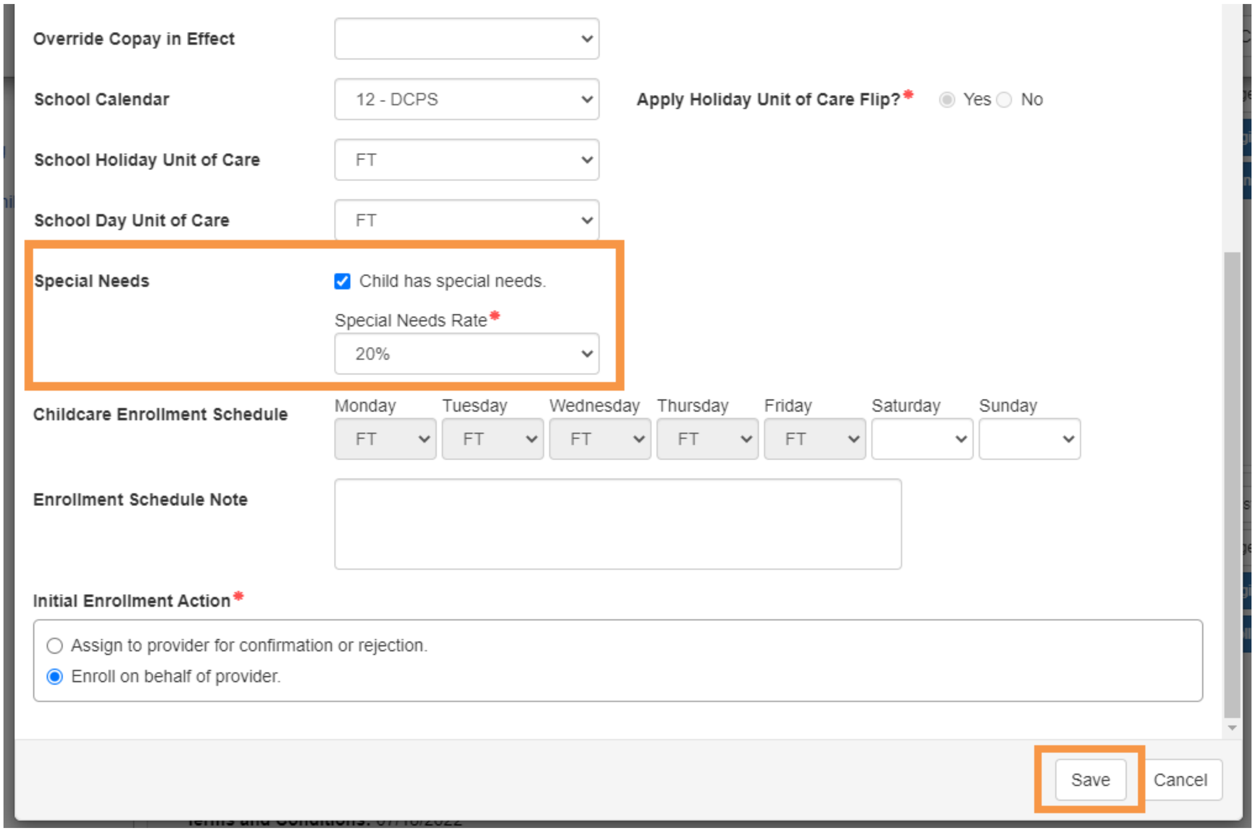


The enrollment start date cannot be prior to the child's eligibility start date. The enrollment start date is the first day the provider will be able to record attendance for the child on the provider attendance roster.

Non-school age children do not require a school calendar to be assigned. The child's Childcare Enrollment Schedule is what sets the child's attendance schedule at the provider. Every day marked with a unit of care will be considered as an authorized day of care at that provider location. All days not marked with a unit of care will be considered as non-reimbursable days.

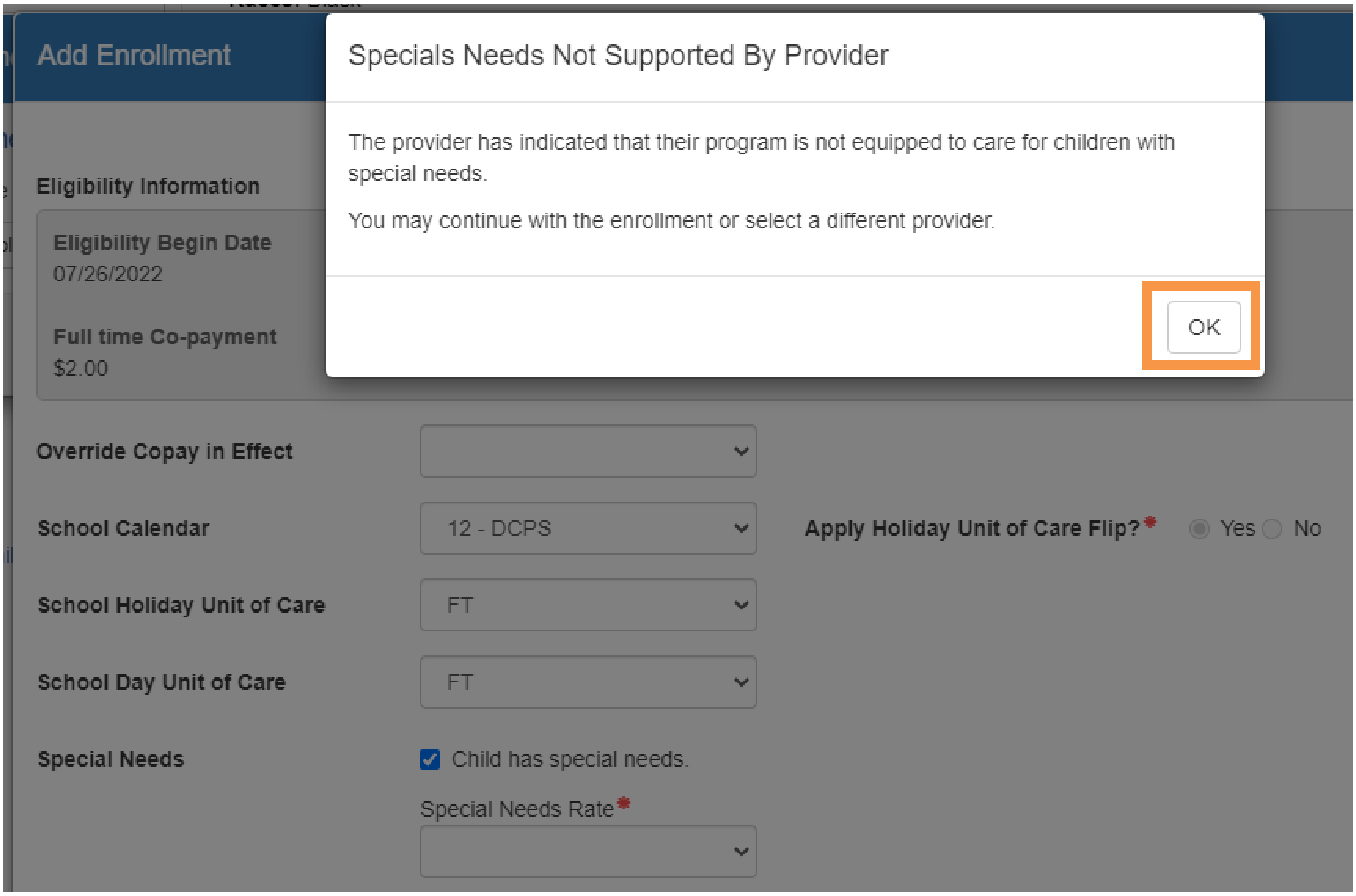
Enrolling a Special Needs Child

The Special Needs indicator will be available on the Add Enrollment page for enrollments with eligibility assignments that start 7/1/2022 or later. When enrolling a child that is deemed to have special needs, select the "Has Special Needs" checkbox. Then, select the special needs rate (10%, 15%, or 20%) that was negotiated with the provider.



NOTES:

- If the provider indicated on their profile Services tab that they are not equipped to care for children with special needs, a message pops-up notifying the user of this; however, it is informational only and does not stop the enrollment. The user can proceed with the enrollment with that provider or select a different provider.



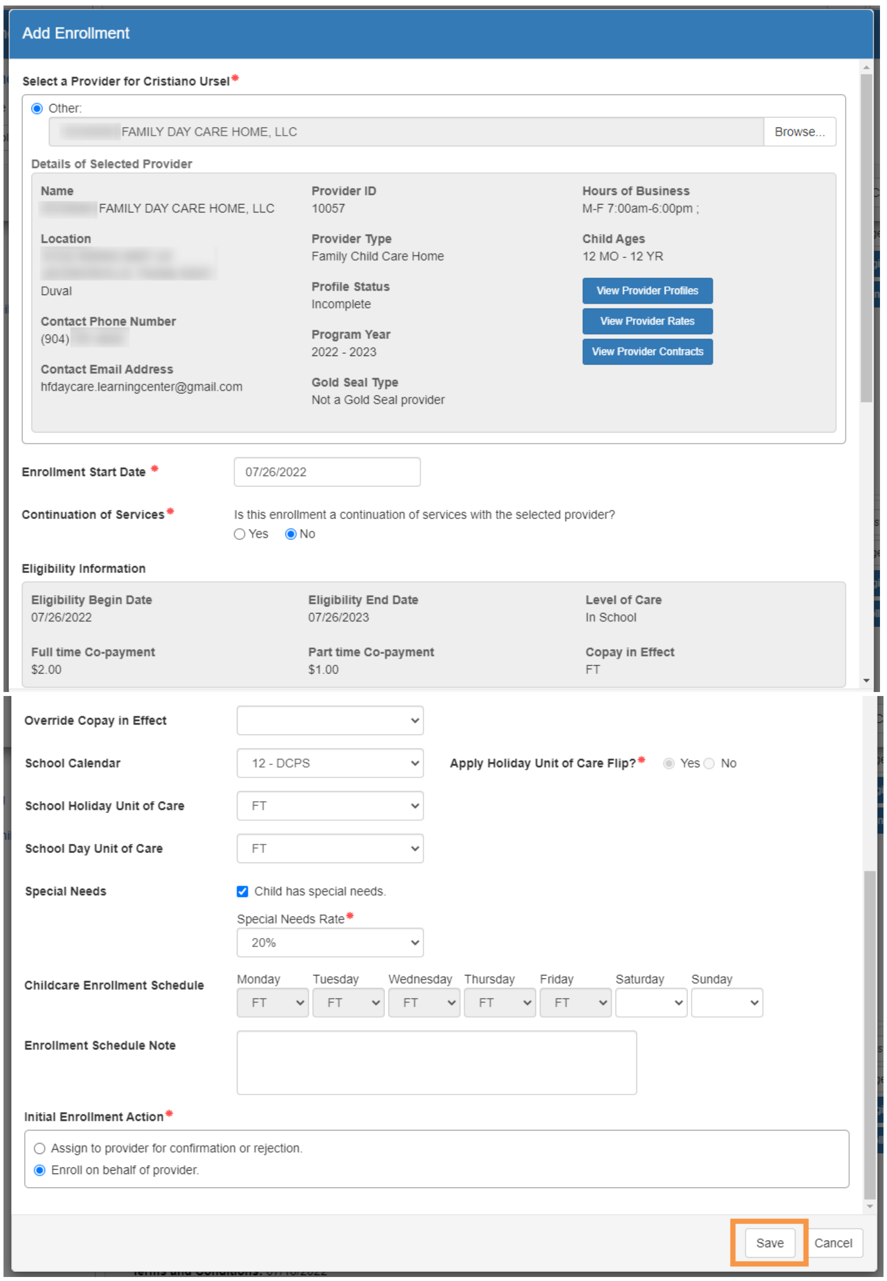
- Special needs rates are calculated using the coalition infant care reimbursement rates. If there is not an SR reimbursement rate plan for the period that coincides with the enrollment start date, a rate plan needs to be created.

Initial Enrollment Action

In the Initial Enrollment Action section, there are two options.

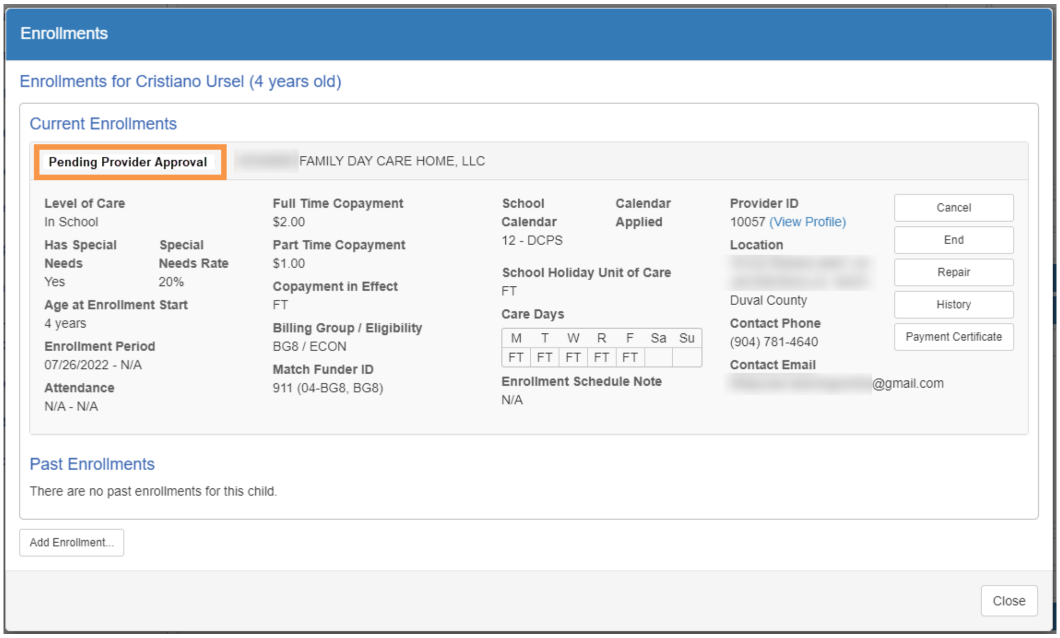
- Option 1 – **Assign to the provider for confirmation or rejection**. This option places the enrollment request in the provider's queue to accept or reject the enrollment. The provider has 5 calendar days to complete the enrollment or rejection or the system will automatically terminate the enrollment request and the coalition user will be required to submit another enrollment request.
- Option 2 – **Enroll on behalf of provider**. This option allows the coalition user to accept the enrollment on behalf of the provider without sending an enrollment request and waiting up to 5 calendar days for response.

After selecting Option 1 or 2, click **<u>Save</u>**.



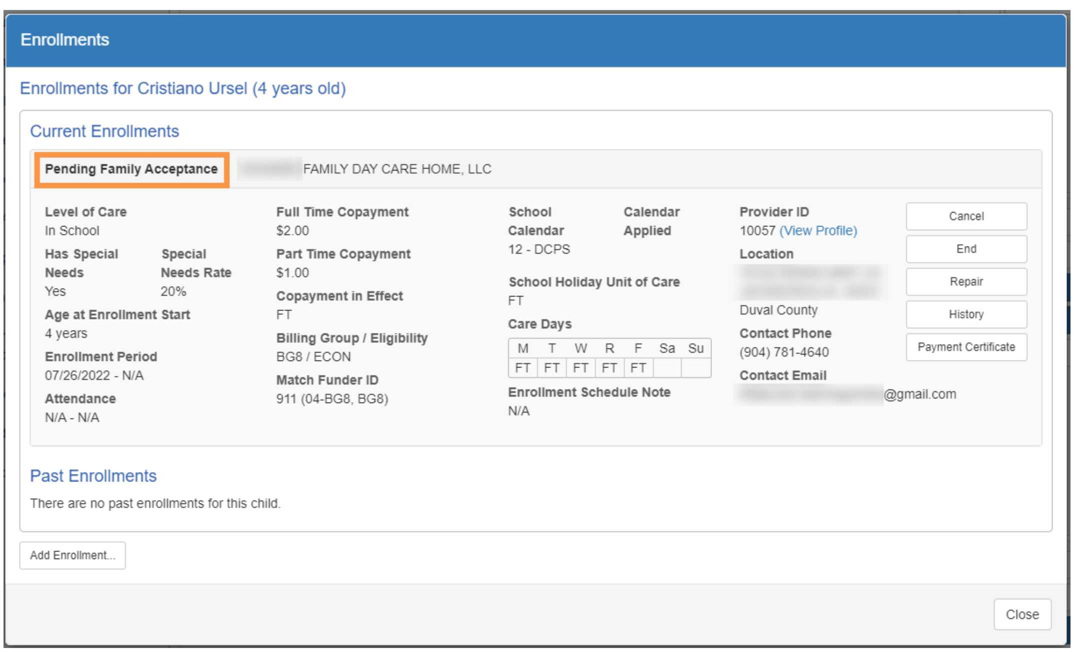
Enrollment Option 1

The coalition user has the ability to override the enrollment request and complete the enrollment on the provider's behalf in the event the provider is not able to do so. The coalition user is also able to cancel the enrollment request if the provider requests not to have the enrollment or the family changes their mind prior to the enrollment being completed.

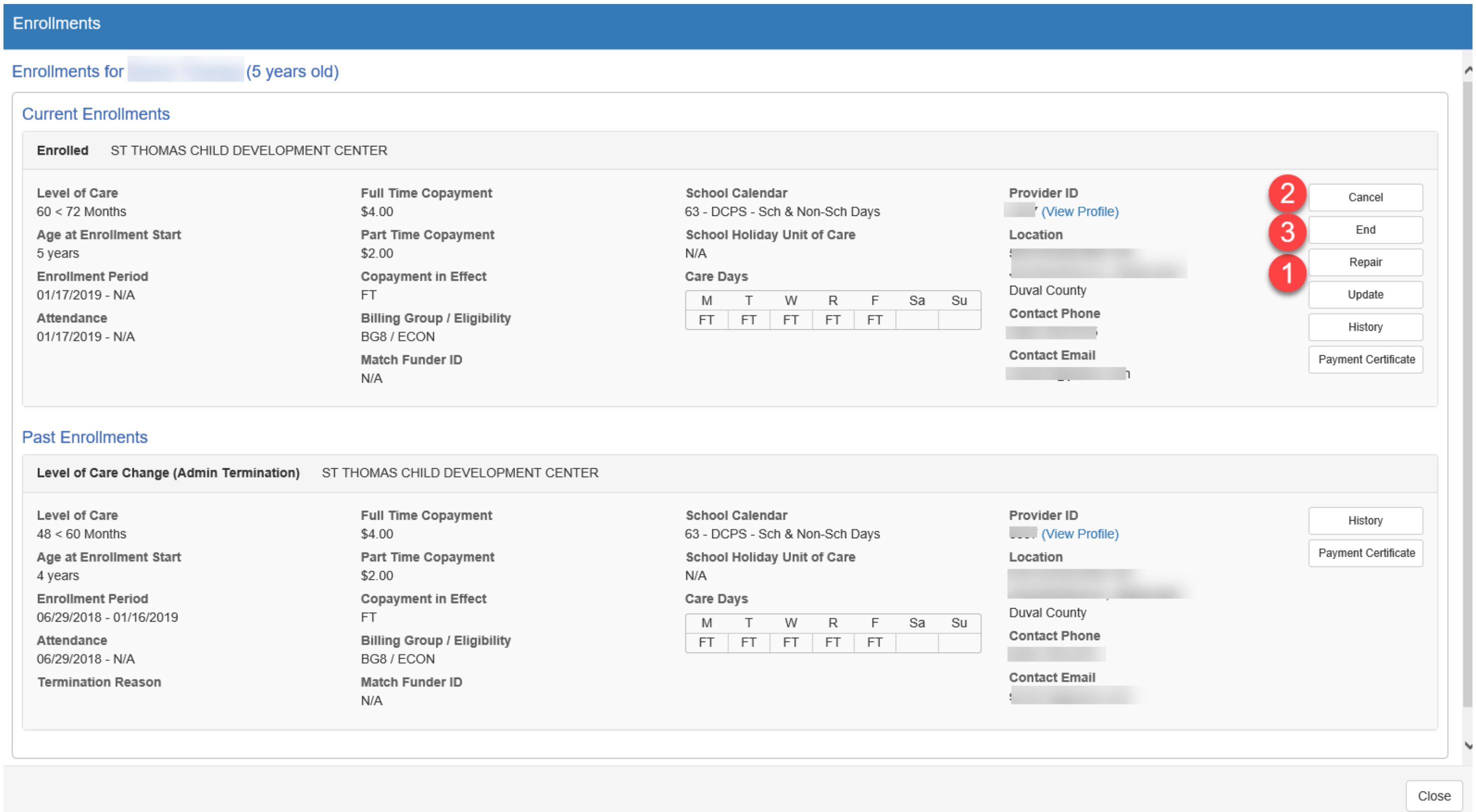


Enrollment Option 2

The completion of the enrollment is now dependent on the family verifying the Terms and Conditions and signing the Payment Certificate on the Family Portal. The child's enrollment will not be completed and the provider will not be able to begin marking attendance for the child until the family completes the enrollment.



Additional SR Enrollment Functionality

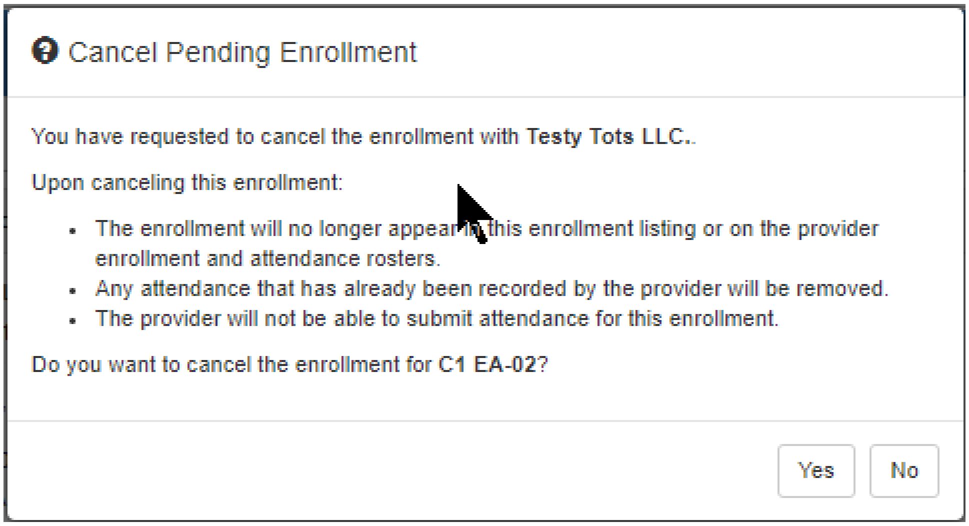


Notes:

1) IF THE REPAIR FEATURE DOES NOT LOOK CORRECT, PLEASE PRESS **'CTRL+F5'** TO REFRESH THE PAGE. YOU SHOULD ONLY NEED TO DO THIS ONCE.
2) **Cancel** will remove the record from the listing.
3) Last Attendance Date will no longer be user entered when ending enrollment. It will now be populated when the provider submits their final attendance roster.

Cancel

Click the **Cancel** button to initiate the Cancel process.



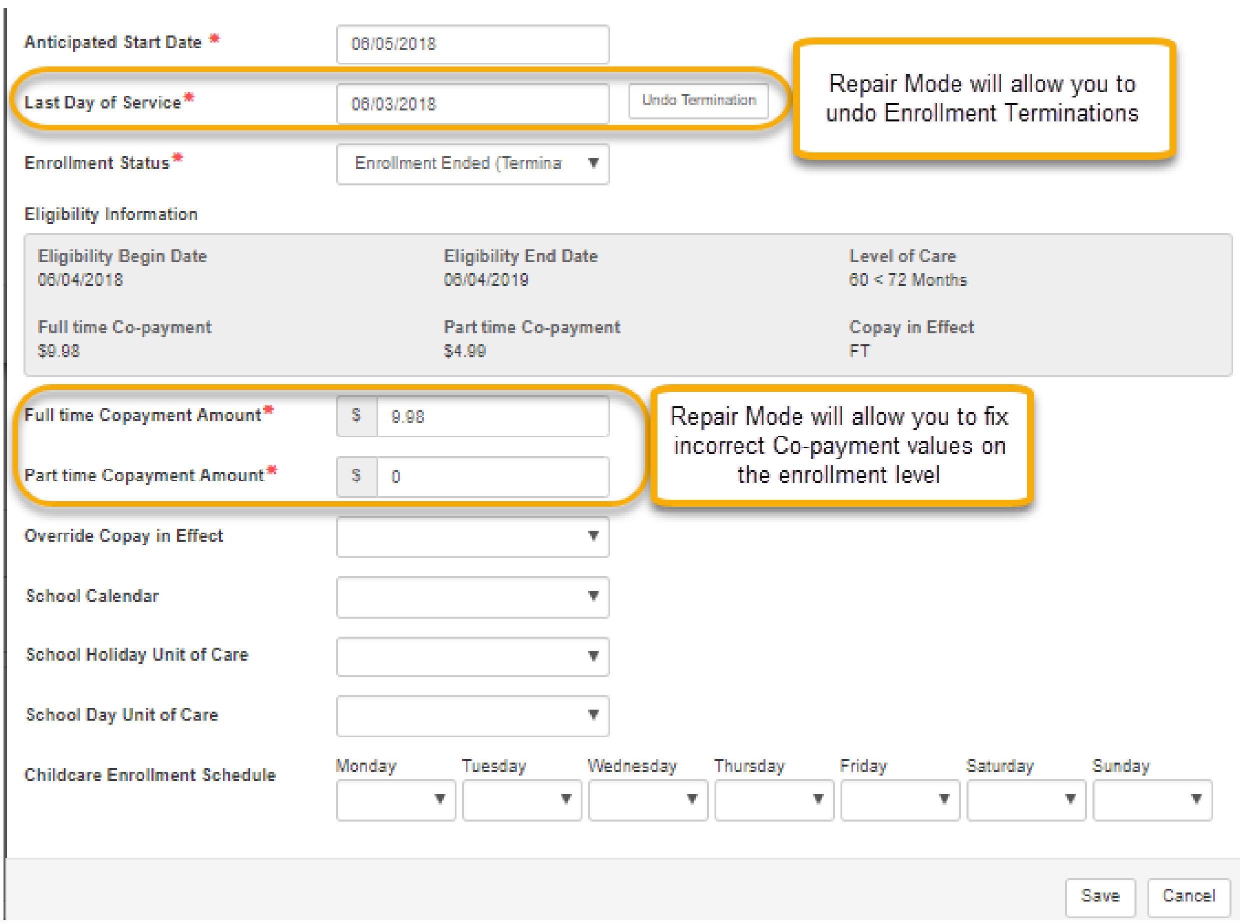
1) (Coalitions) The enrollment will no longer appear under the enrollment listing page.
2) (Providers) The enrollment will no longer appear under provider enrollments or attendance roster. Any attendance recorded that have not been submitted will be removed. The Provider will no longer be able to submit attendance for this enrollment record.
3) If the provider has already submitted attendance for this enrollment record, then they will not get the option to cancel it.

Repair

Click the **Repair** button to initiate the Repair process.

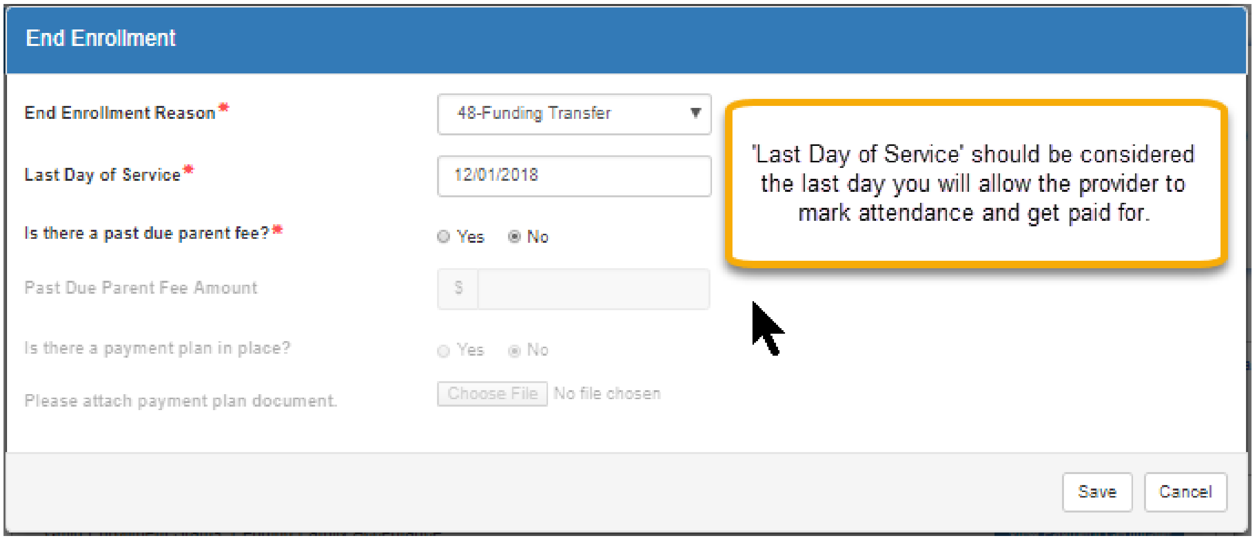
> **Repair Mode**
>
> **Repair Mode** will result in changes to an existing enrollment record without ending the existing enrollment and creating a new one. As such, it is intended only for correcting issues with an existing enrollment record, and not for addressing routine changes that can occur during the enrollment period. Use the Update feature for routine changes.
>
> **Repair Mode** may only be used on enrollment records for which attendance has not yet been submitted.

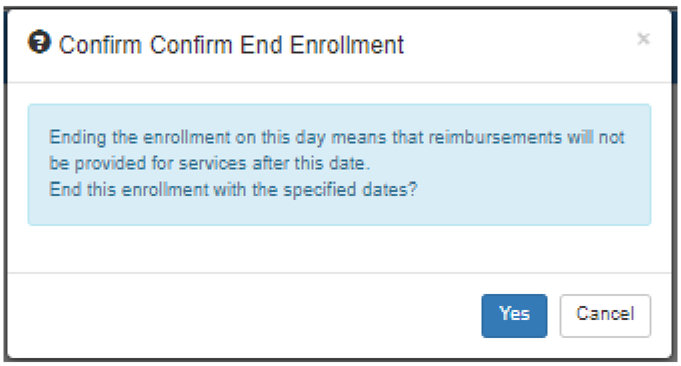
1) In Repair mode you will be able to overwrite an existing enrollment record in the event an error has occurred.
2) Repair mode should NOT be used to address routine changes. For example, a Funding Transfer or a change in copay.
3) Repair mode should only be used to fix errors. For example, data was entered incorrectly or ended incorrectly.
4) If the Copayment Amount has been modified after the family has signed their Payment Certificate, then a new Payment Certificate will be generated and the family will need to re-sign it. The Enrollment Status should be in Pending Family Acceptance and you should notify the parent.



End Enrollment

Click the **End Enrollment** button to initiate the End Enrollment process.

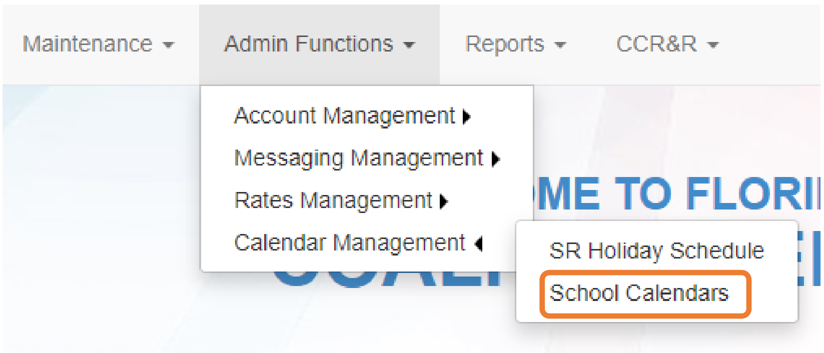




School Calendar

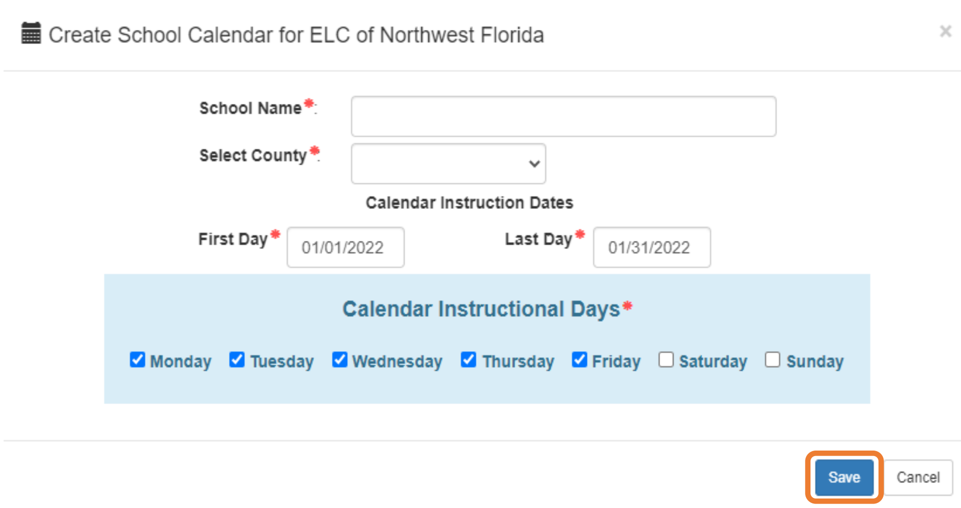
The School Calendar is created by the coalition, based on the school board/school district academic calendar. The dates on the School Calendar are used in enrollment and provider attendance to show care levels for school-age children. For example, a child may receive PT care during the school year, but FT care during the summer. The date that the care level changes from PT to FT and back to PT is based on the school calendar.

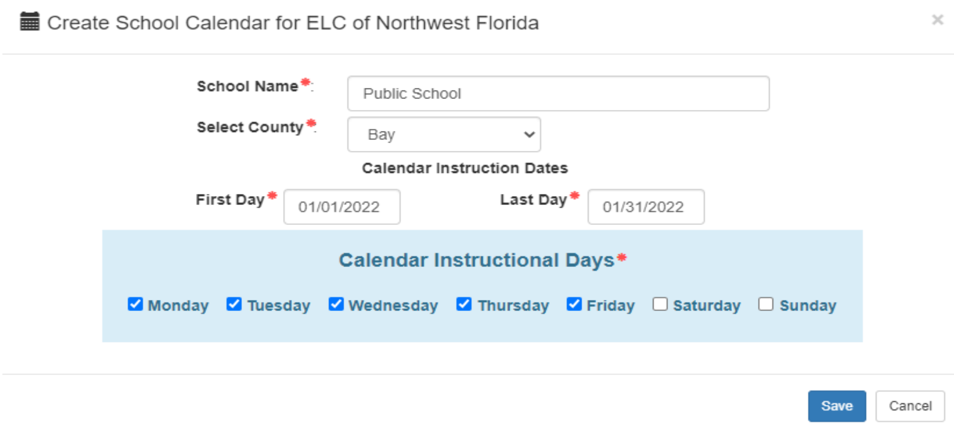
To create a School Calendar, go to **Admin Functions > Calendar Management > School Calendars**.



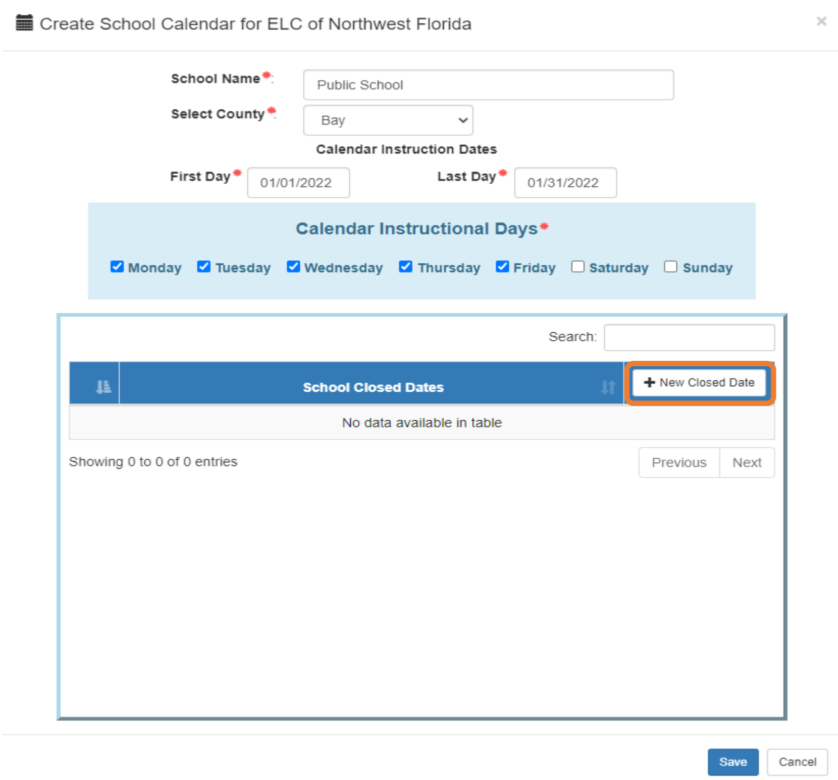
Click **+ Create New Calendar**.

Fill in the School Name field, select the County, and select the First Day and Last Day of instruction. Click **Save**.

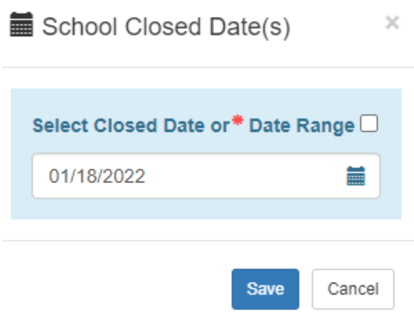


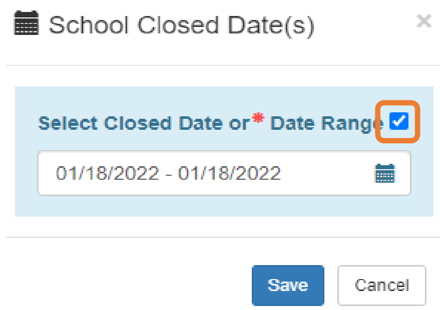


Click **<u>+ New Closed Date</u>** to select the days school is closed.

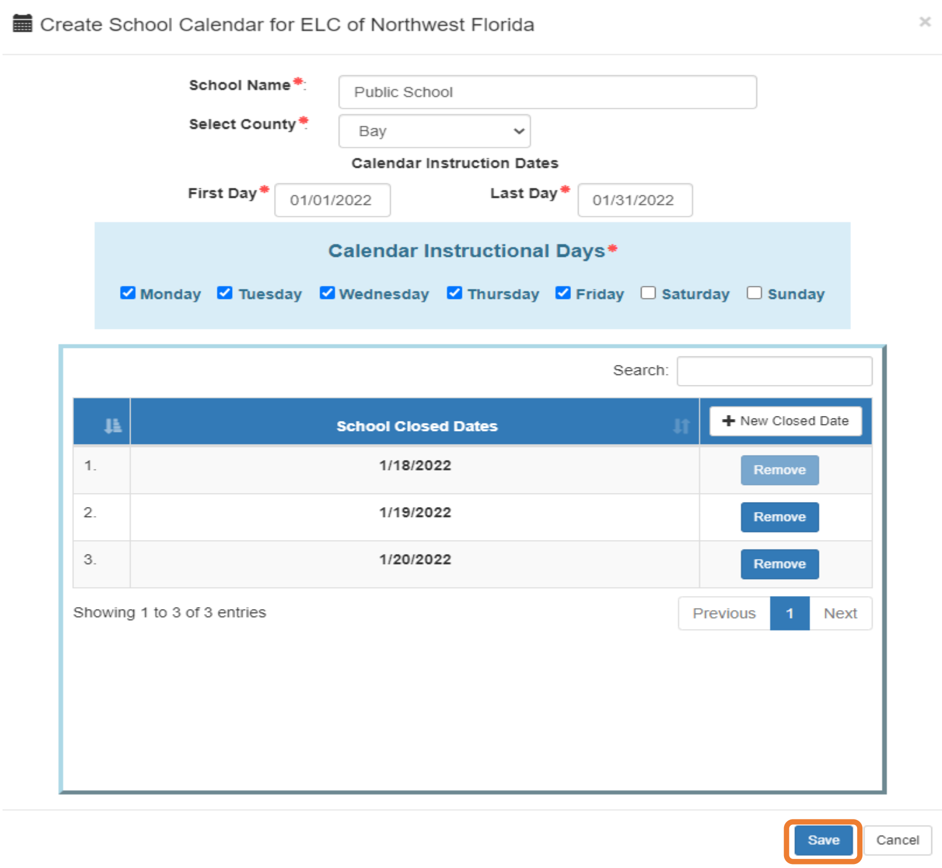


An individual day can be selected, or check the Date Range checkbox, and select multiple days.

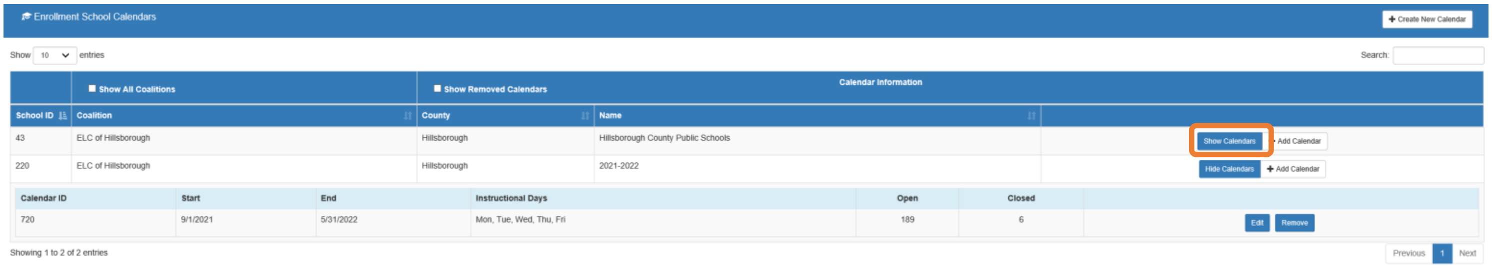


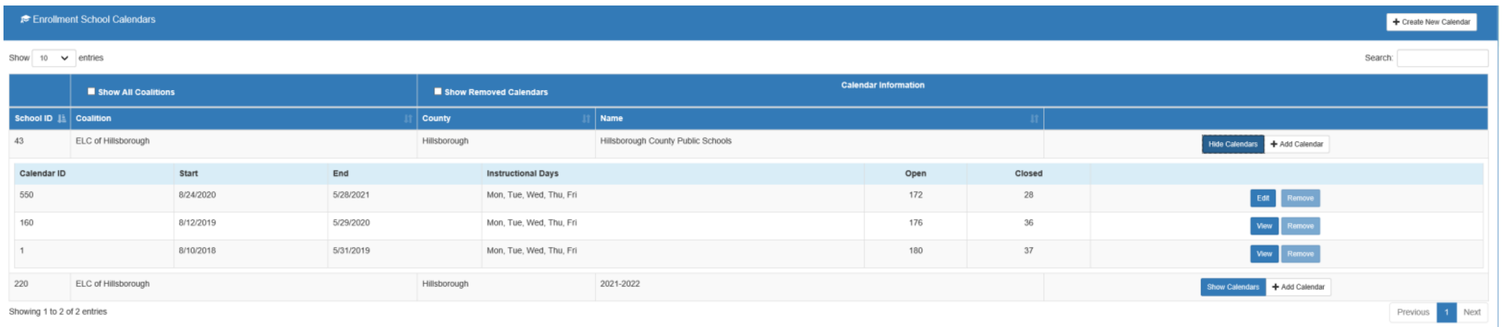


Once all closed dates are entered, click **Save**.

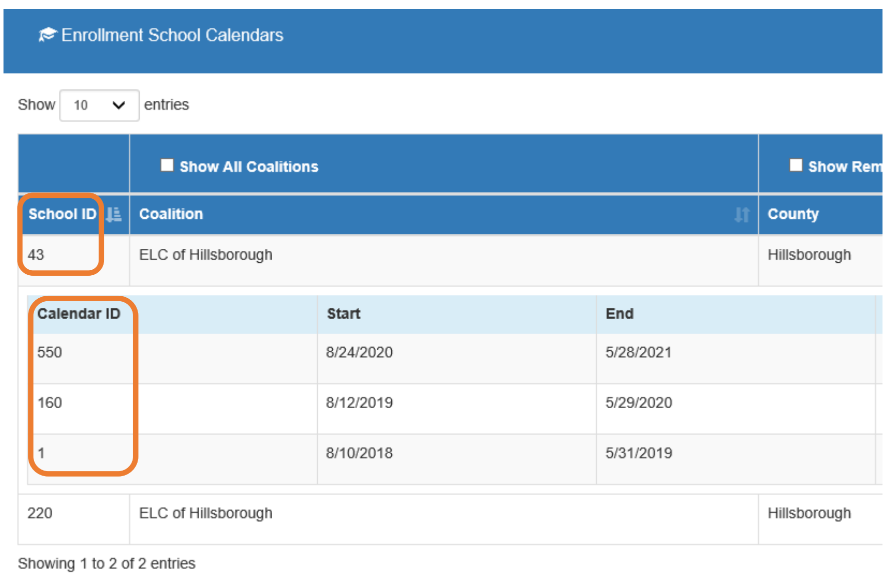


Click the **<u>Show Calendars</u>** button to see all School Calendars under the Master School Calendar.





In this example, the Master School Calendar 43 has Calendar IDs 1, 160, and 550 for each year.



Pending Family Acceptance Emails

SR families who have child records in Pending Family Acceptance status will receive an email notification with instructions to log in to the Family Portal to sign their payment certificate. The email notification will continue to be sent every five days until the payment certificate is signed and the child record is in the Enrolled, Canceled or Terminated status.

Hello,

Your child's enrollment with the child care provider you selected requires your electronic signature on the payment certificate in order to complete the enrollment. The payment certificate authorizes payment for services from the state to the child care provider. Failure to sign the payment certificate could result in the child's enrollment being ended and out-of-pocket expenses to accrue.

Please log into your family portal account to review and sign the payment certificate. Once logged in, scroll down to the School Readiness Funding section and click the "Sign" button in the Payment Certificate column.

<ELC NAME> also provides Child Care Resource and Referral (CCR&R) services. CCR&R is the front door for family services in your county. CCR&R staff will let you know about community resources, child care options and other information that may be of assistance to you. Please contact your early learning coalition and ask to speak to a CCR&R specialist for further assistance.

Sign SR Enrollment Payment Certificate

After the provider approves the enrollment, the family will receive the following email from DONOTREPLY@oel.myflorida.com.

OELSystemTest@oel.myflorida.com 7:15 PM (21 minutes ago)

to me

Hello,

The application you submitted for assistance in paying for child care has been approved by the ELC of the Big Bend Region.

Please log into your family portal account to review the Parental Rights and Responsibilities/Terms and Conditions. Once you have agreed to the terms and conditions you must electronically sign your child's payment certificate in order to confirm your child's enrollment with the child care provider.

The ELC of the Big Bend Region also provides Child Care Resource and Referral (CCR&R) services. CCR&R is the front door for family services in your county. CCR&R staff will let you know about community resources, child care options and other information that may be of assistance to you. Please contact your early learning coalition and ask to speak to a CCR&R specialist for further assistance.

Thank you,

ELC of the Big Bend Region
8669739030
http://www.elcbigbend.org/

Please do not reply to this message. Replies to this message are routed to an unmonitored mailbox. If you have question, please contact your early learning coalition.

When the Family Portal user logs on to the Family Services Portal, click the **Sign** button for the Payment Certificate.

School Readiness Funding

The following table shows the School Readiness funding status for all of the children in your household.

Child Name	EV Number	Status	Enrollment Status	Provider Name	Payment Certificate
	EV_	Eligible	Pending Family Acceptance		Sign

The following screen will display.

I understand I have the right to be notified of decisions made regarding my services and the right to appeal any decision, including reductions in or termination of services.

I understand that services will be provided based on placement priorities (section 1002.87, F.S.), and availability of funding. I must recertify on or before my last day of authorized care or my services will be terminated. If termination occurs, I will be fully responsible for my child care costs. To reapply for services, I must submit a new application in the Family Portal.

I understand my information may be shared with other state and local agencies for the purposes of program administration and public assistance fraud prevention.

I understand that if this is my first 12-month eligibility determination, or subsequent 12-month eligibility determination where my income remains at or below 150% of the federal poverty level (FPL), it is my responsibility to report within 14 calendar days of any change of circumstances related to:

- Address
- Temporary/Non-temporary work or education
- Family size
- Failure to maintain attendance at a job training or education program
- Income exceeds 85% of the state median income (SMI)

I understand that after my first eligibility determination for subsequent 12-month eligibility periods, where my income exceeds 150% federal poverty level and I am considered to be in graduated phase-out from the program, it is my responsibility to report within 10 calendar days of any change of circumstances related to:

- Address
- Temporary/Non-temporary work or education
- Family size
- Failure to maintain attendance at a job training or education program
- Income exceeds 85% of the state median income (SMI)
- Any changes in income

I understand that the coalition or contractor will not discriminate against my family on the basis of race, national origin, ethnic, background, sex, religious affiliation or disability.

I understand that if I am assessed a parent copay by the coalition or contractor for participation in the School Readiness (SR) Program, I must satisfactorily fulfill my copayment obligation before I will be allowed to transfer to another SR Program provider. Satisfactory fulfillment of the copayment obligation is defined as immediate payment of the outstanding copayment obligation or establishment of a repayment plan for the outstanding copayment obligation.

I understand that I have the right to unlimited access to my child during normal hours of child care provider operation and whenever the child is in the provider's care.

I understand that I have the right to confidentiality of my child's or children's information and the right to inspect, review and request a copy of my child's or children's SR records.

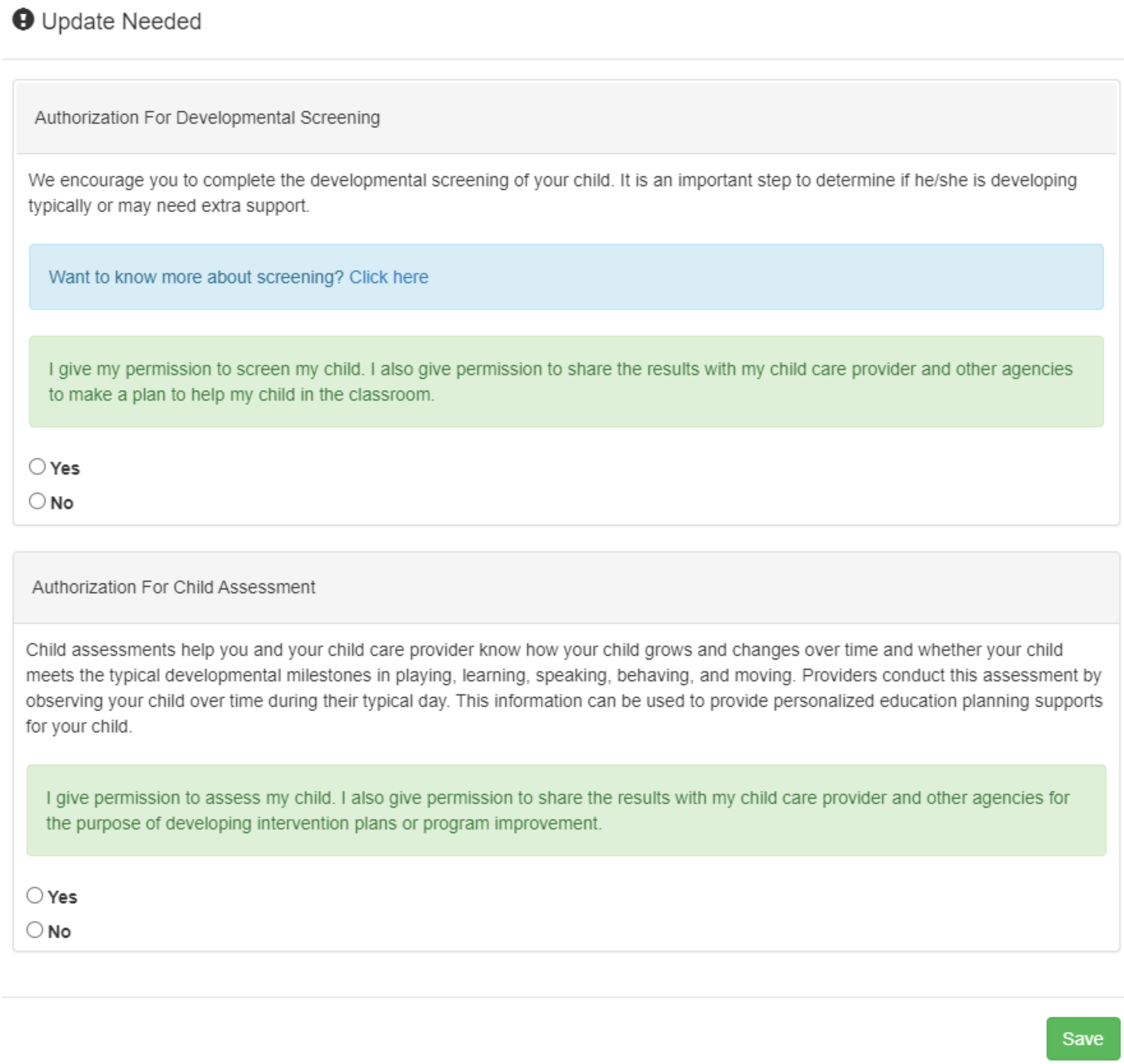
I understand that as a parent, I have the right to choose from a variety of child care categories, including center-based care, faith-based care, family child care and informal child care to the extent authorized in the state's Child Care and Development Fund State Plan that the United States Department of Health and Human Services approved pursuant to 45 CFR s. 98.30.

I accept the coalition's/contractor's determination of my income and household size used to assess my parent copay.

After the parent reads each statement, and clicks the checkbox for each statement, the statement box will collapse, and a green checkmark will appear.

I understand that services will be provided based on placement priorities (section 1002.87, F.S.), and availability of funding. I must recertify on or before my last day of authorized care or my services will be terminated. If termination occurs, I will be fully responsible for my child care costs. To reapply for services, I must submit a new application in the Family Portal.

Once all boxes have been checked, a pop-up window will display for developmental screening and child assessment authorizations. After clicking **Yes** or **No**, the parent will click the **Save** button.



Update Needed

Authorization For Developmental Screening

We encourage you to complete the developmental screening of your child. It is an important step to determine if he/she is developing typically or may need extra support.

Want to know more about screening? Click here

I give my permission to screen my child. I also give permission to share the results with my child care provider and other agencies to make a plan to help my child in the classroom.

- Yes
- No

Authorization For Child Assessment

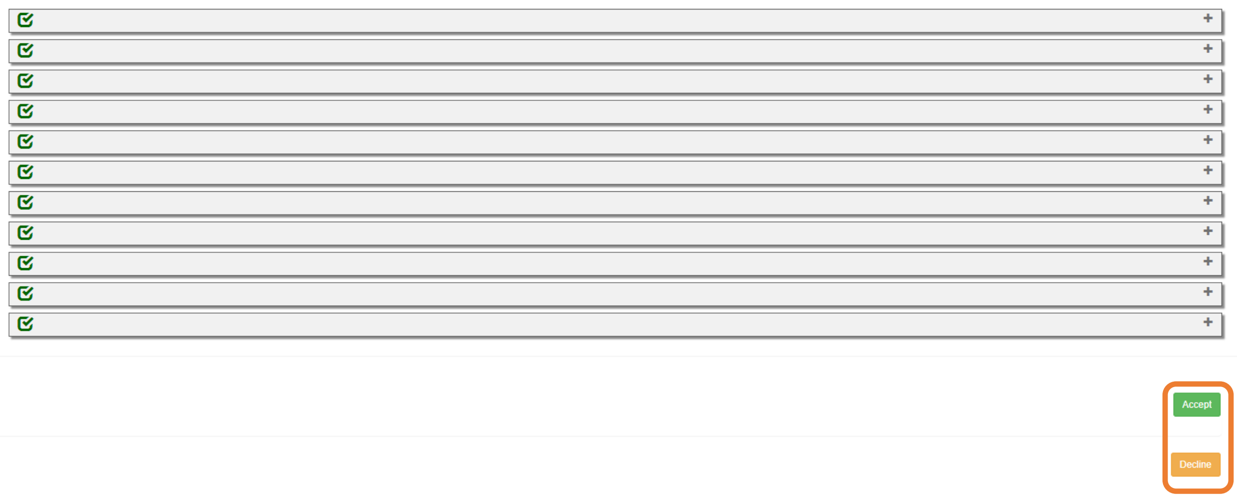
Child assessments help you and your child care provider know how your child grows and changes over time and whether your child meets the typical developmental milestones in playing, learning, speaking, behaving, and moving. Providers conduct this assessment by observing your child over time during their typical day. This information can be used to provide personalized education planning supports for your child.

I give permission to assess my child. I also give permission to share the results with my child care provider and other agencies for the purpose of developing intervention plans or program improvement.

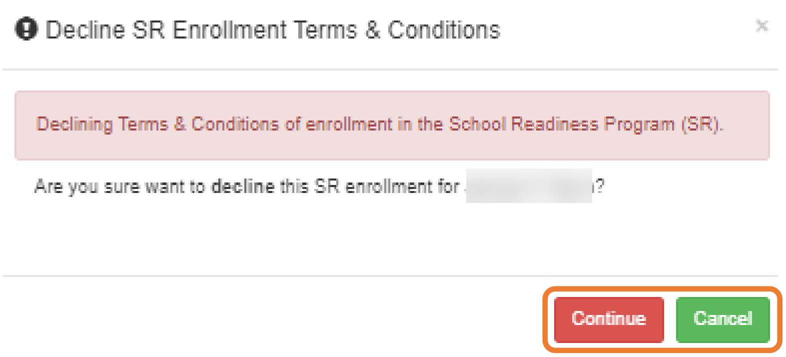
- Yes
- No

Save

After clicking **Save**, the parent will click **Accept** to accept the terms and conditions and continue or click **Decline** to submit terms and conditions and decline the enrollment.

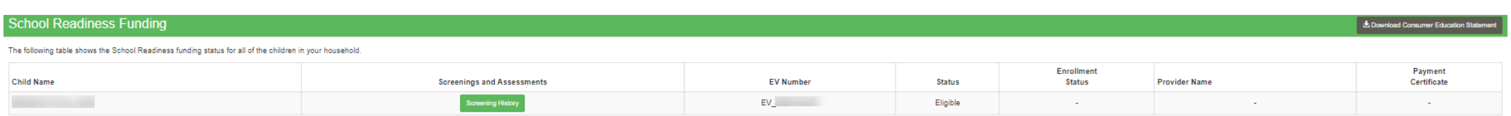


If the parent clicks **Decline**, a pop-up window will display.

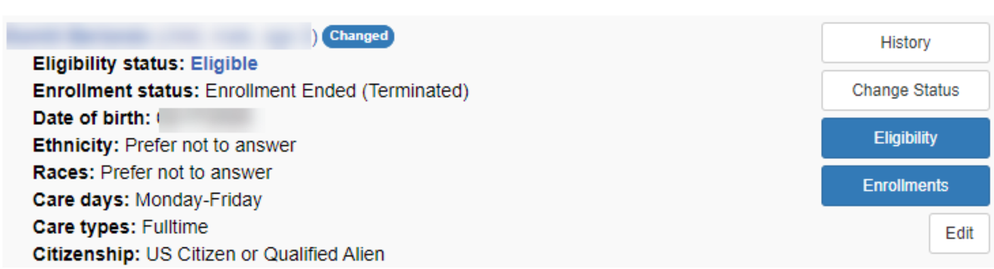


The parent can click **Cancel** and then click **Accept** to accept the terms and conditions.

After **Continue** is clicked, the Enrollment Status will be blank and the **Sign** button for the payment certificate is no longer visible.



On the EV, the Eligibility Status will remain **Eligible**, but the Enrollment Status will change to **Enrollment Ended (Terminated)**.



After clicking **Accept**, the payment certificate will display.

ELC of Pinellas
Non-transferable Child Care Certification
School Readiness Program

Certificate Number: 69825433

* This certificate is not valid for care arranged after: 4/22/2023

PARENT INFORMATION

Name:	**Date of Birth:**	**Social Security Number:**	
Home Address:	**City:**	**State:** Fl	**Zip:**
Home Phone:	**Work Phone:**	**Employer:**	

ENROLLED CHILD INFORMATION

Name:	**Date of Birth:**	**Social Security Number:**

PROVIDER INFORMATION

Provider: Bright Discoveries for Early Learning	**Phone:** (727) 527-5690	**Address:** 438 62ND AVE N ST PETERSBURG, FL 33702

ENROLLMENT INFORMATION

Eligibility Start: 4/23/2022	**Eligibility End**:** 4/22/2023
Counselor: N/A	**Case Worker:** Bernice Rodriguez of ELC of Pinellas

** No reimbursements made after this date*

Gold Seal Rate: $0.00	**Reimbursement Rate:** $37.40	**Parent Full-time Co-Pay**:** $10.20	**Parent Part time Co-Pay**:** $5.10
Enrolled On: 3/22/2022	**Enrollment Start:** 4/23/2022	**Enrollment End:** 4/22/2023	
Unit of Care: FT	**Billing Group:** BG8	**Eligibility:** ECON	

*** Parent co-payment is what the parent is responsible for paying (copay)*

Unit of Care / Day of Care:

Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
FT	FT	FT	FT	FT		

Privacy Act Statement: Social security numbers are requested on this form under s. 119.071(5)(a)2., F.S., for use in the records and data systems of the Office of Early Learning (OEL) and Early Learning Coalitions. Social security numbers will be used for routine data requests, state and federal reporting requirements, identification, and to verify eligibility for the School Readiness Program including, but not limited to, family income. Submission of social security numbers on this form is voluntary and not a condition of enrollment in the School Readiness Program.

I certify that by use of this certificate that I am exercising my choice of caregiver for my child. Other placement options in licensed and subcontract facilities and homes have been explained to me. OEL, the early learning coalition, and its contracted provider, if applicable, are indemnified from and its contract provider are indemnified from all possible liability for payments to the caregiver that I select and from liability for the quality of care my child receives. I understand that I have access to my children at any time and that I may visit the provider's setting at any time during care hours.

Signature of Parent: ______ **Date:** ______
☐ By Electronic Signature

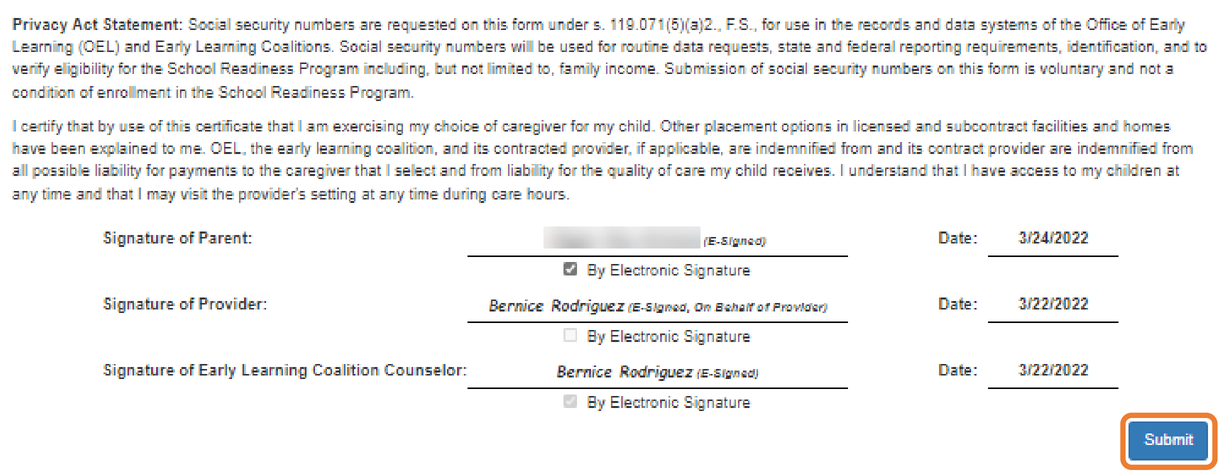
Signature of Provider: *Bernice Rodriguez (E-Signed, On Behalf of Provider)* **Date:** 3/22/2022
☐ By Electronic Signature

Signature of Early Learning Coalition Counselor: *Bernice Rodriguez (E-Signed)* **Date:** 3/22/2022
☑ By Electronic Signature

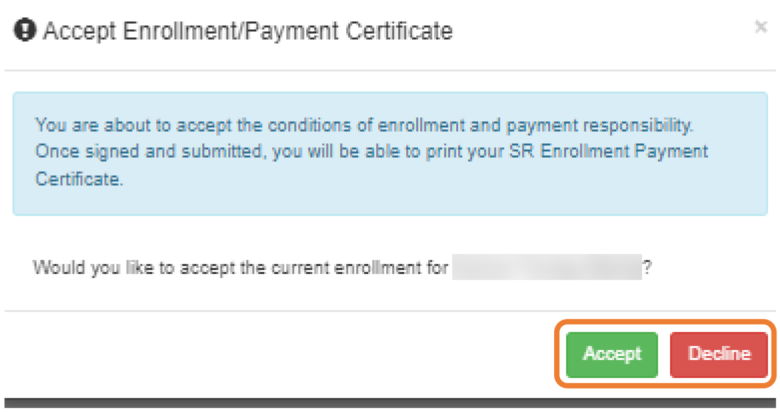
Submit

The parent will check the By **Electronic Signature** checkbox and sign the full name as it appears on the SR application, and click **Yes**.

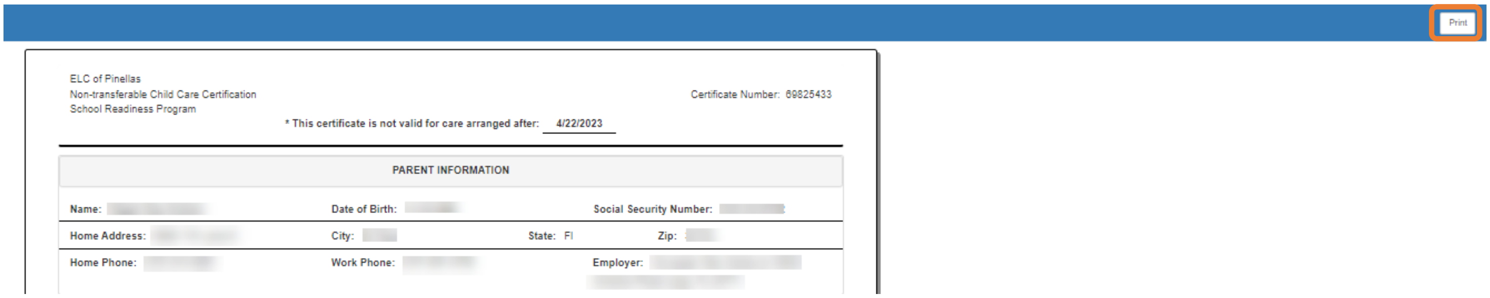
Then, click **Submit**.



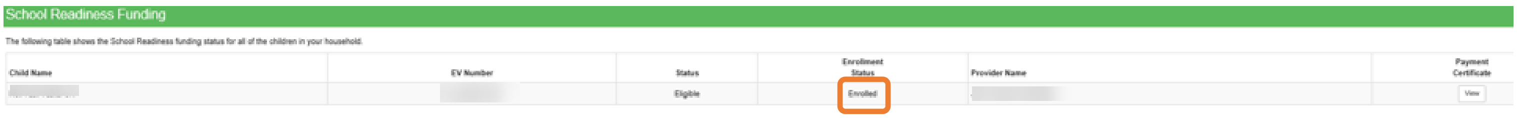
After clicking **Submit**, the following confirmation message will display. The parent will click **Accept** or **Decline**.



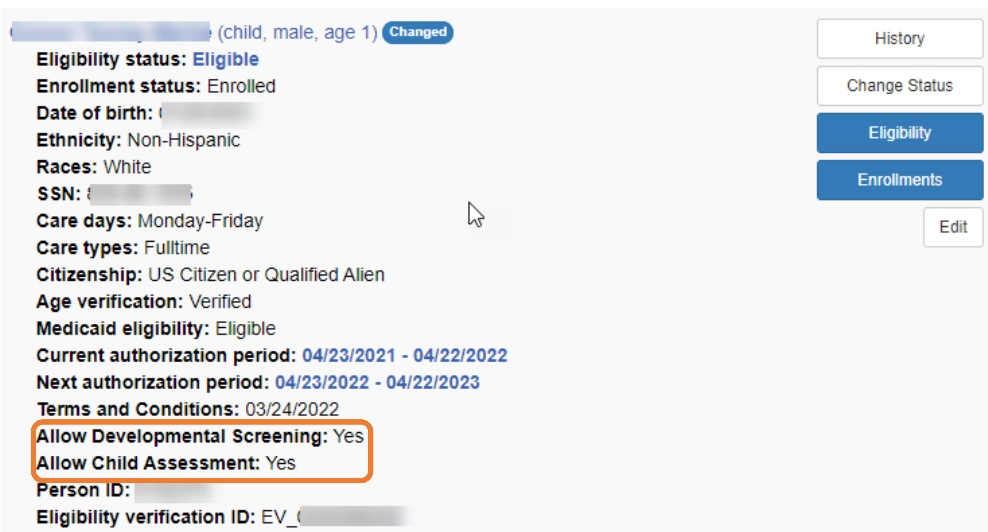
Once **Accept** is clicked, the parent may print the certificate by clicking the **Print** button.



The Enrollment Status on the Family Portal profile page is now **Enrolled**.

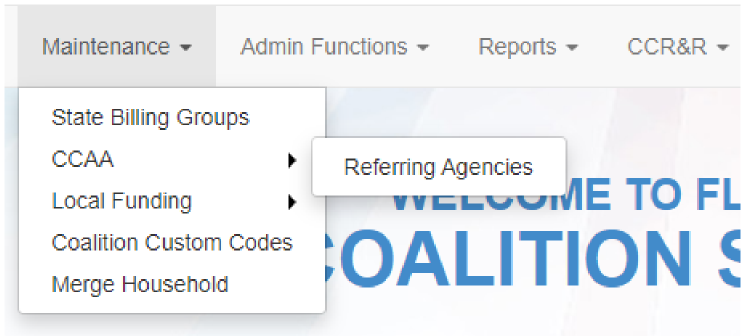


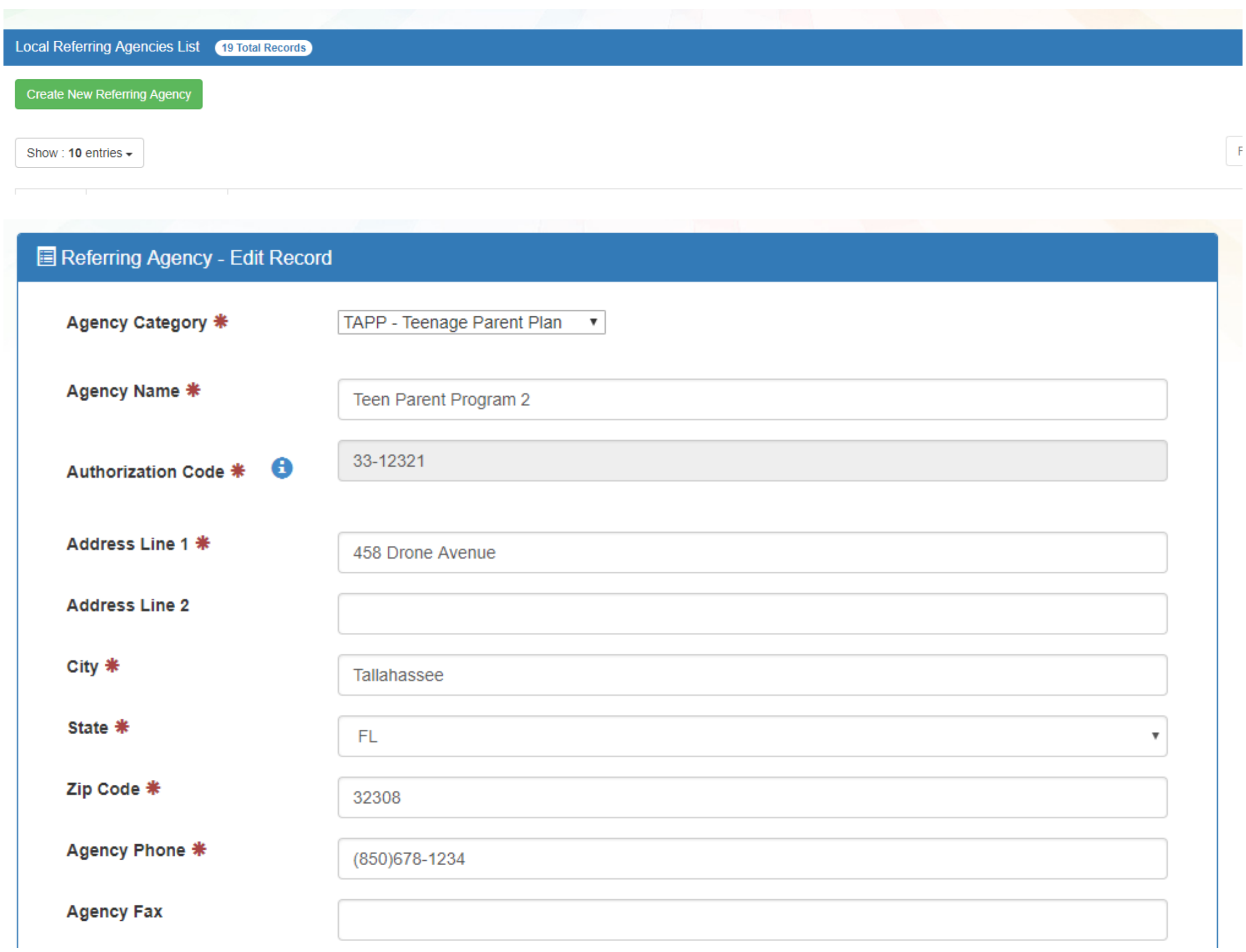
Once the parent has signed the payment certificate, the answers to the screening and assessment questions on the terms and conditions are displayed for the child.



Teenage Parent Program (TAPP) Setup and Referral Entry

1. TAPP Providers must have a profile in EFS-Mod before they will be available for selection during child enrollment.
2. Navigate to **Maintenance > CCAA > Referring Agencies**.
    a. Create New Referring Agency
    b. Agency Category: Select TAPP – Teenage Parent Plan
    c. Enter All Required Data
    d. Select TAPP as the Type of Referral. Click **Save**.





Agency Email *

test.test@gmail.com

Additional Contacts	
Primary Contact	☐
Contact Person	
Primary Phone Number	
Secondary Phone Number	
Email	
Primary Contact	☐
Contact Person	
Primary Phone Number	
Secondary Phone Number	
Email	

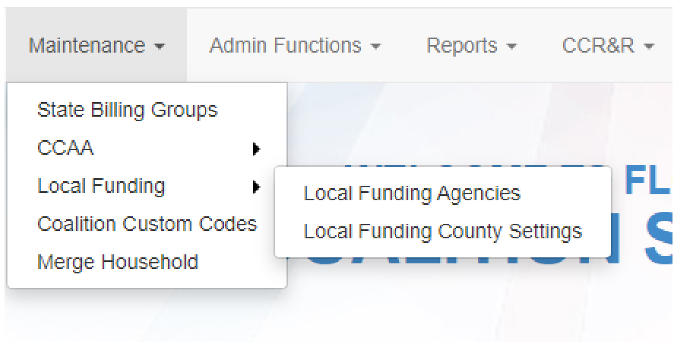
Type of Referral *

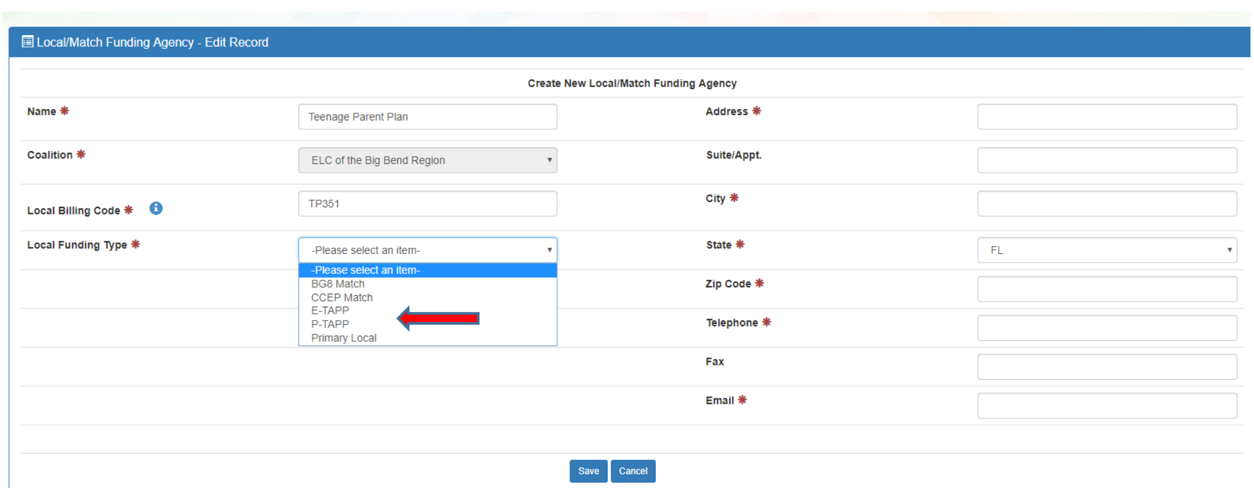
☐ AT-RISK ☐ DOMESTIC VIOLENCE ☐ HOMELESS ☐ RELATIVE CARE GIVER ☐ TANF ☐ TCC ☑ TAPP ☐ LOCAL

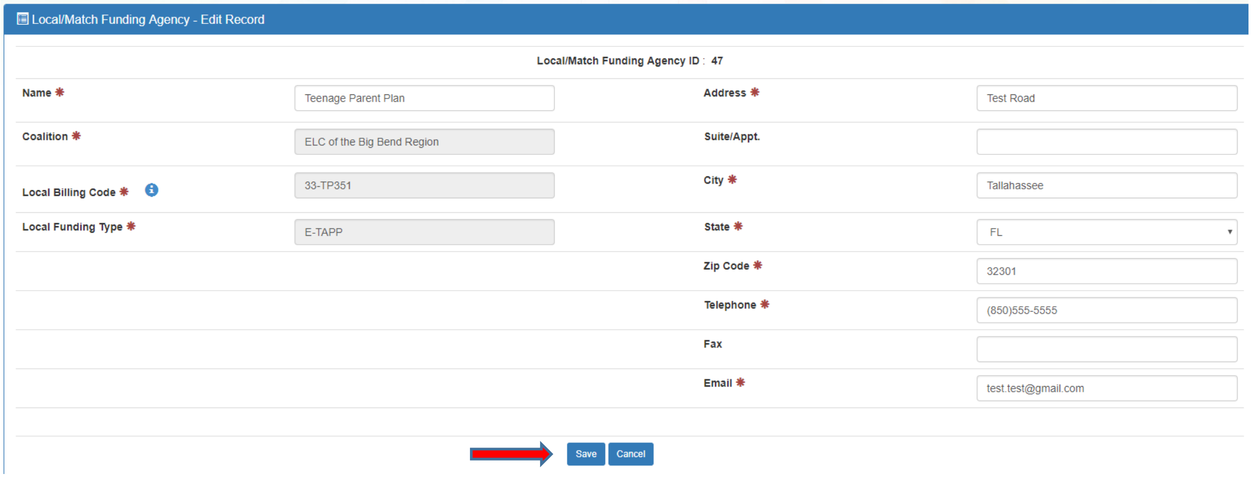
Is Active ☑

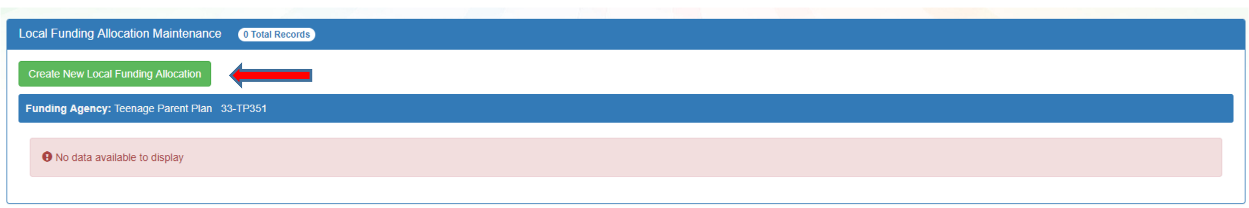
Save Cancel

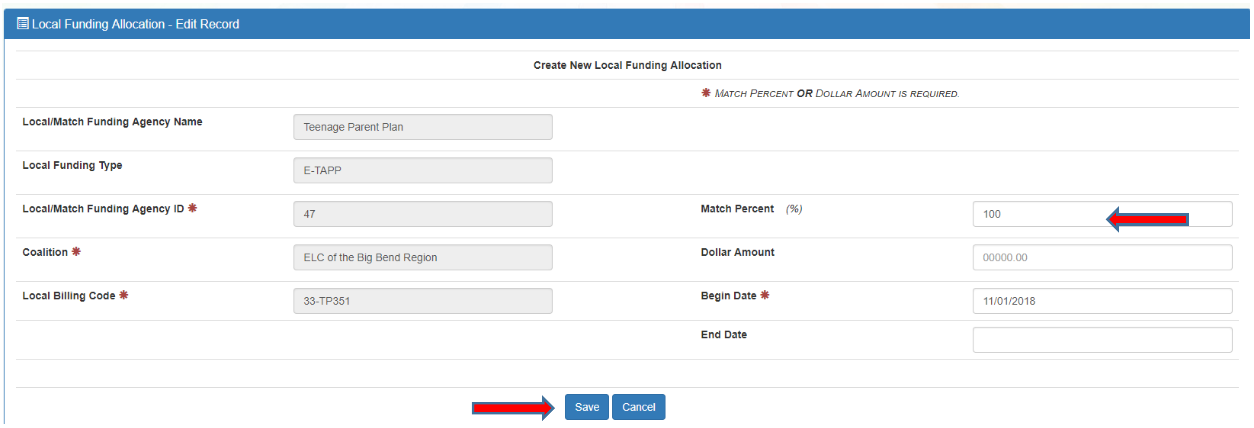
3. **Local Funding > Local Funding Agencies**
   a. Create new Local/Match Funding Agency
   b. Enter All Required Data
   c. Select Local Funder Type **E-TAPP** (Track TAPP Enrollments) for TAPP Enrollments that will only populate the Provider enrollment roster). Set up TAPP Local Funding Billing Group; or
   d. Select Local Funder Type **P-TAPP** (Track TAPP Enrollment and Payment) for TAPP Enrollments that will populate the Provider Attendance roster and be submitted for Reimbursements
   e. **View Local Funding Allocation > Create New Local Funding Allocation**
      i. Set the Match Percent to 100%
      ii. Set Use Approved SR Rates for Provider to = NO
      iii. Backdate the Begin Date to the earliest enrollment that should be funded by the provider
      iv. Set the End Date if applicable

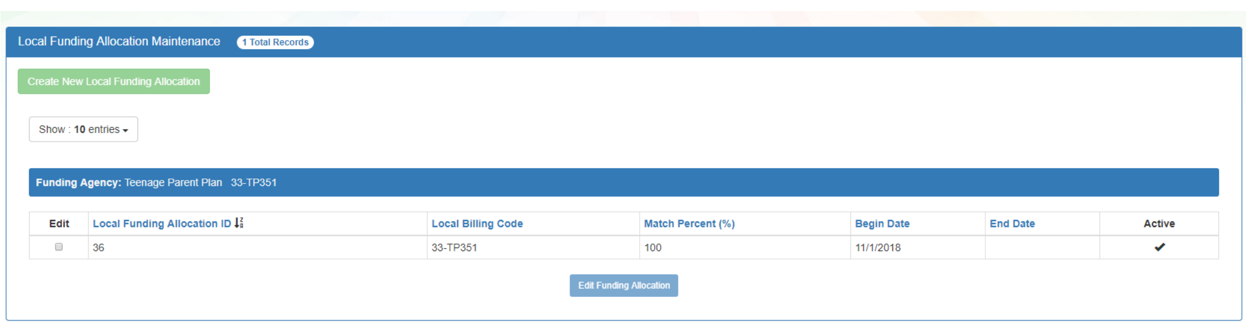





Local/Match Funding Agency - Edit Record
Local/Match Funding Agency ID : 47
Name
Teenage Parent Plan
Address
Test Road
Coalition
ELC of the Big Bend Region
Suite/Appt.
Local Billing Code
33-TP351
City
Tallahassee
Local Funding Type
E-TAPP
State
FL
Zip Code
32301
Telephone
(850)555-5555
Fax
Email
test.test@gmail.com
Save
Cancel

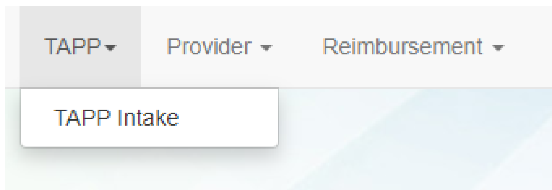

Local Funding Allocation Maintenance
0 Total Records
Create New Local Funding Allocation
Funding Agency: Teenage Parent Plan 33-TP351
No data available to display

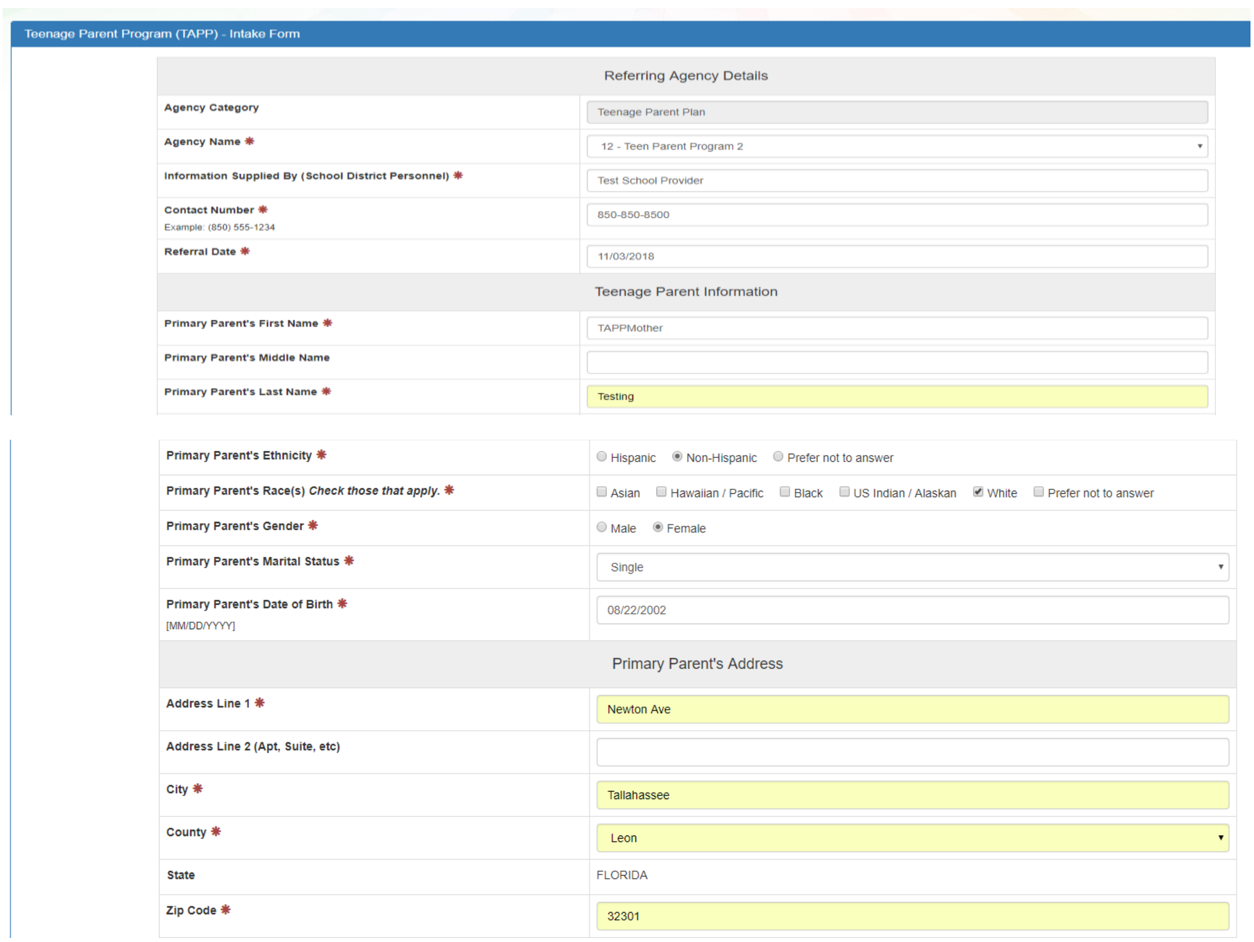

Local Funding Allocation - Edit Record
Create New Local Funding Allocation
Match Percent OR Dollar Amount is required.
Local/Match Funding Agency Name
Teenage Parent Plan
Local Funding Type
E-TAPP
Local/Match Funding Agency ID
47
Match Percent (%)
100
Coalition
ELC of the Big Bend Region
Dollar Amount
00000.00
Local Billing Code
33-TP351
Begin Date
11/01/2018
End Date
Save
Cancel

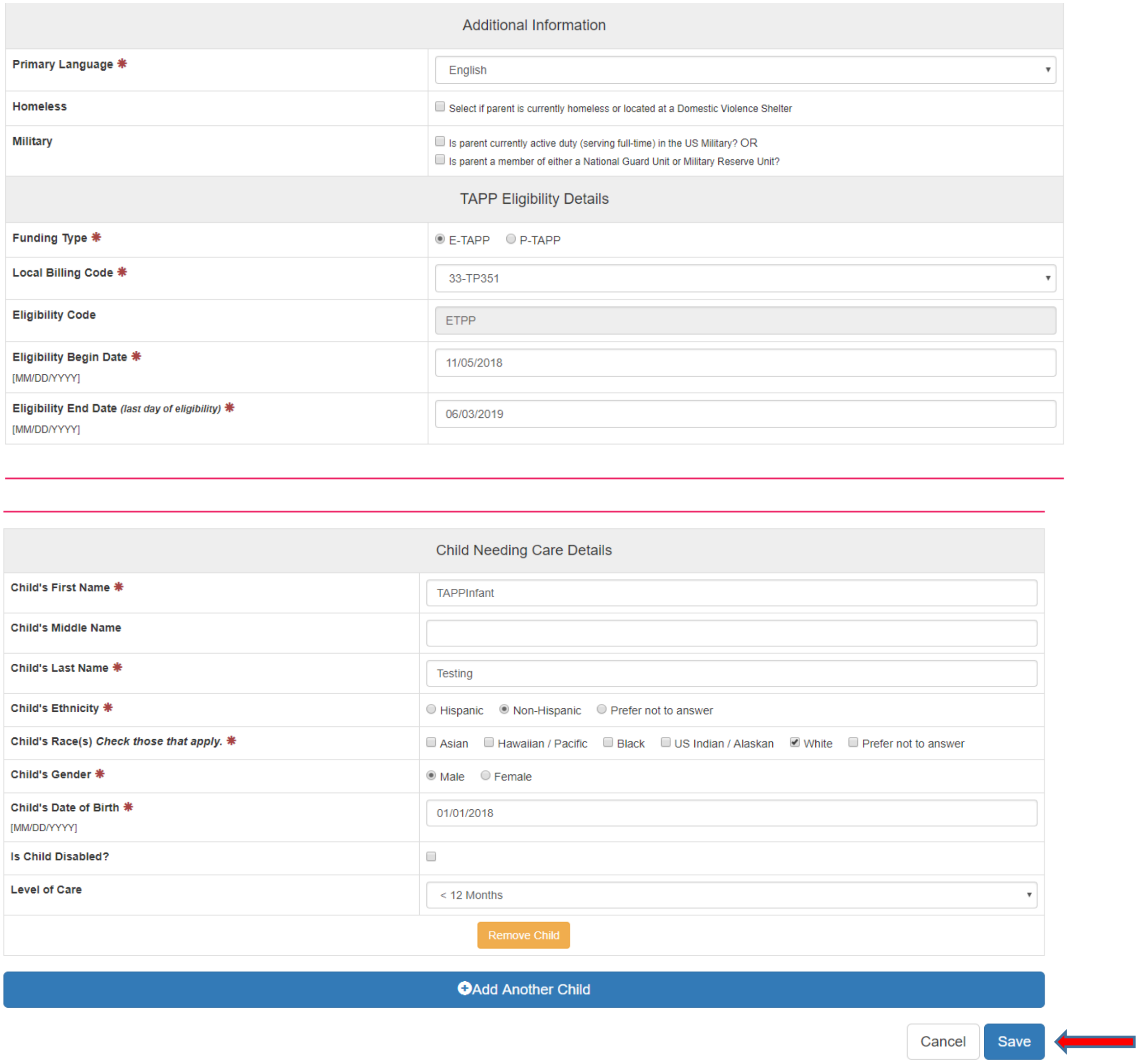

Local Funding Allocation Maintenance
1 Total Records
Create New Local Funding Allocation
Show : 10 entries
Funding Agency: Teenage Parent Plan 33-TP351
Edit
Local Funding Allocation ID
Local Billing Code
Match Percent (%)
Begin Date
End Date
Active
36
33-TP351
100
11/1/2018
Edit Funding Allocation

4. TAPP Intake
    a. Select the TAPP Agency from the Agency Category. This dropdown only displays the TAPP Referral Agencies that have been entered.
    b. Enter All Required Data
    c. Enter the TAPP Enrollment Details
    d. Select E-TAPP to see only the local E-TAPP billing codes
    e. Select P-TAPP to see only the local P-TAPP billing codes
    f. Make the eligibility start and end dates the TAPP enrollment start and end dates
    g. Add the child(ren) data. Click **Save**.

NOTE: The TAPP intake process allows coalition users to identify the physical county of residence and families receiving RCMA services.







Additional Information	
Primary Language *	English
Homeless	☐ Select if parent is currently homeless or located at a Domestic Violence Shelter
Military	☐ Is parent currently active duty (serving full-time) in the US Military? OR ☐ Is parent a member of either a National Guard Unit or Military Reserve Unit?

TAPP Eligibility Details	
Funding Type *	◉ E-TAPP ○ P-TAPP
Local Billing Code *	33-TP351
Eligibility Code	ETPP
Eligibility Begin Date * [MM/DD/YYYY]	11/05/2018
Eligibility End Date *(last day of eligibility)* * [MM/DD/YYYY]	06/03/2019

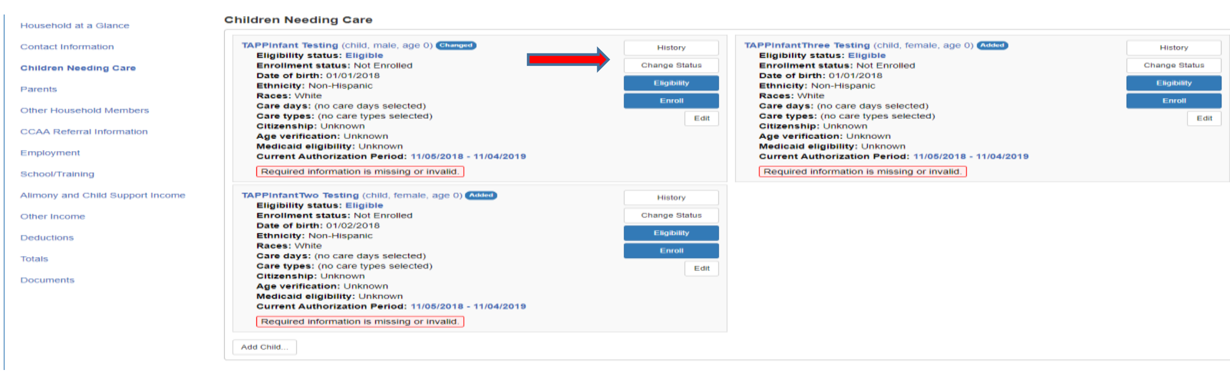
Child Needing Care Details	
Child's First Name *	TAPPInfant
Child's Middle Name	
Child's Last Name *	Testing
Child's Ethnicity *	○ Hispanic ◉ Non-Hispanic ○ Prefer not to answer
Child's Race(s) *Check those that apply.* *	☐ Asian ☐ Hawaiian / Pacific ☐ Black ☐ US Indian / Alaskan ☑ White ☐ Prefer not to answer
Child's Gender *	◉ Male ○ Female
Child's Date of Birth * [MM/DD/YYYY]	01/01/2018
Is Child Disabled?	☐
Level of Care	< 12 Months

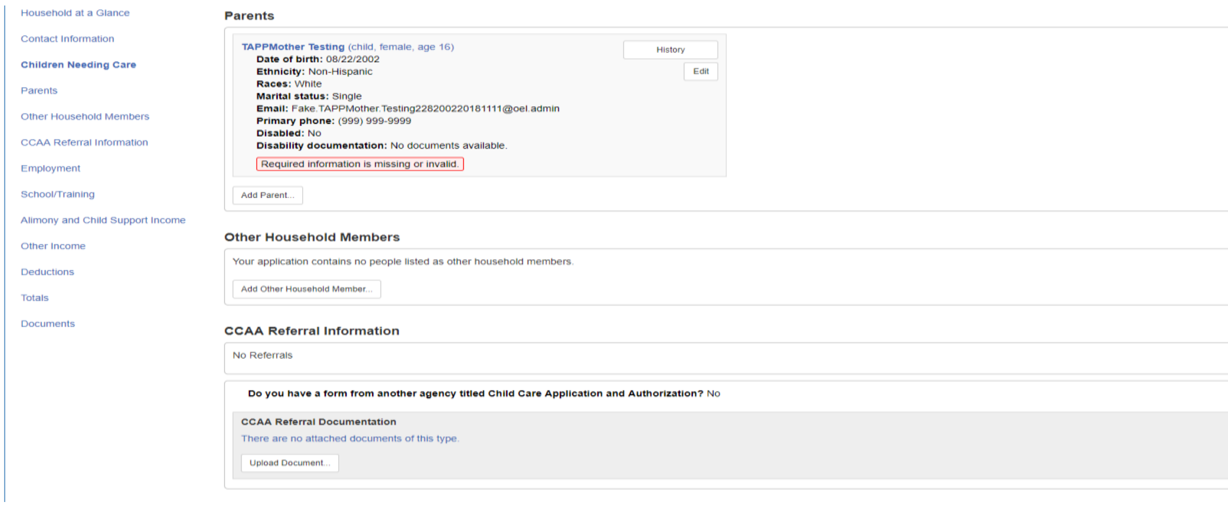
Remove Child

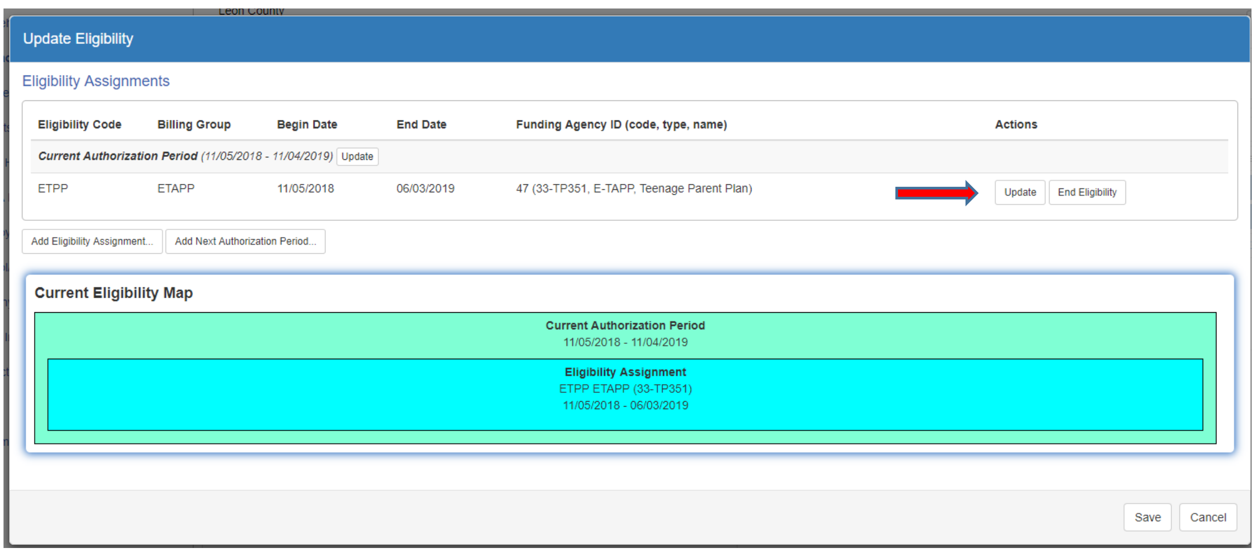
Add Another Child

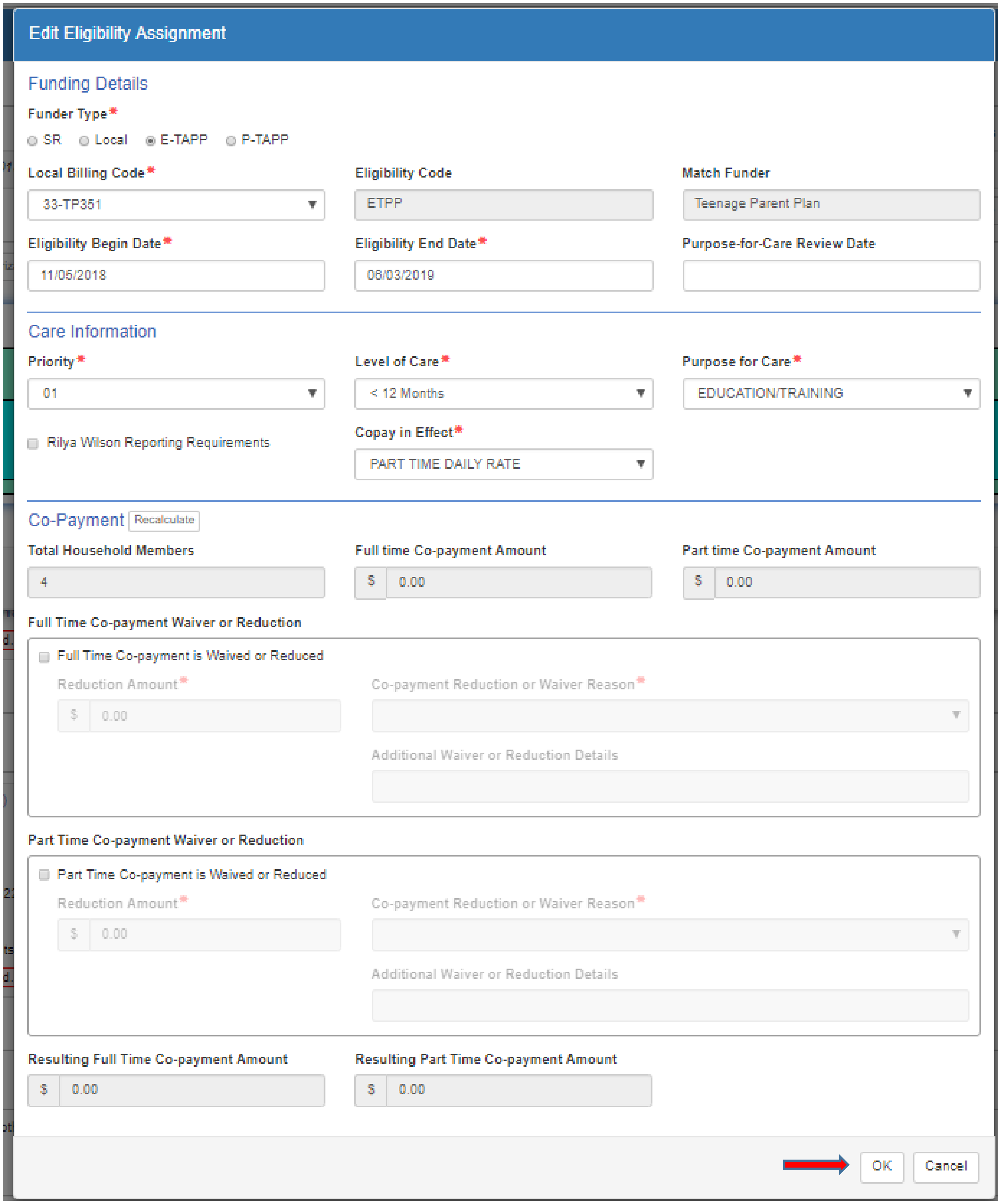
Cancel Save

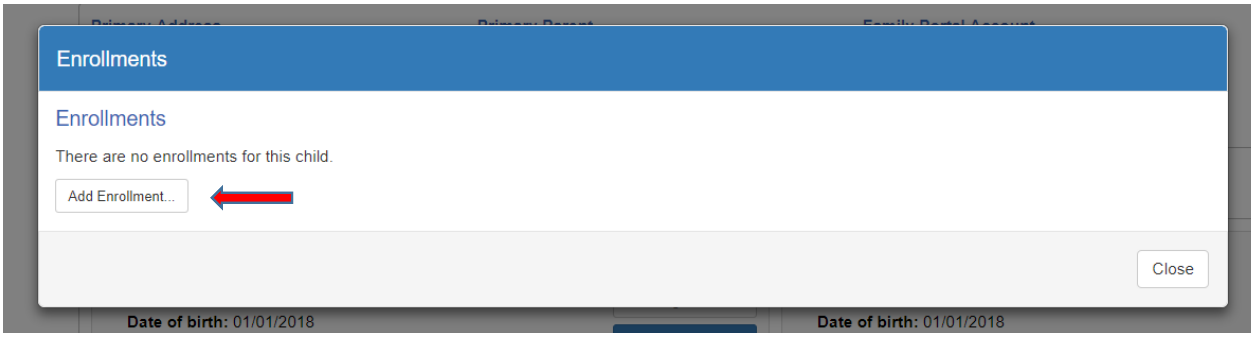
5. TAPP EV opens.
   a. Verify all of the data input into the TAPP Intake form is correct
   b. Upload the TAPP Referral Document in the Additional Documents section
   c. There is no TAPP Referral Section
   d. Click **Eligibility**
      i. Verify the eligibility information that was entered into the TAPP Intake form is correct
      ii. Priority is not required
      iii. Purpose for care is not required
      iv. Zero (0.00) copay is allowed
   e. Click **Enroll** - The TAPP Provider must have a profile in EFS-Mod before they will be available for selection during child enrollment
      i. Search for TAPP Provider
      ii. Enter Anticipated start date (the date as the eligibility start date)
         1. Verify that the eligibility information populates the UI
      iii. Enter Copay in Effect
      iv. Select school calendar if applicable
      v. Select school holiday unit of care if applicable
      vi. Select school day unit of care if applicable
      vii. Select Enrollment Schedule days
      viii. Enroll on behalf of the provider and click **Save**
      ix. The enrollment is complete
      x. The payment certificate is created without the parent signature
         1. Print the Payment Certificate and have the parent sign it
         2. Upload the signed payment certificate to the EV in the Additional Documents section of the Household Review screen

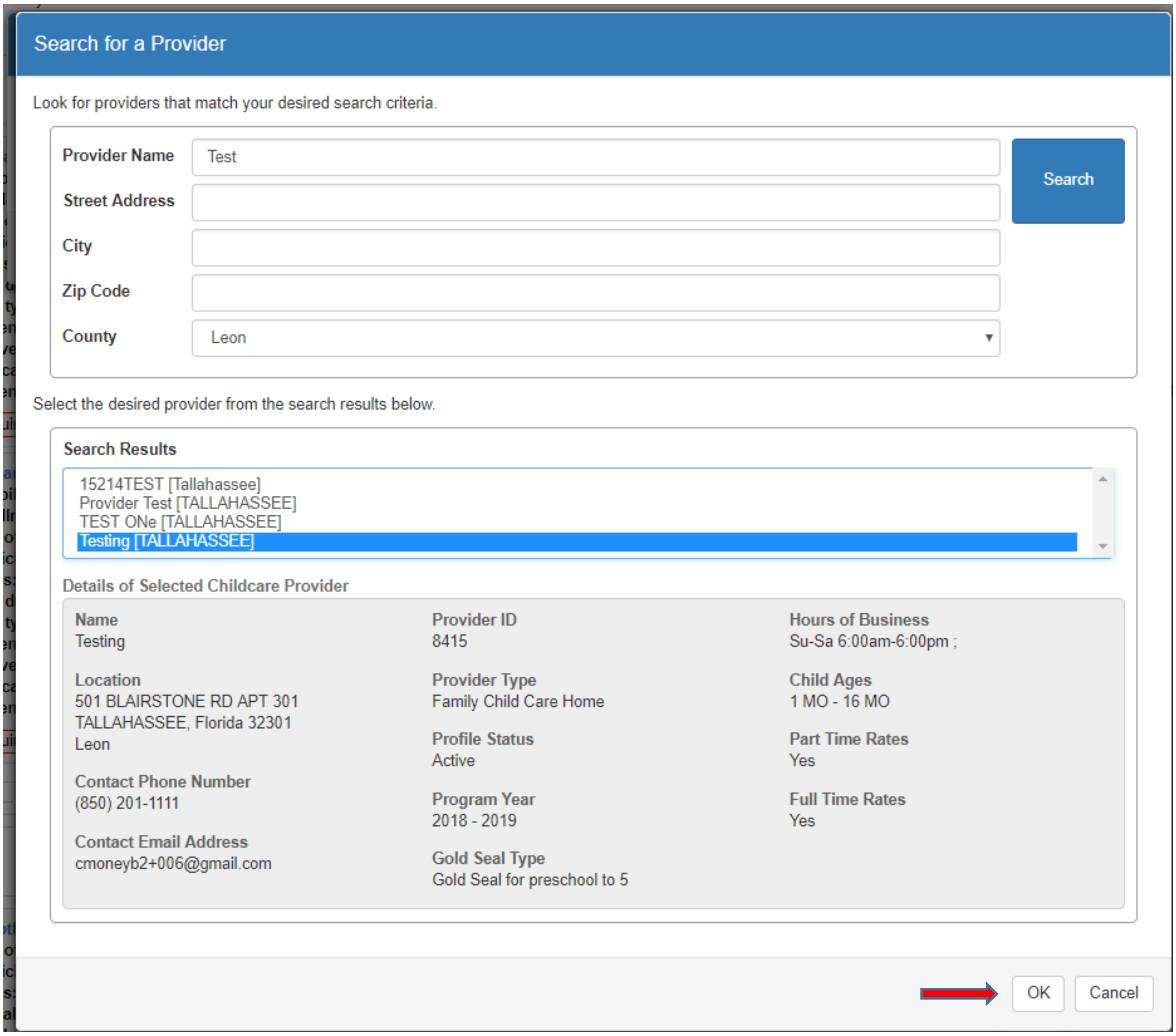


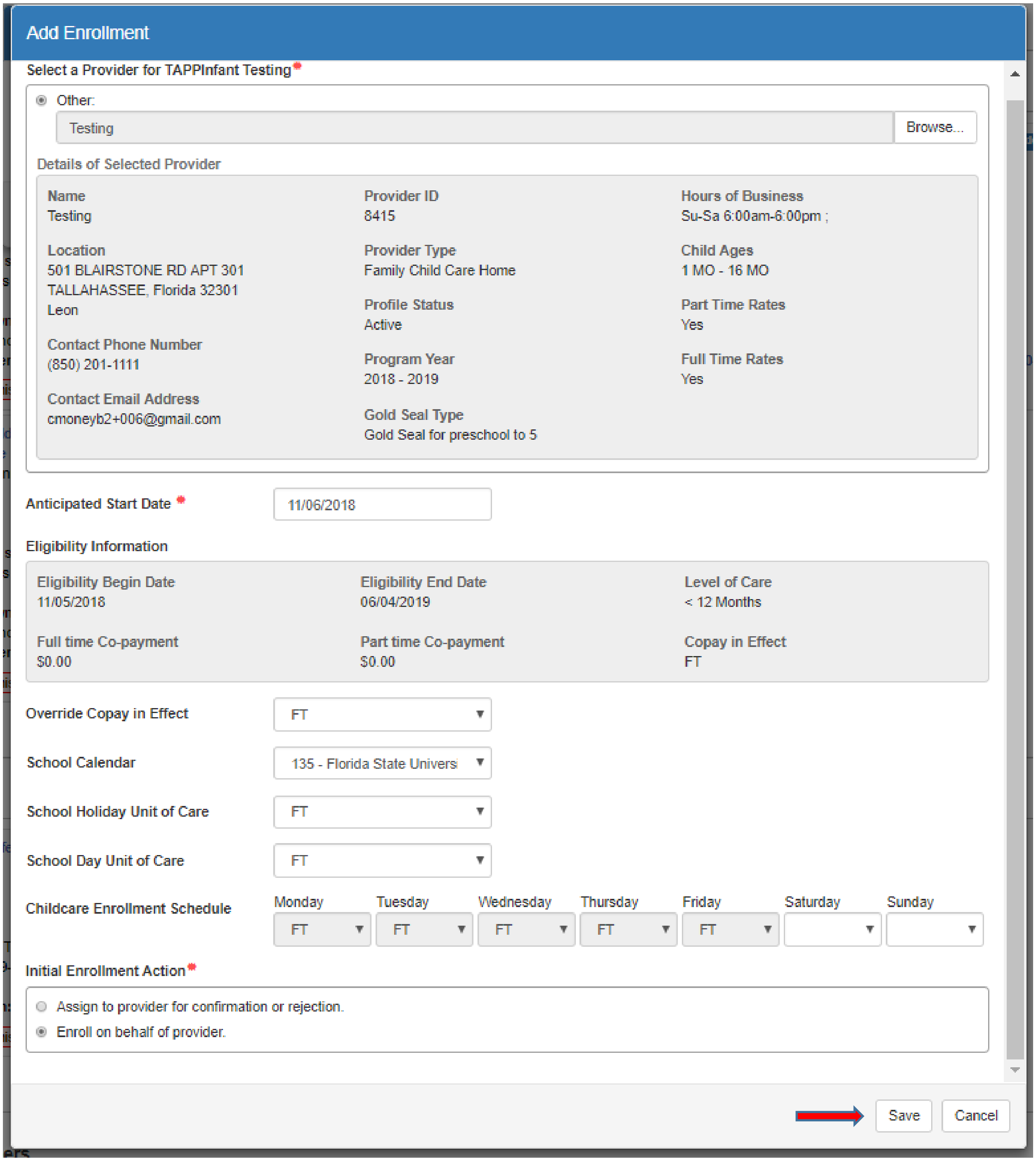

Household at a Glance
Contact Information
Children Needing Care
Parents
Other Household Members
CCAA Referral Information
Employment
School/Training
Alimony and Child Support Income
Other Income
Deductions
Totals
Documents
Parents
TAPPMother Testing (child, female, age 16)
History
Edit
Date of birth: 08/22/2002
Ethnicity: Non-Hispanic
Races: White
Marital status: Single
Email: Fake.TAPPMother.Testing228200220181111@oel.admin
Primary phone: (999) 999-9999
Disabled: No
Disability documentation: No documents available.
Required information is missing or invalid.
Add Parent...
Other Household Members
Your application contains no people listed as other household members.
Add Other Household Member...
CCAA Referral Information
No Referrals
Do you have a form from another agency titled Child Care Application and Authorization? No
CCAA Referral Documentation
There are no attached documents of this type.
Upload Document...


Update Eligibility
Eligibility Assignments
Eligibility Code
Billing Group
Begin Date
End Date
Funding Agency ID (code, type, name)
Actions
Current Authorization Period (11/05/2018 - 11/04/2019) Update
ETPP
ETAPP
11/05/2018
06/03/2019
47 (33-TP351, E-TAPP, Teenage Parent Plan)
Update
End Eligibility
Add Eligibility Assignment...
Add Next Authorization Period...
Current Eligibility Map
Current Authorization Period
11/05/2018 - 11/04/2019
Eligibility Assignment
ETPP ETAPP (33-TP351)
11/05/2018 - 06/03/2019
Save
Cancel


Edit Eligibility Assignment
Funding Details
Funder Type*
SR
Local
E-TAPP
P-TAPP
Local Billing Code*
33-TP351
Eligibility Code
ETPP
Match Funder
Teenage Parent Plan
Eligibility Begin Date*
11/05/2018
Eligibility End Date*
06/03/2019
Purpose-for-Care Review Date
Care Information
Priority*
01
Level of Care*
< 12 Months
Purpose for Care*
EDUCATION/TRAINING
Rilya Wilson Reporting Requirements
Copay in Effect*
PART TIME DAILY RATE
Co-Payment
Recalculate
Total Household Members
4
Full time Co-payment Amount
$ 0.00
Part time Co-payment Amount
$ 0.00
Full Time Co-payment Waiver or Reduction
Full Time Co-payment is Waived or Reduced
Reduction Amount*
$ 0.00
Co-payment Reduction or Waiver Reason*
Additional Waiver or Reduction Details
Part Time Co-payment Waiver or Reduction
Part Time Co-payment is Waived or Reduced
Reduction Amount*
$ 0.00
Co-payment Reduction or Waiver Reason*
Additional Waiver or Reduction Details
Resulting Full Time Co-payment Amount
$ 0.00
Resulting Part Time Co-payment Amount
$ 0.00
OK
Cancel


Enrollments
Enrollments
There are no enrollments for this child.
Add Enrollment...
Close
Date of birth: 01/01/2018
Date of birth: 01/01/2018


Search for a Provider
Look for providers that match your desired search criteria.
Provider Name
Test
Street Address
City
Zip Code
County
Leon
Search
Select the desired provider from the search results below.
Search Results
15214TEST [Tallahassee]
Provider Test [TALLAHASSEE]
TEST ONe [TALLAHASSEE]
Testing [TALLAHASSEE]
Details of Selected Childcare Provider
Name
Testing
Location
501 BLAIRSTONE RD APT 301
TALLAHASSEE, Florida 32301
Leon
Contact Phone Number
(850) 201-1111
Contact Email Address
cmoneyb2+006@gmail.com
Provider ID
8415
Provider Type
Family Child Care Home
Profile Status
Active
Program Year
2018 - 2019
Gold Seal Type
Gold Seal for preschool to 5
Hours of Business
Su-Sa 6:00am-6:00pm ;
Child Ages
1 MO - 16 MO
Part Time Rates
Yes
Full Time Rates
Yes
OK
Cancel


Add Enrollment

Select a Provider for TAPPInfant Testing*

Other:

Testing | Browse...

Details of Selected Provider

Name Testing	Provider ID 8415	Hours of Business Su-Sa 6:00am-6:00pm ;
Location 501 BLAIRSTONE RD APT 301 TALLAHASSEE, Florida 32301 Leon	Provider Type Family Child Care Home	Child Ages 1 MO - 16 MO
	Profile Status Active	Part Time Rates Yes
Contact Phone Number (850) 201-1111	Program Year 2018 - 2019	Full Time Rates Yes
Contact Email Address cmoneyb2+006@gmail.com	Gold Seal Type Gold Seal for preschool to 5	

Anticipated Start Date * 11/06/2018

Eligibility Information

Eligibility Begin Date 11/05/2018	Eligibility End Date 06/04/2019	Level of Care < 12 Months
Full time Co-payment $0.00	Part time Co-payment $0.00	Copay in Effect FT

Override Copay in Effect: FT

School Calendar: 135 - Florida State Univers

School Holiday Unit of Care: FT

School Day Unit of Care: FT

Childcare Enrollment Schedule

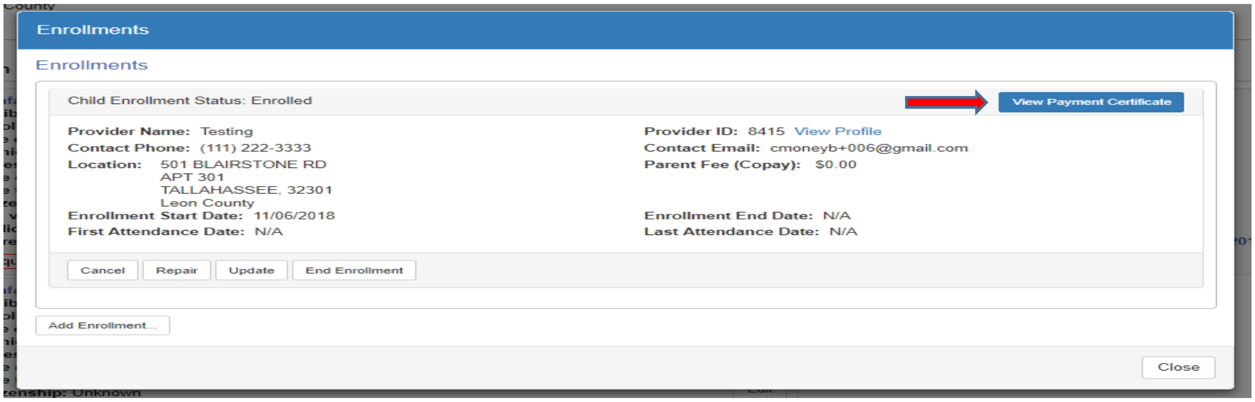
Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
FT	FT	FT	FT	FT		

Initial Enrollment Action*

Assign to provider for confirmation or rejection.

Enroll on behalf of provider.

Save Cancel



Enrollments

Enrollments

Child Enrollment Status: Enrolled | View Payment Certificate

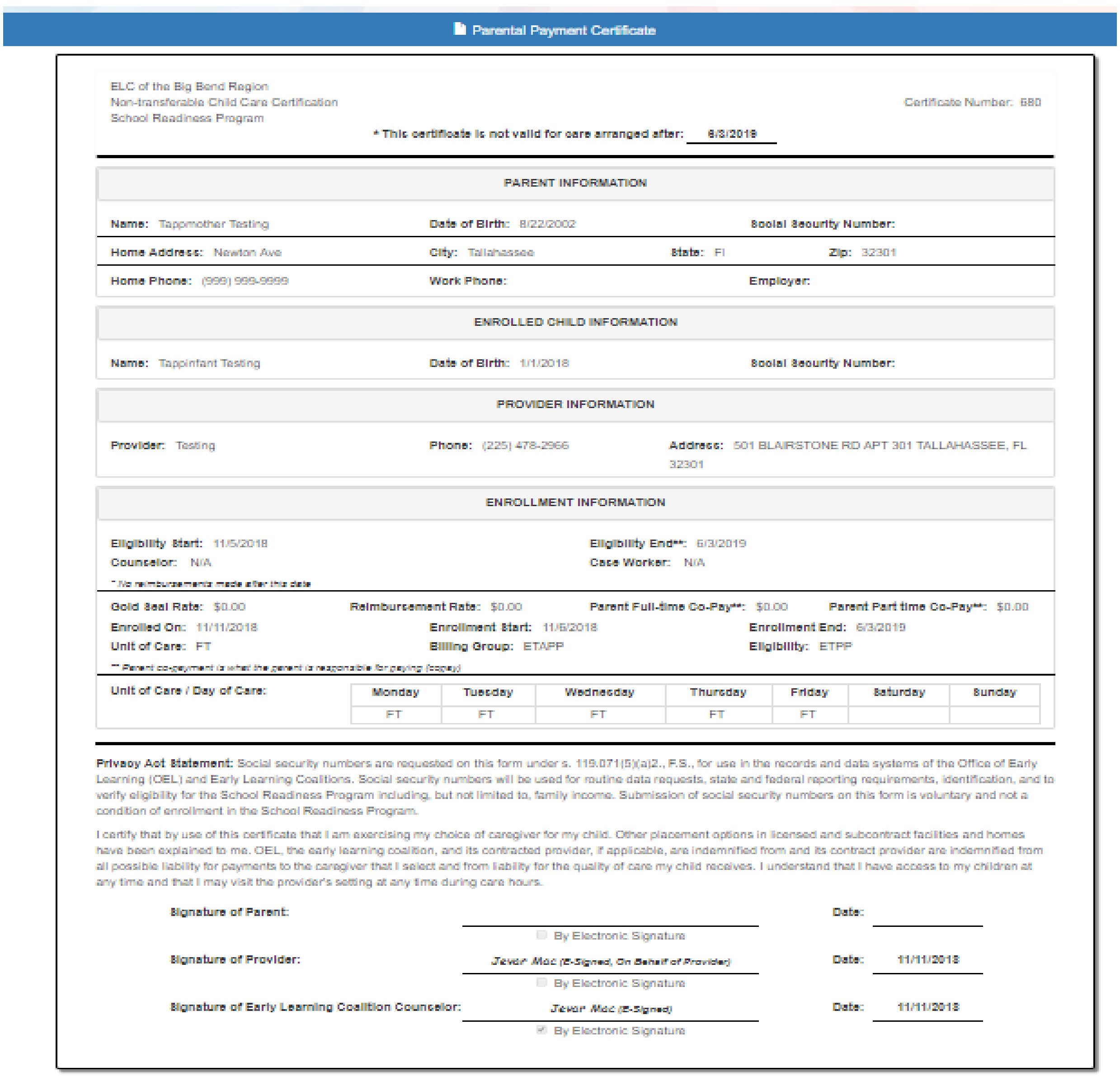
Provider Name: Testing
Contact Phone: (111) 222-3333
Location: 501 BLAIRSTONE RD
APT 301
TALLAHASSEE, 32301
Leon County
Enrollment Start Date: 11/06/2018
First Attendance Date: N/A

Provider ID: 8415 View Profile
Contact Email: cmoneyb+006@gmail.com
Parent Fee (Copay): $0.00
Enrollment End Date: N/A
Last Attendance Date: N/A

Cancel | Repair | Update | End Enrollment

Add Enrollment...

Close



Parental Payment Certificate

ELC of the Big Bend Region
Non-transferable Child Care Certification
School Readiness Program

Certificate Number: 680

* This certificate is not valid for care arranged after: 6/3/2019

PARENT INFORMATION

Name: Tappmother Testing **Date of Birth:** 8/22/2002 **Social Security Number:**

Home Address: Newton Ave **City:** Tallahassee **State:** Fl **Zip:** 32301

Home Phone: (999) 999-9999 **Work Phone:** **Employer:**

ENROLLED CHILD INFORMATION

Name: Tappinfant Testing **Date of Birth:** 1/1/2018 **Social Security Number:**

PROVIDER INFORMATION

Provider: Testing **Phone:** (225) 478-2966 **Address:** 501 BLAIRSTONE RD APT 301 TALLAHASSEE, FL 32301

ENROLLMENT INFORMATION

Eligibility Start: 11/5/2018 **Eligibility End**:** 6/3/2019
Counselor: N/A **Case Worker:** N/A

* No reimbursements made after this date

Gold Seal Rate: $0.00 **Reimbursement Rate:** $0.00 **Parent Full-time Co-Pay**:** $0.00 **Parent Part time Co-Pay**:** $0.00
Enrolled On: 11/11/2018 **Enrollment Start:** 11/6/2018 **Enrollment End:** 6/3/2019
Unit of Care: FT **Billing Group:** ETAPP **Eligibility:** ETPP

** Parent co-payment is what the parent is responsible for paying (copay)

Unit of Care / Day of Care:	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
	FT	FT	FT	FT	FT		

Privacy Act Statement: Social security numbers are requested on this form under s. 119.071(5)(a)2., F.S., for use in the records and data systems of the Office of Early Learning (OEL) and Early Learning Coalitions. Social security numbers will be used for routine data requests, state and federal reporting requirements, identification, and to verify eligibility for the School Readiness Program including, but not limited to, family income. Submission of social security numbers on this form is voluntary and not a condition of enrollment in the School Readiness Program.

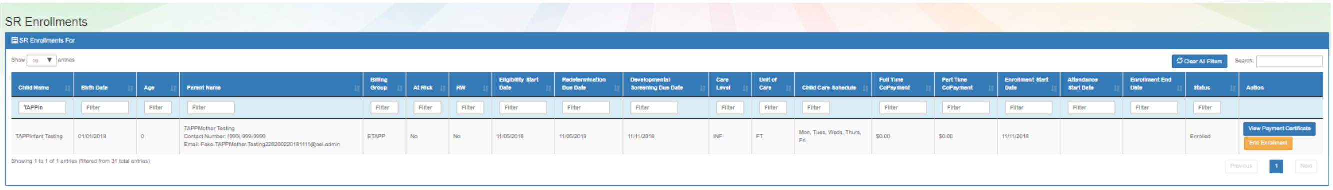
I certify that by use of this certificate that I am exercising my choice of caregiver for my child. Other placement options in licensed and subcontract facilities and homes have been explained to me. OEL, the early learning coalition, and its contracted provider, if applicable, are indemnified from and its contract provider are indemnified from all possible liability for payments to the caregiver that I select and from liability for the quality of care my child receives. I understand that I have access to my children at any time and that I may visit the provider's setting at any time during care hours.

Signature of Parent: ________ **Date:** ______
By Electronic Signature

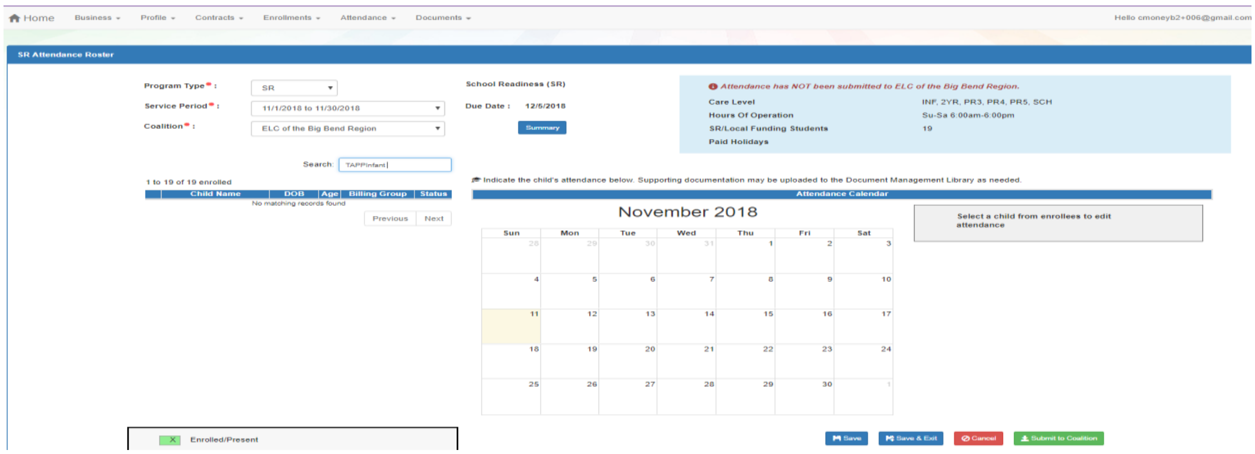
Signature of Provider: *Javar Mac (E-Signed, On Behalf of Provider)* **Date:** 11/11/2018
By Electronic Signature

Signature of Early Learning Coalition Counselor: *Javar Mac (E-Signed)* **Date:** 11/11/2018
By Electronic Signature

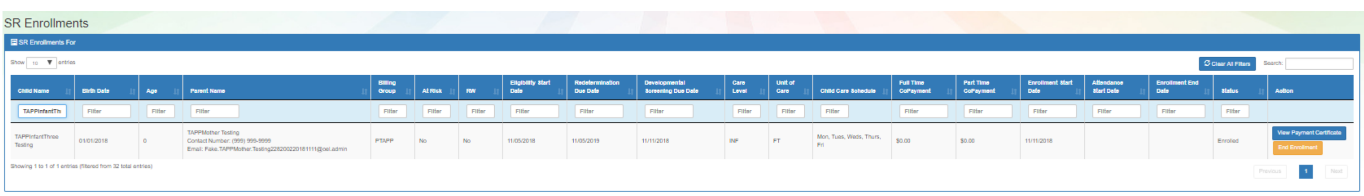
Below is a view of the E-TAPP and P-TAPP enrollments in the Provider Portal. E-TAPP Enrollments only display on the Provider’s Enrollment Roster.



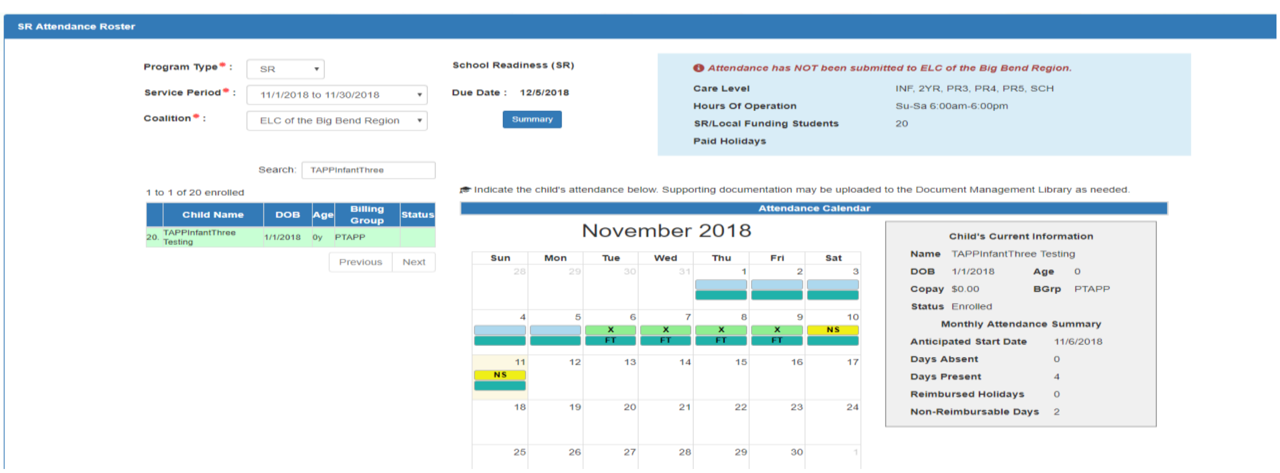
The E-TAPP Enrollment is not present on the Attendance Roster.



P-TAPP Enrollments display on the Provider’s Enrollment Roster and Attendance Roster.

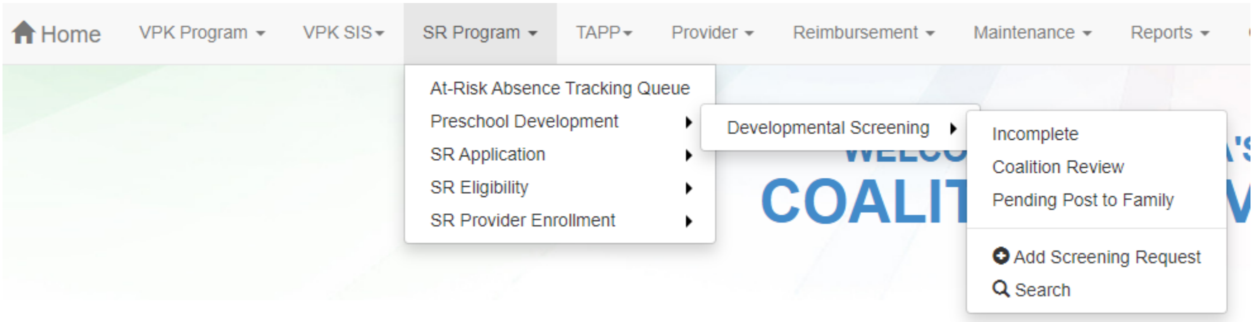


P-TAPP Enrollments are present on the Attendance Roster. The provider is able to mark attendance for these enrollments in the same way as all other enrollments.



Developmental Screening

Developmental Screening menu is available at **SR Program > Preschool Development > Developmental Screening.**

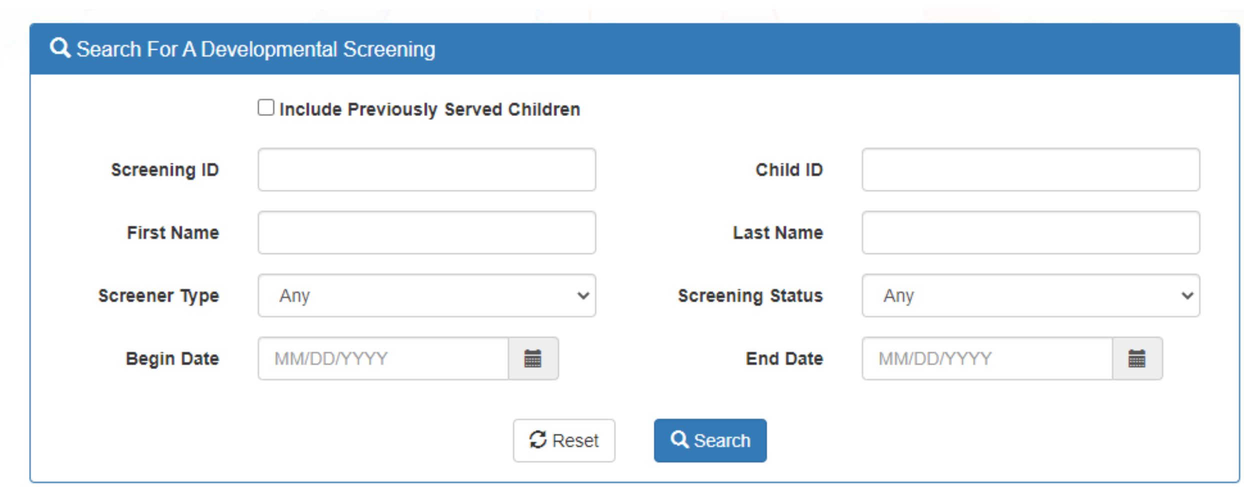


Search

The search function allows coalition users to search by multiple criteria:

- Screening ID – the ID assigned after a screening is started.
- Child ID
- First Name – of child
- Last Name – of child
- Screener Type – Coalition, Family or Provider
- Screening Status – Approved, Incomplete, Coalition Reviewing
- Begin Date
- End Date

To see all children with screenings in a coalition, click the **<u>Search</u>** button without entering any search criteria.

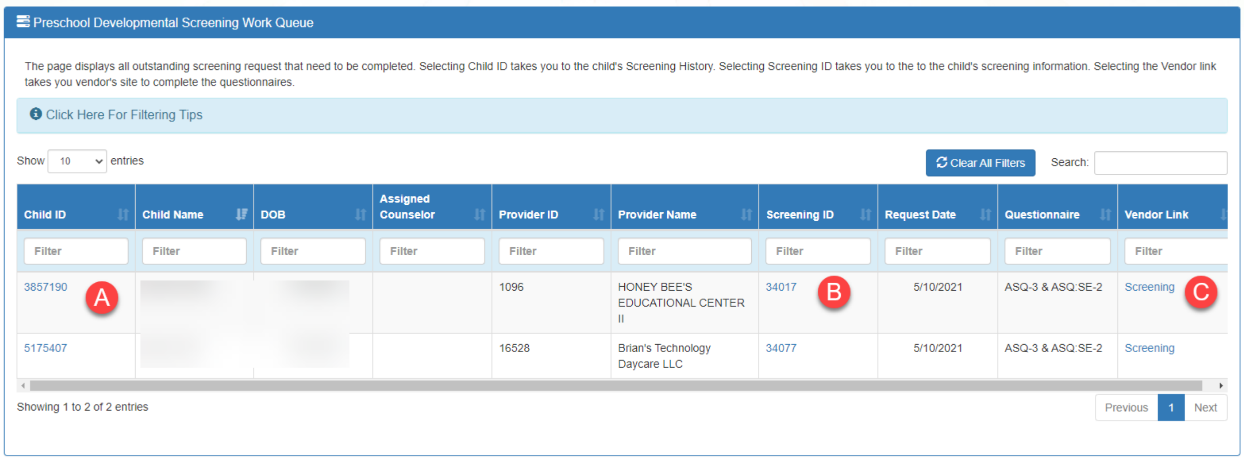


Incomplete Queue

SR Program > Preschool Development > Developmental Screening > Incomplete

The Incomplete queue displays the screenings for children in a coalition that are incomplete. The queue displays 10 records on a page. If more than 10 records display, then multiple pages will display below the grid. Each column can be sorted and filtered.

A. Clicking on the **Child ID** link navigates to the screening history for the child.
B. Clicking on the **Screening ID** link navigates to the child's screening results for that screening.
C. Clicking on the **Screening** link in the Vendor Link column opens the questionnaire so the coalition can complete the screening.



Preschool Development Screening Work Queue

The page displays all outstanding screening request that need to be completed. Selecting Child ID takes you to the child's Screening History. Selecting Screening ID takes you to the to the child's screening information. Selecting the Vendor link takes you vendor's site to complete the questionnaires.

Click Here For Filtering Tips

Show 10 entries — Clear All Filters — Search:

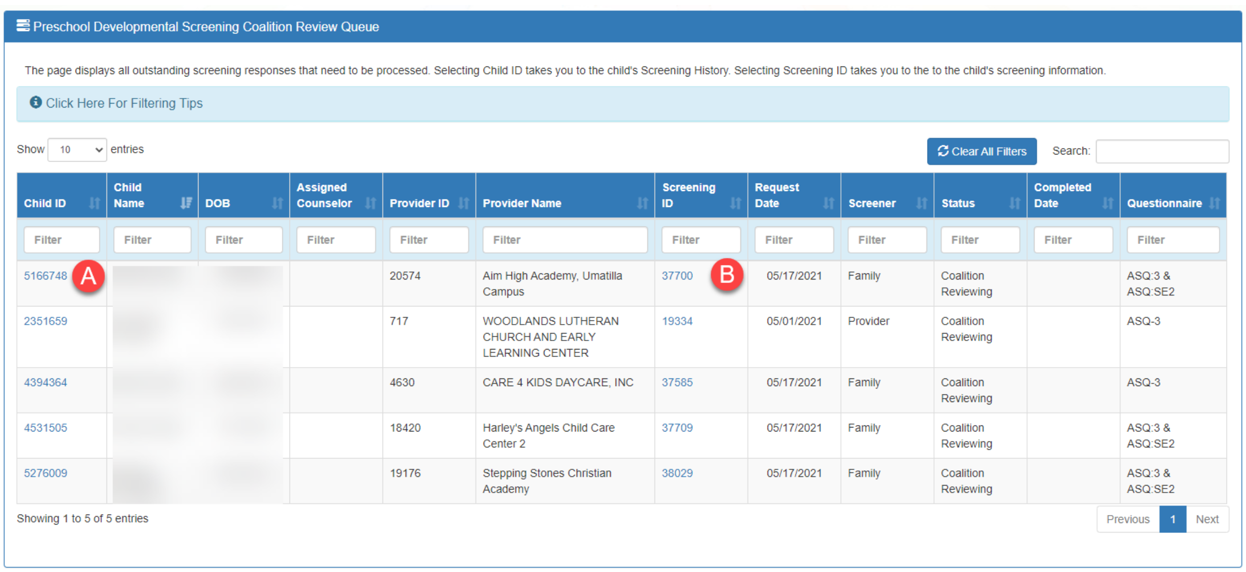
Child ID	Child Name	DOB	Assigned Counselor	Provider ID	Provider Name	Screening ID	Request Date	Questionnaire	Vendor Link
Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter
3857190 A				1096	HONEY BEE'S EDUCATIONAL CENTER II	34017 B	5/10/2021	ASQ-3 & ASQ:SE-2	Screening C
5175407				16528	Brian's Technology Daycare LLC	34077	5/10/2021	ASQ-3 & ASQ:SE-2	Screening

Showing 1 to 2 of 2 entries — Previous 1 Next

Coalition Review Queue

The Coalition Review queue displays all outstanding responses that need to be processed.

A. Clicking on the **Child ID** link navigates to the screening history for the child.
B. Clicking on the **Screening ID** link navigates to the child's screening results for that screening.



Preschool Developmental Screening Coalition Review Queue

The page displays all outstanding screening responses that need to be processed. Selecting Child ID takes you to the child's Screening History. Selecting Screening ID takes you to the to the child's screening information.

Click Here For Filtering Tips

Show 10 entries — Clear All Filters — Search:

Child ID	Child Name	DOB	Assigned Counselor	Provider ID	Provider Name	Screening ID	Request Date	Screener	Status	Completed Date	Questionnaire
Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter
5166748 A				20574	Aim High Academy, Umatilla Campus	37700 B	05/17/2021	Family	Coalition Reviewing		ASQ:3 & ASQ:SE2
2351659				717	WOODLANDS LUTHERAN CHURCH AND EARLY LEARNING CENTER	19334	05/01/2021	Provider	Coalition Reviewing		ASQ-3
4394364				4630	CARE 4 KIDS DAYCARE, INC	37585	05/17/2021	Family	Coalition Reviewing		ASQ-3
4531505				18420	Harley's Angels Child Care Center 2	37709	05/17/2021	Family	Coalition Reviewing		ASQ:3 & ASQ:SE2
5276009				19176	Stepping Stones Christian Academy	38029	05/17/2021	Family	Coalition Reviewing		ASQ:3 & ASQ:SE2

Showing 1 to 5 of 5 entries — Previous 1 Next

Screening Results

The screening results screen display the results for the child's screening. There are buttons at the top of the page. The light blue buttons indicate functionality that is not yet available in EFS Mod. The dark blue buttons indicate coalition user actions.

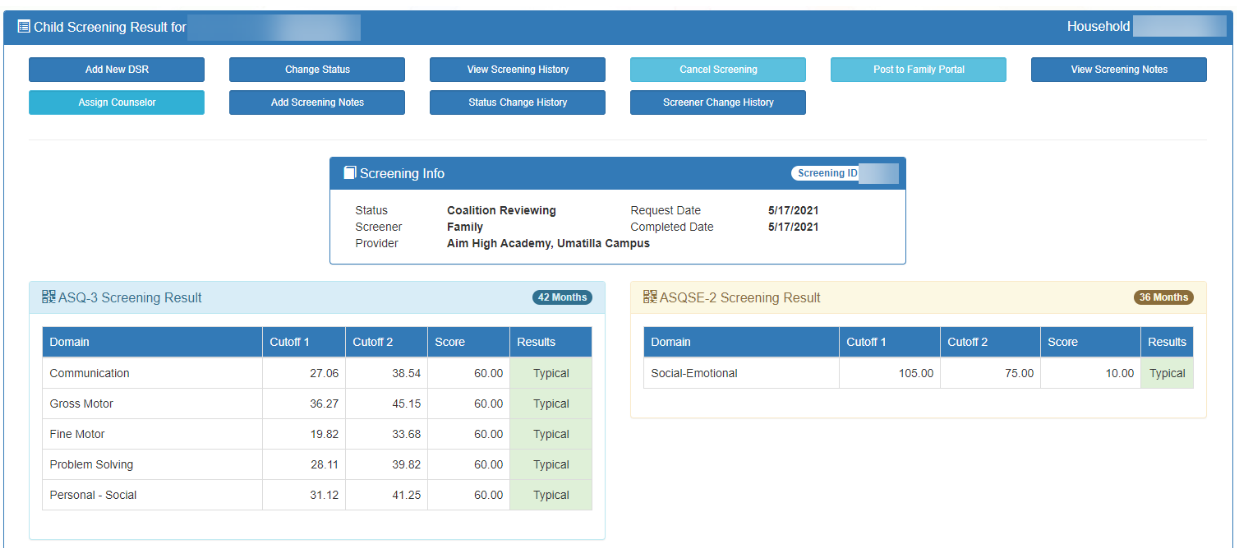
- Add New DSR – add a new developmental screening request
- Change Status – change the status of the screening
- View Screening History – view the screening history of the child
- Cancel Screening – cancel the screening. This functionality is coming soon.
- Post to Family Portal – share the results of the screening on the Family Portal
- View Screening Notes – view any screening notes entered by the screener, provider or coalition
- Assign Counselor – This functionality is coming soon.
- Add Screening Notes – add a new screening note
- Status Change History – view the status changes for the screening
- Screener Change History – view the screener changes
- Change Screener – change the screener for an incomplete screening

The details on the screening display in the Screening Info box:

- Status
- Screener
- Provider
- Request Date
- Completed Date

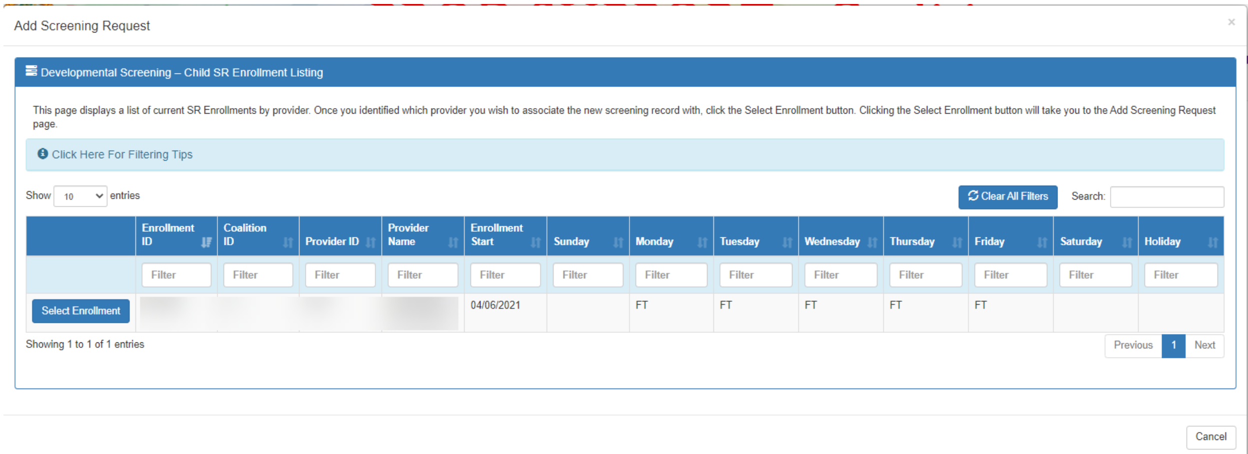
The results of the screening(s) display with scores.

- Typical – the child's scores are on or above the typical cutoff range
- Monitoring – the child's scores are below the typical cutoff range but above the concern cutoff range
- Concern – the child's scores are below or at the concern cutoff range

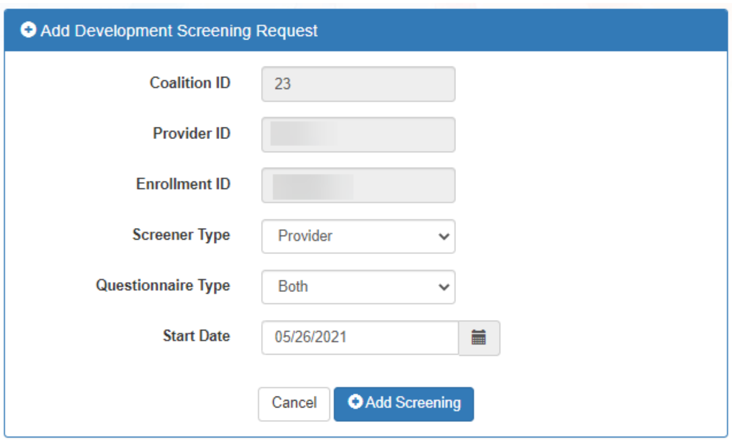


Adding a Screening Request

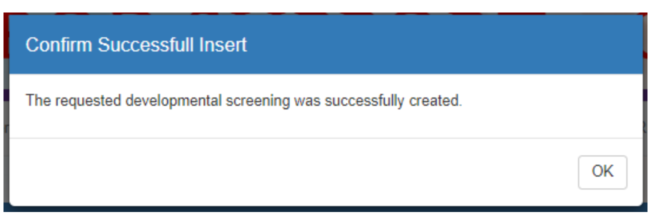
From the Screening Results screen, clicking **Add New DSR** opens the Add Screening Request pop-up window. Clicking the **Select Enrollment** button navigates to the Add Development Screening Request page.



Select the Screener Type, Questionnaire Type and Start Date. Then click **Add Screening**.

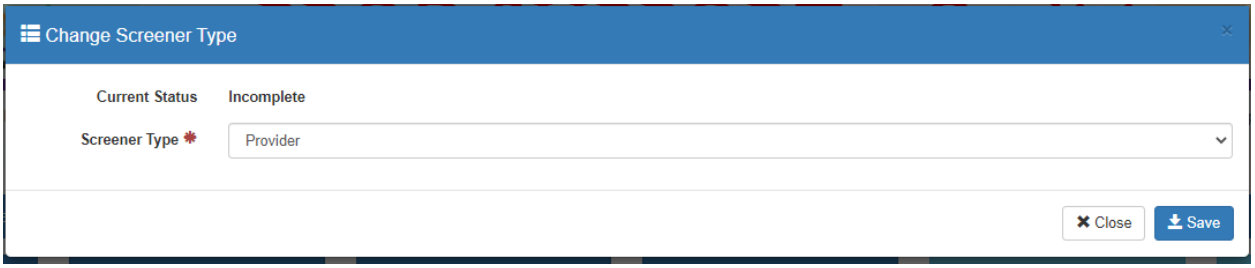


The Confirm Successful Insert pop-up window opens. The screening will now appear in the queue for the selected screener.



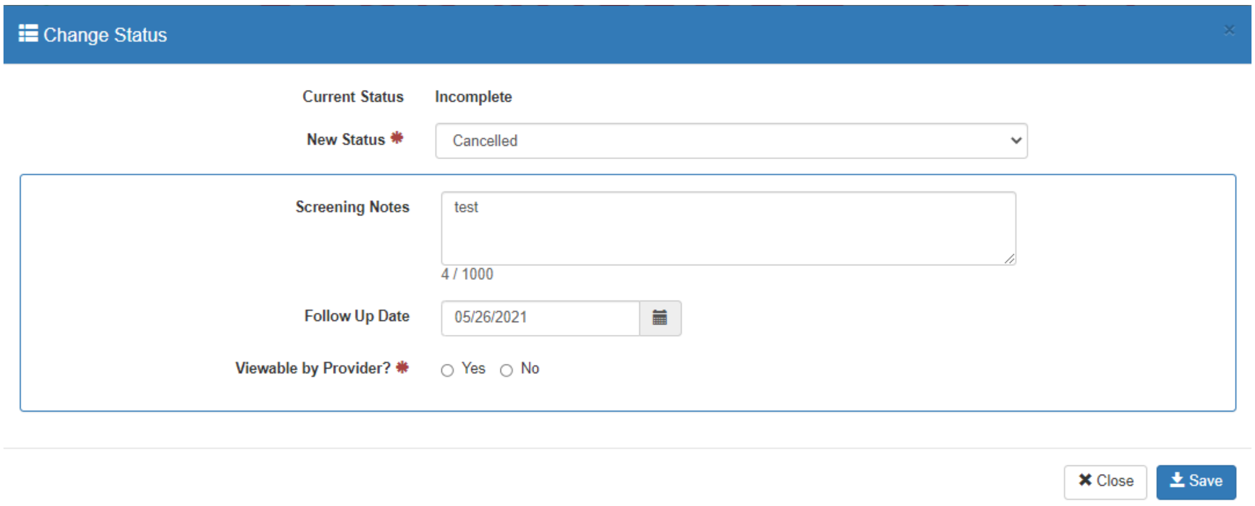
Change Screener

From the Screening Results, clicking the **Change Screener** button opens the Change Screener Type pop-up window. This button is only available for Incomplete screenings.



Change Status

From the Screening Results, clicking the **Change Status** button opens the Change Status pop-up window. This button is not available for Approved screenings.



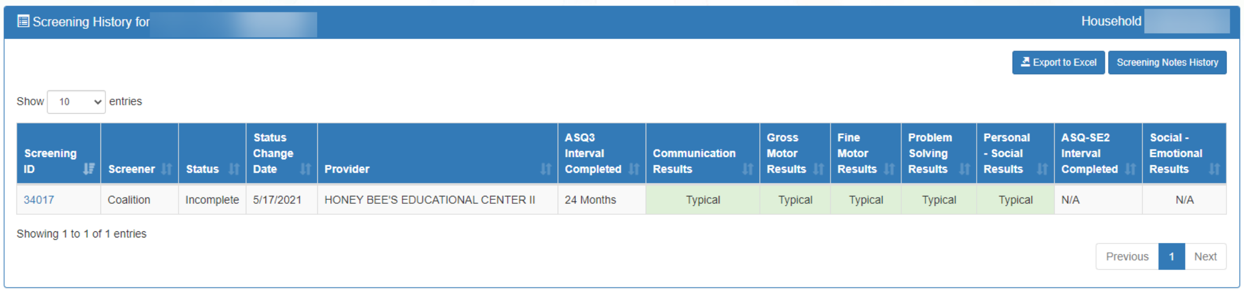
Screening History

The screening history displays all the screening results for the child over time. The screening history can be shown by clicking the:

1. **<u>View Screening History</u>** button on the Screening Results page
2. Child ID link from the queue

On the Screening History page:

A. Clicking on the **Screening ID** link navigates to the child's screening results for that screening.
B. The screening history can be exported to Excel.



Screening History for | Household

Export to Excel | Screening Notes History

Show 10 entries

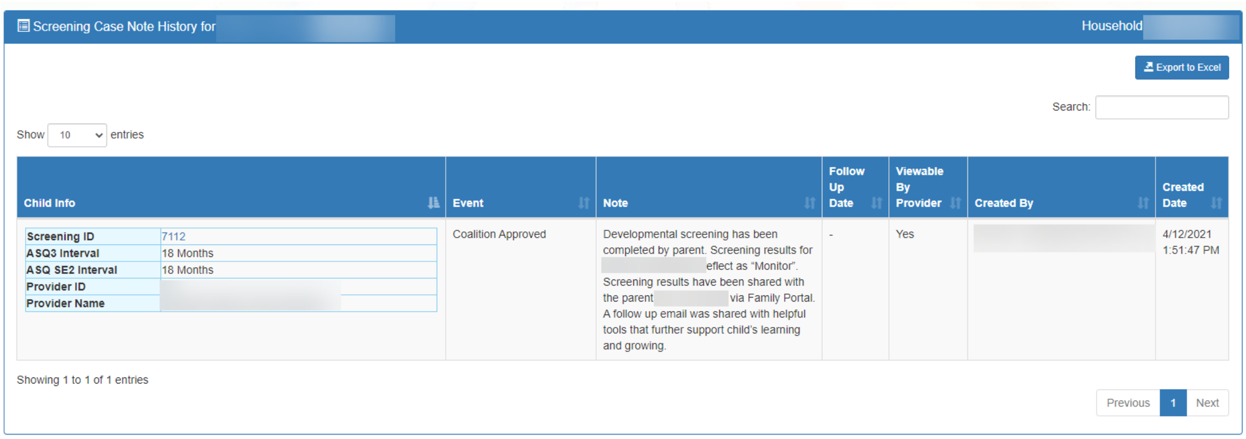
Screening ID	Screener	Status	Status Change Date	Provider	ASQ3 Interval Completed	Communication Results	Gross Motor Results	Fine Motor Results	Problem Solving Results	Personal - Social Results	ASQ-SE2 Interval Completed	Social - Emotional Results
34017	Coalition	Incomplete	5/17/2021	HONEY BEE'S EDUCATIONAL CENTER II	24 Months	Typical	Typical	Typical	Typical	Typical	N/A	N/A

Showing 1 to 1 of 1 entries

Previous 1 Next

View Screening Notes

From the Screening Results, clicking the **<u>View Screening Notes</u>** button navigates to the Screening Case Note History page. The Screening Notes can be exported to Excel.



Screening Case Note History for | Household

Export to Excel

Search:

Show 10 entries

Child Info	Event	Note	Follow Up Date	Viewable By Provider	Created By	Created Date
Screening ID: 7112 ASQ3 Interval: 18 Months ASQ SE2 Interval: 18 Months Provider ID: Provider Name:	Coalition Approved	Developmental screening has been completed by parent. Screening results for effect as "Monitor". Screening results have been shared with the parent via Family Portal. A follow up email was shared with helpful tools that further support child's learning and growing.	-	Yes		4/12/2021 1:51:47 PM

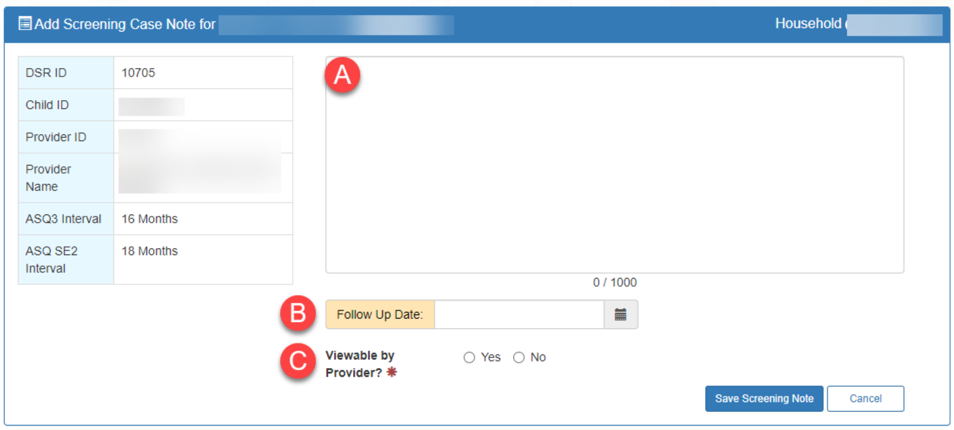
Showing 1 to 1 of 1 entries

Previous 1 Next

Add Screening Note

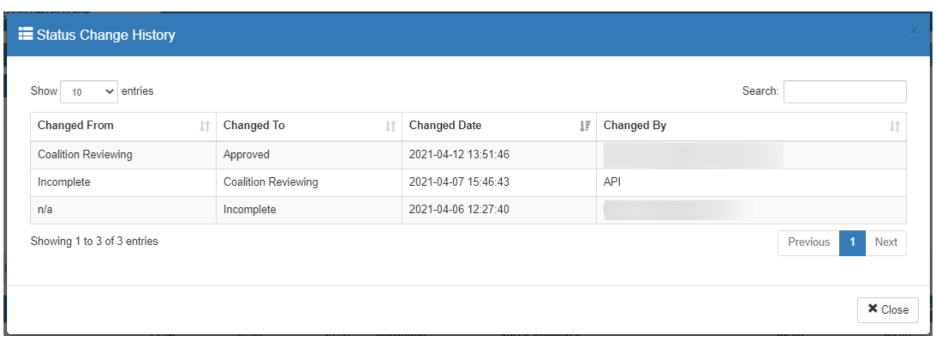
From the Screening Results, clicking the **Add Screening Note** button navigates to the Add Screening Case Note screen.

A. Enter the case note for the screening.
B. Optionally, a follow-up date can be selected using the calendar. Selecting a follow-up date is for reporting purposes only.
C. Select whether the note will be viewable by the provider.



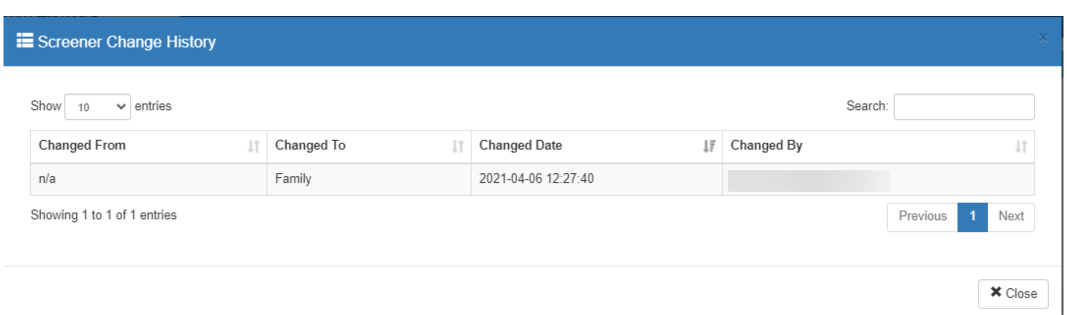
Status Change History

From the Screening Results, clicking the **Status Change History** button opens the Status Change History pop-up window. The most recent status displays at the top of the grid.



Screener Change History

From the Screening Results, clicking the **Screener Change History** button opens the Screener Change History pop-up window.



Bulk Billing Group Transfer

Coalitions can apply for and receive from the state a match allocation based on a dollar-for-dollar match. Once awarded, the match allocation can be applied at the participant level in the manner determined by the coalition to represent the most efficient expenditure of the coalition's awarded SR dollars. In order to access the awarded match dollars, coalitions should invoice DEL through the BG8 SRMAT eligibility code and should expect to receive the amount equal to the local match received to complete the balance of the monthly payment. Coalitions should not invoice DEL for any records that include CCEP for any period in the 2019-2020 fiscal year.

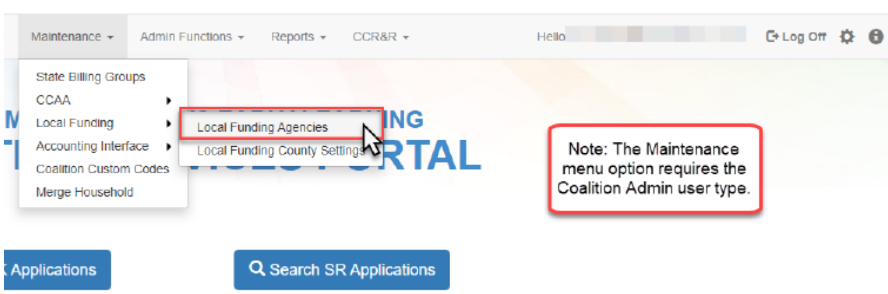
In an attempt to assist coalitions through the transition of the match process, DEL developed a bulk billing group transfer tool within EFS Mod that allows coalition to transfer records, on a monthly basis, to the appropriate category to best utilize the needed match for that payment period. This tool was provided to allow coalitions additional time to make eligibility and enrollment changes to child records, as needed, to accurately reflect the actual match application. **The tool only makes the changes for the current month and for payment purposes only. If eligibility and enrollment data is not made at the child level, the tool would need to be used again in the next month to accurately assess the match as determined by the coalition.** This process would continue until the eligibility and enrollment records were changed at the child level.

Beginning with the July 2019 service period, children with the CCEP match billing group must be updated with the Bulk Billing Group Transfer feature while in Closed Attendance to an appropriate billing group. Children eligible for the new SR Match program need to be updated with the Bulk Billing Group Transfer feature so that their billing group is BG8 and their eligibility code is SR MATCH, provided that the coalition has SR Match funds to use. This will apply a 50% default match assessment calculation that can be increased, decreased, or zeroed out with the Run Match Assessment feature, if needed, as determined by the coalition. This also associates the records to the new SR Match OCA Payment Code, SRMAT. Children may remain in the BG8 billing group with the ECON eligibility code. With the release of 4.1.6, the default match assessment calculation will be 0%. The calculation can be increased, as needed, using the Run Match Assessment feature. This associates the records to the current 97P00 OCA Payment Code. Separate match funding agencies and allocation plans for BG8 ECON and BG8 SRMAT must be created.

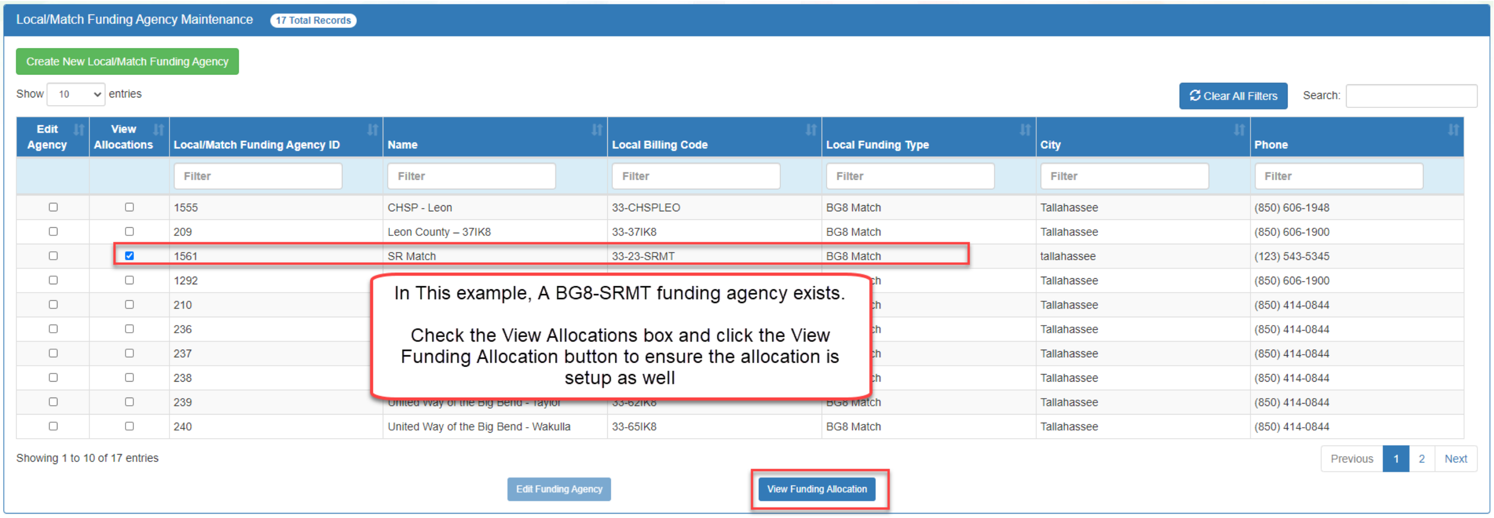
NOTE: This process is a temporary solution required each service period until new match funders are created and enrollment records are updated.

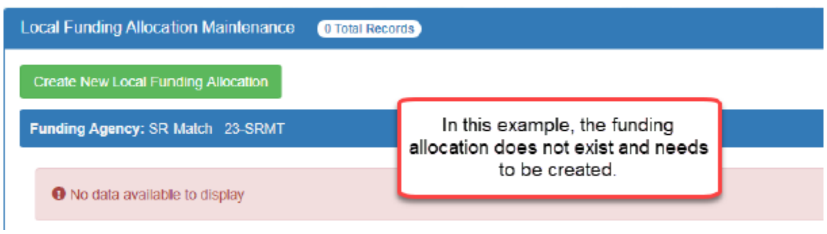
SR Match Funder Allocation for BG8-SRMAT

To use the BG8 SRMAT eligibility code, a new BG8 match funder must be set up. Go to **Maintenance > Local Funding > Local Funding Agencies**.

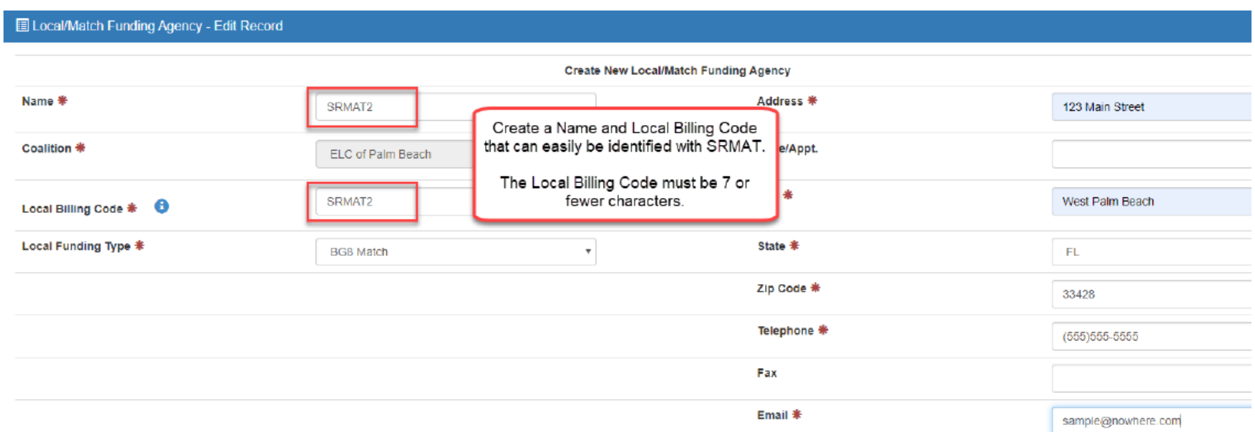


Make sure that a SRMAT funder is created with an allocation.

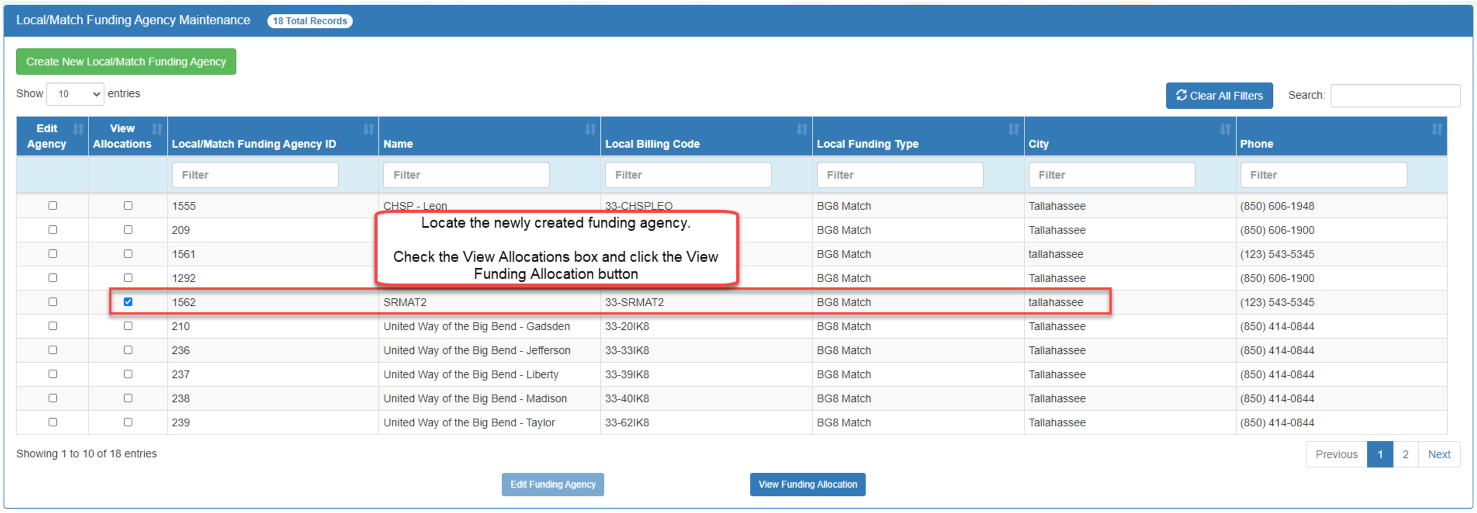




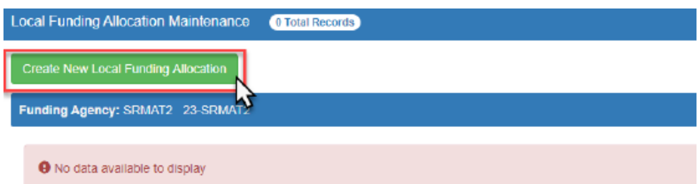
If no BG8 SRMAT funder exists, click the **Create Local/Match Funding Agency** button and complete the required fields.



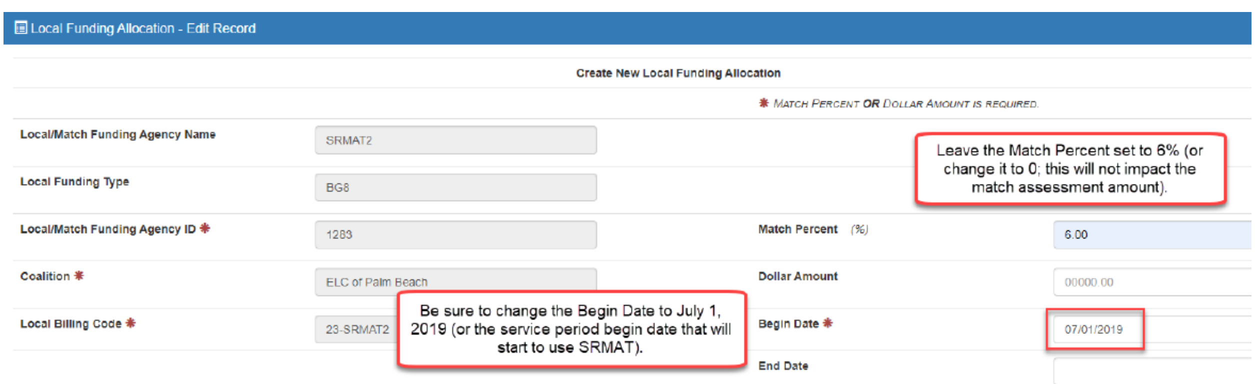
Locate the newly created funding agency. Check the **View Allocations** box and click the **View Funding Allocation** button.



If no BG8 SRMAT allocation exists, click the **Create New Local Funding Allocation** button.

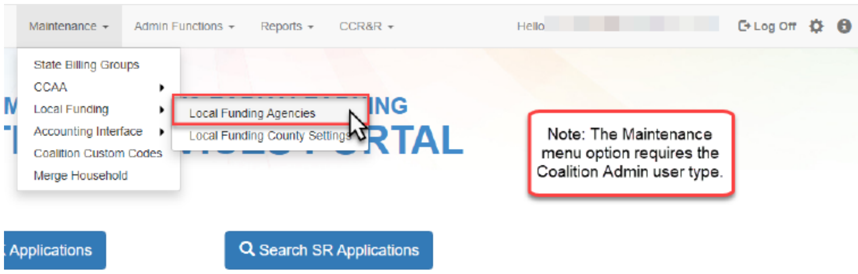


Complete the required fields.



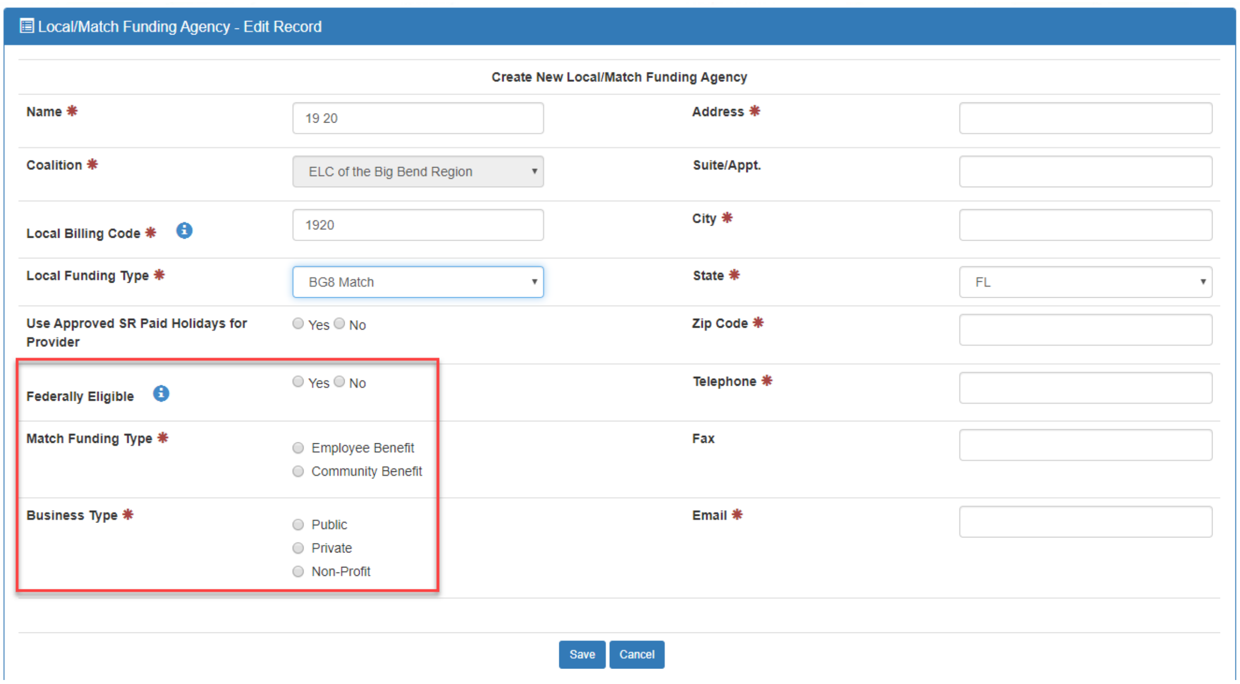
SR Match Program Changes for 2019-2020

Go to **Maintenance > Local Funding > Local Funding Agencies > Edit Agency**.



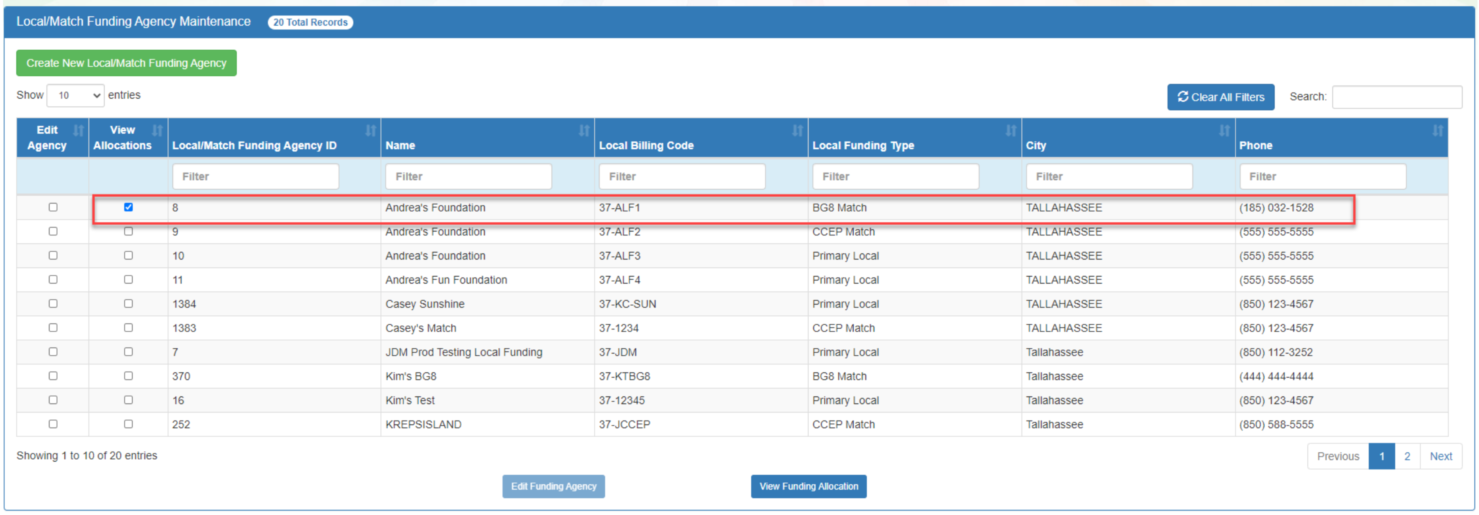
For Local Funding, the same questions for CCEP will display for BG8. CCEP can only have a start date prior to July 1, 2019.

- Federally Eligible
- Match Funding Type
- Business Type



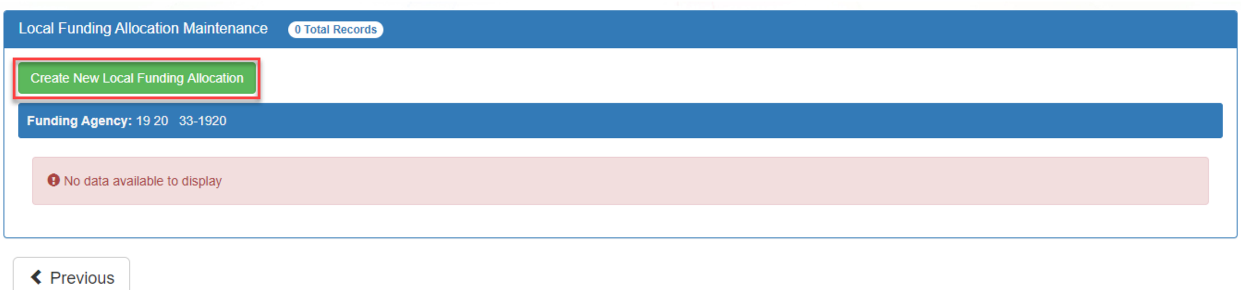
Funding Allocation

After creating a new Local/Match Funding Agency, click the View Allocations checkbox. Then click the **View Funding Allocation** button.



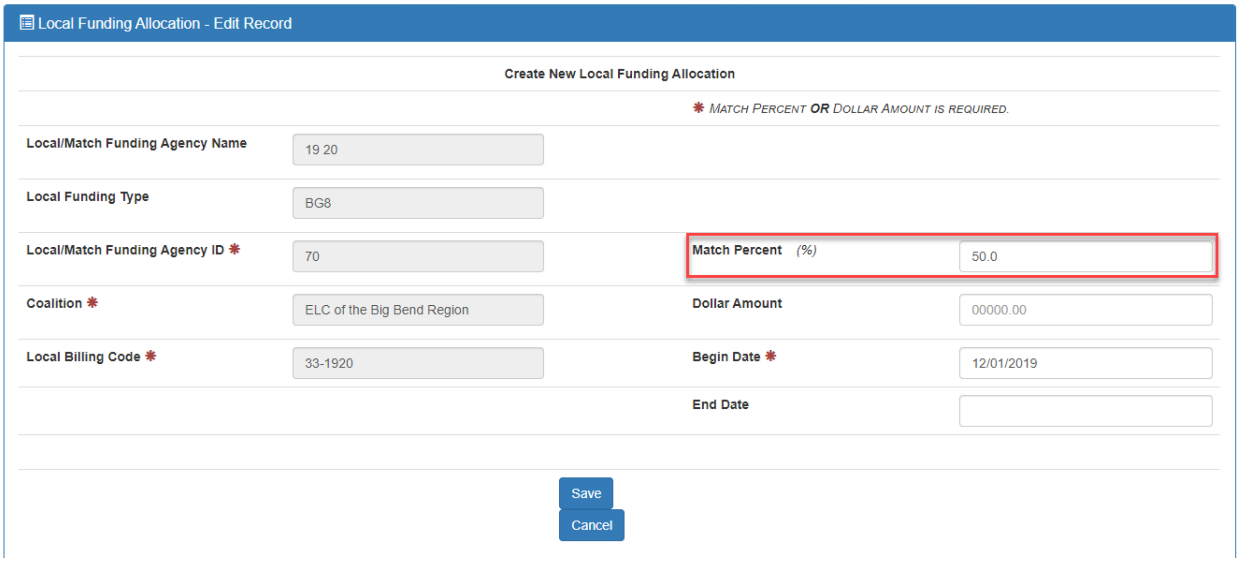
Create New Local Funding Allocation

Clicking the **Create New Local Funding Allocation** button opens the Local Funding Allocation – Edit Record screen.



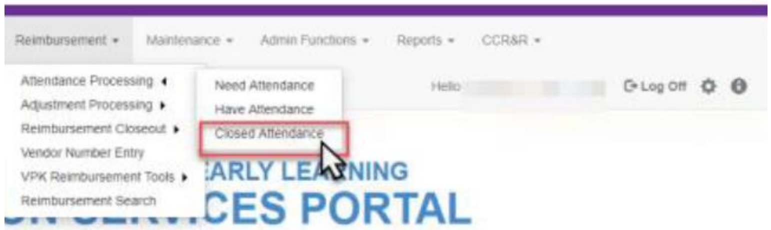
Local Funding Allocation – Edit Record

For BG8 records, the Match Percent defaults to 50%. The Begin Date can only be on the first day of the month. If a date other than the first day of the month, clicking the **Save** button will change the date to the first day of the month. The End Date can only be the last day of the month. If a date other than the last day of the month, clicking the **Save** button will change the date to the last day of the month.

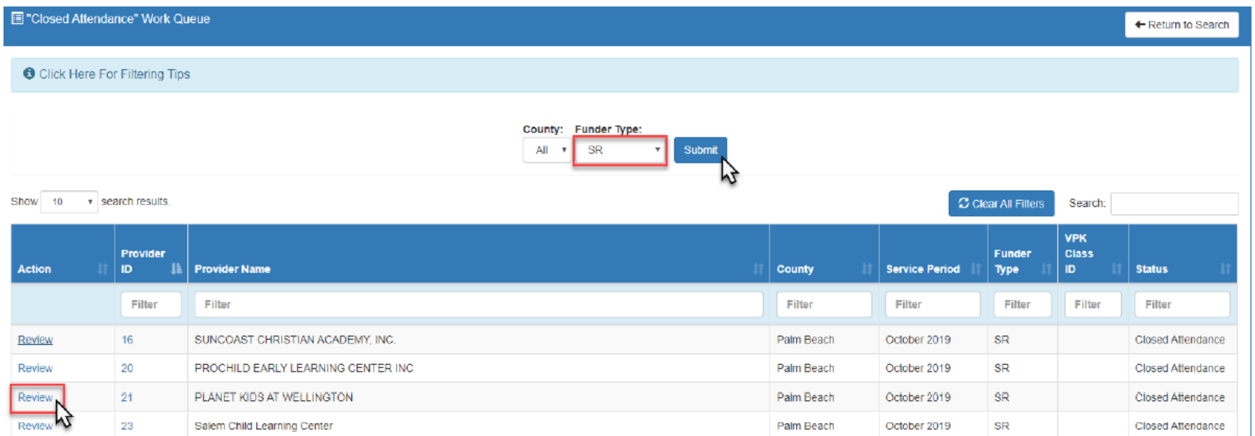


Closed Attendance Check

Once the new funder and funding allocations are created, at the end of the payment period, go to **Reimbursement > Attendance Processing > Closed Attendance**.



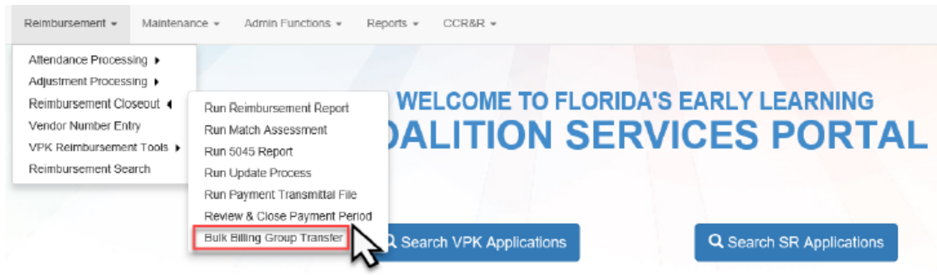
Select the Funder Type (SR) from the funder type drop down menu and click **Submit**. Then, click on the Review link to open a provider's Closed Attendance records for a service period.



Review the records. Are there are CCEP records? If so, STOP!

The CCEP records must be changed with the bulk billing group transfer process before verifying.

Go to **Reimbursement > Reimbursement Closeout > Bulk Billing Group Transfer**.



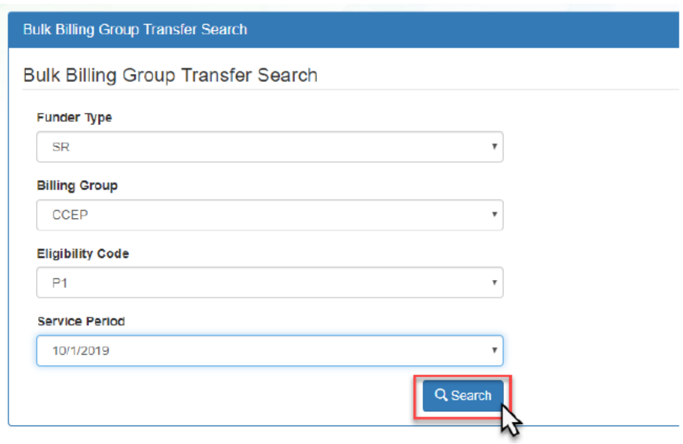
The **Bulk Billing Group Transfer Search** screen displays. Select the *Funder Type, Billing Group, Eligibility Code,* and *Service Period* that need to be updated and click the **Search** button.

Note: Each selection is a filter that must be selected (in order) before the search can be initiated.

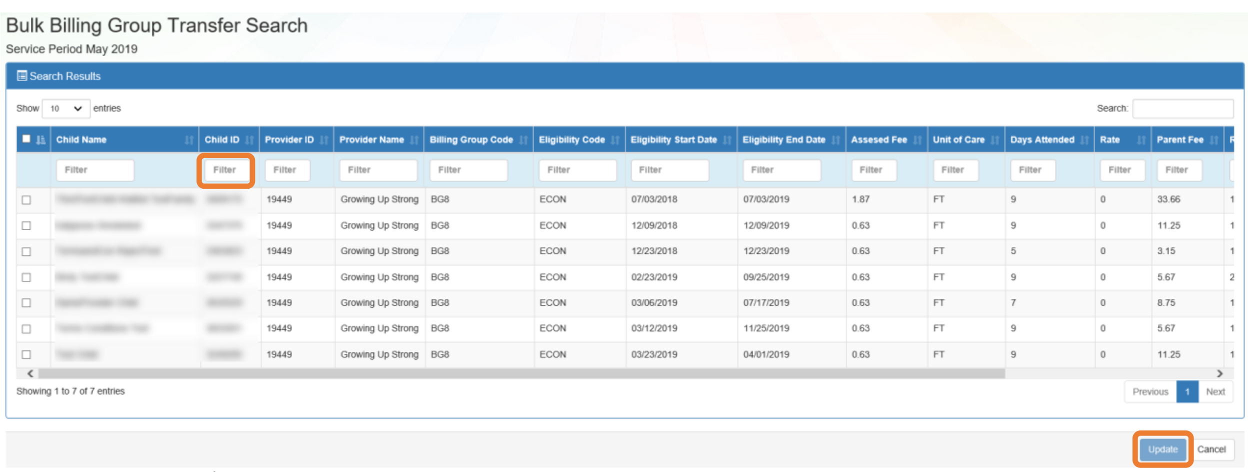
The **Billing Group** dropdown menu displays all of the billing group codes that are associated with the selected funder type.

The **Eligibility Code** dropdown menu displays all of the eligibility codes that are associated with the selected funder type and billing group code.

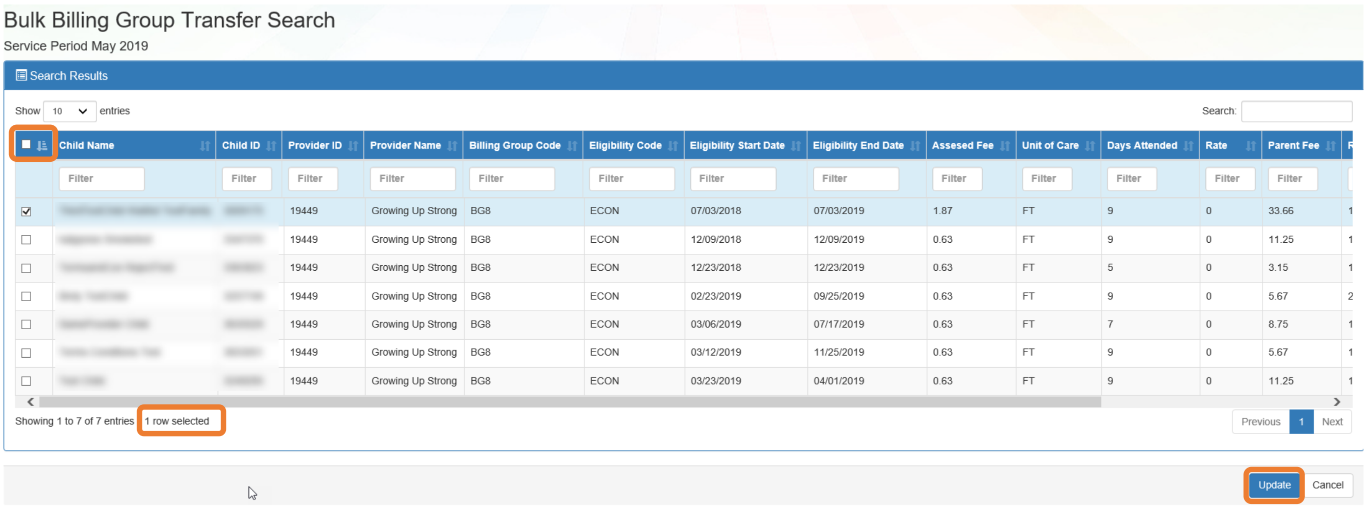
The **Service Period** dropdown menu displays all service periods that are associated with the selected funder type, billing group, and eligibility code AND are in the **Closed Attendance** status.



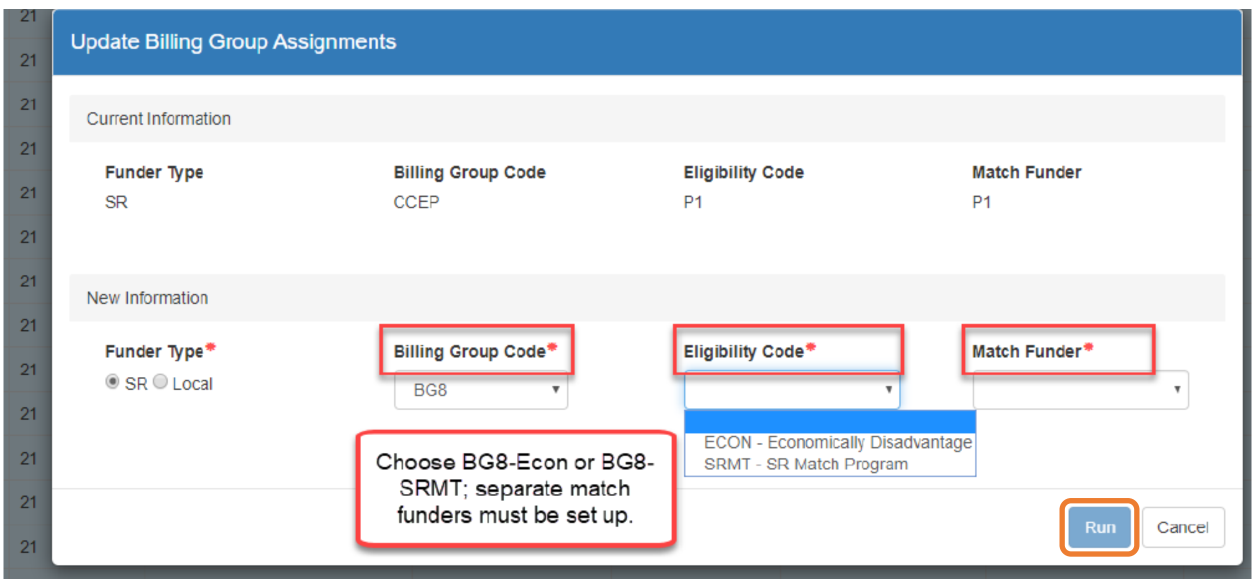
The results display all records in Closed Attendance that have the funder type, billing group, and eligibility combination for the service period selected. Use the Search feature and column filters to narrow results. Scroll to the right to see more. The **Update** button is disabled until a record is selected.



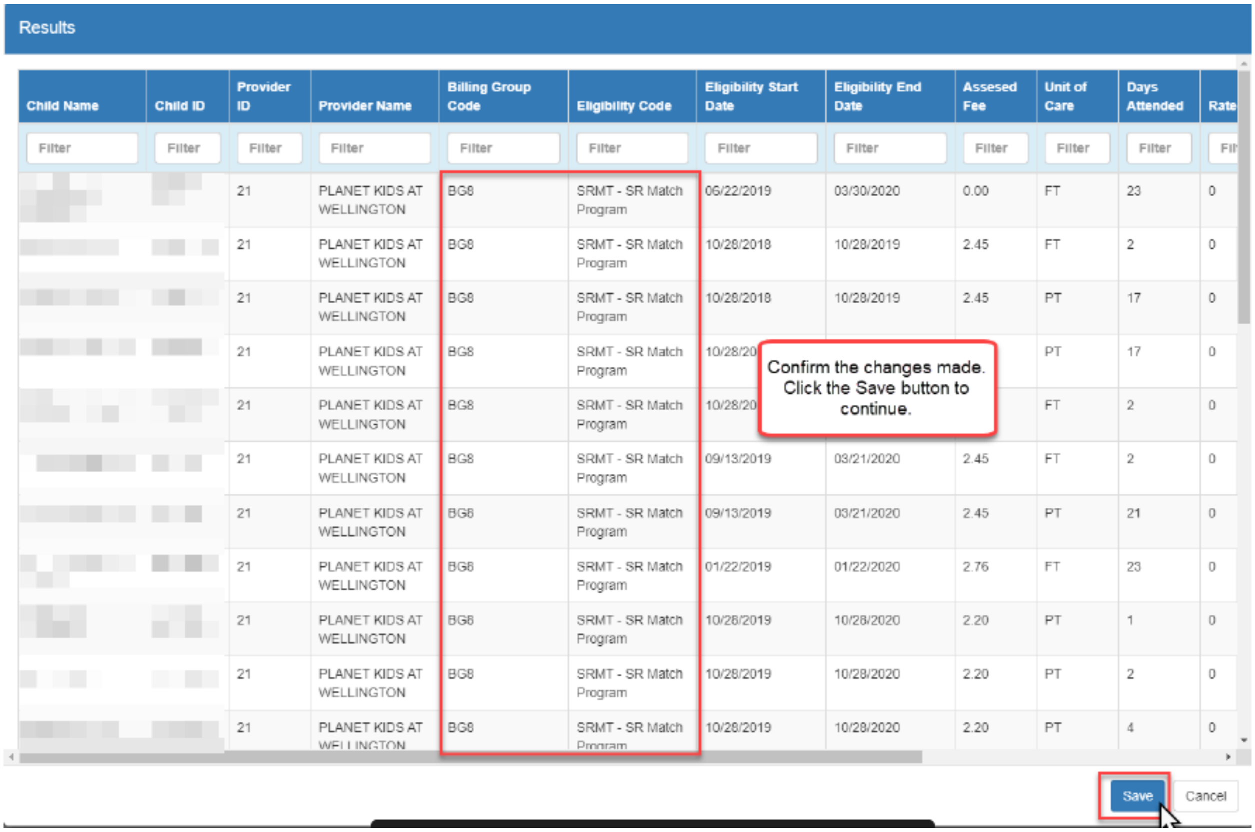
Select each row that needs to be updated by clicking the row. The row becomes highlighted blue and the total number of rows selected display at the bottom of the screen. A Select All feature is also available, to the left of the Child Name header. The **Update** button is now enabled. Click the **Update** button.



The Update Billing Group Assignments pop-up displays. The Current Information area displays the current funder type, billing group, eligibility code and match funder name. Coalition users input the changes needed in the New Information area. Then, click the **Run** button.



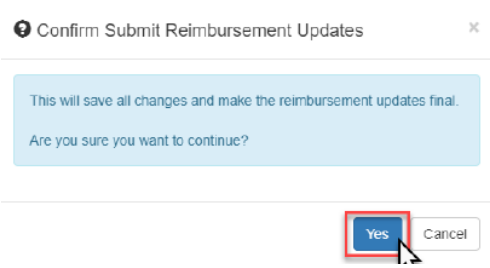
The Results window displays a preview of the updated reimbursement records. Notice the changed billing group, eligibility code. If correct, click the **Save** button. Otherwise, click the **Cancel** button to abandon the changes.



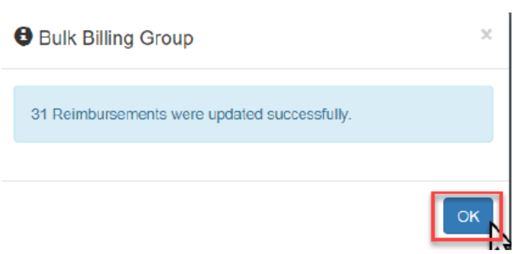
Results

Child Name	Child ID	Provider ID	Provider Name	Billing Group Code	Eligibility Code	Eligibility Start Date	Eligibility End Date	Assesed Fee	Unit of Care	Days Attended	Rate
Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter	Fil
		21	PLANET KIDS AT WELLINGTON	BG8	SRMT - SR Match Program	06/22/2019	03/30/2020	0.00	FT	23	0
		21	PLANET KIDS AT WELLINGTON	BG8	SRMT - SR Match Program	10/28/2018	10/28/2019	2.45	FT	2	0
		21	PLANET KIDS AT WELLINGTON	BG8	SRMT - SR Match Program	10/28/2018	10/28/2019	2.45	PT	17	0
		21	PLANET KIDS AT WELLINGTON	BG8	SRMT - SR Match Program	10/28/20			PT	17	0
		21	PLANET KIDS AT WELLINGTON	BG8	SRMT - SR Match Program	10/28/20			FT	2	0
		21	PLANET KIDS AT WELLINGTON	BG8	SRMT - SR Match Program	09/13/2019	03/21/2020	2.45	FT	2	0
		21	PLANET KIDS AT WELLINGTON	BG8	SRMT - SR Match Program	09/13/2019	03/21/2020	2.45	PT	21	0
		21	PLANET KIDS AT WELLINGTON	BG8	SRMT - SR Match Program	01/22/2019	01/22/2020	2.76	FT	23	0
		21	PLANET KIDS AT WELLINGTON	BG8	SRMT - SR Match Program	10/28/2019	10/28/2020	2.20	PT	1	0
		21	PLANET KIDS AT WELLINGTON	BG8	SRMT - SR Match Program	10/28/2019	10/28/2020	2.20	PT	2	0
		21	PLANET KIDS AT WELLINGTON	BG8	SRMT - SR Match Program	10/28/2019	10/28/2020	2.20	PT	4	0

Next, a confirmation message displays. Click the **Yes** button to commit the changes. Otherwise, click the **Cancel** button to abandon the changes.

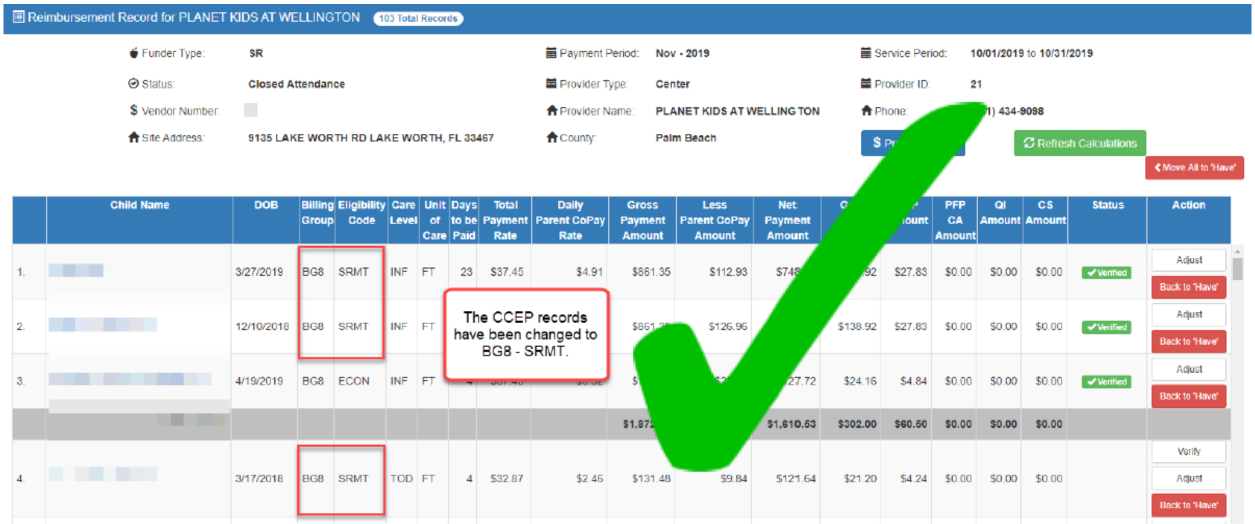


Then, a success message displays with the total number of records that were updated. Click the **OK** button.



When the message is closed, the screen returns to the Bulk Billing Group Transfer search page. The changes can now be verified in Closed Attendance.

Review the records. Now that there are no CCEP records, continue to verify records as usual. Repeat for all service period rosters.

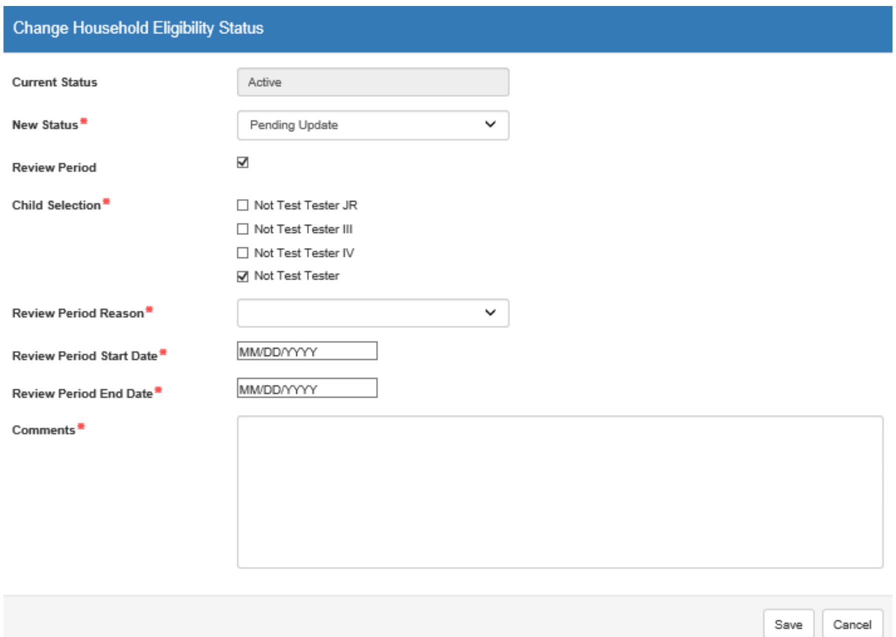


Create a Review Period

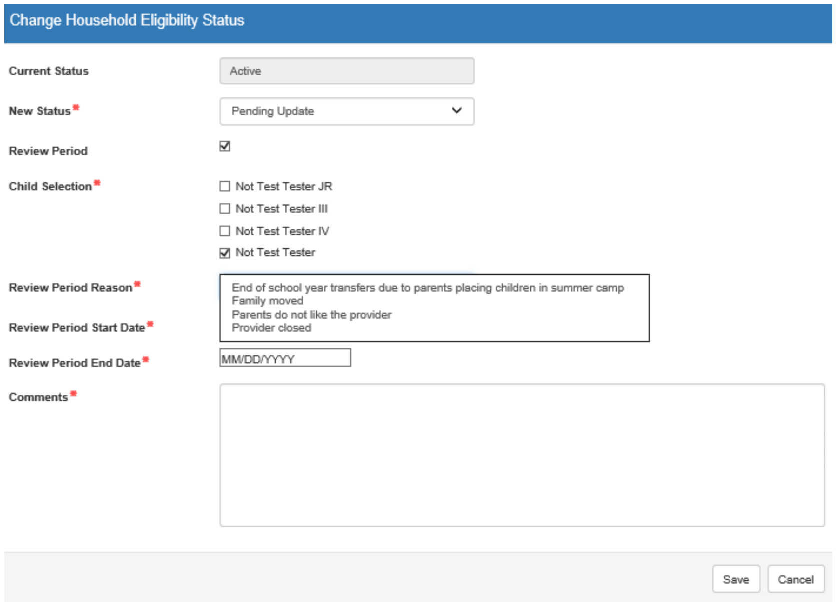
A coalition admin can set up a review period for a child by setting the household status to **Pending Update**. Check the **Review Period** checkbox and select the child.

NOTE: Creating a Review Period has requirements:

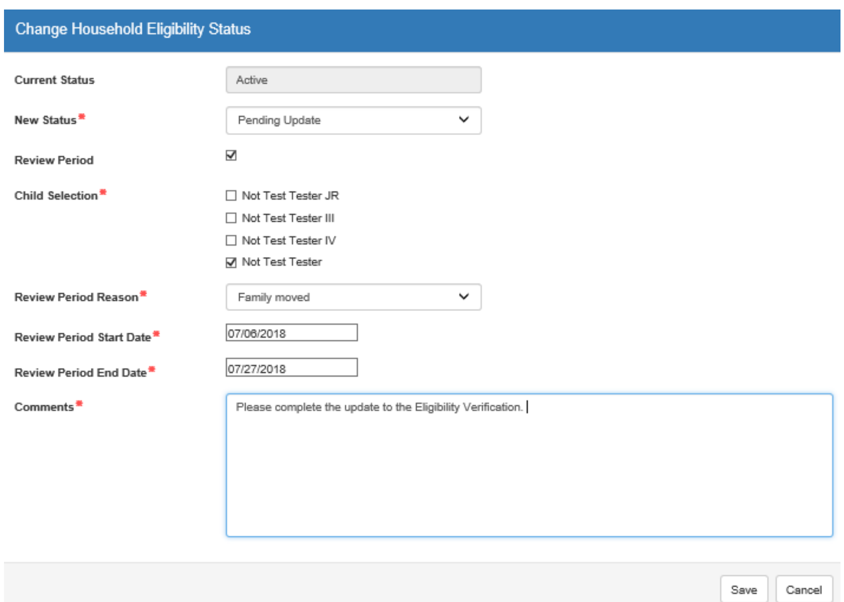
- There must be a least one day between the review period start and end dates.
- The start date must fall within the current authorization period and must be within the existing eligibility assignment.
- If the review period extends past the current authorization period, the next authorization period is created.
- If the current eligibility assignment corresponds to a TANF billing group, a new eligibility assignment is created.

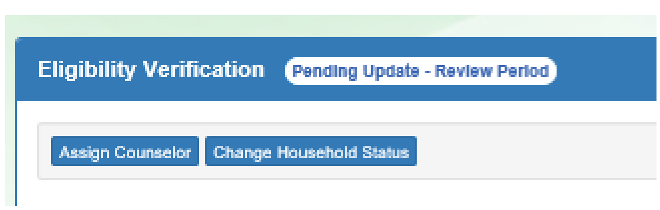


Select the **Review Period Reason**.



Select the **Review Period Start Date** and **Review Period End Date**. Enter Comments and click **<u>Save</u>**.

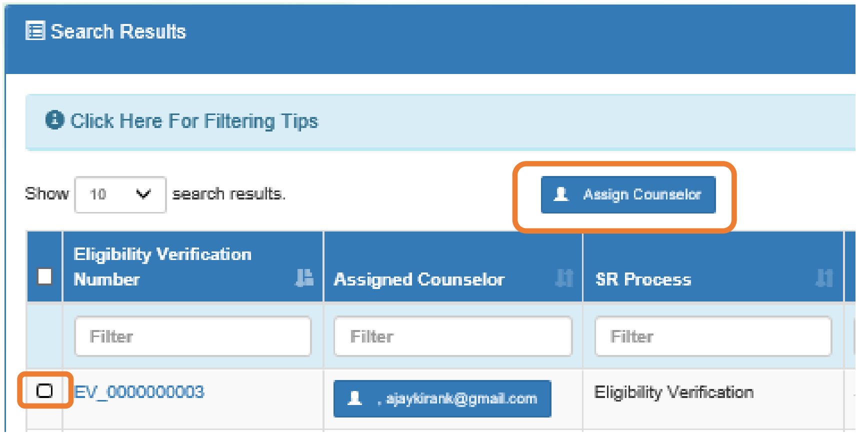




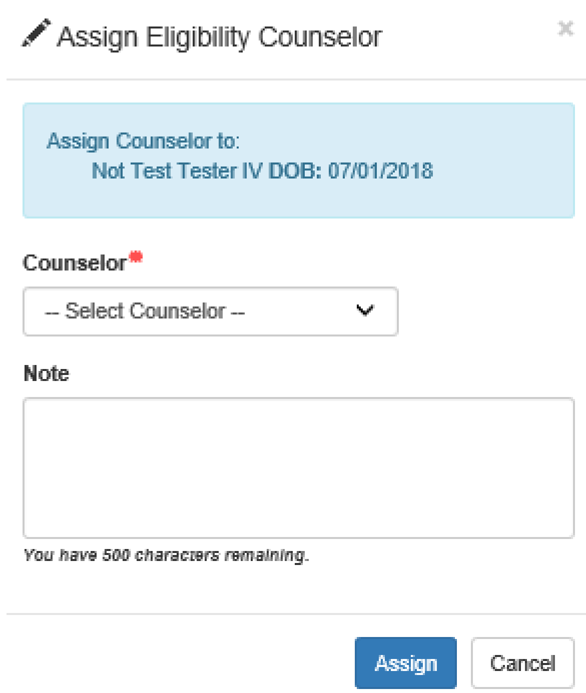
The family will then update and submit the Eligibility Verification as shown above.

Assign a Counselor

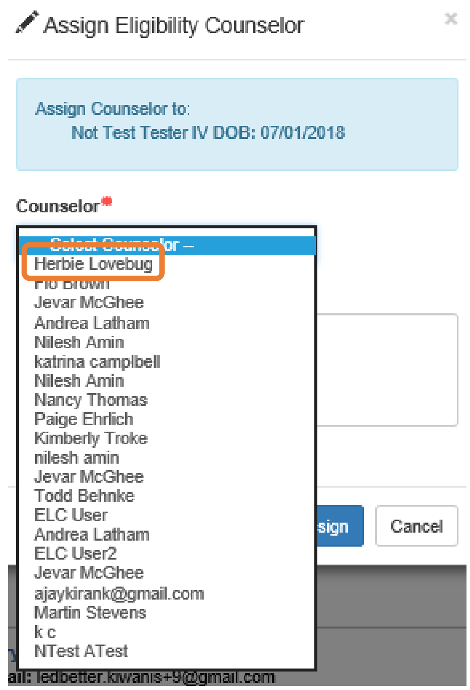
A counselor is not required, but may be assigned to an EV. Select an Eligibility Verification Number and click **<u>Assign Counselor</u>**.



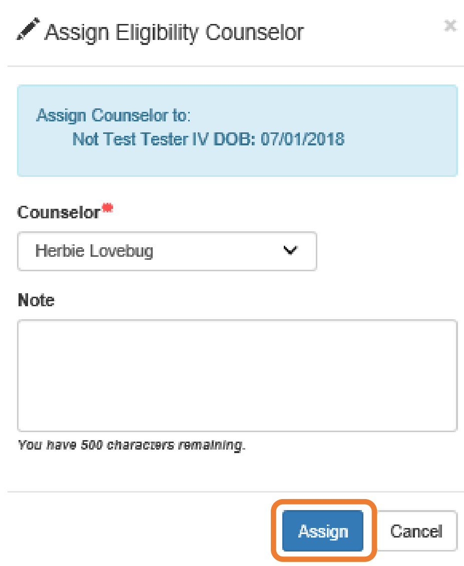
The following screen will display.



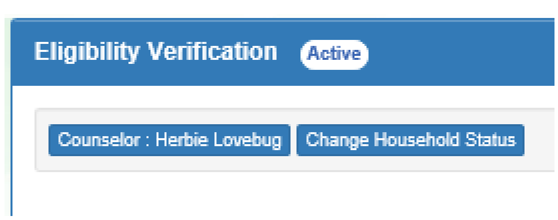
Select a counselor from the **Counselor** dropdown. The list of counselors is generated from coalition users who are given the Manage SR Applications and Manage Eligibility permissions for their user role or coalition admins.



Click **<u>Assign</u>** to assign the counselor.

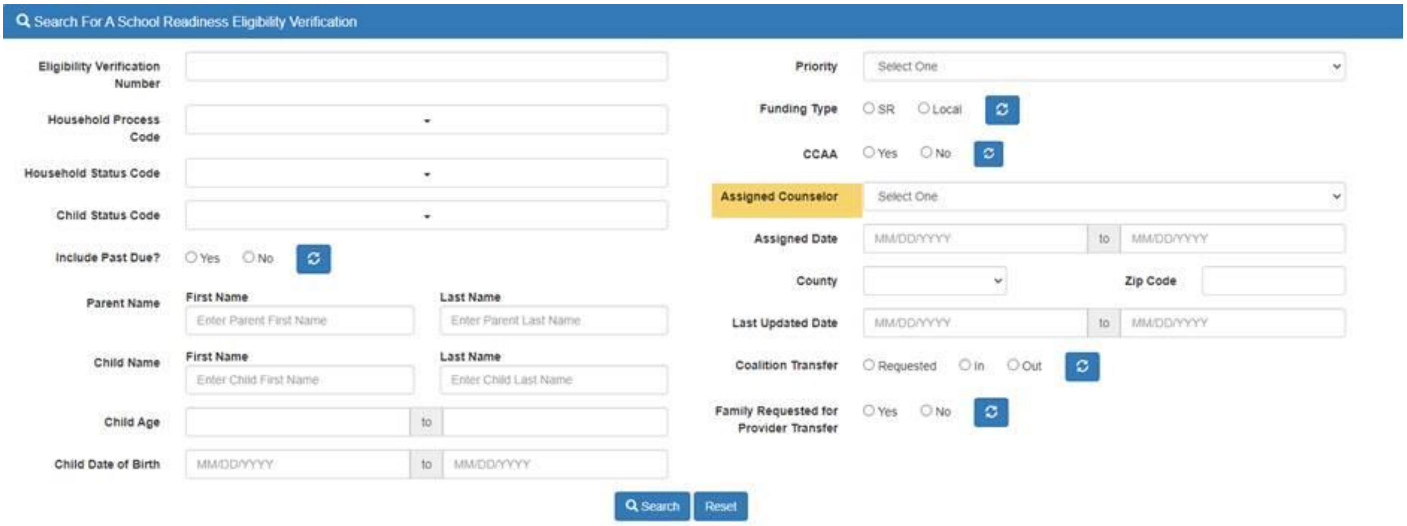


The counselor is assigned.

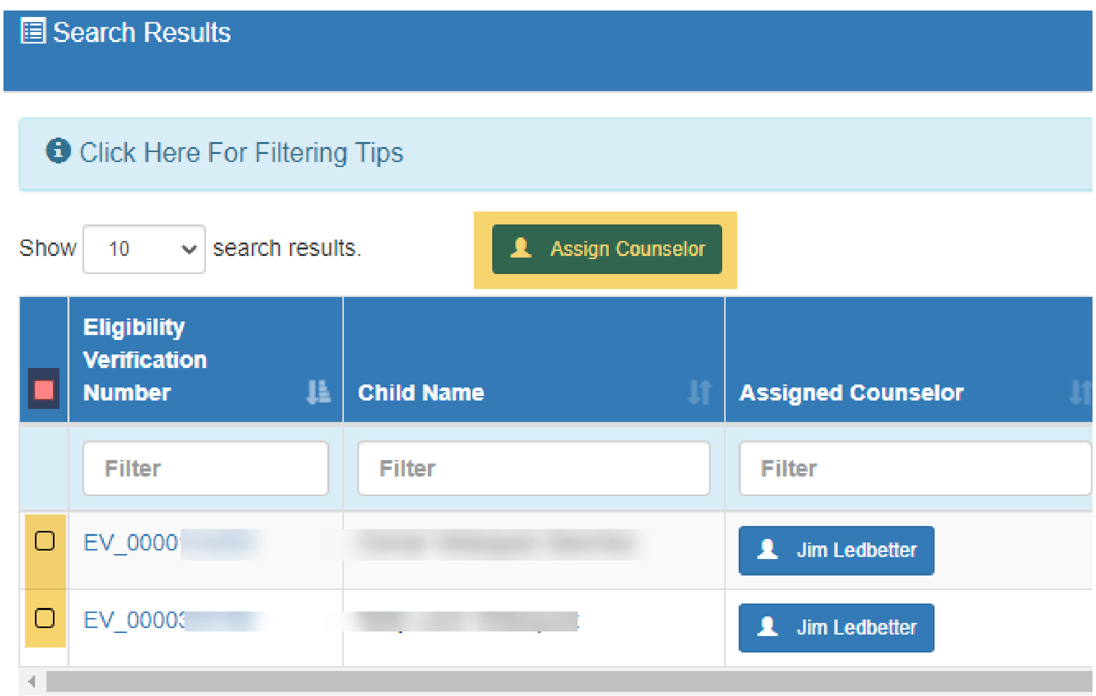


Change an Assigned Counselor

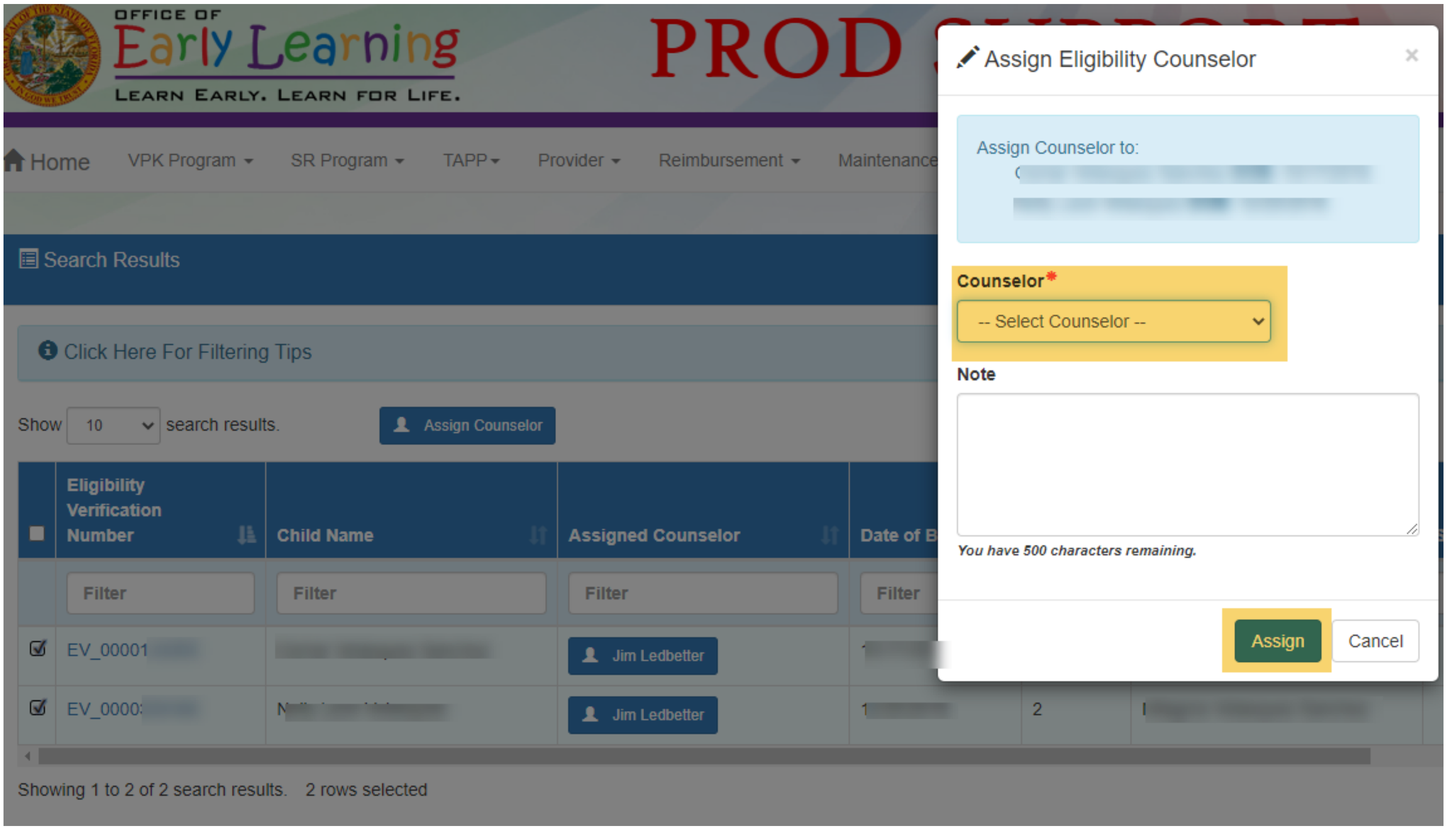
From the EV Search page, select the current Assigned Counselor from the dropdown.



From the Search Results list, put a check in each checkbox for 50 of the results. Don't use the select all feature (in red). Then, click the **Assign Counselor** button.



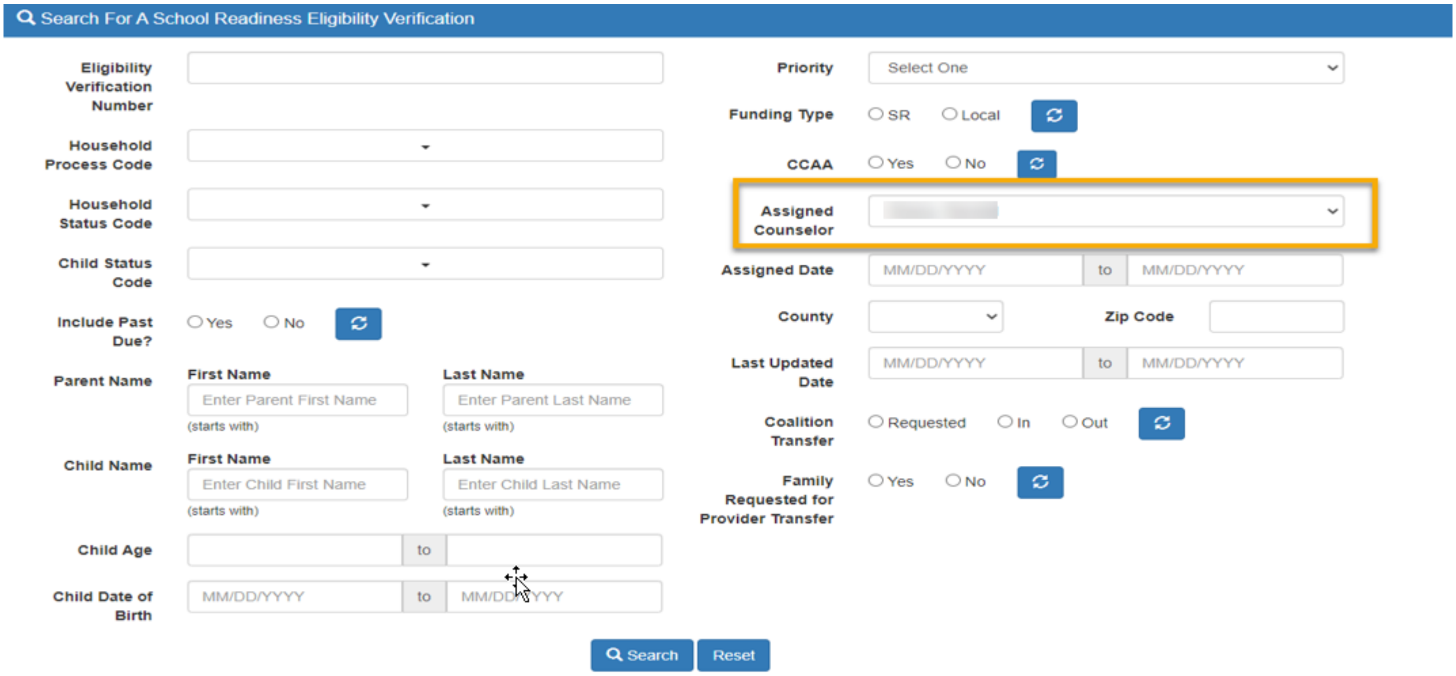
Select the new Counselor from the dropdown and click **Assign**.



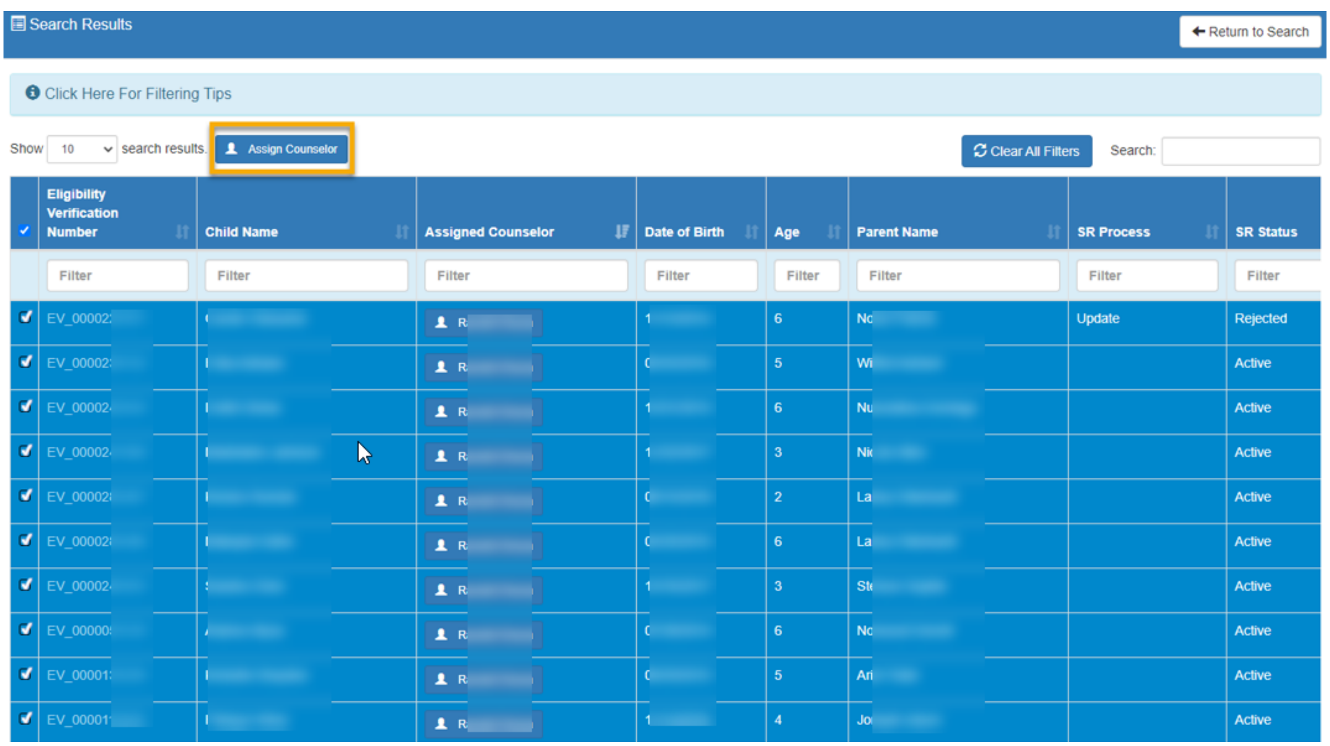
Remove an Assigned Counselor

If a new Assigned Counselor is not known, or has not been determined, all cases from the current Assigned Counselor can be marked unassigned.

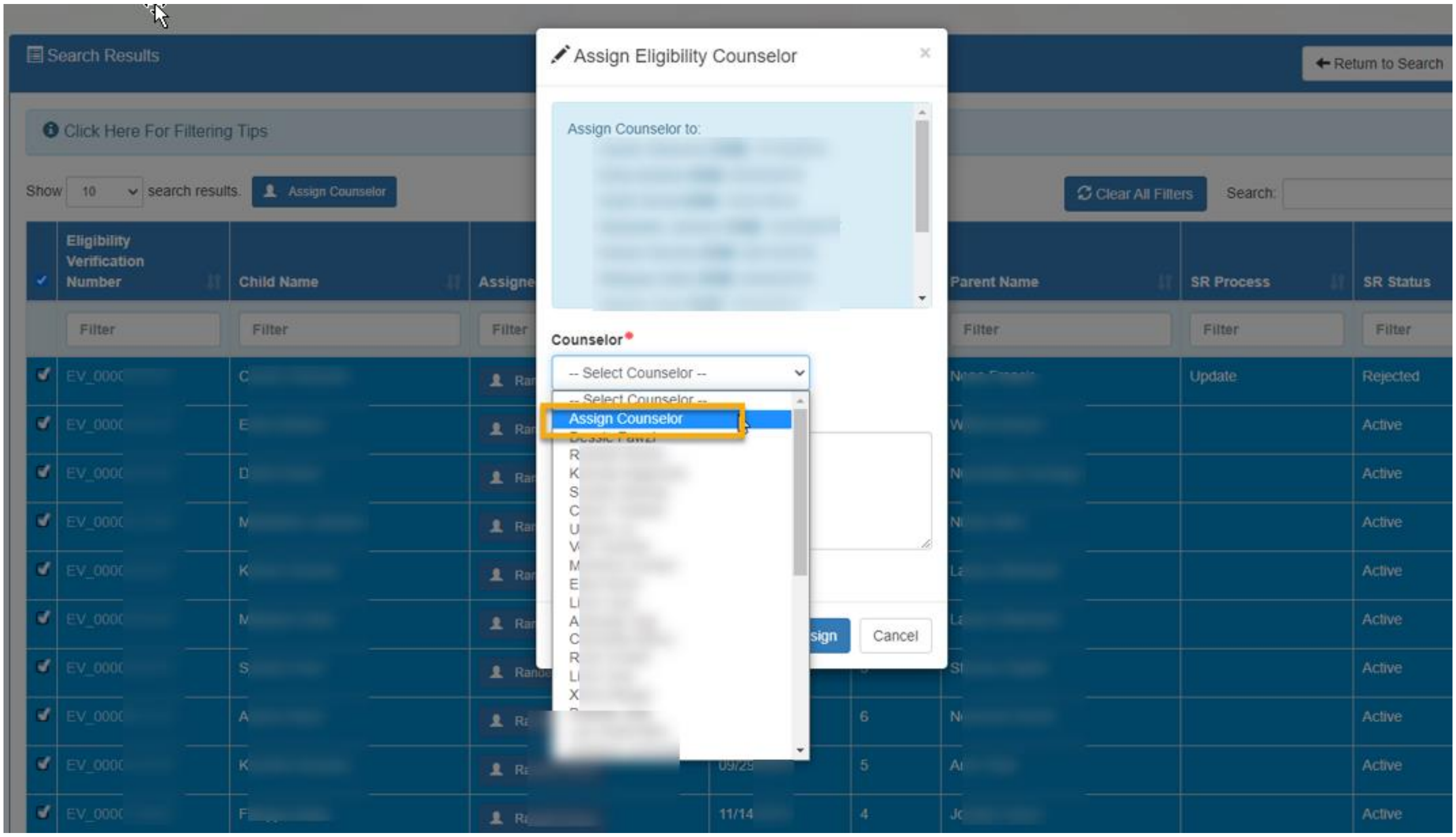
From the EV Search, select the current Assigned Counselor from the dropdown.



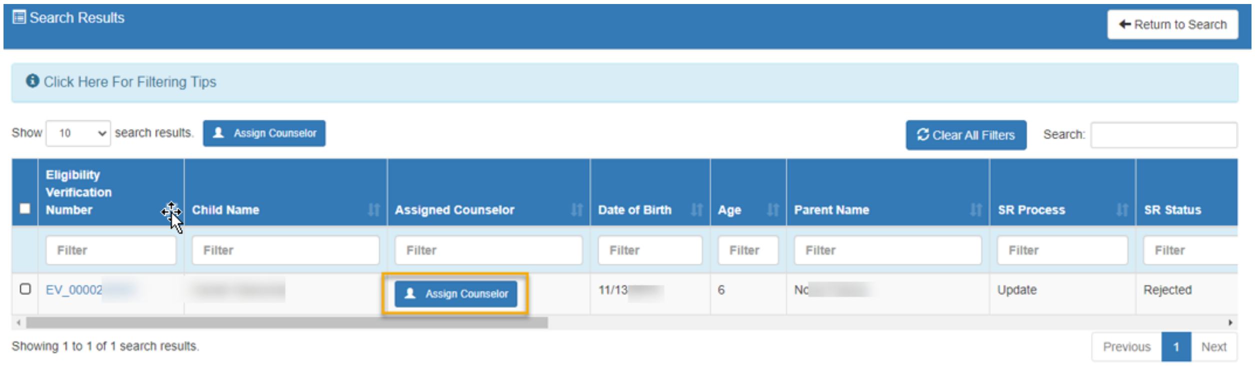
From the Search Results list, put a check in each checkbox for 50 of the results. Don't use the select all feature. Then, click **Assign Counselor**.

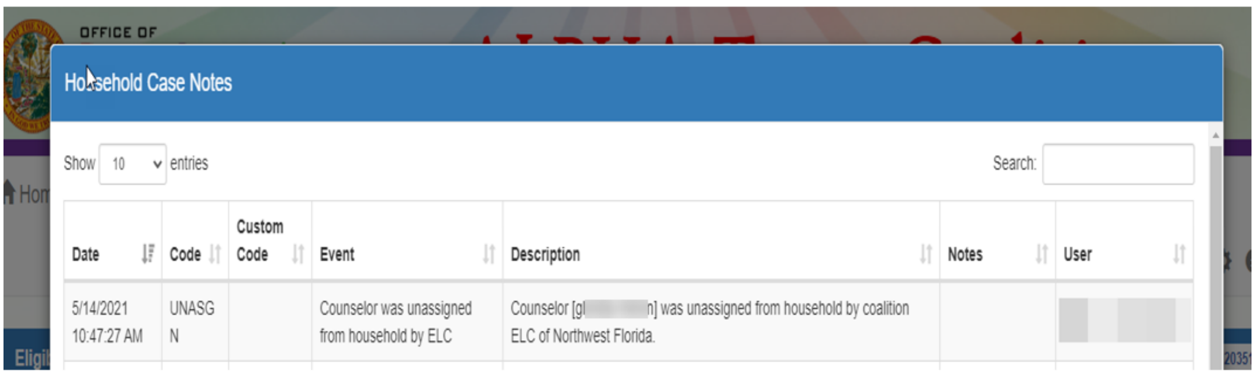


Select “Assign Counselor” from the dropdown and click **Assign**.



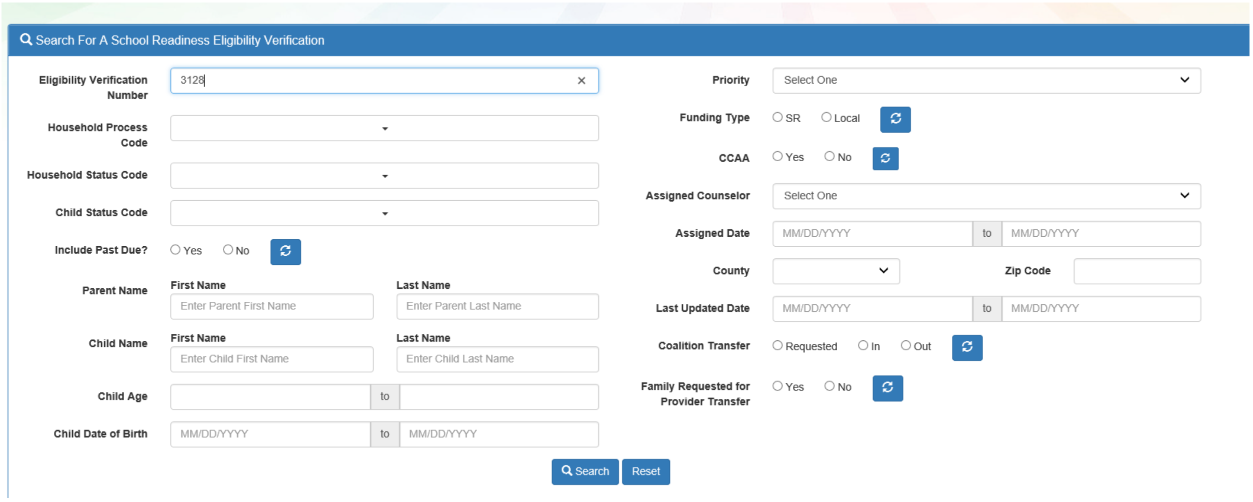
The previously assigned counselor is removed from the EVs. When those EVs are searched for, Assign Counselor displays and a case note is added to the household case notes for each eligibility verification that was updated.

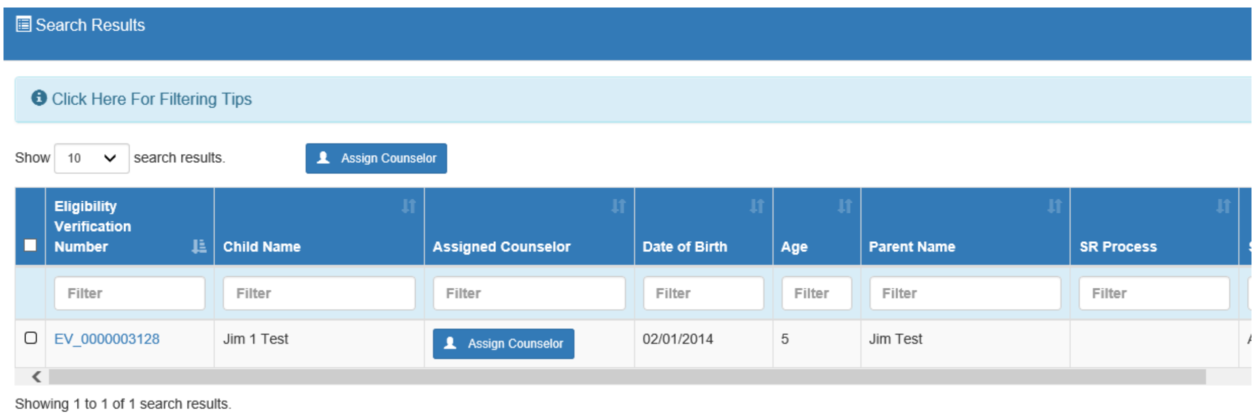




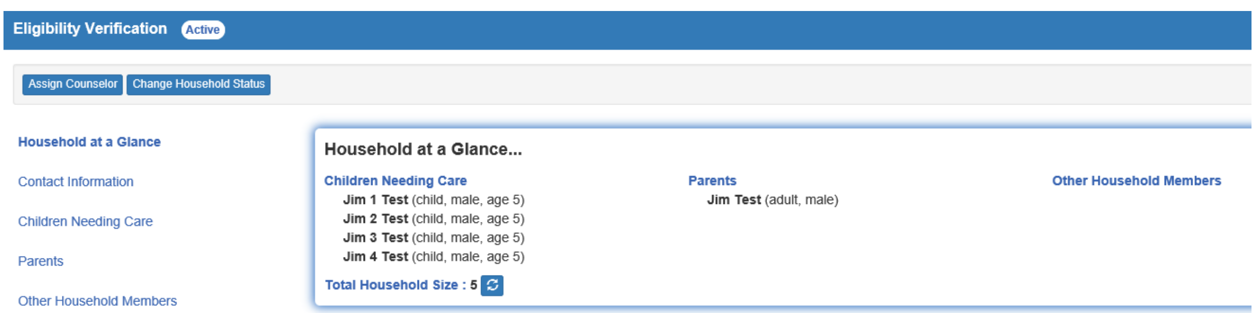
Coalition Transfer

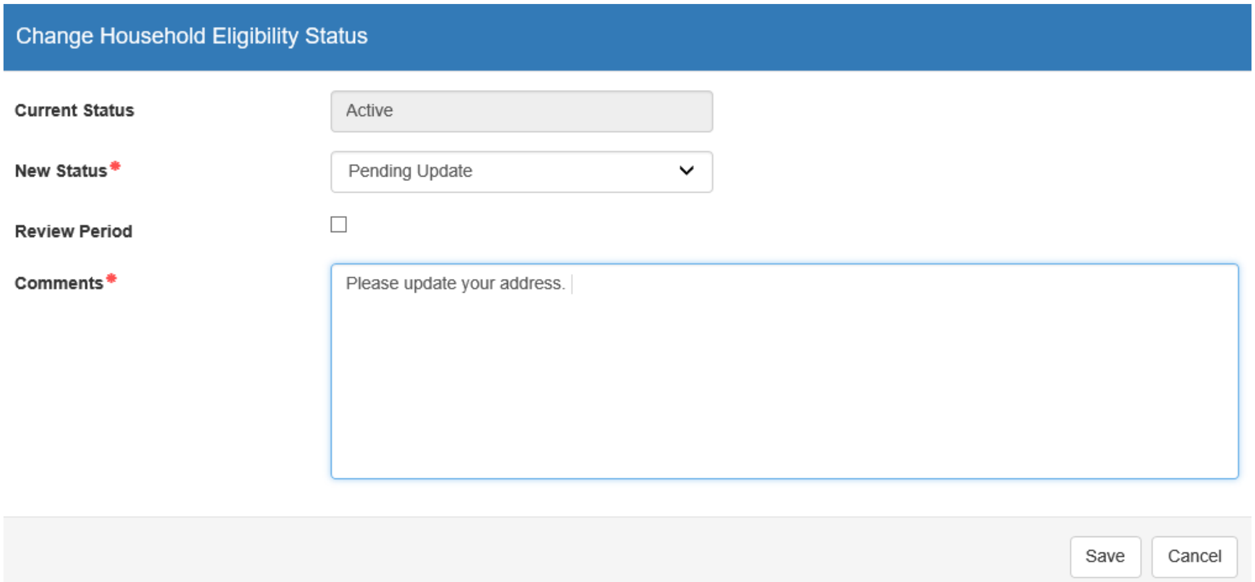
To transfer an EV from Coalition A to Coalition B, Coalition A will look up the record and click the EV number of the desired record.



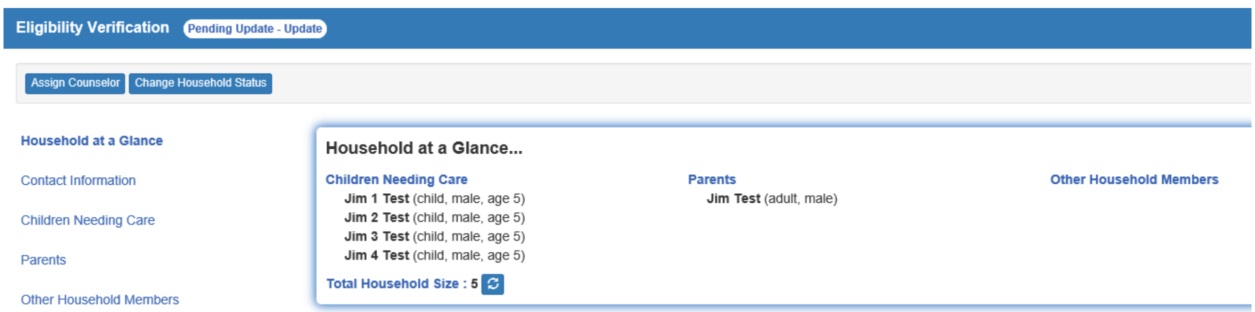


Coalition A will change the Household Status to **Pending Update** and request the family to update their address.

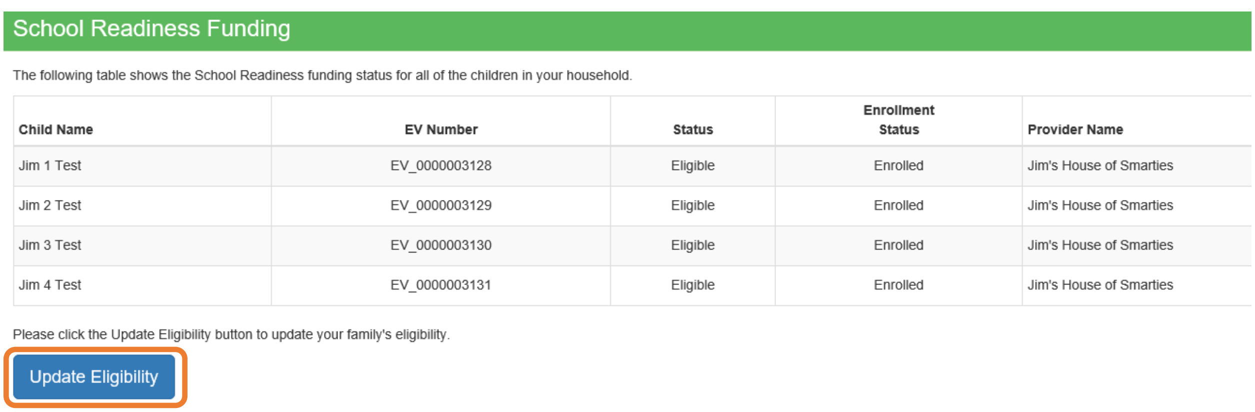




The Household Status is now **Pending Update**.

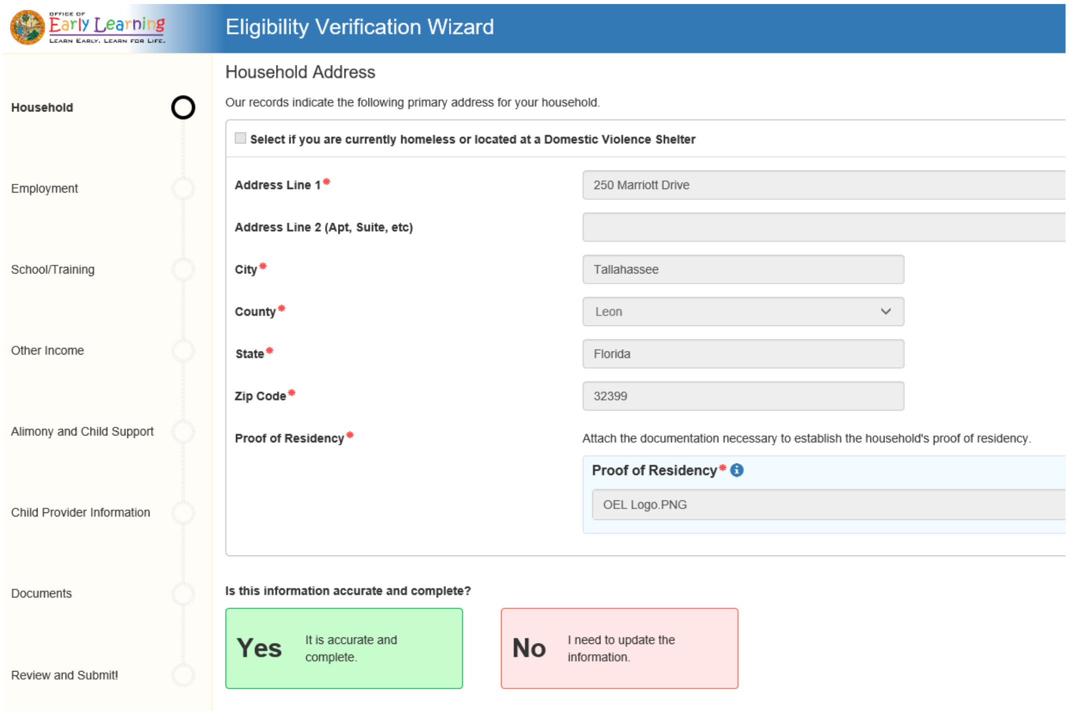


The family will see a blue **<u>Update Eligibility</u>** button on their dashboard.

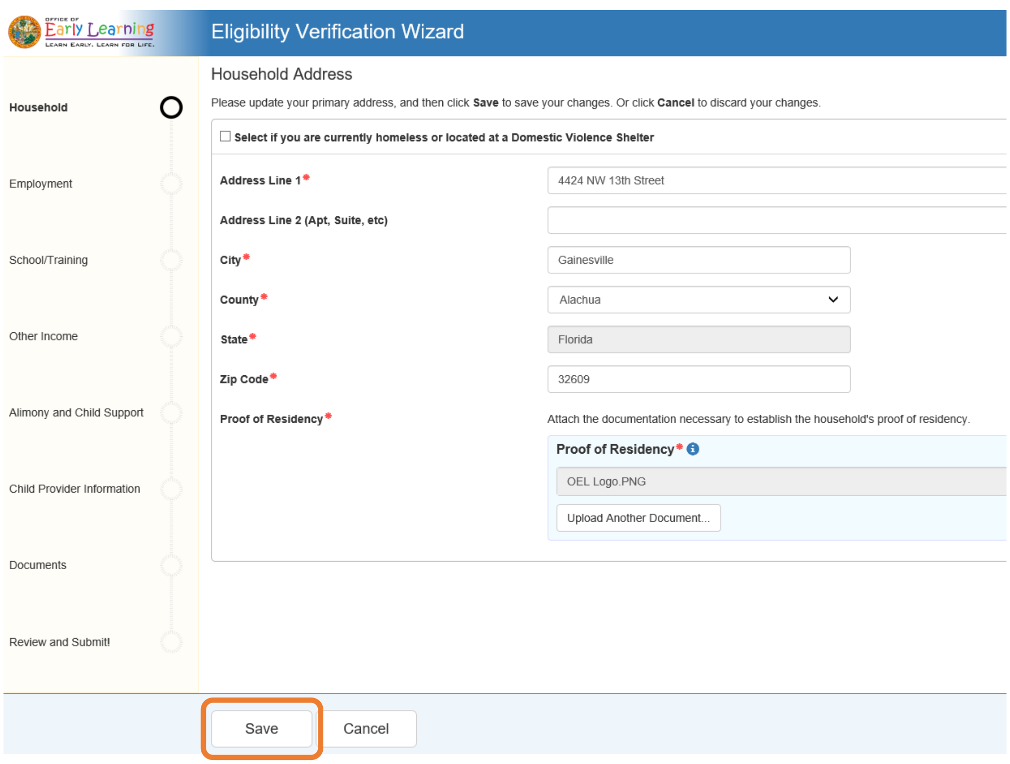


Child Name	EV Number	Status	Enrollment Status	Provider Name
Jim 1 Test	EV_0000003128	Eligible	Enrolled	Jim's House of Smarties
Jim 2 Test	EV_0000003129	Eligible	Enrolled	Jim's House of Smarties
Jim 3 Test	EV_0000003130	Eligible	Enrolled	Jim's House of Smarties
Jim 4 Test	EV_0000003131	Eligible	Enrolled	Jim's House of Smarties

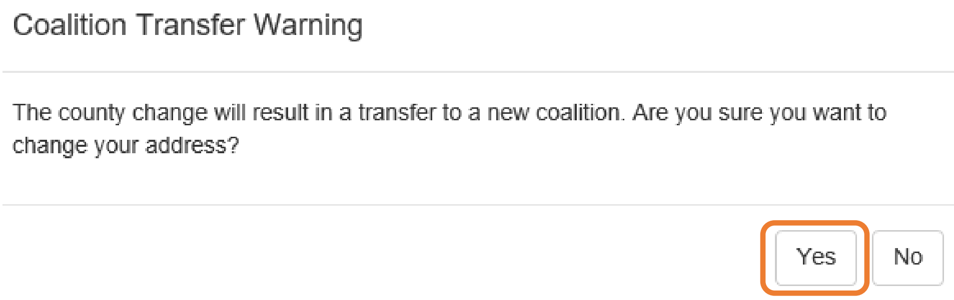
The family will update the address in the Eligibility Wizard from the old address…

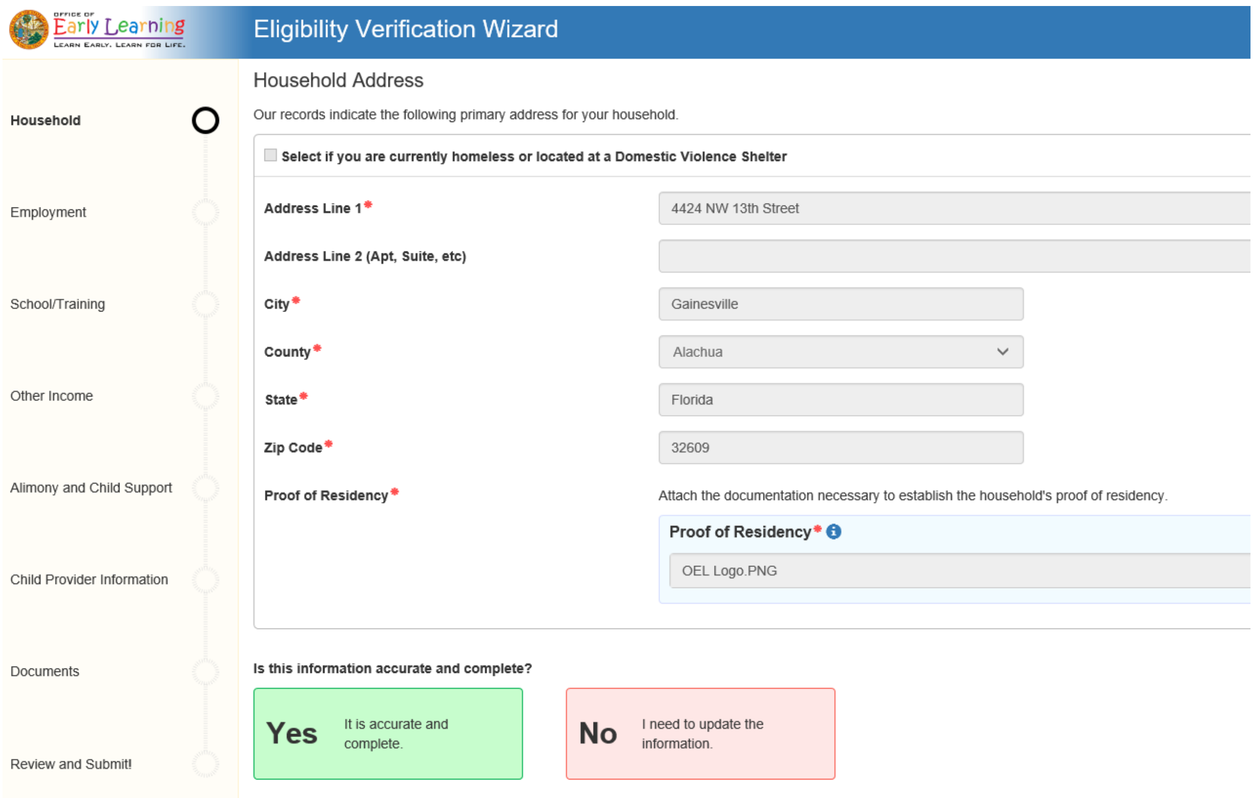


...to the new address and click **Save**.

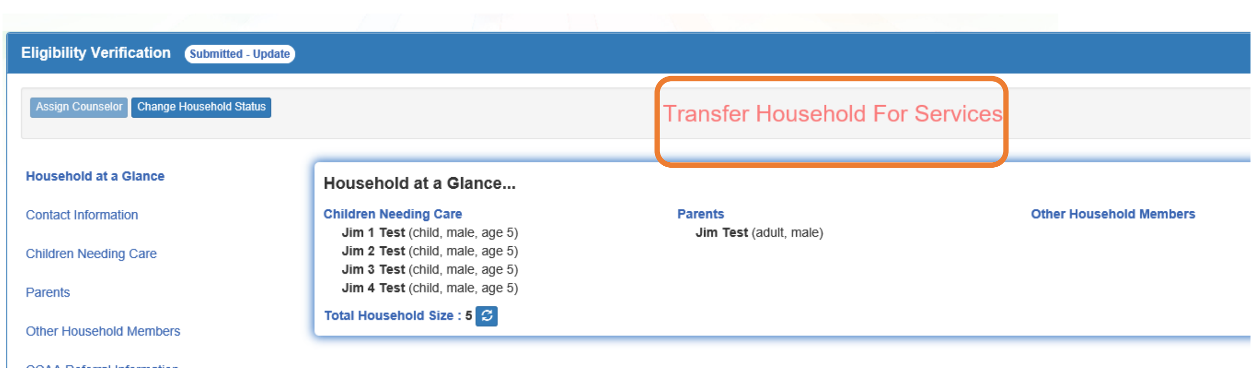


Once the family clicks **Save**, the following will display. The family will click **Yes** to continue.

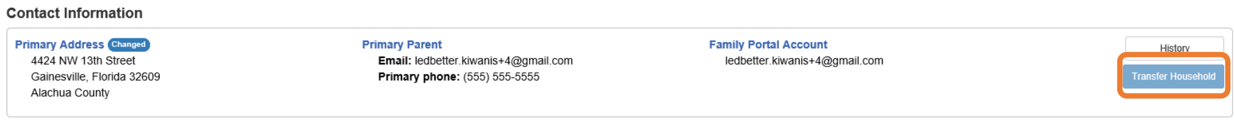




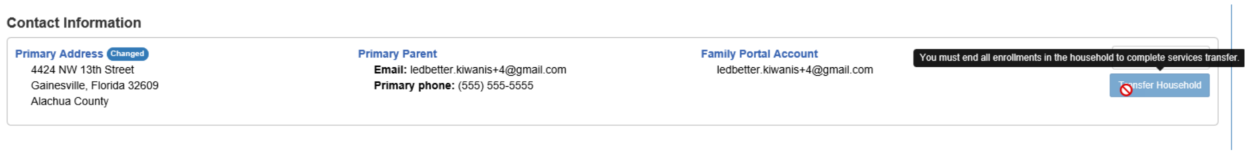
Coalition A will now see a "Transfer Household For Services" banner at the top of the EV.



Coalition A will note that the **Transfer Household** button is grayed out.

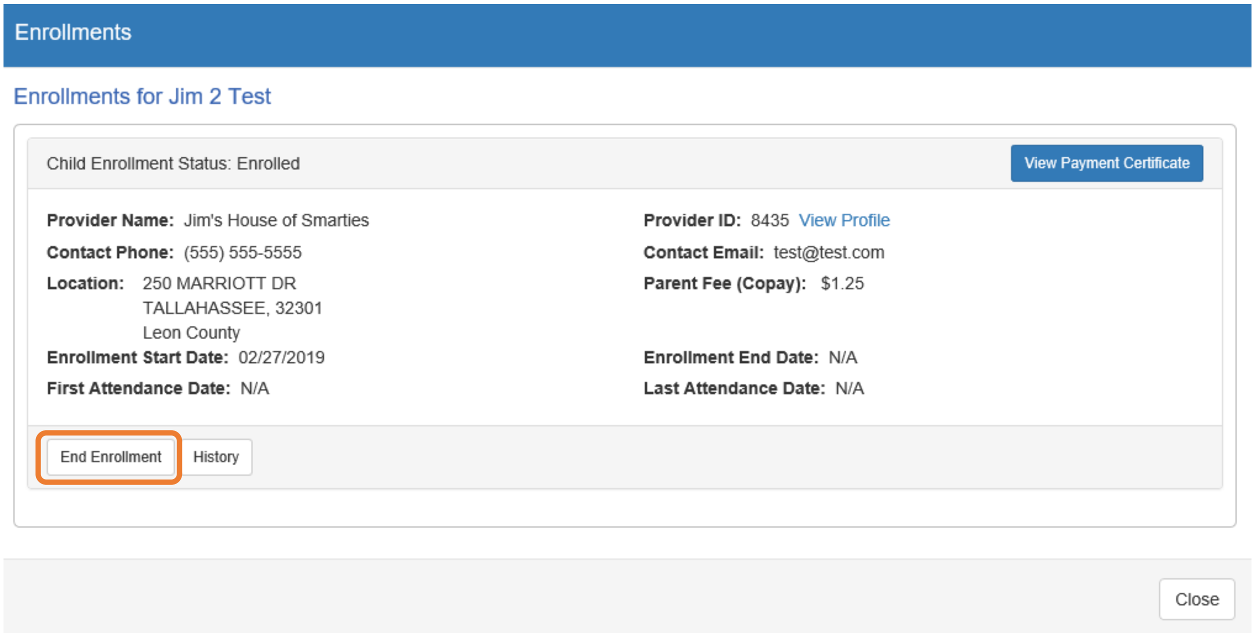


When Coalition A hovers over the **Transfer Household** button, a message will appear, reminding Coalition A that enrollments must be terminated to initiate the transfer.

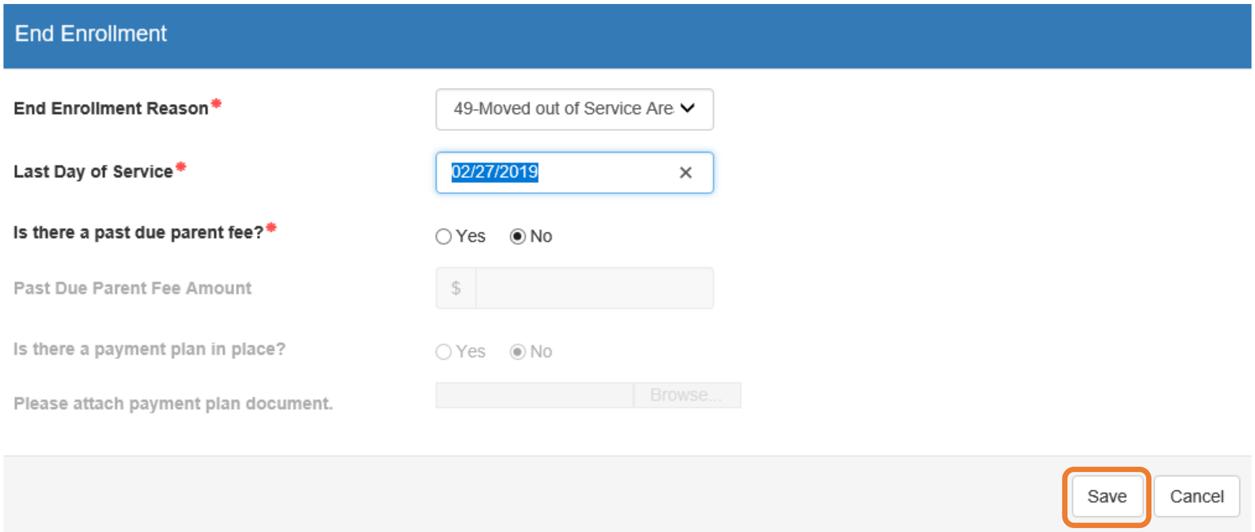


To end an enrollment, go to the Children Needing Care section and click the **End Enrollments** button for each child.

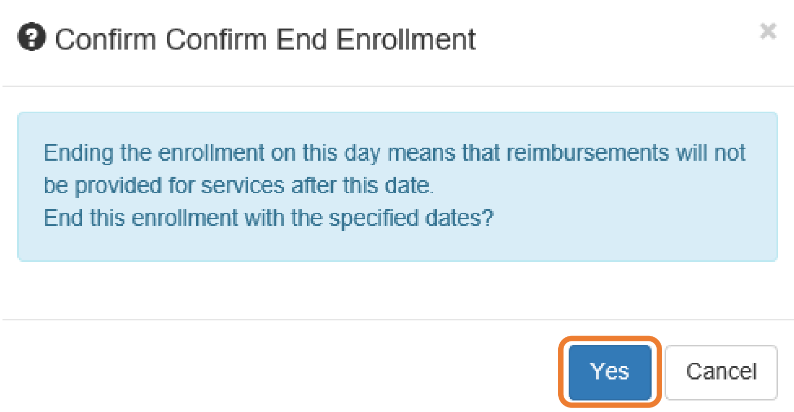
Then, click the **End Enrollment** button.



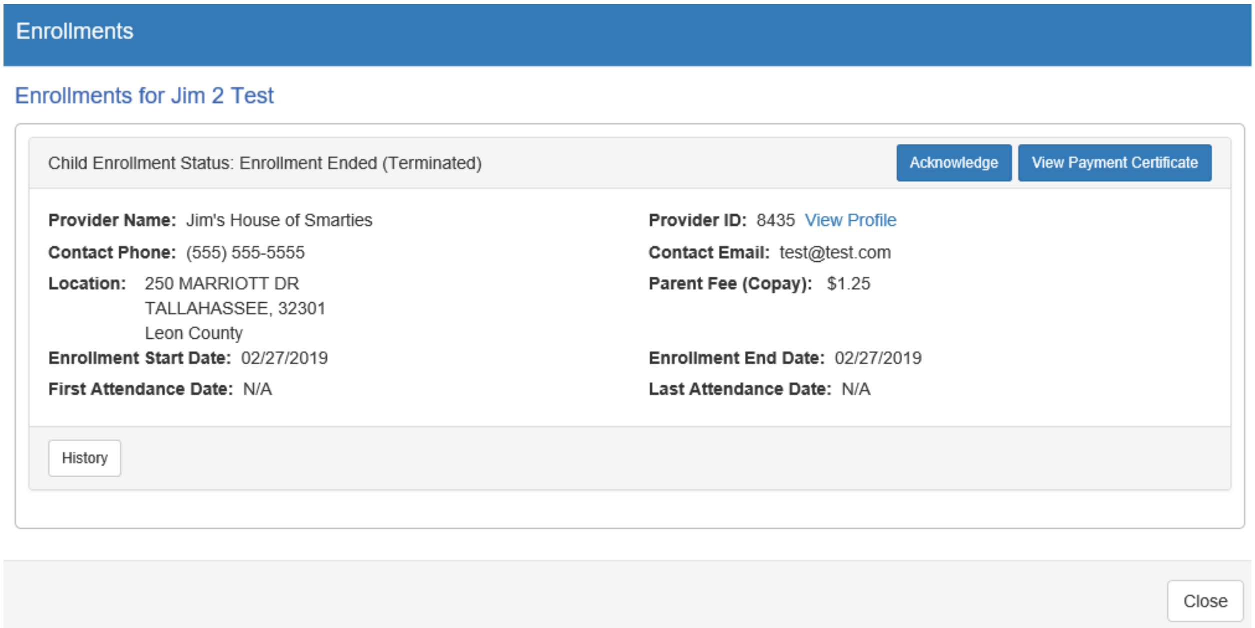
Enter the End Enrollment Reason as 49-Moved out of Service Area and set the Last Day of Service. Click **Save**.



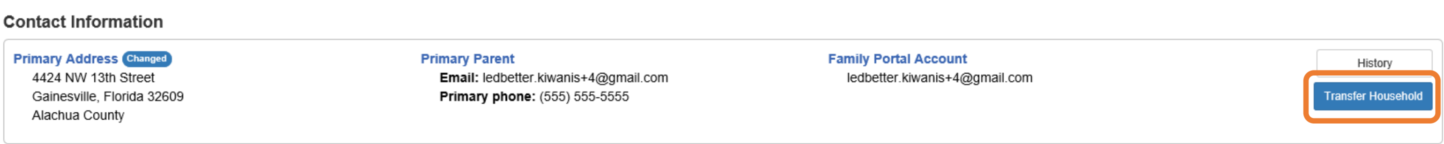
Then, click **Yes**.

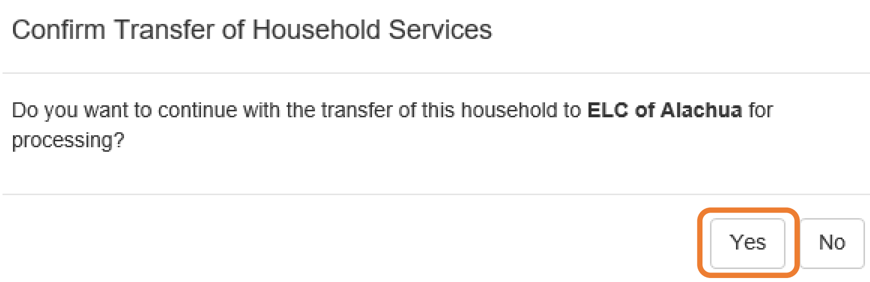


The Enrollment Status is now **Enrollment Ended (Terminated).**

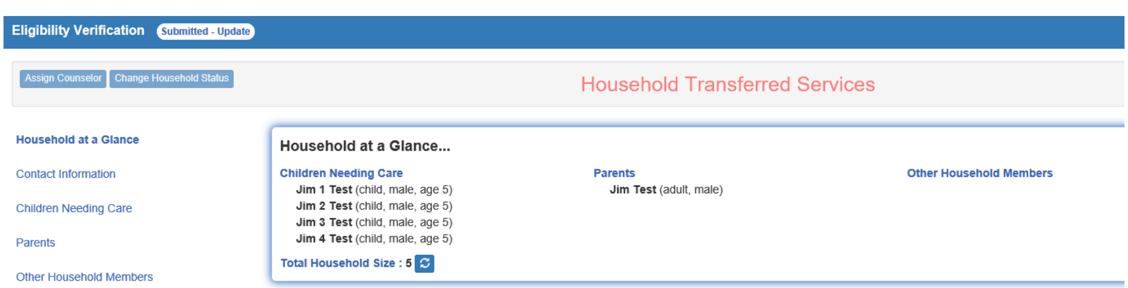


To initiate the transfer process, Coalition A will click the **<u>Transfer Household</u>** button and click **<u>Yes</u>** when the confirmation message displays.

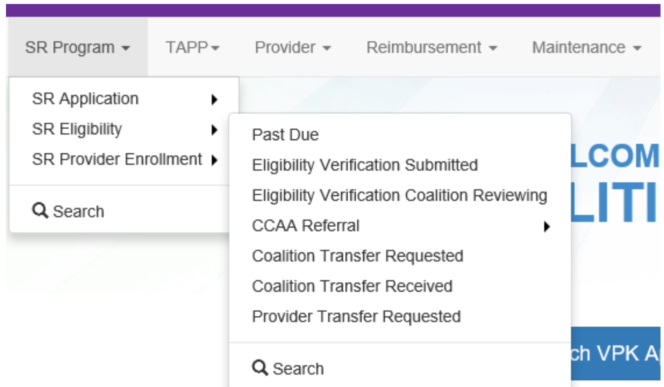




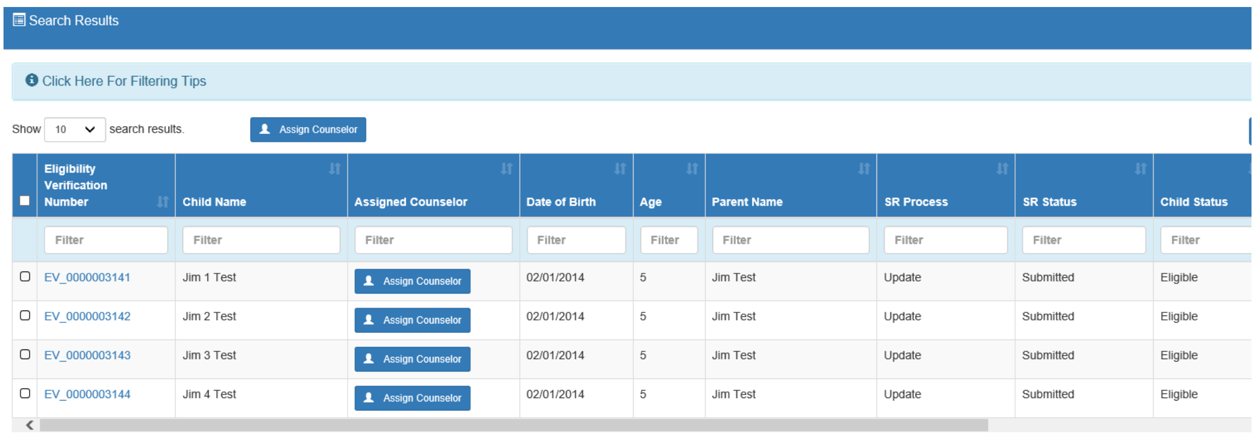
Coalition A will now see a "Household Transferred Services" banner at the top of the EV and the **<u>Change Household Status</u>** and **<u>Assign Counselor</u>** buttons are grayed out.



Coalition B will click the **Coalition Transfer Received** link.

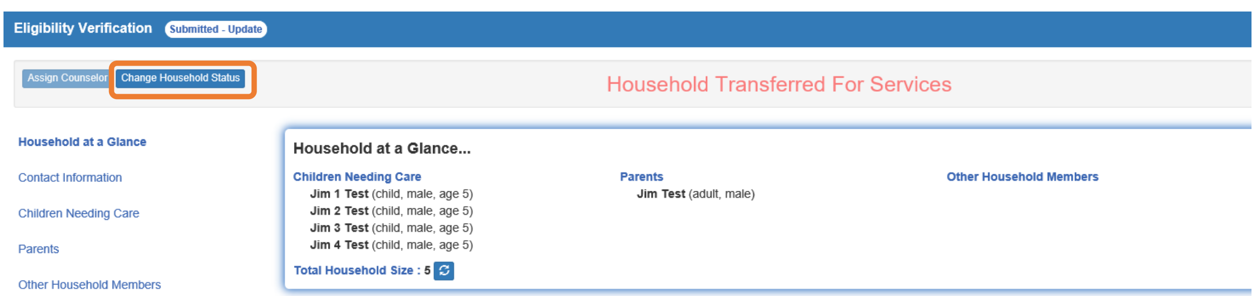


Coalition B will search for the desired EV record that was transferred from Coalition A.

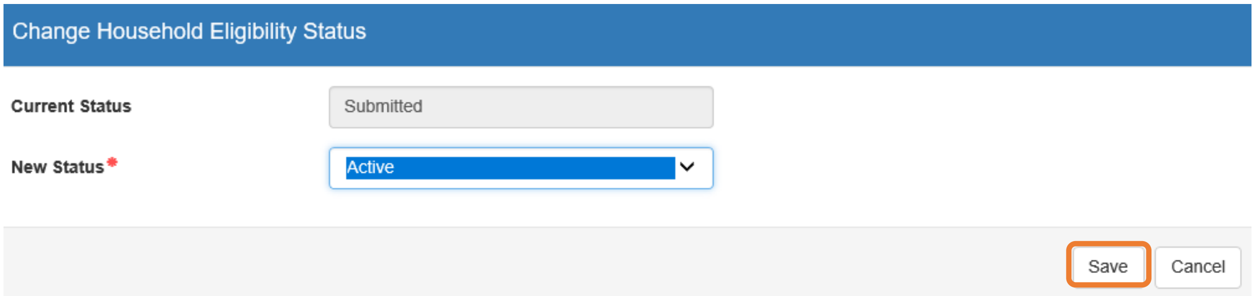


Eligibility Verification Number	Child Name	Assigned Counselor	Date of Birth	Age	Parent Name	SR Process	SR Status	Child Status
EV_0000003141	Jim 1 Test	Assign Counselor	02/01/2014	5	Jim Test	Update	Submitted	Eligible
EV_0000003142	Jim 2 Test	Assign Counselor	02/01/2014	5	Jim Test	Update	Submitted	Eligible
EV_0000003143	Jim 3 Test	Assign Counselor	02/01/2014	5	Jim Test	Update	Submitted	Eligible
EV_0000003144	Jim 4 Test	Assign Counselor	02/01/2014	5	Jim Test	Update	Submitted	Eligible

Coalition B will now see a "Household Transferred Services" banner at the top of the EV. Click the **<u>Change Household Status</u>** button.

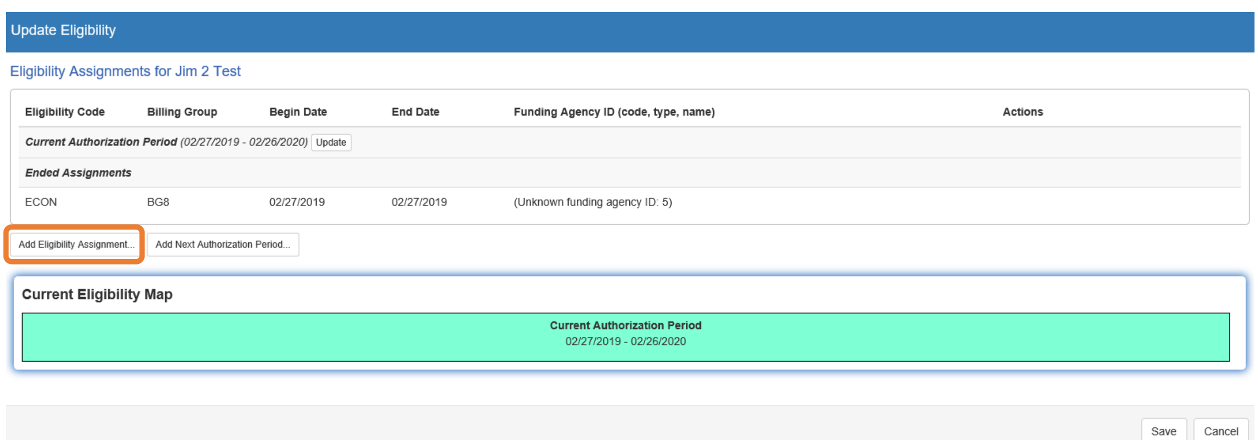


Change the status to **Active** and click **Save.**

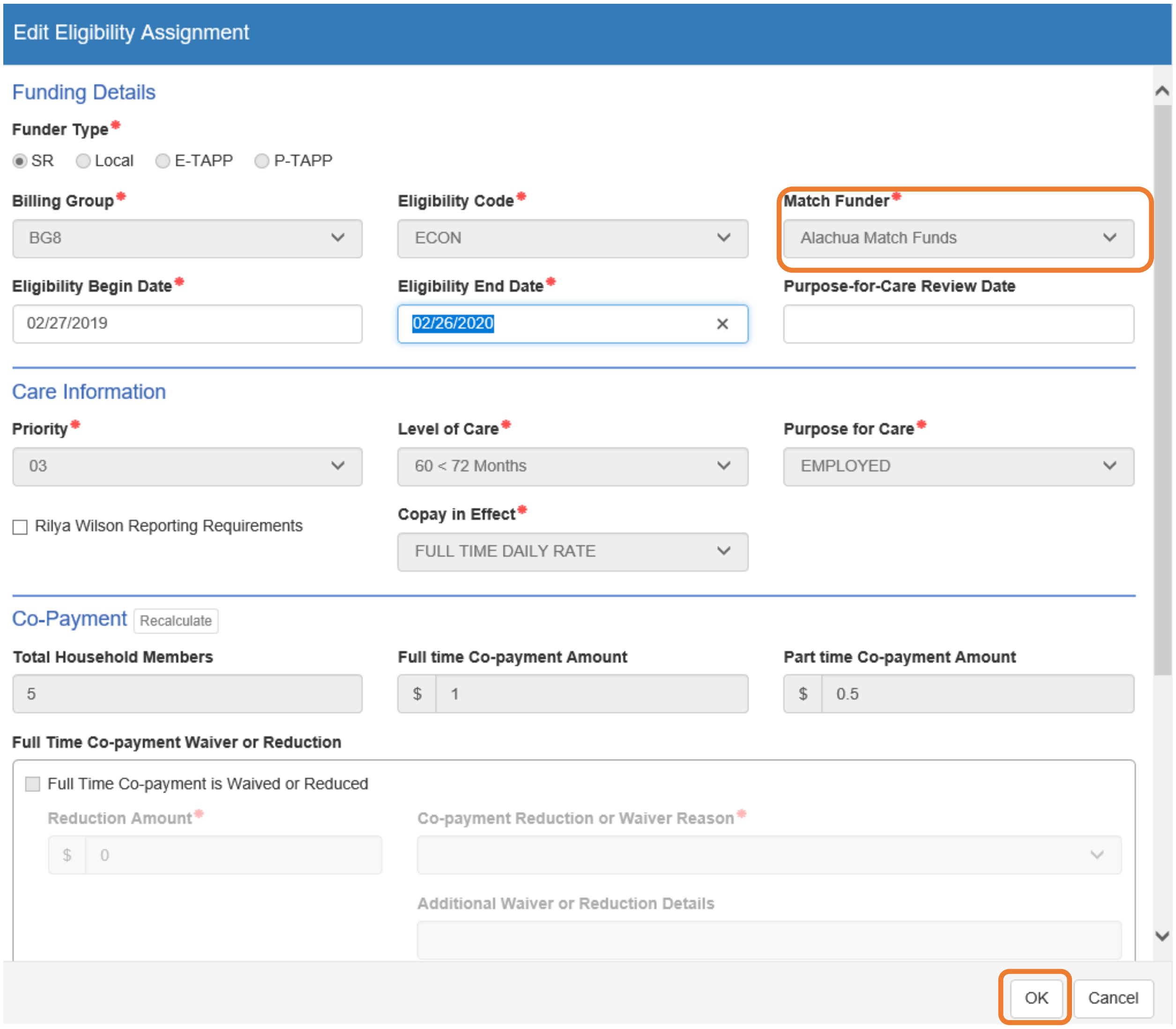


Then, click the **Eligibility** button.

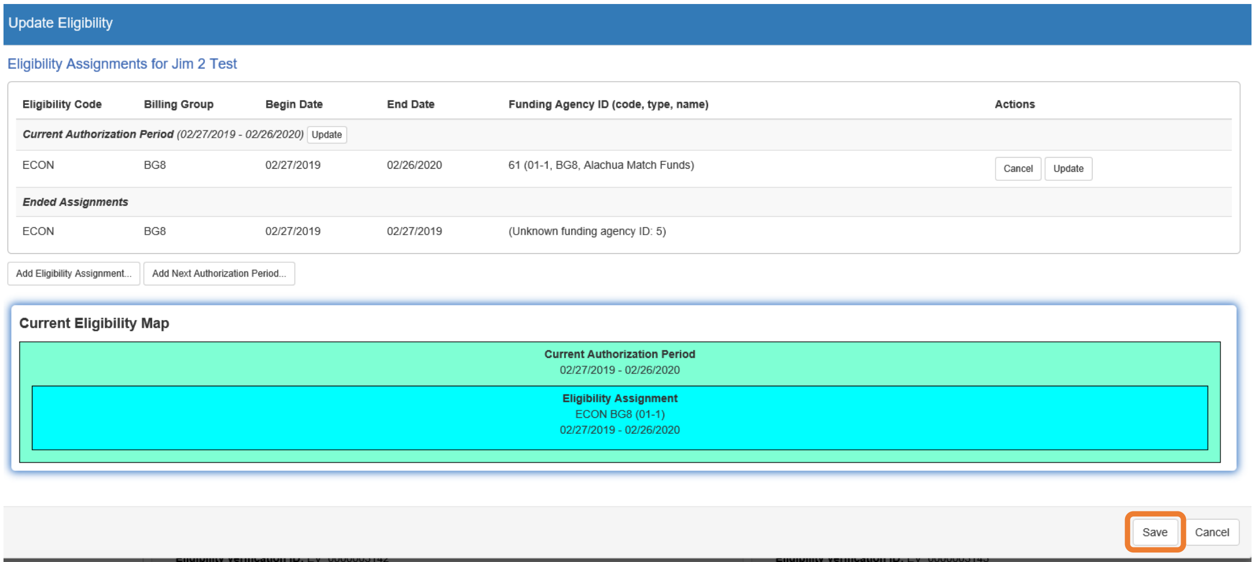
Click the **Add Eligibility Assignment…** button.



Coalition B will create a new Eligibility Assignment. Ensure that the Eligibility Begin Date and Eligibility End Date is within the Authorization Period. Note that the Match Funder is from Coalition B, not Coalition A. Click **OK**.

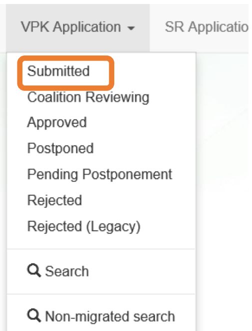


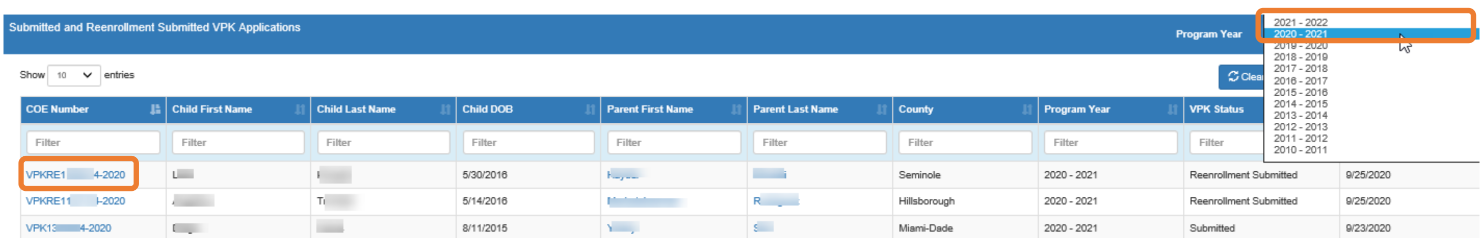
The Eligibility Assignment is now created within the Authorization Period. Click **<u>Save</u>**.



Processing a Submitted VPK Application

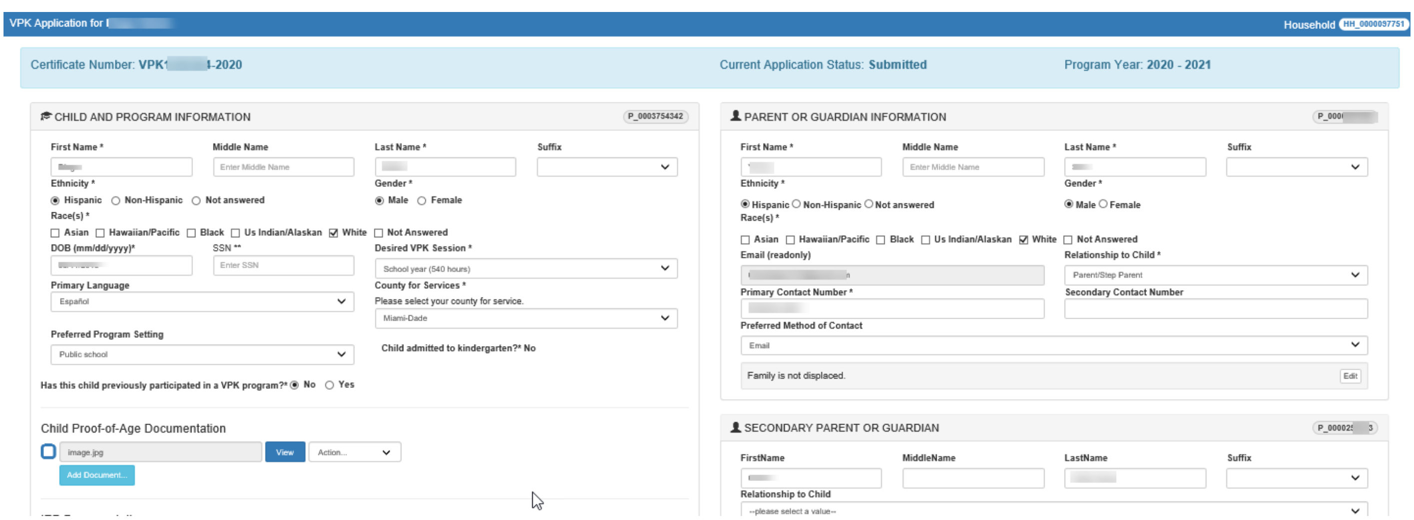
The first step to process a **Submitted** VPK Application is to click on the **Submitted** work queue. To begin reviewing an application, the coalition user must click the **<u>Child Name</u>** link of the record the user is assigned to review.

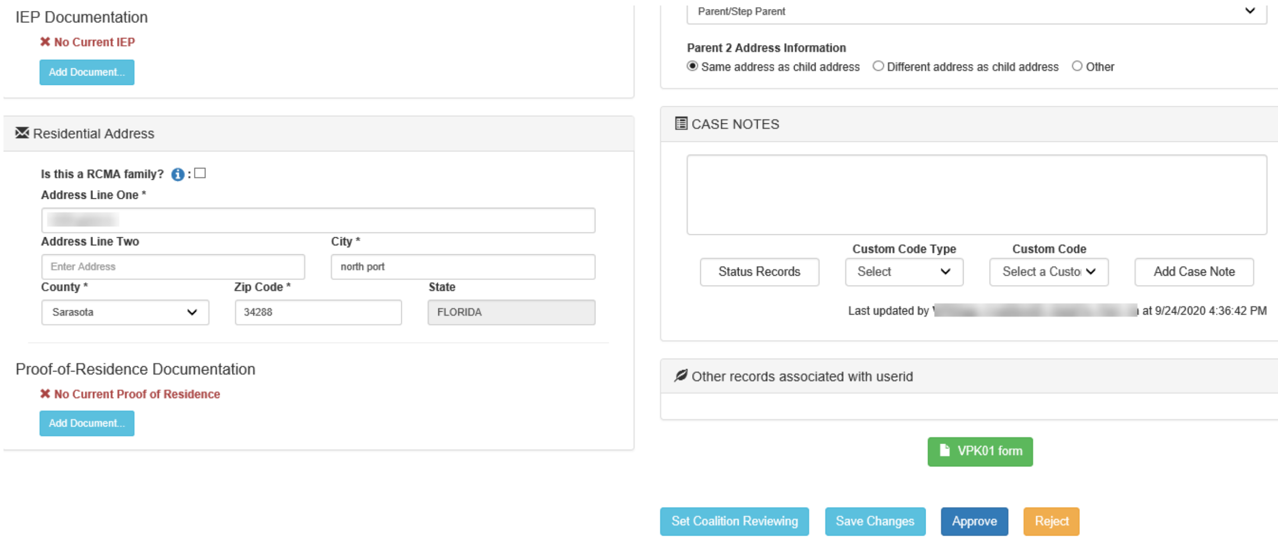




Please note that the Program Year for the search automatically selects the current program year. To see all program years, click the dropdown menu arrow.

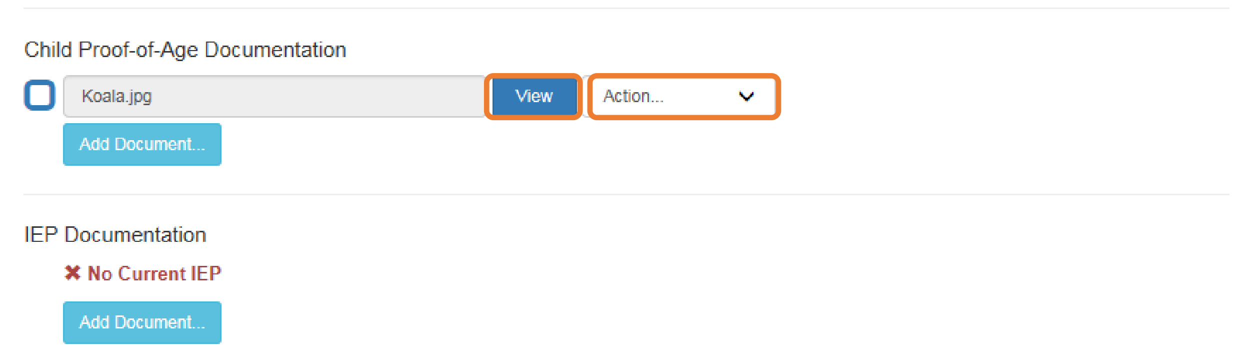
The following page will display:



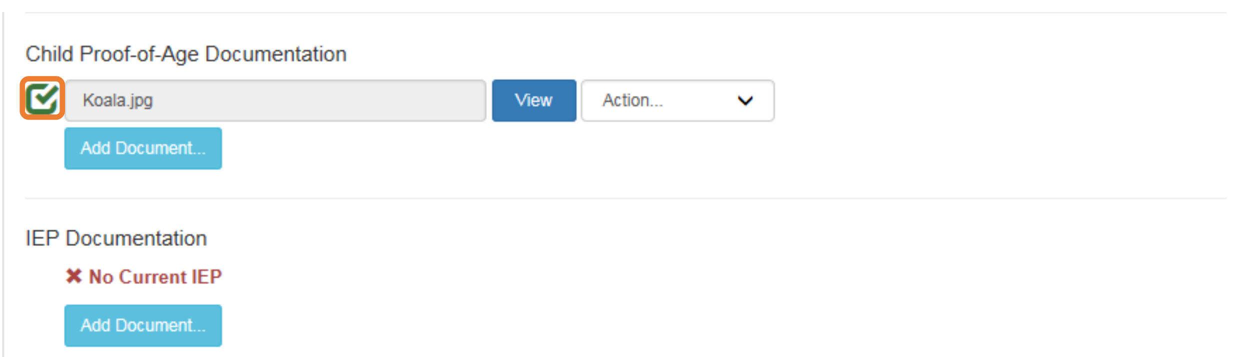


Verify Attached Documents

The coalition user can review the attached documents by clicking the **View** button. Each document must be verified prior to approval of the application. To verify the document, click the **Action…** dropdown menu and select Verify Document or Delete Document.



When the document is verified by the coalition user and the user clicks **Save Changes**, a green check mark will appear in the checkbox.



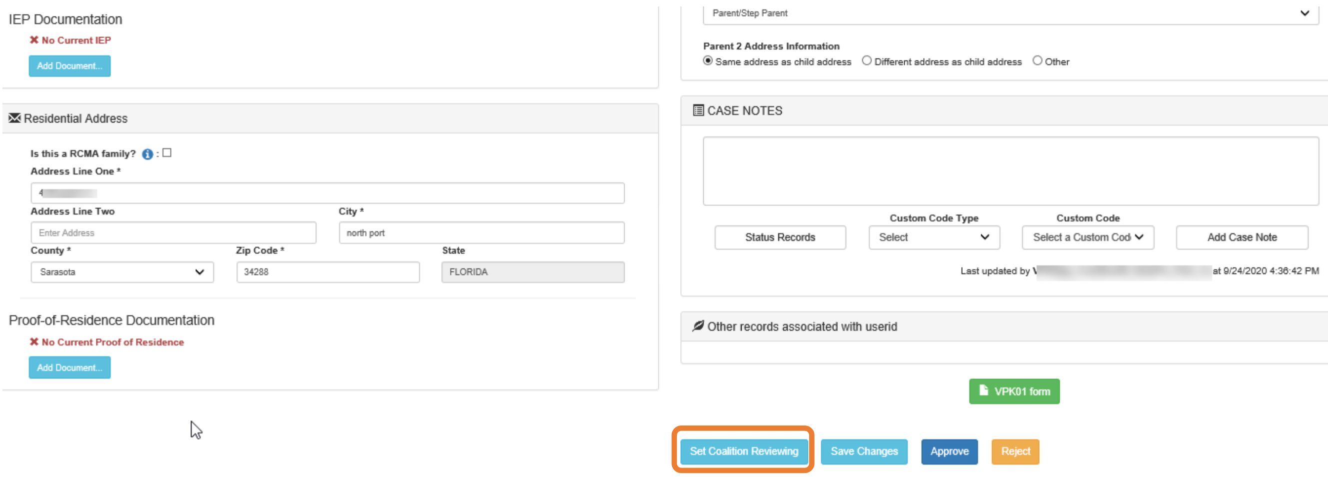
VPK Application Review Process

Depending on the application review process, the VPK application can be set to **Coalition Reviewing**, **Approved** or **Rejected**.

Coalition Reviewing

If the coalition user needs more time to review the application before making a decision to approve or reject, the application's status can be set to **Coalition Reviewing** by clicking the **Set Coalition Reviewing** button. See the **Managing VPK Applications for a Family Portal User** section for the auto-generated email that is delivered to the parent when the application is set to coalition reviewing.

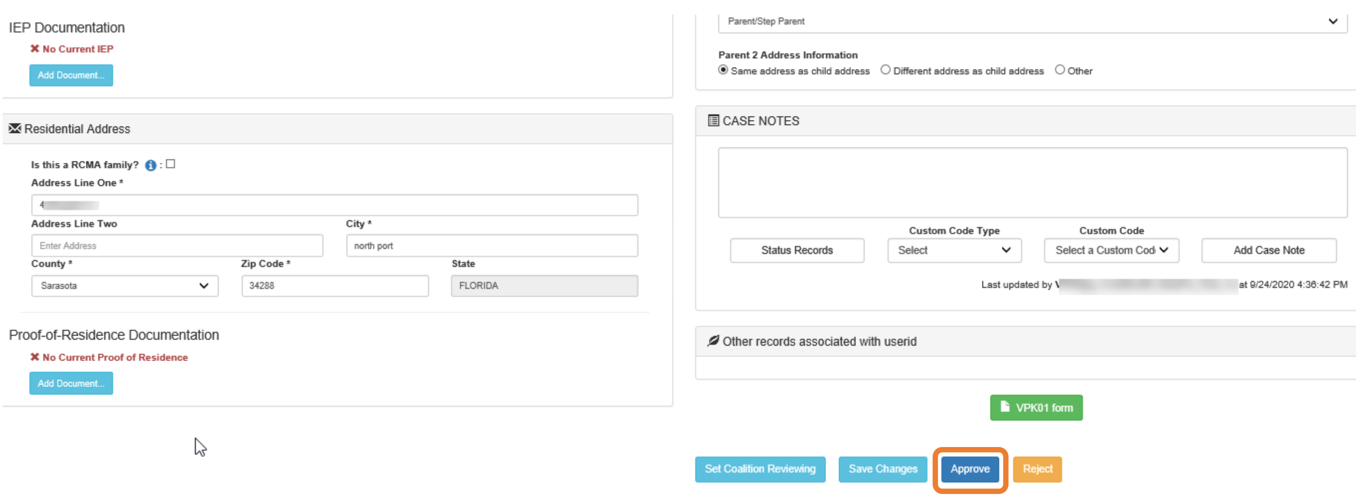
NOTE: With Release 4.5, coalition users can select families receiving RCMA services with a "Is this a RCMA family" checkbox under Residential address.



Once an eligibility decision is made, the coalition user will then either click the **Approve** or **Reject** button.

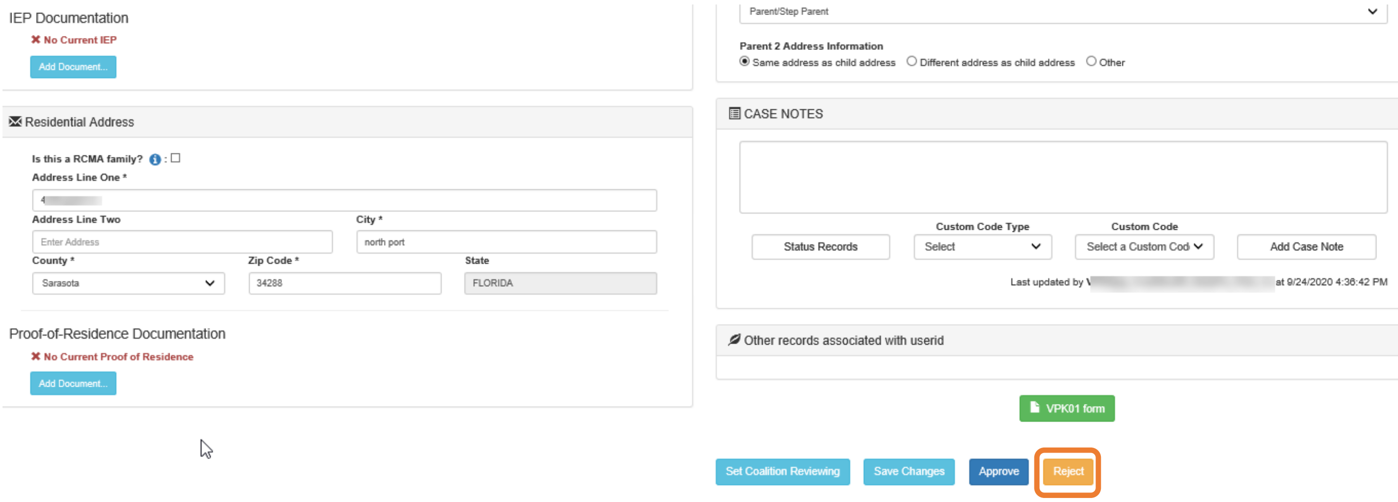
Approved Applications

If supporting eligibility documents meet VPK program requirements and are verified, the coalition user will click the **Approve** button. This will trigger the system to generate a Certificate of Eligibility (COE/DEL-VPK 02) for the parent to access in their Family Portal account. See the **Managing VPK Applications for a Family Portal User** section for the auto-generated email that is delivered to the parent when the application is approved.

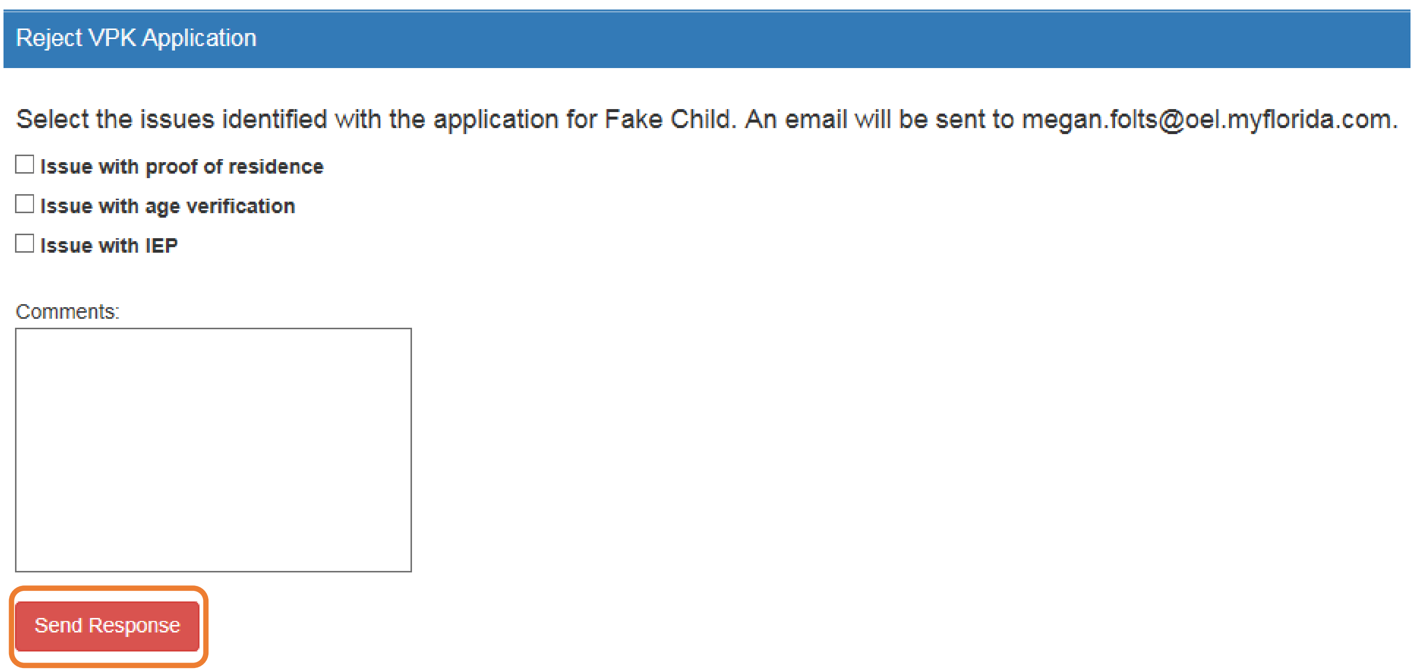


Rejected Applications

If supporting eligibility documents do not meet VPK program requirements, the coalition user will click the **Reject** button to reject the application.



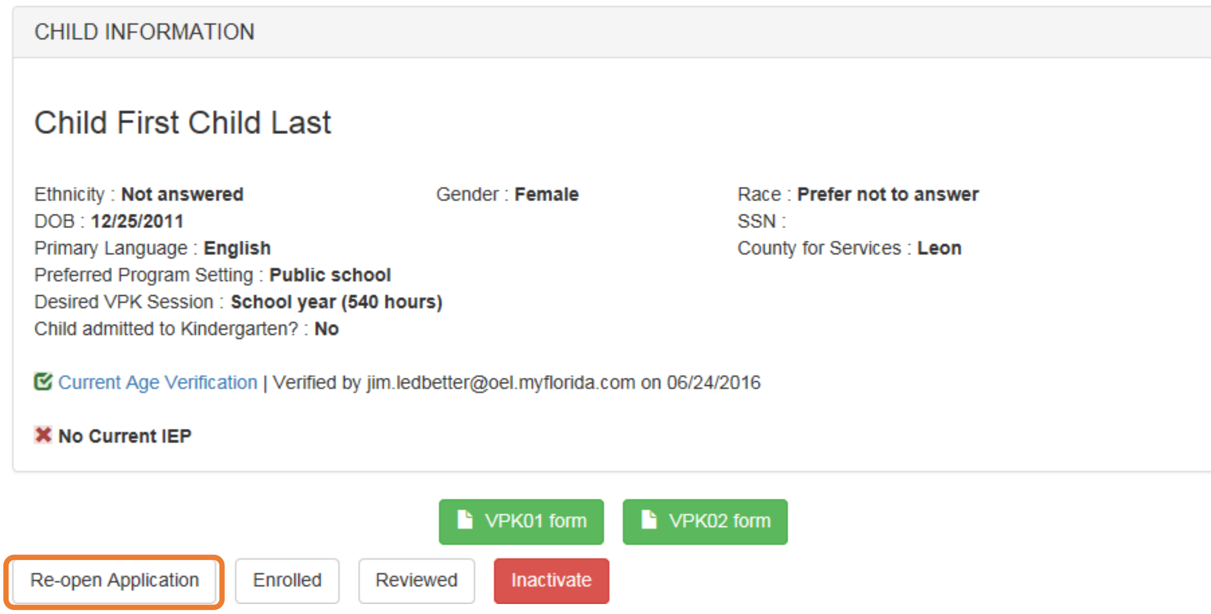
Then, the coalition user must select the checkbox for the appropriate rejection reason(s), enter a comment and click the **Send Response** button. The comment will appear in the auto-generated email from **DONOTREPLY@oel.myflorida.com** to the parent. See the **Managing VPK Applications for a Family Portal User** section for the auto-generated email that is delivered to the parent when the application is rejected.



Once the coalition user has rejected the application, the user can only add or review Case Notes, but no other actions can be performed because the application is in editable status for the parent.

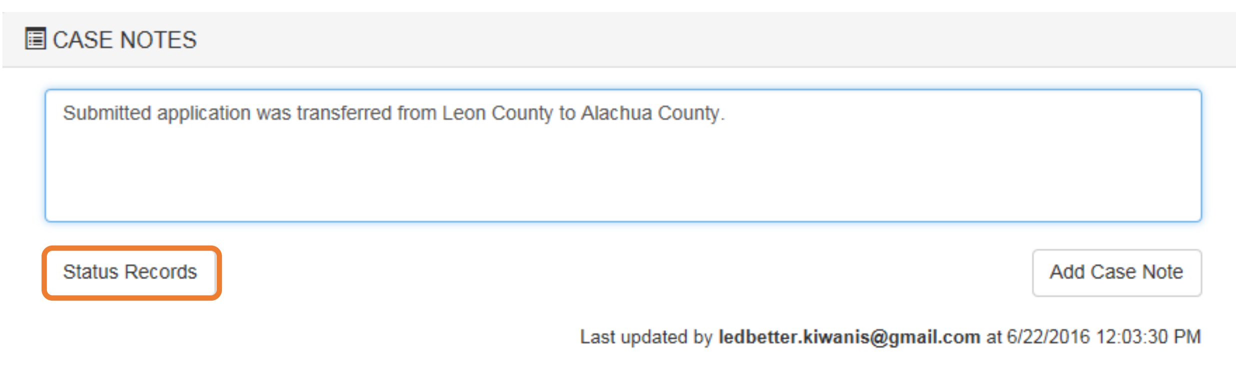
Inactive Applications

An application should be set to **Inactive** to remove duplicate or erroneous applications from the VPK application work queues. **Inactive** applications are accessed using the VPK advanced search feature. An **Inactive** application can be re-opened and **Approved** or **Rejected** if it was inactivated by mistake.



View Case Notes

To view all Case Notes for an application, the coalition user can click the **<u>Status Records</u>** button.

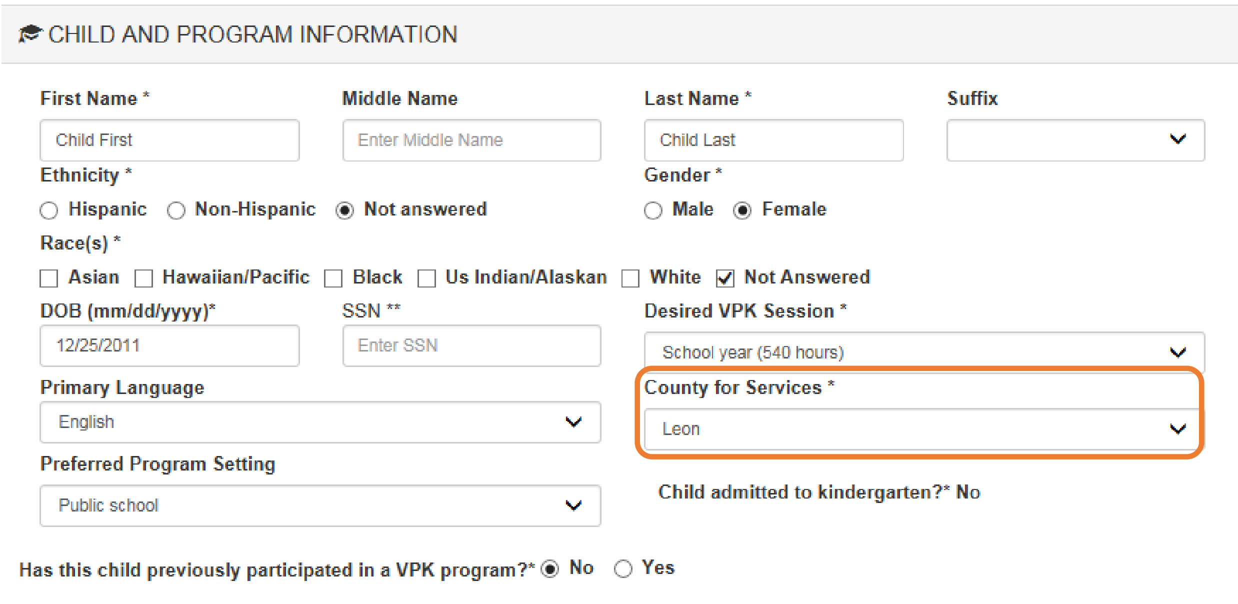


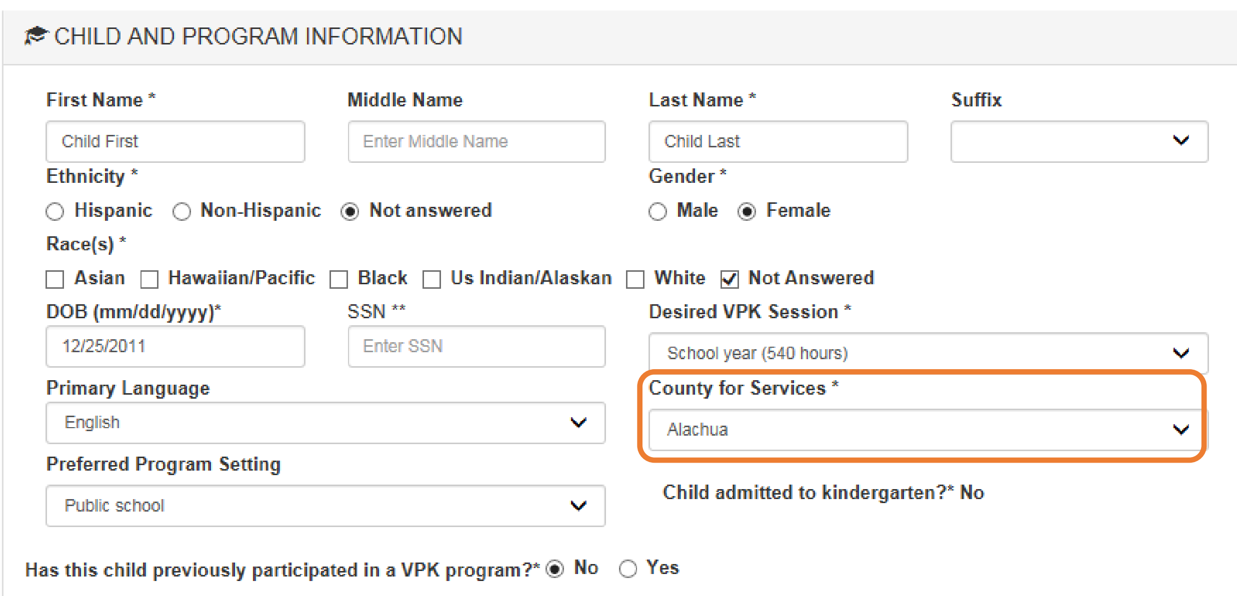
VPK Application Transfer Process – Change in County of Service

If a child has not used any VPK hours, applications can be transferred by a coalition admin or DEL admin, from one county to another when the application is in **Submitted**, **Approved** or **Enrolled** status. If an application is in **Rejected** status, the parent can be instructed to update the county of service on the application and resubmit. The application will be delivered to the appropriate coalition, based on the county of service selected.

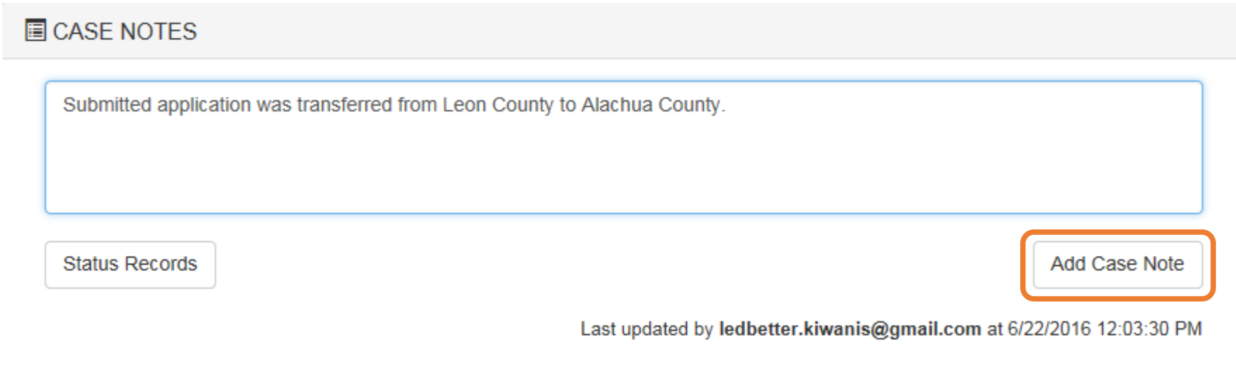
Submitted Applications

To transfer a **Submitted** VPK application, select the new county from the **County for Services** dropdown menu.

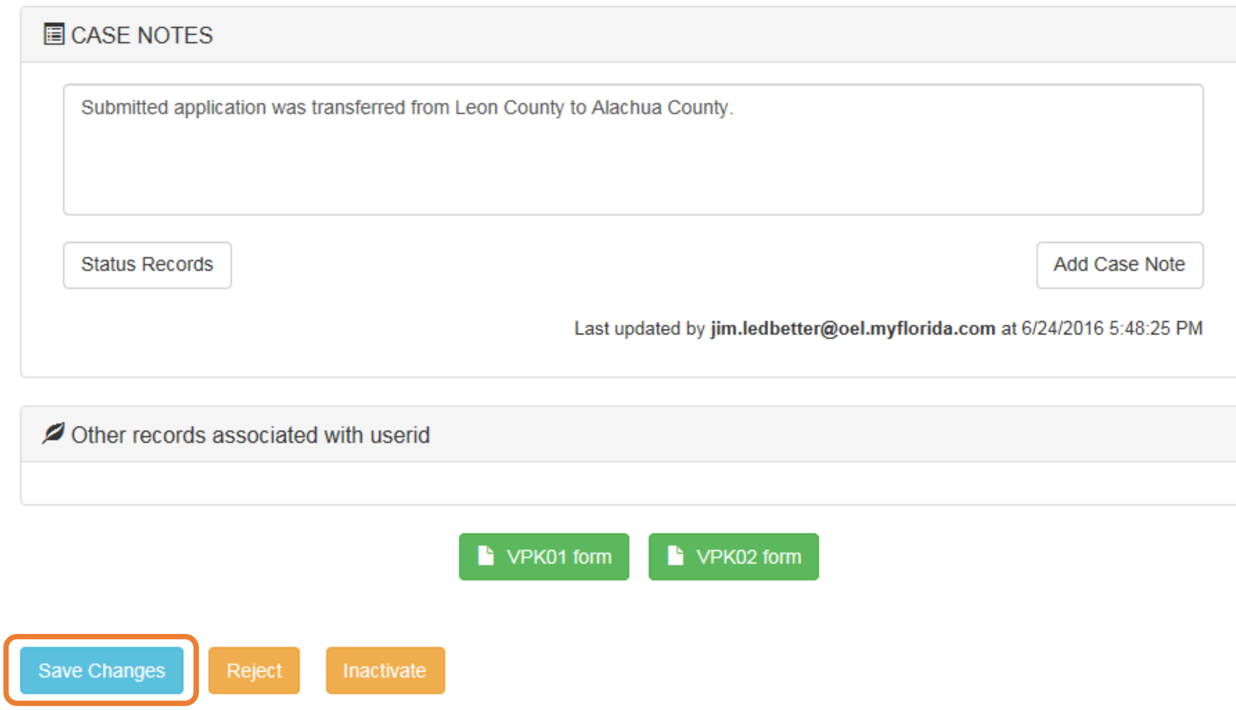




Enter a Case Note, documenting the application transfer from County A to County B and click the **Add Case Note** button.



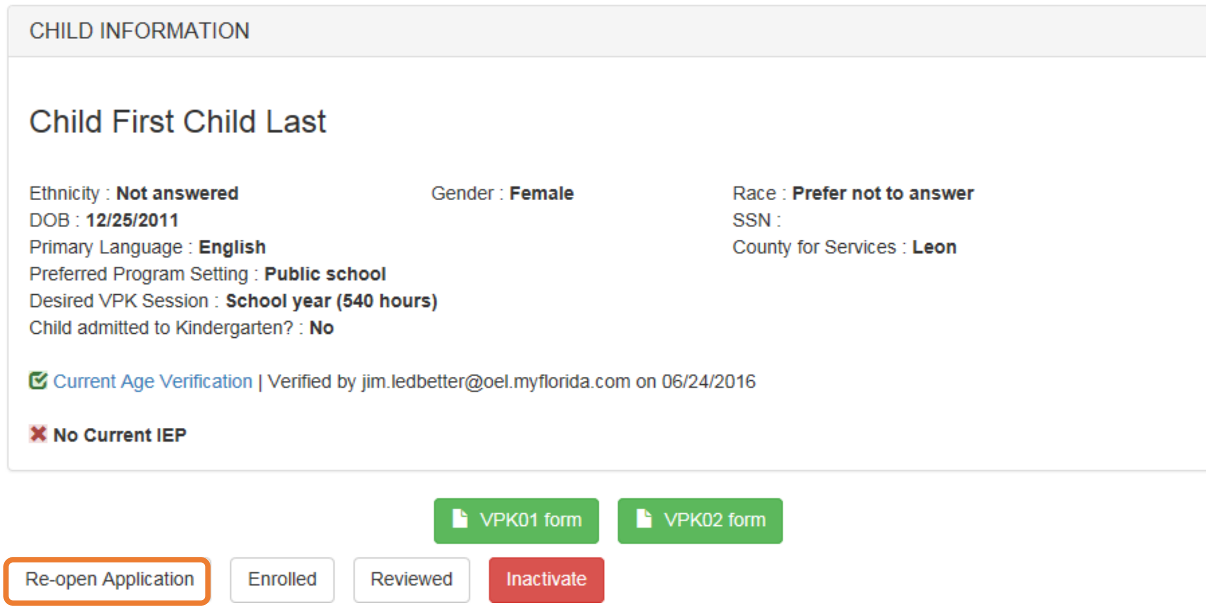
Click the **Save Changes** button.



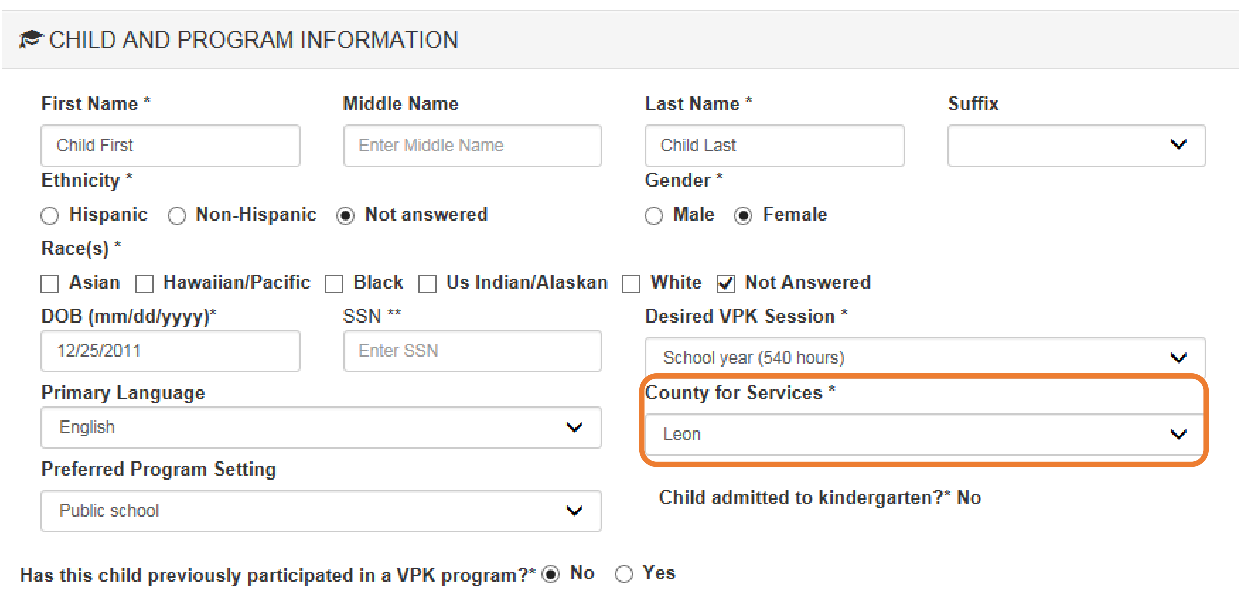
Approved and Enrolled VPK Applications

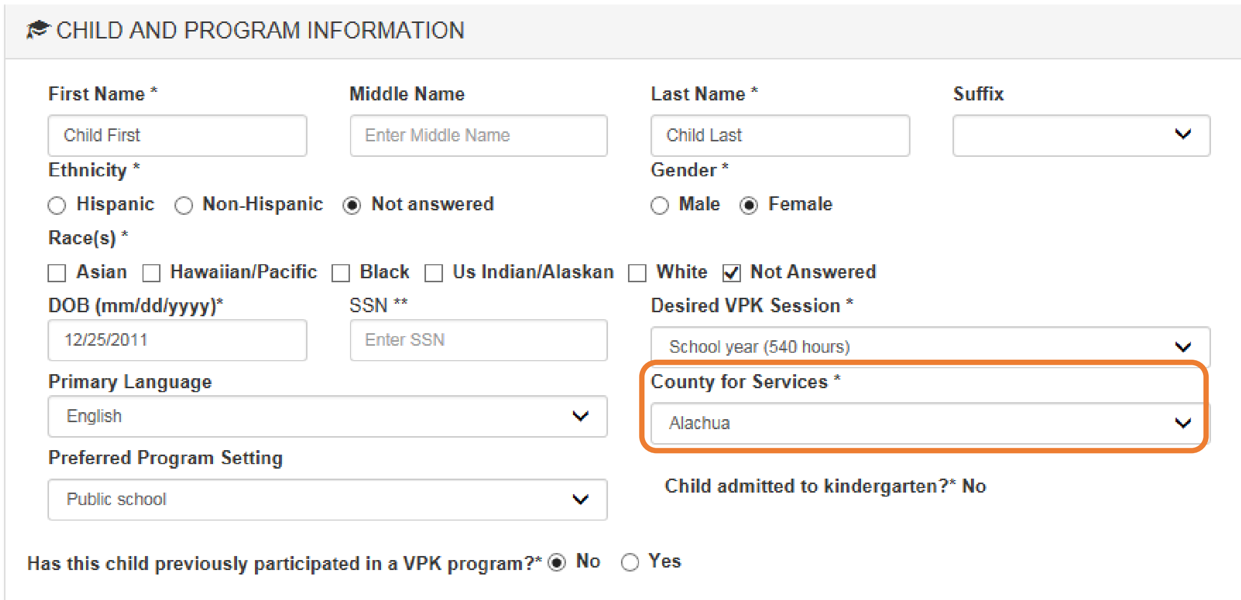
To transfer an **Approved** or **Enrolled** VPK application, the original coalition must first confirm that the child has not participated in any VPK program hours.

If the child has **not** attended VPK program hours, the coalition user can open the VPK record in the Coalition Services Portal and click the **Re-Open Application** button.

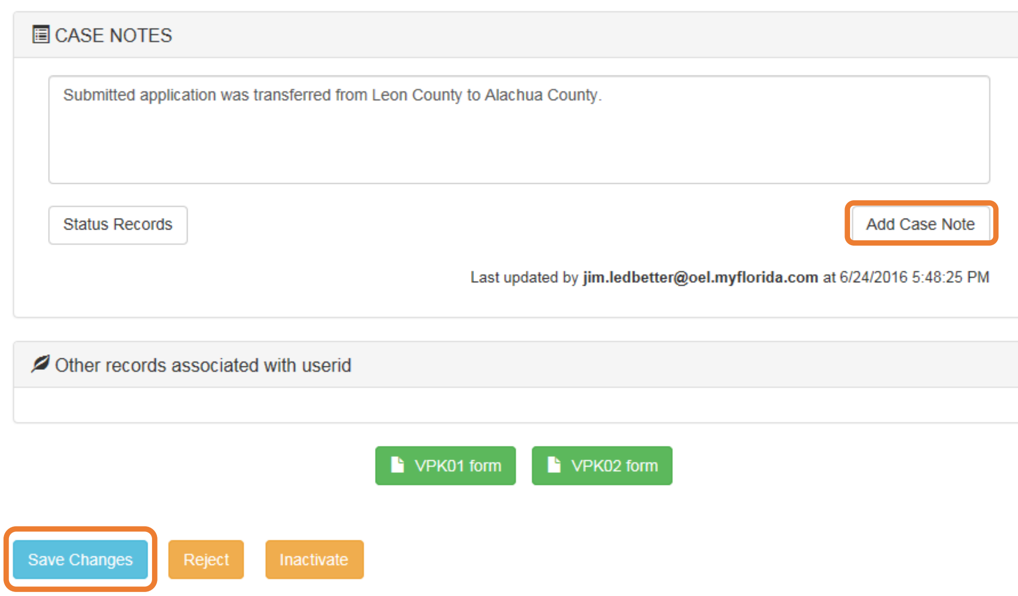


Then, select the new county from the **County for Services** dropdown menu. Once the county of service is changed, the receiving coalition can process the application.





Enter a Case Note, documenting the application transfer from County A to County B, click the **Add Case Note** button and click the **Save Changes** button. NOTE: Once the county is changed, the original coalition will no longer have access to the application in the Coalition Services Portal.

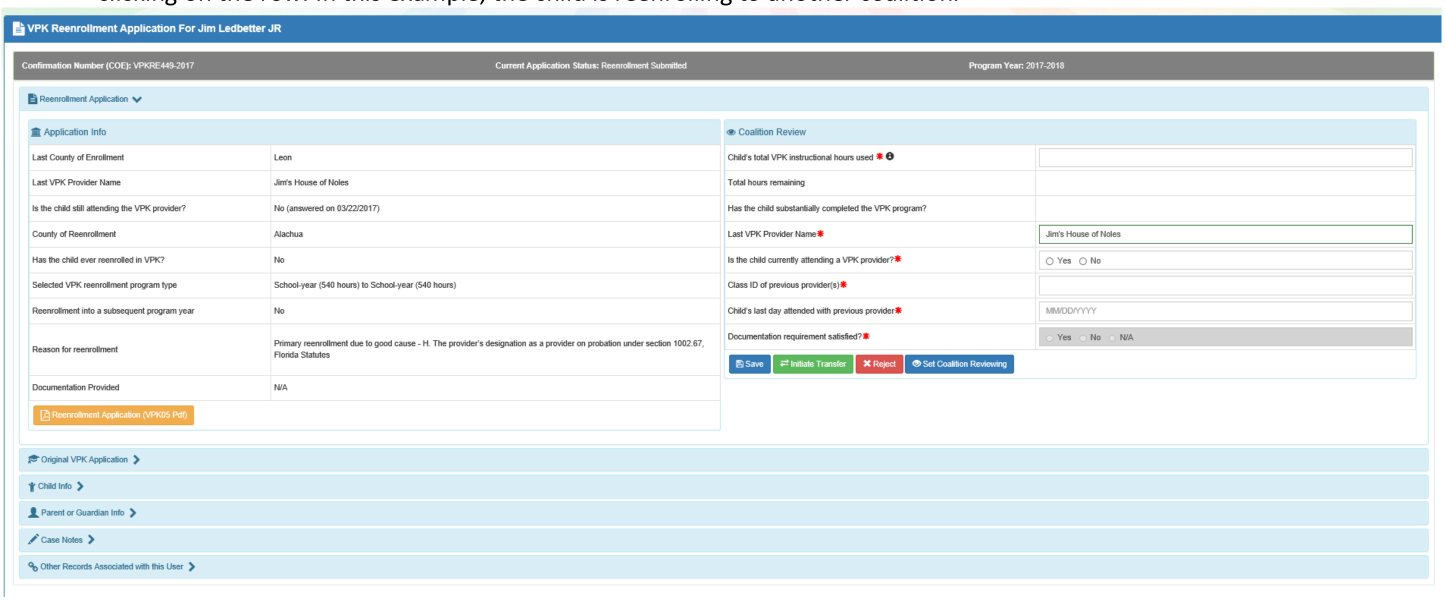


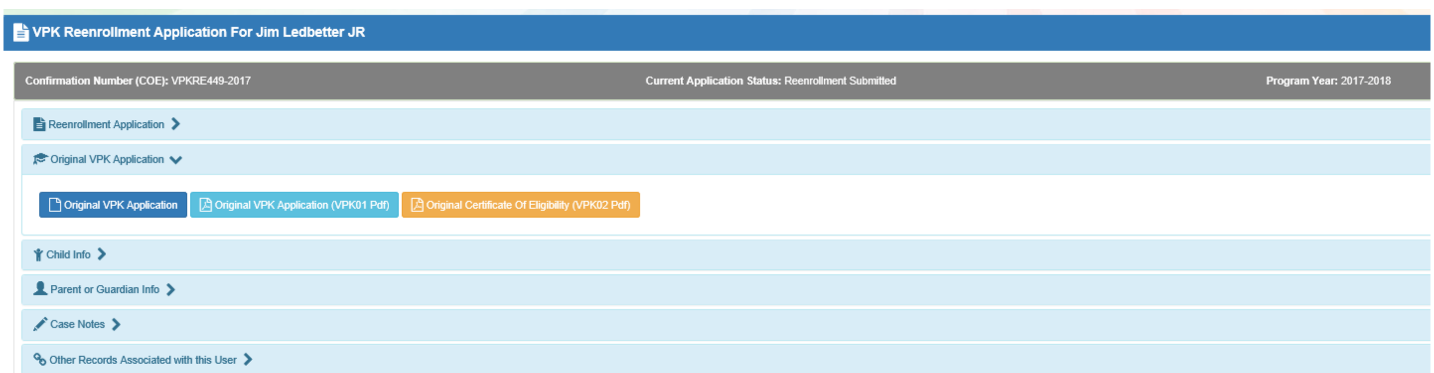
VPK Reenrollment Applications

If the child **has** participated in VPK program hours, the Family Portal user needs to complete a reenrollment application.

To begin processing a VPK reenrollment application, select **Submitted** or **Reenrollment Submitted** from the VPK Application dropdown menu.

The following screen will display for the selected reenrollment application. Each screen can be expanded by clicking on the row. In this example, the child is reenrolling to another coalition.





VPK Reenrollment Application For Jim Ledbetter JR

Confirmation Number (COE): VPKRE449-2017 **Current Application Status:** Reenrollment Submitted **Program Year:** 2017-2018

Reenrollment Application

Original VPK Application

Child Info

Jim Ledbetter JR

Ethnicity : **Not answered**
DOB : **03/17/2013**
Primary Language :
Preferred Program Setting : **Public school**
Desired VPK Session : **School year (540 hours)**
Child admitted to Kindergarten? : **No**

Gender : **Male**

Race : **Prefer not to answer**
SSN :
County for Services : **Leon**

Current Age Verification | Verified by jim.ledbetter@oel.myflorida.com on 03/22/2017

No Current IEP

Parent or Guardian Info

Case Notes

Other Records Associated with this User

VPK Reenrollment Application For Jim Ledbetter JR

Confirmation Number (COE): VPKRE449-2017 **Current Application Status:** Reenrollment Submitted **Program Year:** 2017-2018

Reenrollment Application

Original VPK Application

Child Info

Parent or Guardian Info

Jim Ledbetter

Ethnicity : **Not answered**
Relationship to Child : **Parent/Step Parent**
Preferred Method of Contact : **Email**
Email : ledbetter.kiwanis+4@gmail.com

Gender : **Male**

Race : **Prefer not to answer**
Address :
250 Marriott Drive
Tallahassee, 32399
Primary: (555) 555-5555
Secondary:

SECONDARY PARENT OR GUARDIAN :

Relationship to Child :
Parent 2 Address Information :

Current Proof of Residence | Verified by jim.ledbetter@oel.myflorida.com on 03/22/2017

Case Notes

Other Records Associated with this User

VPK Reenrollment Application For Jim Ledbetter JR

Confirmation Number (COE): VPKRE449-2017 **Current Application Status:** Reenrollment Submitted **Program Year:** 2017-2018

Reenrollment Application

Original VPK Application

Child Info

Parent or Guardian Info

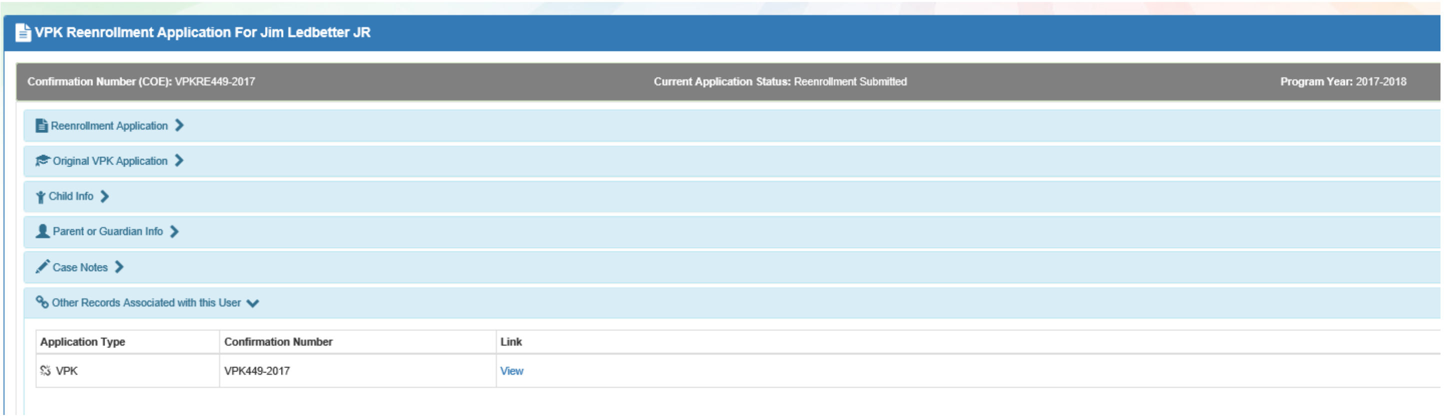
Case Notes

Status Records

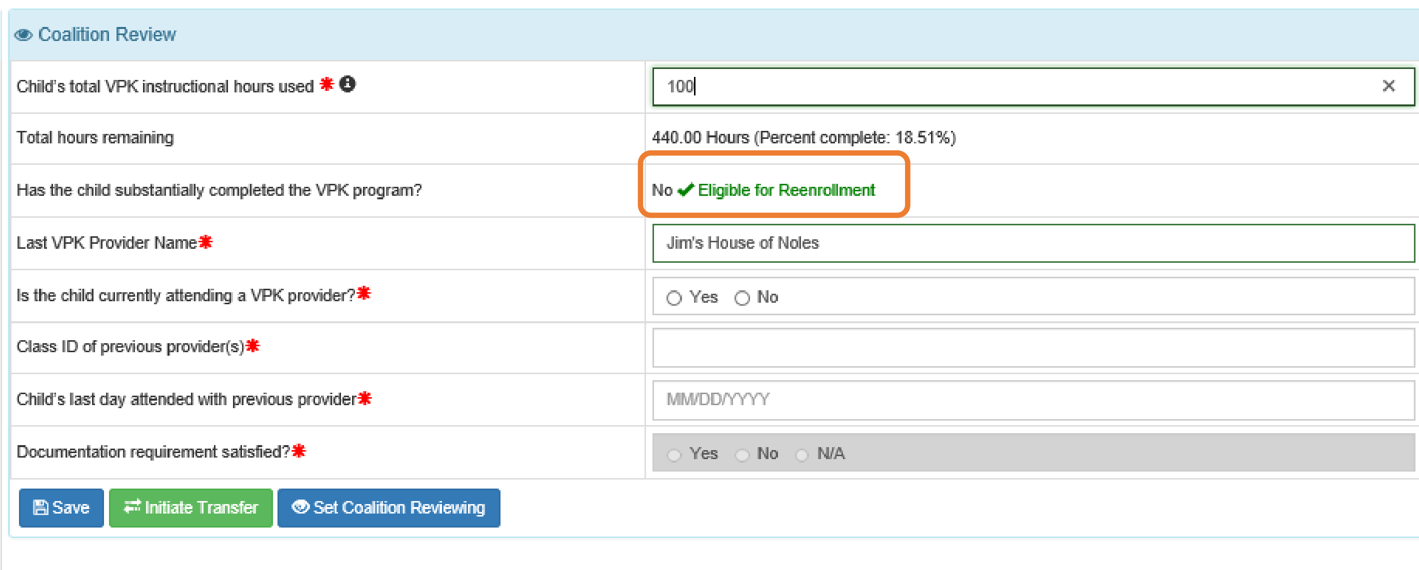
Add Case Note

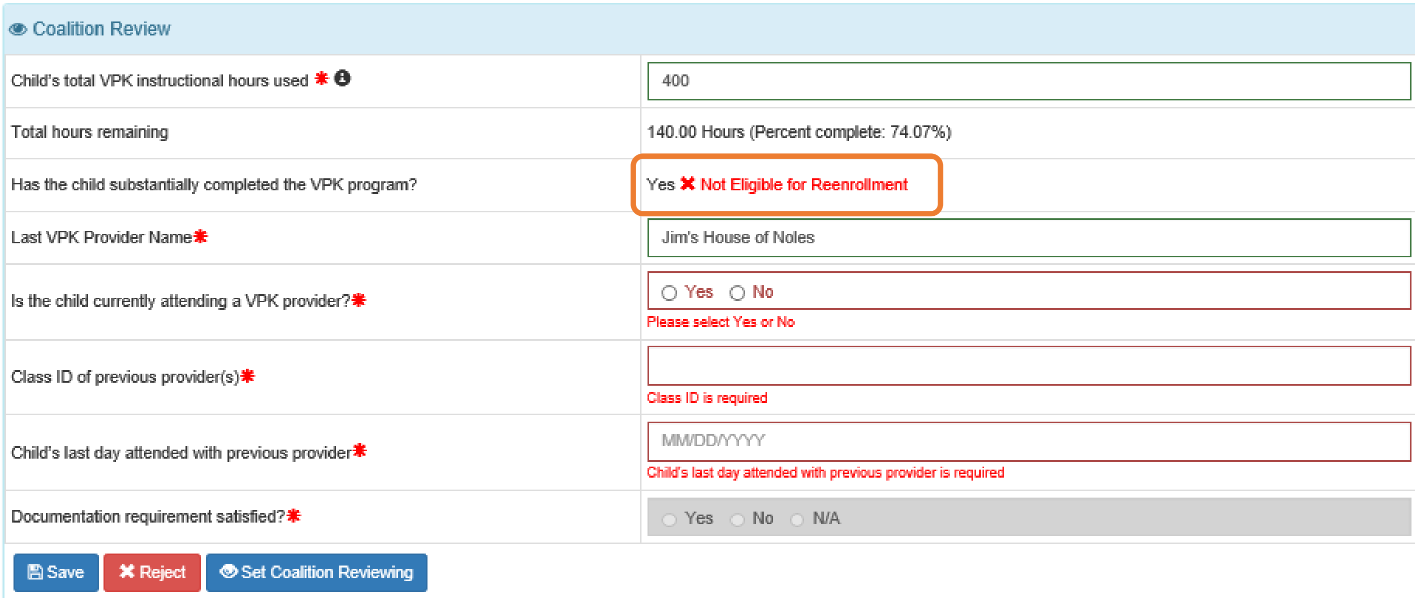
Last updated by **ledbetter.kiwanis+4@gmail.com** on 3/22/2017 at 6:45:49 PM

Other Records Associated with this User



The Coalition Review screen allows a coalition user to input the number of VPK instructional hours paid. The system will calculate the number of hours remaining. Only applications with 70% or fewer hours paid are eligible for reenrollment. See examples below.

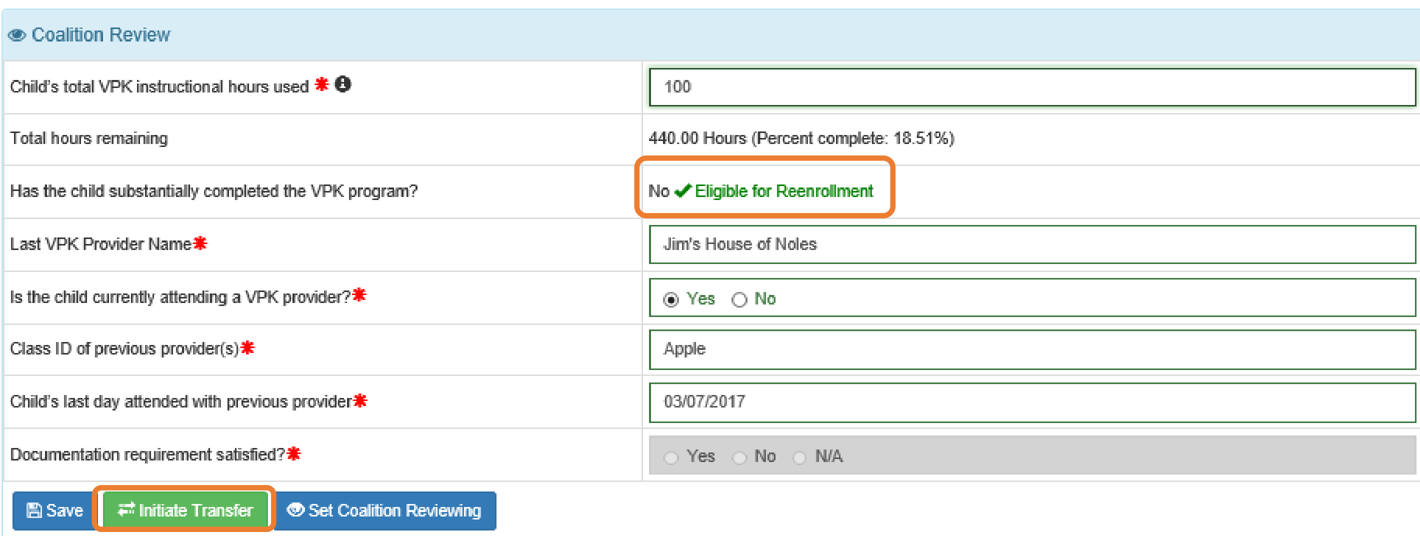




Coalition Review

Child's total VPK instructional hours used *	400
Total hours remaining	140.00 Hours (Percent complete: 74.07%)
Has the child substantially completed the VPK program?	Yes ✖ Not Eligible for Reenrollment
Last VPK Provider Name*	Jim's House of Noles
Is the child currently attending a VPK provider?*	Yes No Please select Yes or No
Class ID of previous provider(s)*	 Class ID is required
Child's last day attended with previous provider*	MM/DD/YYYY Child's last day attended with previous provider is required
Documentation requirement satisfied?*	Yes No N/A

Save | Reject | Set Coalition Reviewing



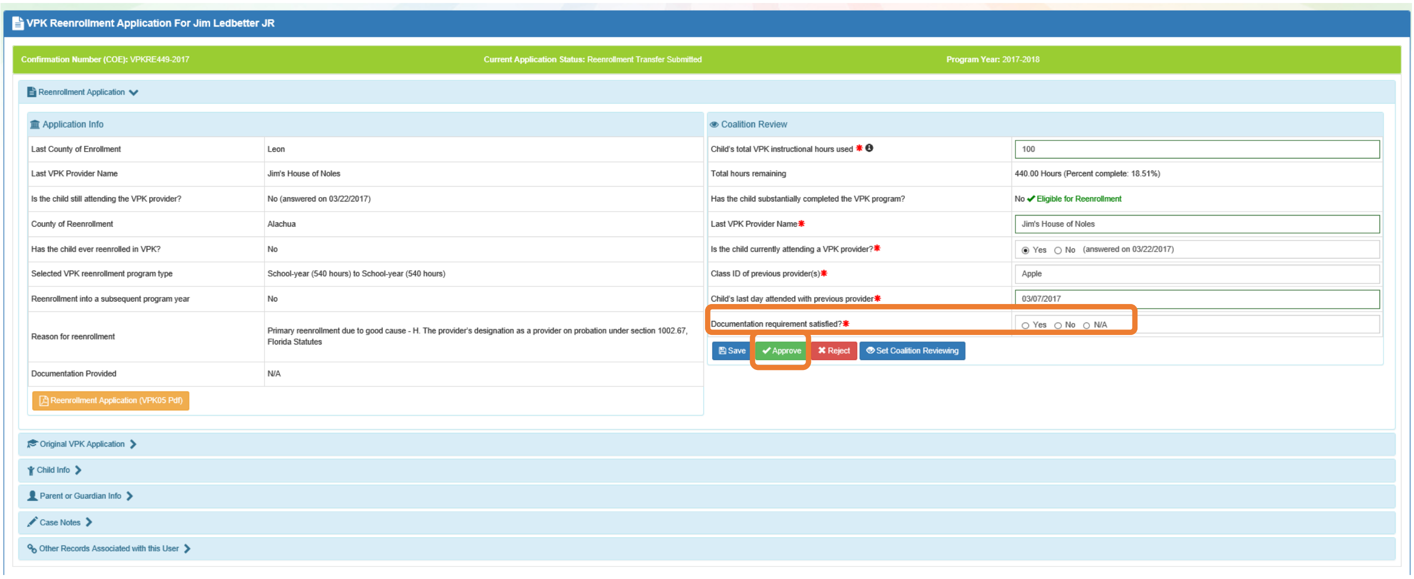
Coalition Review

Child's total VPK instructional hours used *	100
Total hours remaining	440.00 Hours (Percent complete: 18.51%)
Has the child substantially completed the VPK program?	No ✔ Eligible for Reenrollment
Last VPK Provider Name*	Jim's House of Noles
Is the child currently attending a VPK provider?*	Yes No
Class ID of previous provider(s)*	Apple
Child's last day attended with previous provider*	03/07/2017
Documentation requirement satisfied?*	Yes No N/A

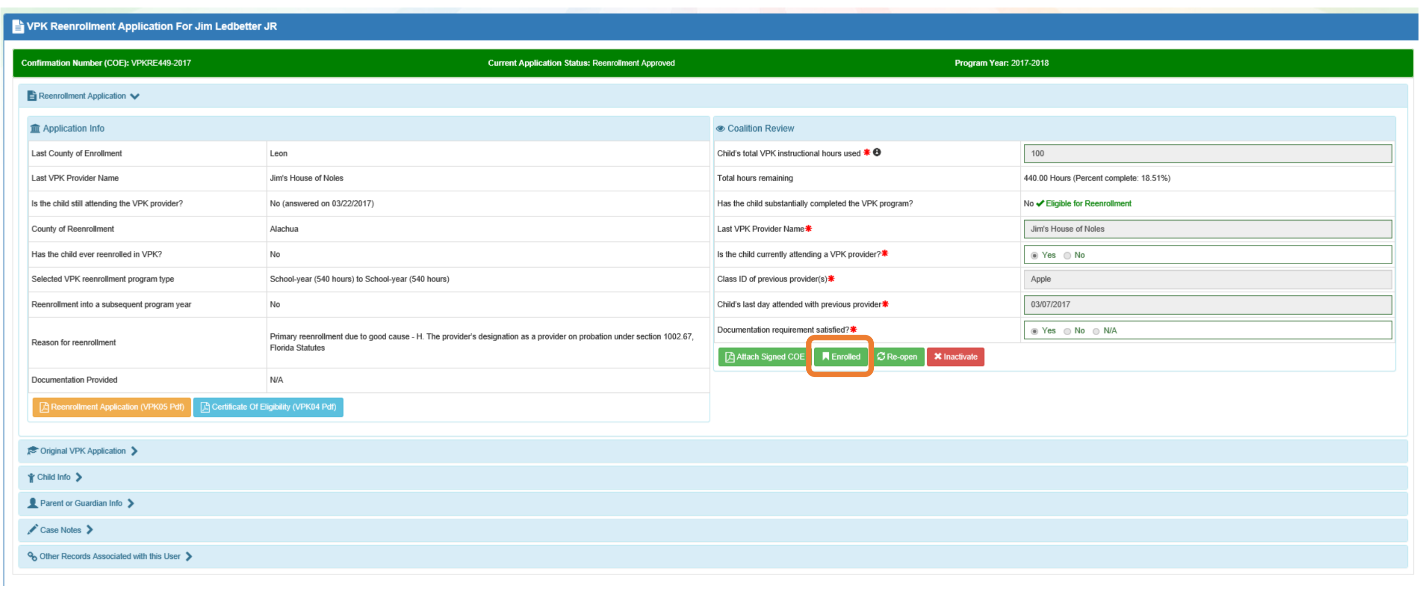
Save | Initiate Transfer | Set Coalition Reviewing

If the child is eligible for reenrollment, the coalition user must check the required fields and click the **<u>Initiate Transfer</u>** button to send the application to the receiving coalition.

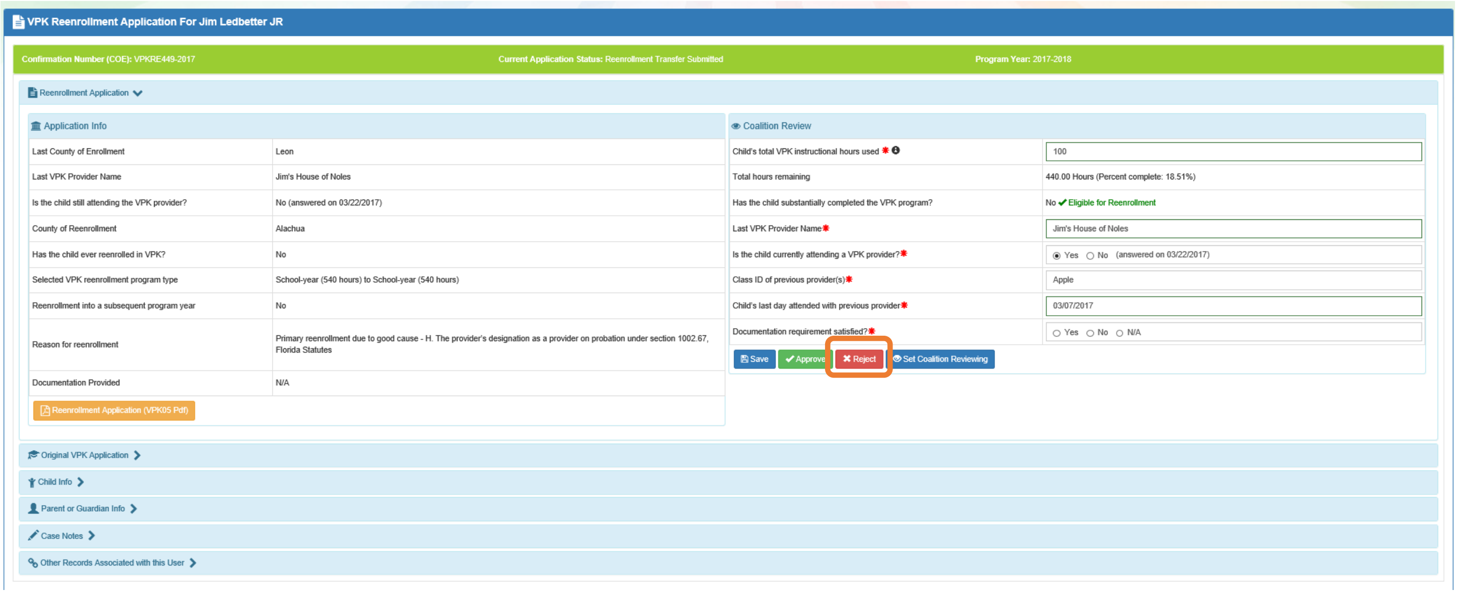
The receiving coalition will determine if the documentation requirement has been met. If the reenrollment application is approved by the receiving coalition, the coalition user will click the **Approve** button.



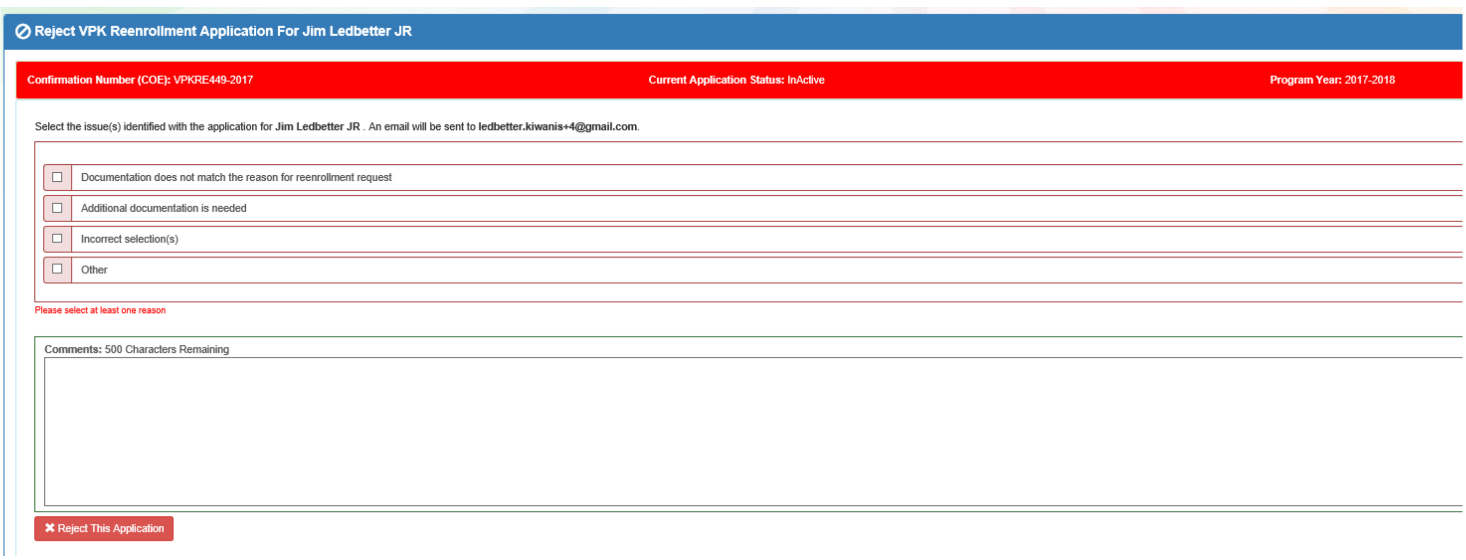
After the reenrollment application is approved, the child can be enrolled by clicking the **Enrolled** button.



If the reenrollment application is rejected, the coalition user will click the **Reject** button.



After clicking the **Reject** button, the coalition user will select the rejection reason and fill in the comments section.

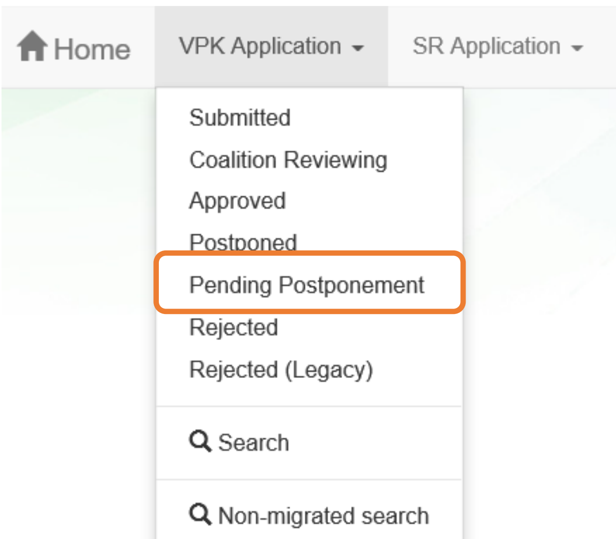


VPK Program Year Postponement Process

If a child's date of birth is between Feb. 2 and Sept. 1, parents have the option to select the current VPK program year or postpone enrollment until a future VPK program year.

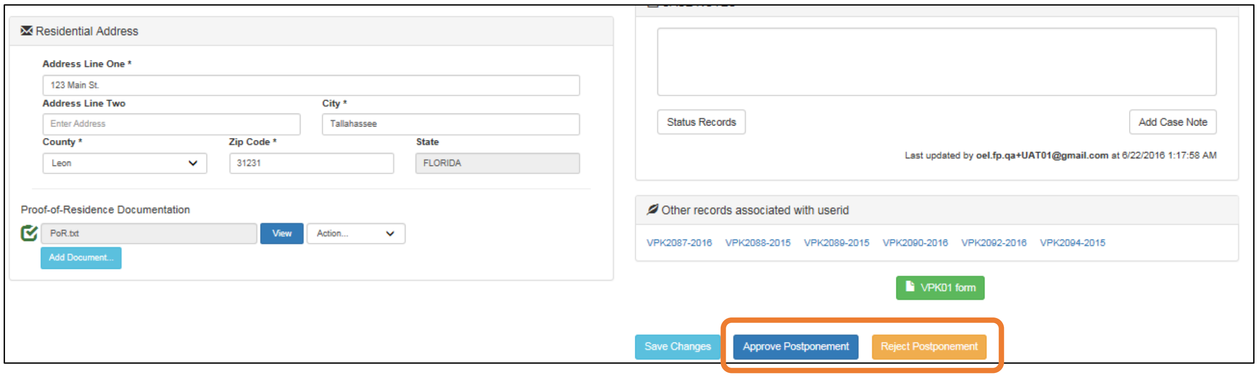
Processing Postponements

Pending Postponement applications are existing **Approved** applications where the parent has requested to postpone VPK for a different VPK program year than the original application. The coalition user must take action on the parent's request. Coalition users can click **Pending Postponement** from the work queues dropdown menu to do a quick search.



Child Name	Confirmation ID/COE Number	Parent Name	Original Submission Date	Application Status
Stevens, Suzie Q	VPK272-2016	Stevens, Martin A	6/29/2016	Pending Postponement
Hooey, Yada Yada	VPK250-2016	Stevens, Martin A	6/24/2016	Pending Postponement
Stevens, Kiddo	VPK238-2016	Stevens, Martin A	6/23/2016	Pending Postponement
Lincoln, Andrew	VPK232-2016	Stevens, Martin A	6/23/2016	Pending Postponement

Coalition users must click the **Approve Postponement** or **Reject Postponement** button after determining the child has not used VPK hours in the coalition service area.



If the coalition user approves the postponement, the application status will change to **Postponed** on the Family Profile, and the parent will receive an email from **DONOTREPLY@oel.myflorida.com.**

Email Message:

Hello sasd asd.

Your request to postpone VPK for Test5 Test has been approved.

The 2017 - 2018 program year *Certificate of Eligibility* for your child will be available on January 1, 2017. Beginning on this date you will be able to log on to your account at https://familyservicesuat.floridaearlylearning.com to print or download the *Certificate of Eligibility* for your child.

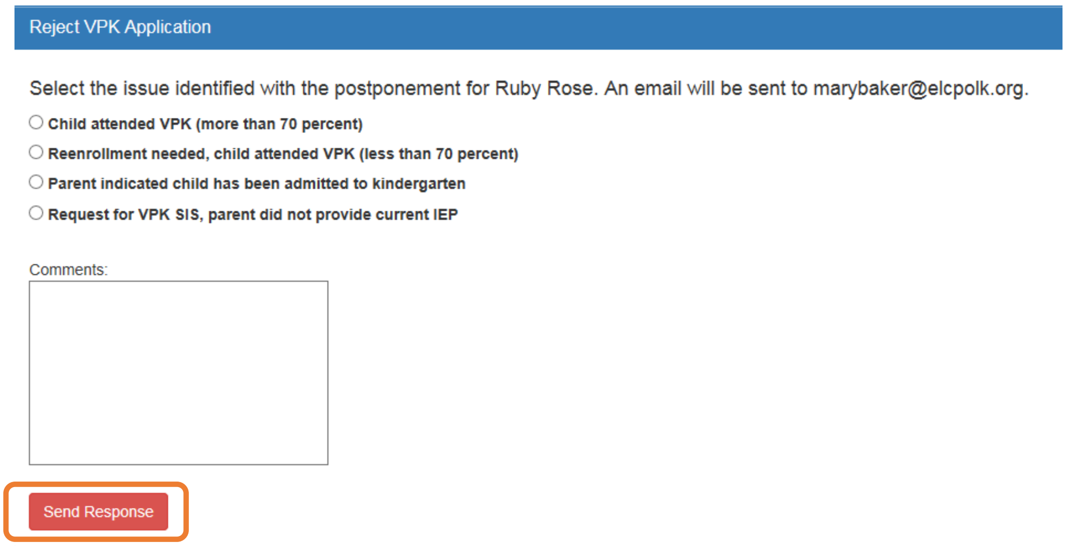
If your child has already attended or completed VPK, please contact the early learning coalition at the number below, as it impacts your child's eligibility. Please keep in mind your child cannot attend VPK once he or she has been admitted to kindergarten.

If you need assistance, please contact your early learning coalition at the link below.

Thank you,
ELC of Northwest Florida
(850) 747-5400
http://www.elcnwf.org/

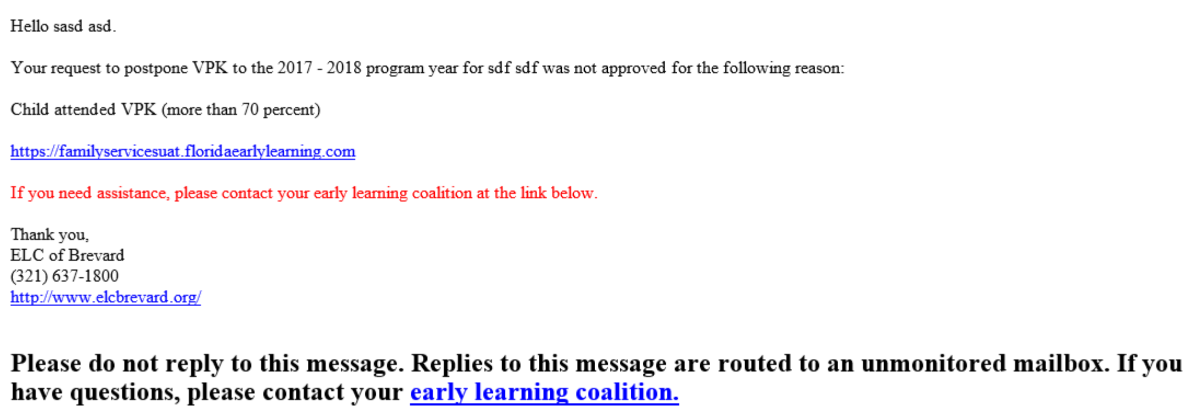
Please do not reply to this message. Replies to this message are routed to an unmonitored mailbox. If you have questions, please contact your early learning coalition.

If the coalition user rejects the postponement, the user must select the checkbox for the appropriate rejection reason(s), enter a comment and click the **Send Response** button. The comment will appear in the auto-generated email from **DONOTREPLY@oel.myflorida.com** to the parent.



The application status will be set to **Approved**, and the parent will receive an email from **DONOTREPLY@oel.myflorida.com.**

Email Message:



Hello sasd asd.

Your request to postpone VPK to the 2017 - 2018 program year for sdf sdf was not approved for the following reason:

Child attended VPK (more than 70 percent)

https://familyservicesuat.floridaearlylearning.com

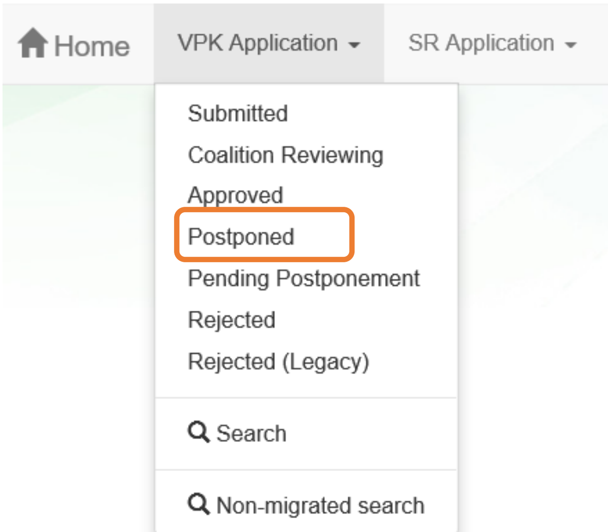
If you need assistance, please contact your early learning coalition at the link below.

Thank you,
ELC of Brevard
(321) 637-1800
http://www.elcbrevard.org/

Please do not reply to this message. Replies to this message are routed to an unmonitored mailbox. If you have questions, please contact your early learning coalition.

Postponed Applications

Postponed applications are postponement requests the coalition user approved before the requested VPK program year application became available. Certificates of Eligibility for **Postponed** applications will become available for the parent after Jan. 1 of the selected VPK program year. The coalition user does not need to take action, but the application is viewable. Coalition users can click **Postponed** from the work queues dropdown menu to do a quick search.



Postponed applications can be inactivated following the same process as a standard VPK application.

Guardianship Transfer

Rules Overview

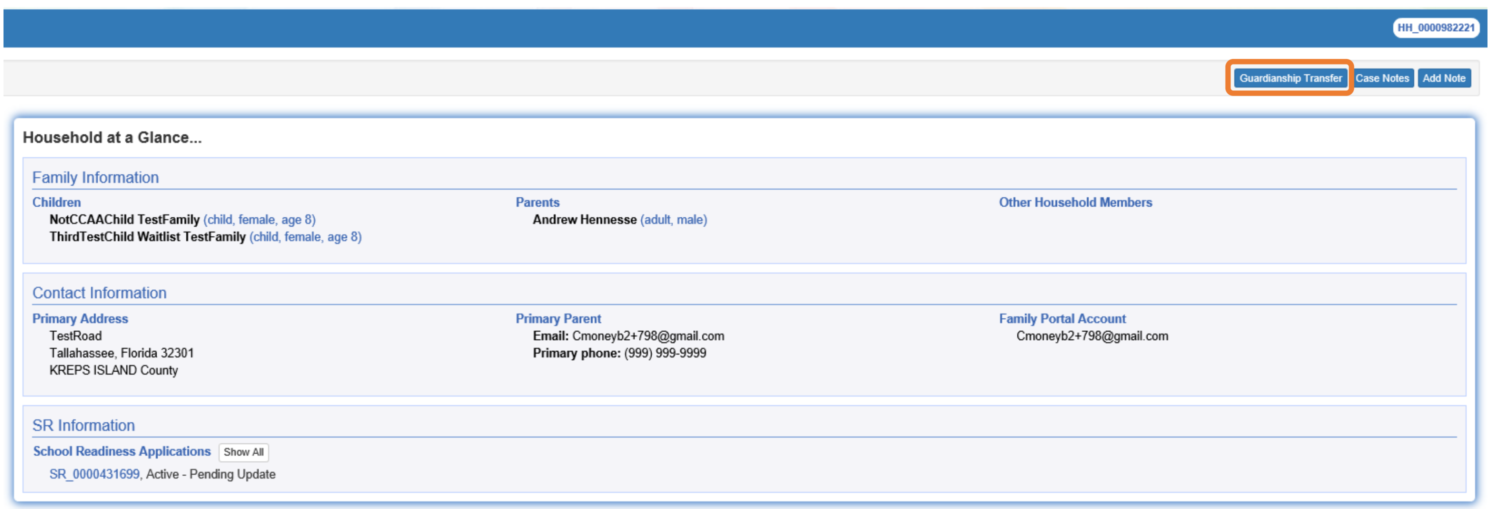
1. The Guardianship Transfer process is designed to only transfer children that have a School Readiness (SR) Eligibility Assignment and/or VPK Enrollment.
    a. The child must exist in EFS-Mod
    b. The transfer process will not transfer a child that is on the SR Waiting List
    c. The transfer process will not transfer a child that has an Approved VPK application
    d. The records for an SR Waiting List and/or VPK Approved child must be made inactive in the old guardian's household and the new guardian is required to submit an application to enroll the child in the SR and/or VPK program
    e. The ELC user is responsible for inactivating all child records in the associated applications for children that are to be transferred out of a household. The EFS-Mod system will not automatically terminate or inactivate a child record in an application in association with a guardianship transfer process.
2. If the new guardian does not exist in EFS-Mod, the ELC user is able to create the new guardian household within the Guardianship Transfer module by entering the required data elements to create a primary parent of a household. Once the new household is created, the new guardian can be searched for and selected for a transfer.
3. For SR, only the child's active eligibility authorization period and active eligibility assignment will be transferred to the new guardian's household. No SR child/provider enrollments will be transferred. The SR provider enrollment must be ended before the transfer will process.
    a. When ending a child's enrollment in the guardianship transfer module, the ELC user must enter a past date. An enrollment cannot be ended on the same day a guardianship transfer is processed because it appears as though the old guardian is responsible for paying for an enrollment on a day that the child is no longer in their household.
4. For VPK, the child's provider enrollment will not be terminated. There will not be a break in service in order to avoid losing count of the child's accrued VPK hours. The child will remain enrolled with the VPK provider until the new guardian or ELC initiates a re-enrollment.
    a. Only children with an enrollment status of **Enrolled** and **Enrollment Ended** will appear in the From Household transfer list
    b. If the child is going through a classroom transfer (the VPK enrollment status is **Change Requested**) at the time that a guardianship transfer becomes necessary, the classroom transfer must be completed before the guardianship transfer can be completed
    c. If the VPK enrollment status is **Enrollment Submitted**, the coalition must complete enrollment request before a guardianship transfer can be completed
    d. If the VPK enrollment status is **Enrollment Rejected,** a guardianship transfer cannot be completed. The coalition must re-open the VPK application to inactivate it; the new family must create a new VPK application for the child
    e. If the VPK enrollment status is **Enrollment Canceled**, a guardianship transfer cannot be completed. The coalition must re-open the VPK application to inactivate it; the new family must create a new VPK application for the child
    f. If the VPK enrollment status is **Coalition Reviewing** at the time that a guardianship transfer becomes necessary, the coalition must complete the enrollment request before the guardianship transfer can be completed
5. In the Guardianship Transfer process, only one child can be transferred from a household at a time.
    a. If a child is enrolled in both the SR program and the VPK program, that child will display as two separate children in the transfer list. That child's records will have to be transferred individually.
        i. This may not be the case in situations where the coalition has merged the child's VPK and SR records into one person record for the child. In that case, the child will only be listed once in the transfer list.
    b. Siblings that are being transferred to a new guardian will have to be transferred individually

6. When the guardianship transfer process is completed:
    a. For VPK the old guardian will only see **Enrollment Ended** for the transferred child's enrollment in the household. The old guardian will not have a view of the child's new enrollments or documents in the new guardian's household.
    b. For SR the old guardian will not see the history of the child in their household
    c. The new guardian will not see the history of the child's enrollment in the old guardian's household
    d. The new guardian will not have access to view any of the documents from the old guardian's household. The new guardian or the ELC must upload all required documentation for the child.
7. The Guardianship Transfer process allows a child to be transferred across coalitions. The county of the household to which the child is being transferred is used to identify the coalition that will receive the transferred SR eligibility/VPK enrollment.
8. Things To Come (Not Yet Developed):
    a. Guardianship Transfer Work Queue

NOTE: With Release 4.5, the guardianship transfer process allows coalition users to identify the physical county of residence and families receiving RCMA services.

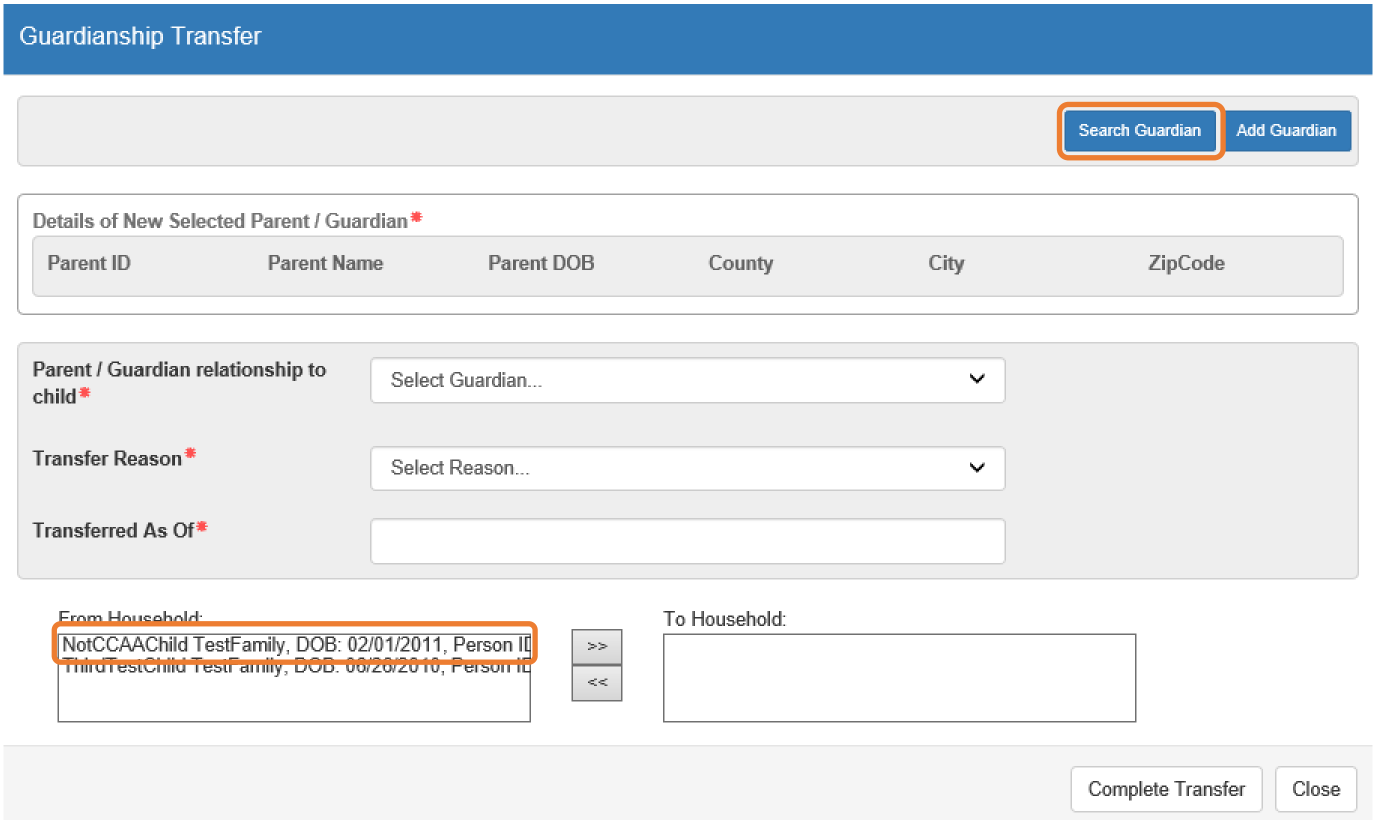
Search for New Guardian and Transfer Child

After accessing the household dashboard, click the **Guardianship Transfer** button.

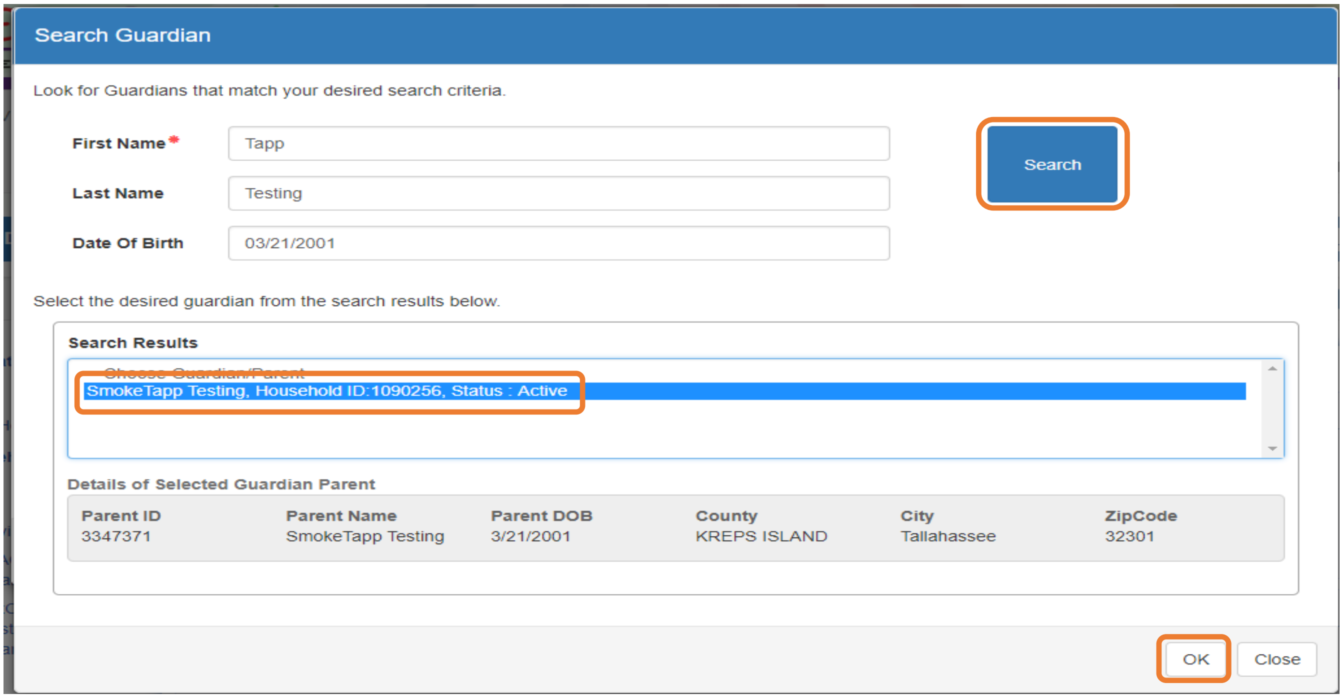


Verify that the child that is to be transferred is listed in the From Household window. For SR – Children have an eligibility authorization period. For VPK – Children are enrolled or their enrollment has been ended.

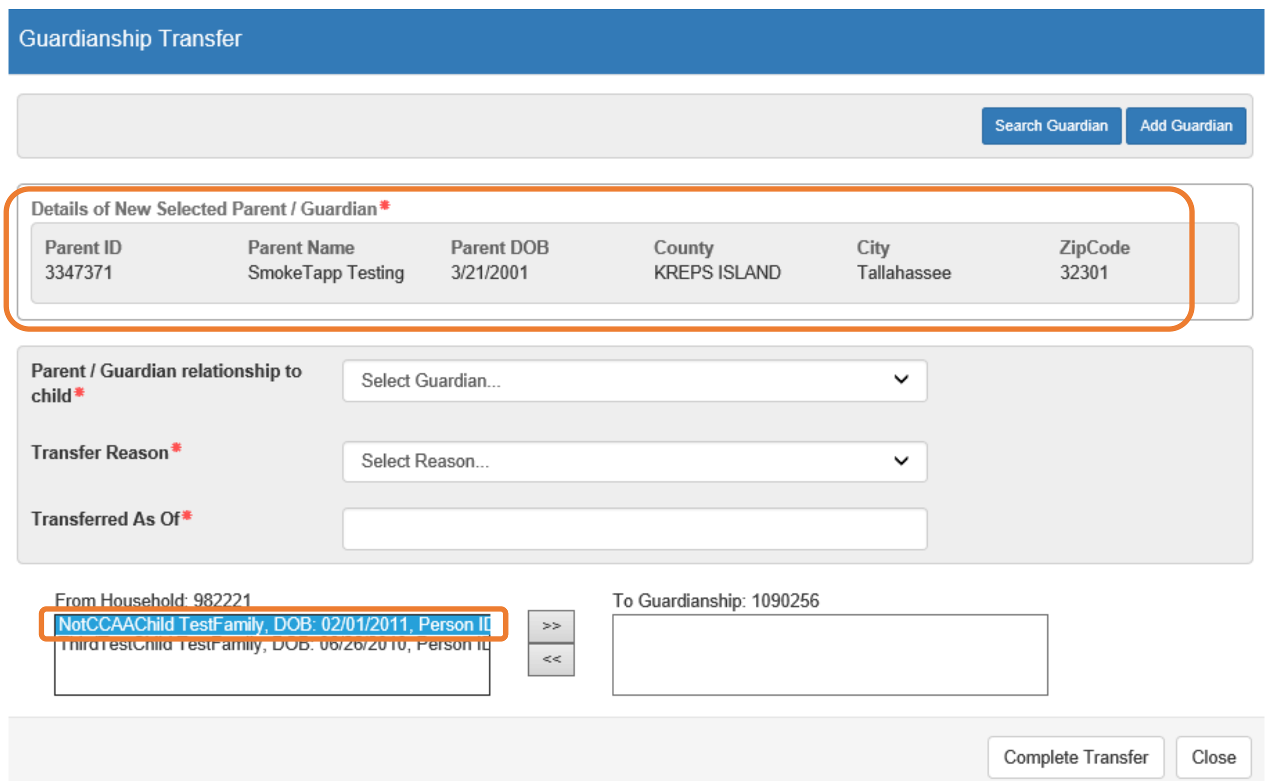
Click **Search Guardian**.



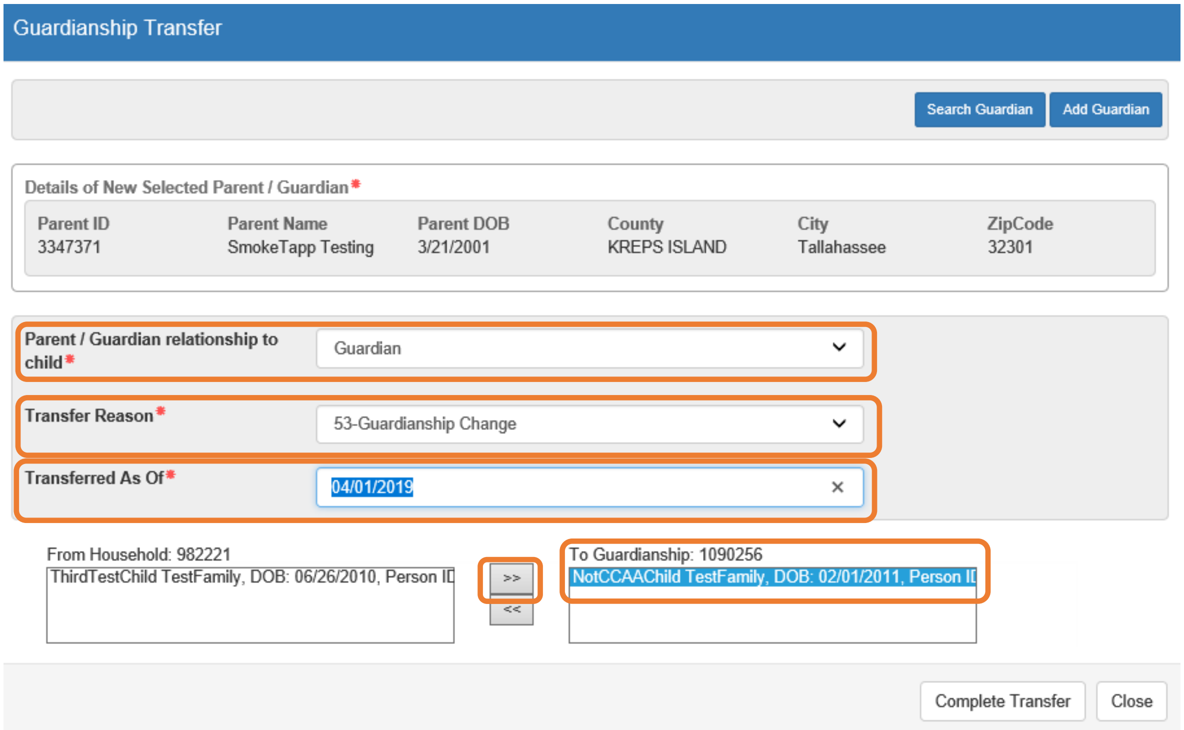
Enter the New Guardian Search Data: First Name, Last Name and DOB – click **Search.** Verify the Household ID and Household Status to confirm the correct guardian is selected. If correct, click the **OK** button.



Verify the New Guardian is displayed in the New Selected Parent/Guardian section. Select the child to transfer.



Click the move **>>** button to place the child into the To Household section. Complete the **Transfer Reason** and **Transferred As Of** date fields.


Guardianship Transfer

Search Guardian | Add Guardian

Details of New Selected Parent / Guardian*

Parent ID	Parent Name	Parent DOB	County	City	ZipCode
3347371	SmokeTapp Testing	3/21/2001	KREPS ISLAND	Tallahassee	32301

Parent / Guardian relationship to child* Guardian

Transfer Reason* 53-Guardianship Change

Transferred As Of* 04/01/2019

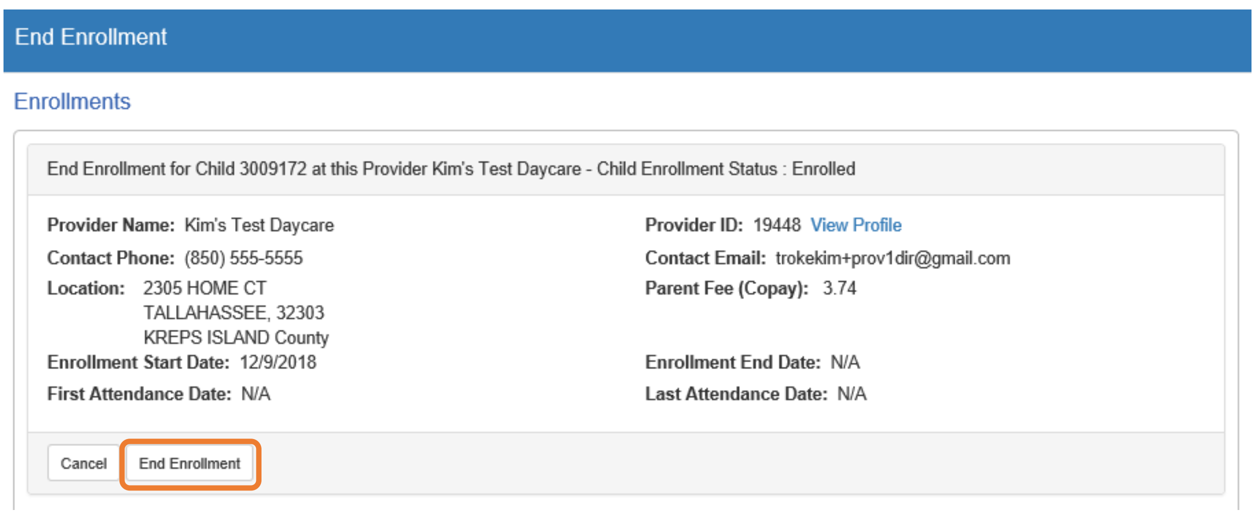
From Household: 982221
ThirdTestChild TestFamily, DOB: 06/26/2010, Person ID

>>
<<

To Guardianship: 1090256
NotCCAAChild TestFamily, DOB: 02/01/2011, Person ID

Complete Transfer | Close

If the child's SR enrollments have not been ended prior to the start of the guardianship transfer, the End Enrollment screen will be displayed to allow the user to end the enrollment. Click the **End Enrollment** button.


End Enrollment

Enrollments

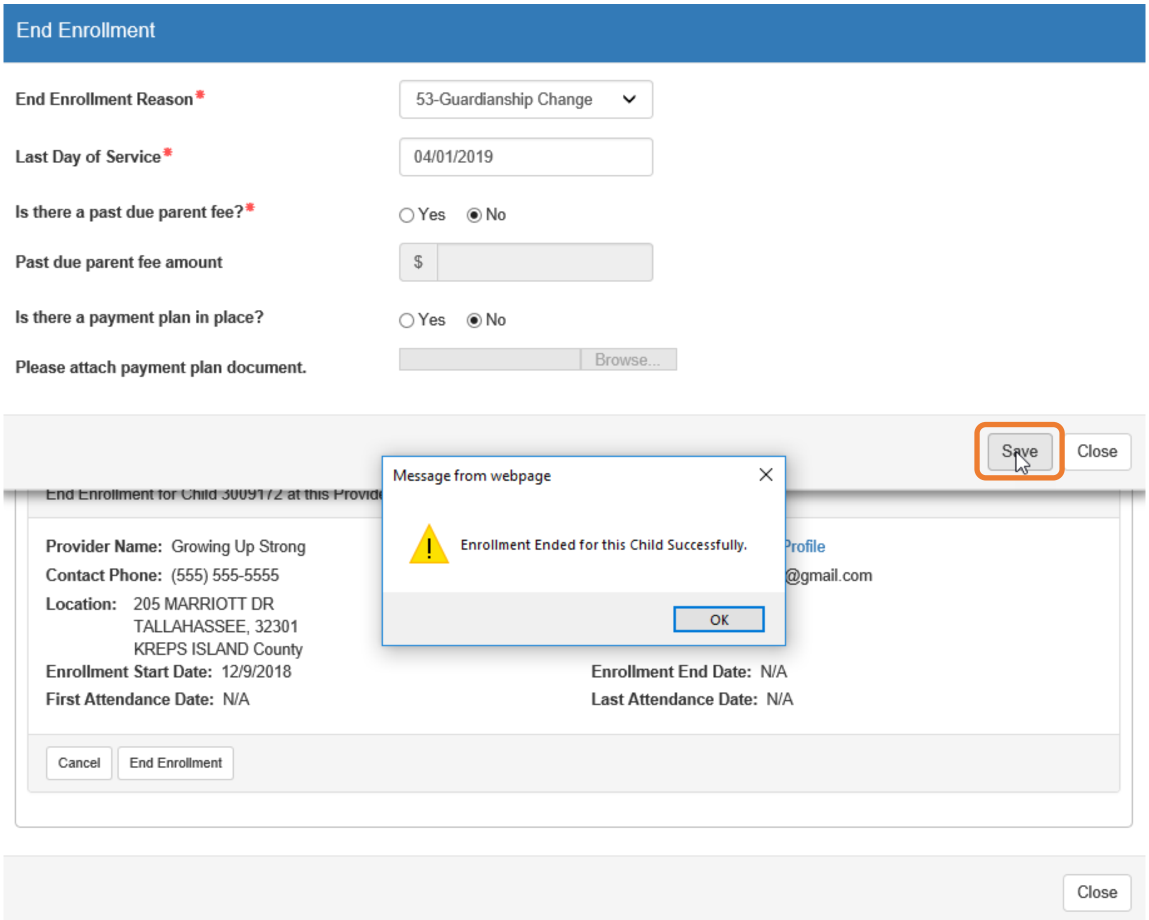
End Enrollment for Child 3009172 at this Provider Kim's Test Daycare - Child Enrollment Status : Enrolled

Provider Name: Kim's Test Daycare
Contact Phone: (850) 555-5555
Location: 2305 HOME CT
TALLAHASSEE, 32303
KREPS ISLAND County
Enrollment Start Date: 12/9/2018
First Attendance Date: N/A

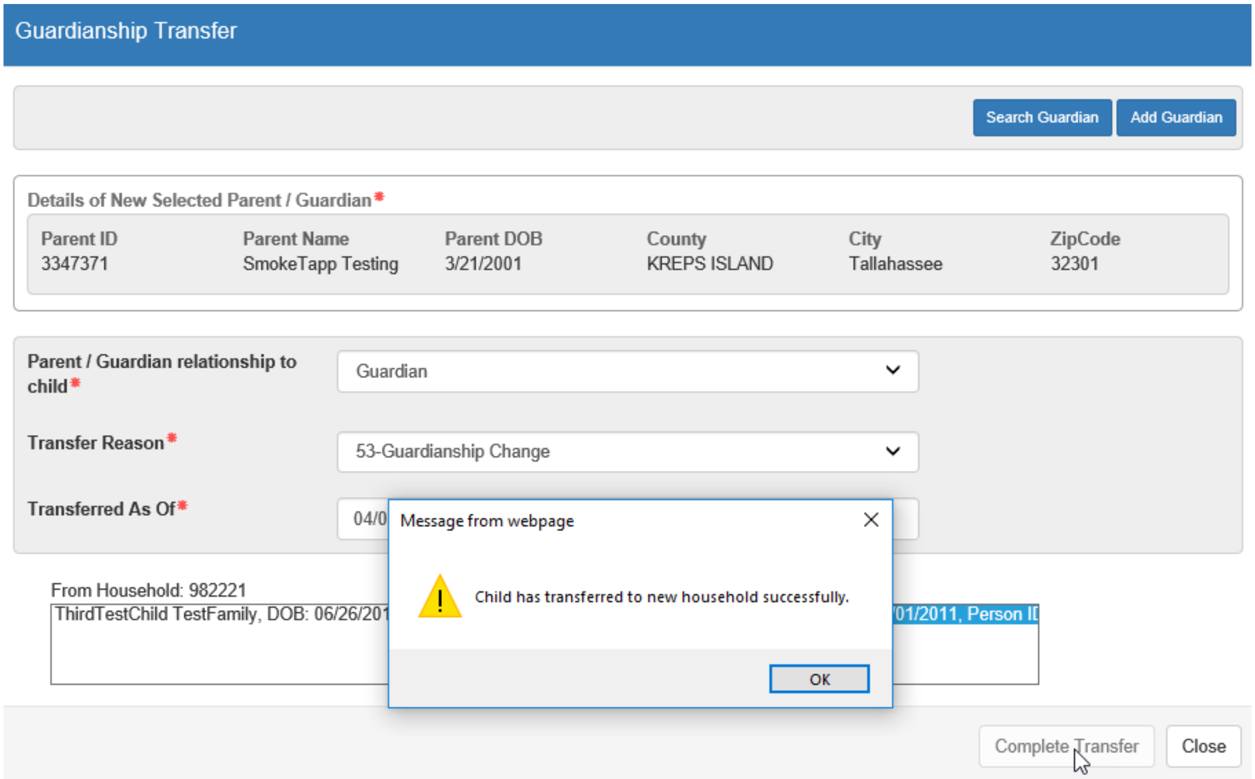
Provider ID: 19448 View Profile
Contact Email: trokekim+prov1dir@gmail.com
Parent Fee (Copay): 3.74
Enrollment End Date: N/A
Last Attendance Date: N/A

Cancel | End Enrollment

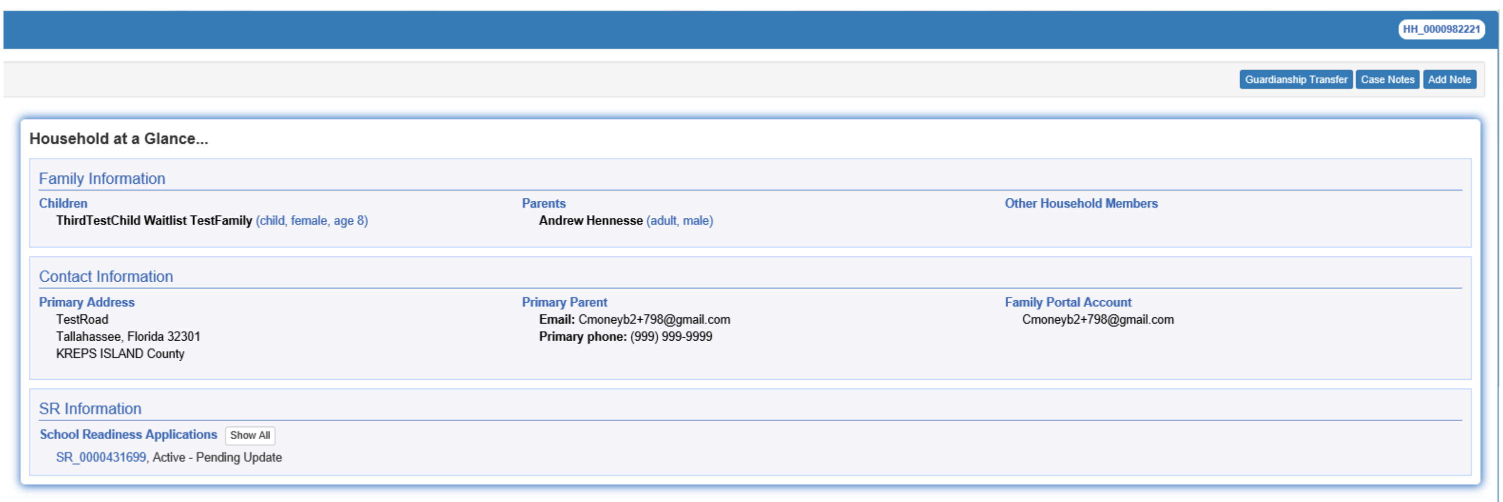
Fill in the required fields and click **Save**. Once the enrollment is ended, a popup window will display stating: Enrollment Ended for this Child Successfully.



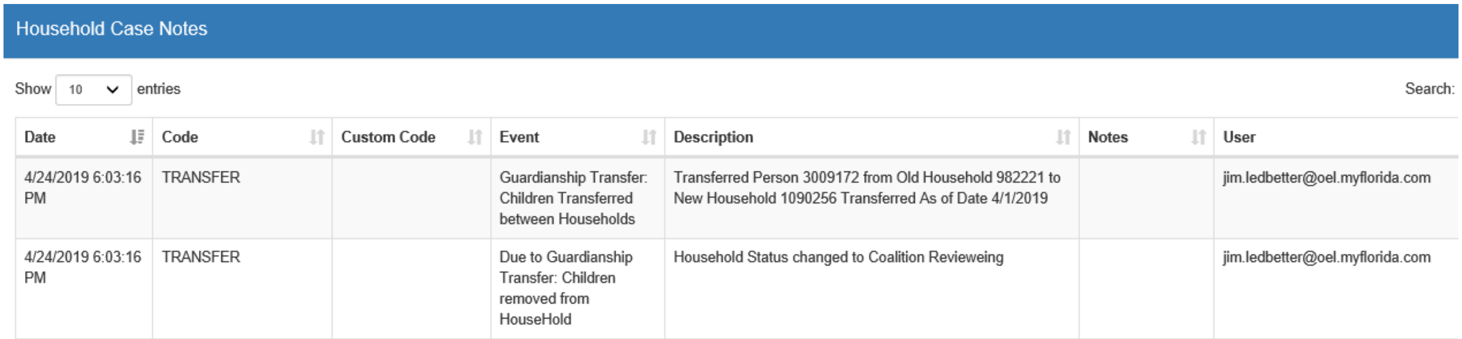
Click the child name in the To Household window and click the **Complete Transfer** button. Once the transfer is completed, a popup window will display stating: Child has transferred to new household successfully.



When the household dashboard refreshes, the child will be removed from the household.

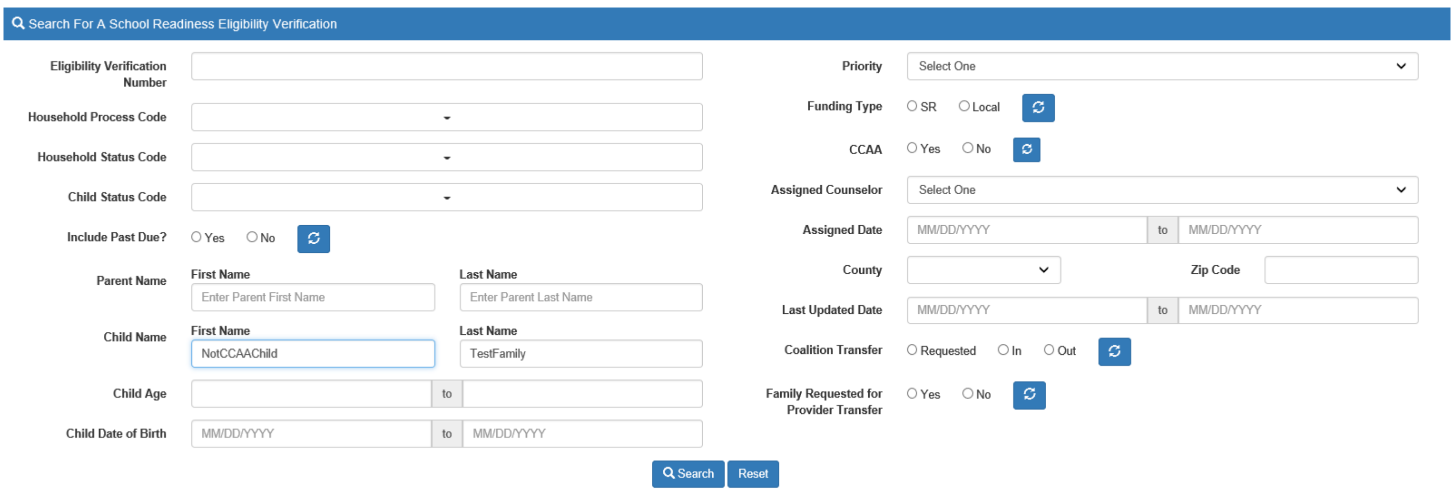


Click **Case Notes** to view the new household case note.

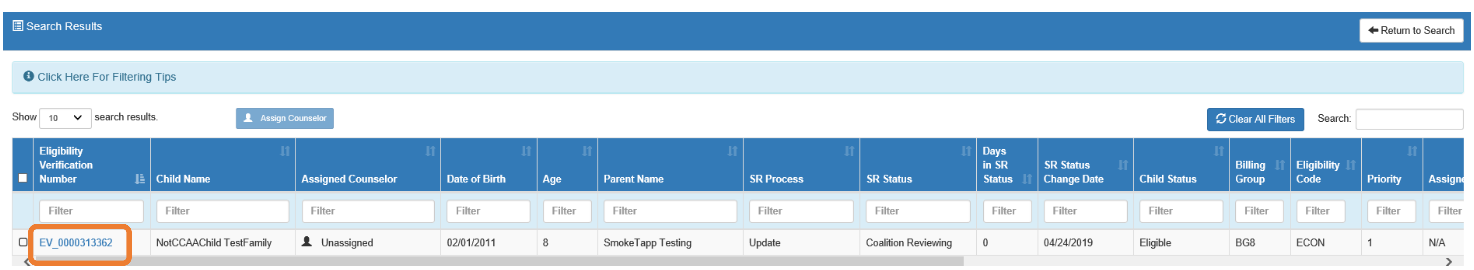


Date	Code	Custom Code	Event	Description	Notes	User
4/24/2019 6:03:16 PM	TRANSFER		Guardianship Transfer: Children Transferred between Households	Transferred Person 3009172 from Old Household 982221 to New Household 1090256 Transferred As of Date 4/1/2019		jim.ledbetter@oel.myflorida.com
4/24/2019 6:03:16 PM	TRANSFER		Due to Guardianship Transfer: Children removed from HouseHold	Household Status changed to Coalition Revieweing		jim.ledbetter@oel.myflorida.com

Search for the child that was removed from the household.

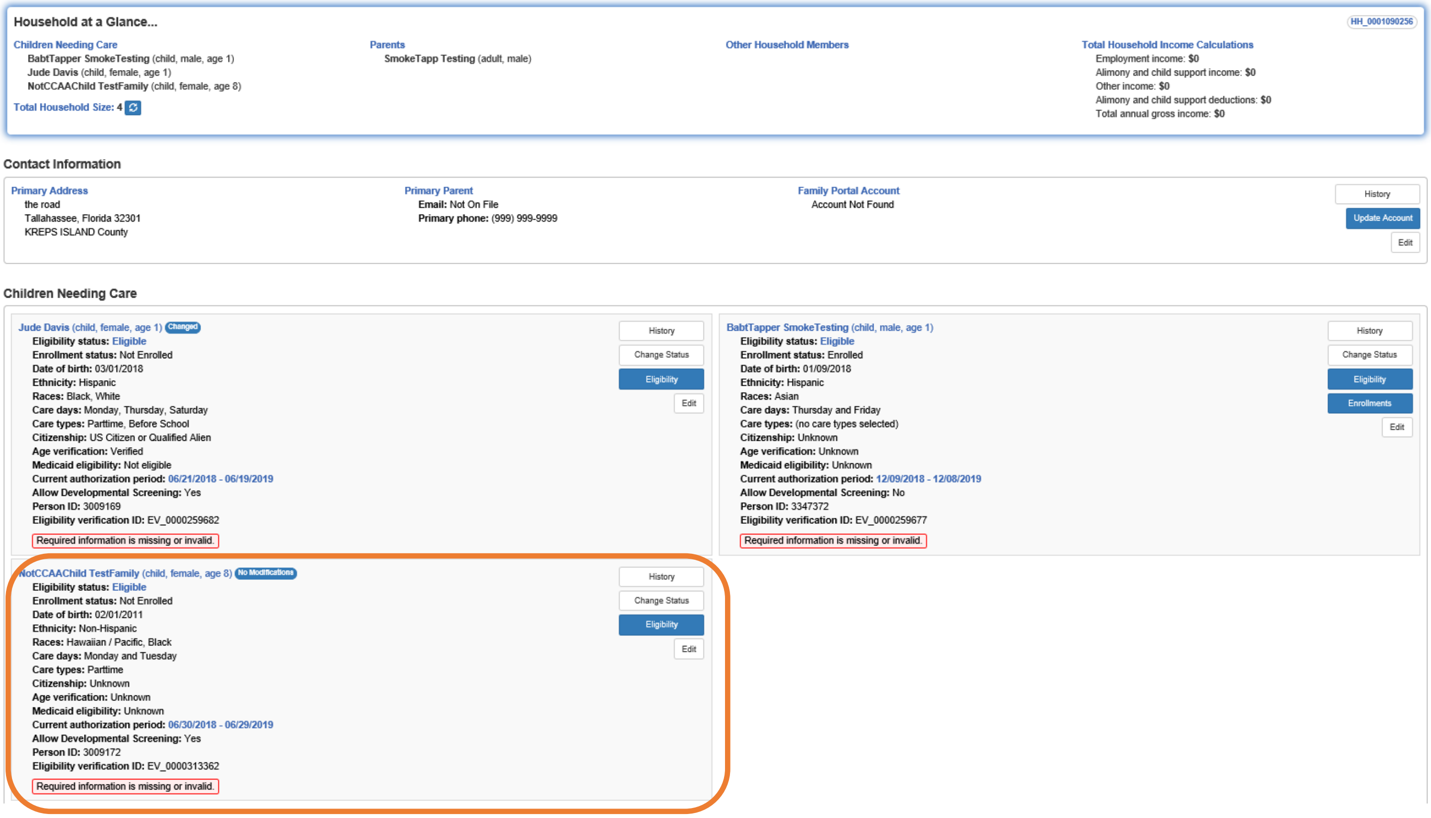


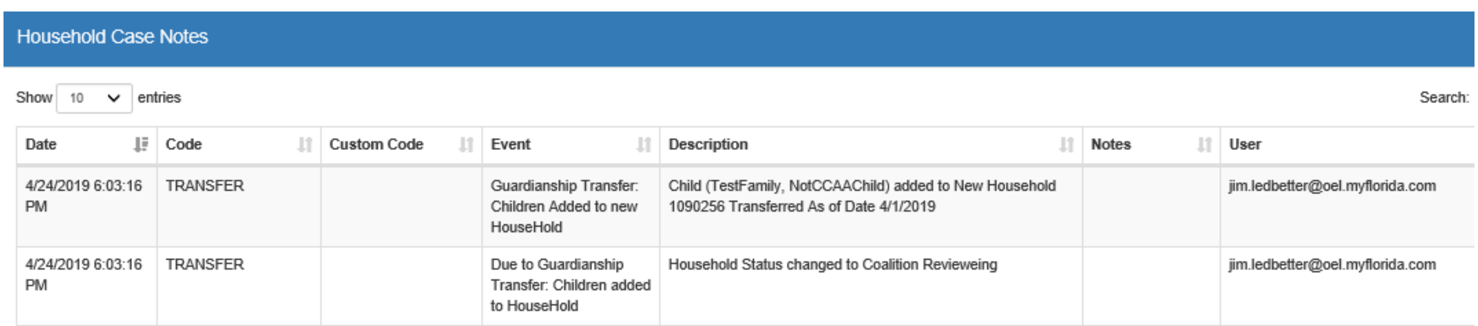
The child shows up in the search results in the new guardian household. Click the EV number.



Eligibility Verification Number	Child Name	Assigned Counselor	Date of Birth	Age	Parent Name	SR Process	SR Status	Days in SR Status	SR Status Change Date	Child Status	Billing Group	Eligibility Code	Priority	Assign
Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter
EV_0000313362	NotCCAAChild TestFamily	Unassigned	02/01/2011	8	SmokeTapp Testing	Update	Coalition Reviewing	0	04/24/2019	Eligible	BG8	ECON	1	N/A

The child is now in the new household with their authorization period from the old household. Click **Case Notes** in the new household to verify the child was moved successfully.



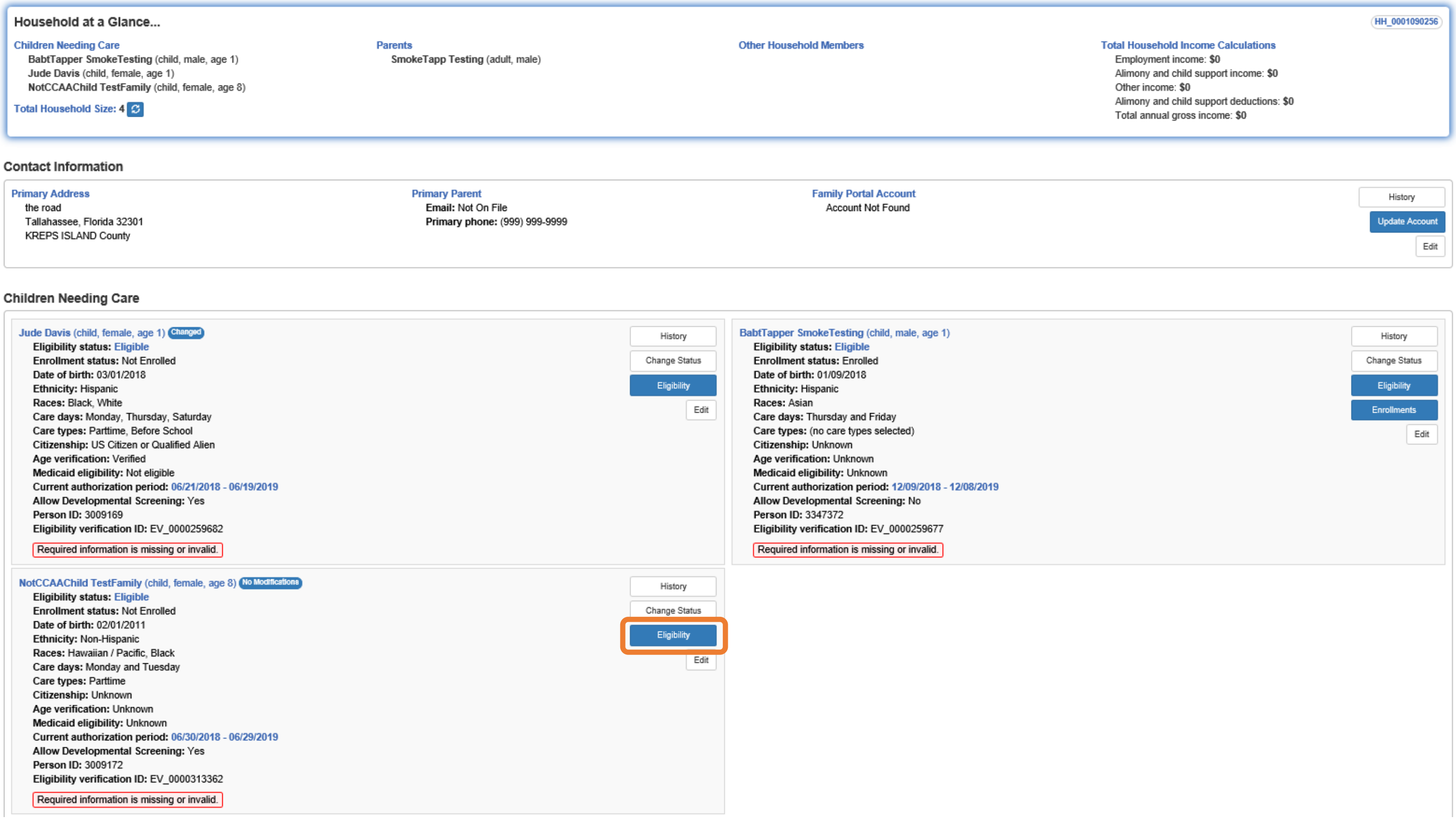


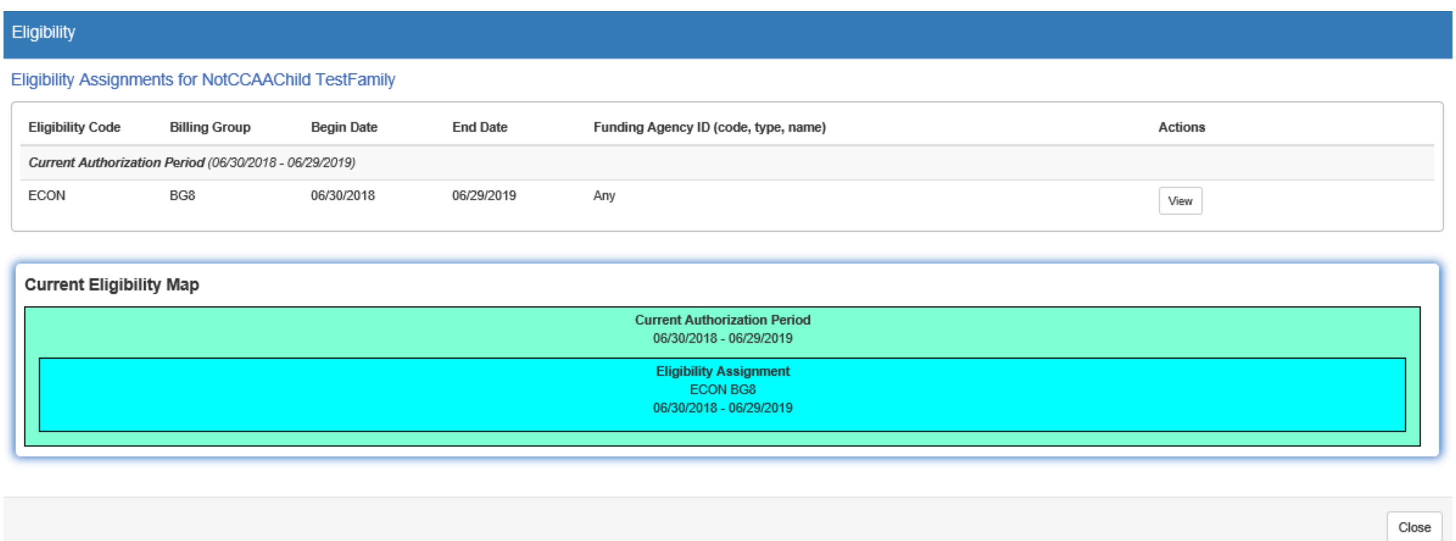
Household Case Notes

Show 10 entries Search:

Date	Code	Custom Code	Event	Description	Notes	User
4/24/2019 6:03:16 PM	TRANSFER		Guardianship Transfer: Children Added to new HouseHold	Child (TestFamily, NotCCAAChild) added to New Household 1090256 Transferred As of Date 4/1/2019		jim.ledbetter@oel.myflorida.com
4/24/2019 6:03:16 PM	TRANSFER		Due to Guardianship Transfer: Children added to HouseHold	Household Status changed to Coalition Reviewing		jim.ledbetter@oel.myflorida.com

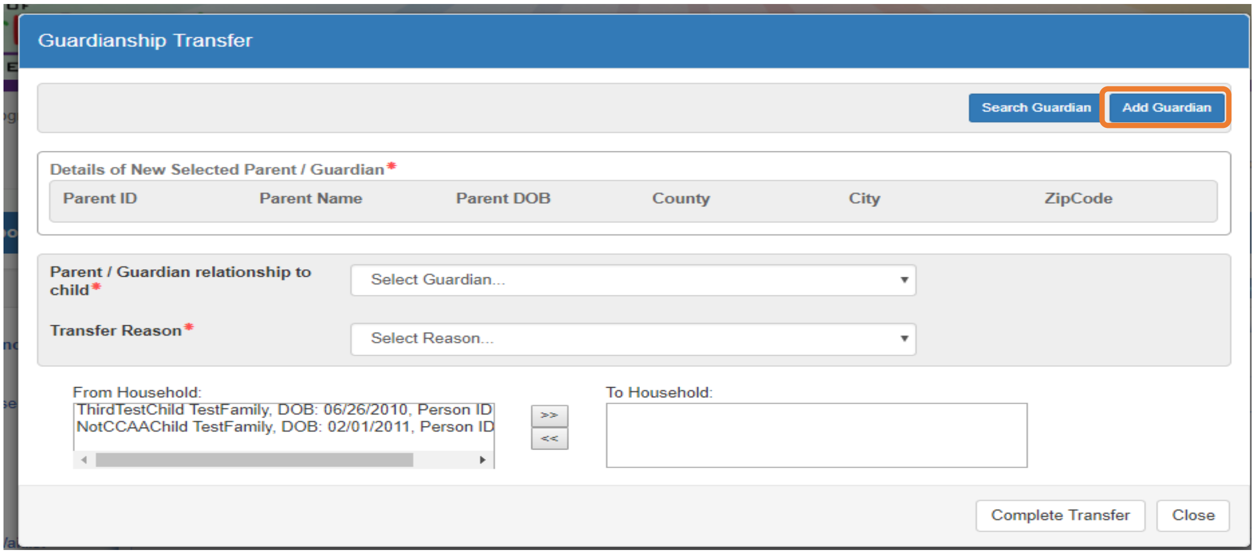
Click the **Eligibility** button to verify the child's eligibility is still intact.



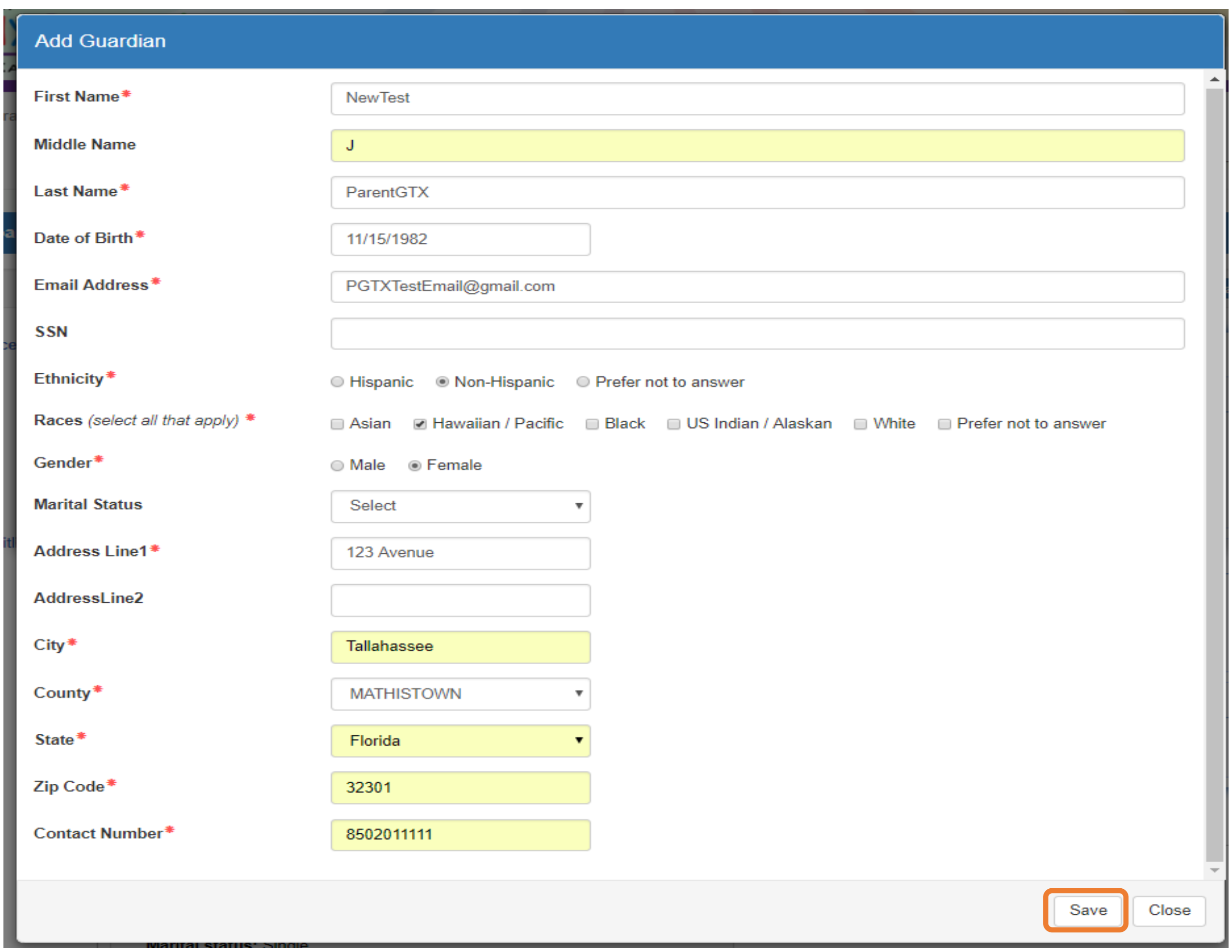


Add New Guardian

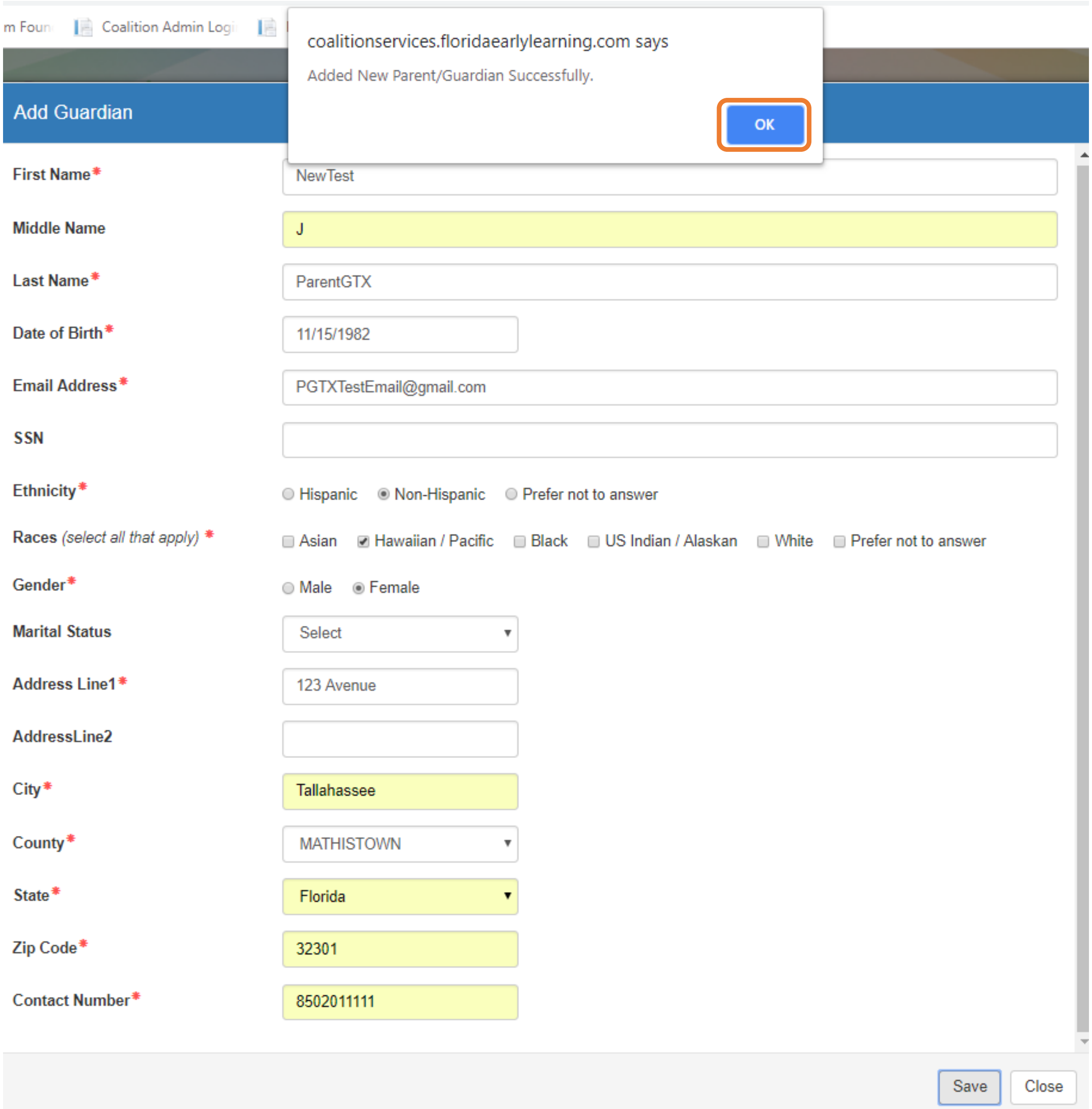
Click **Add Guardian**.



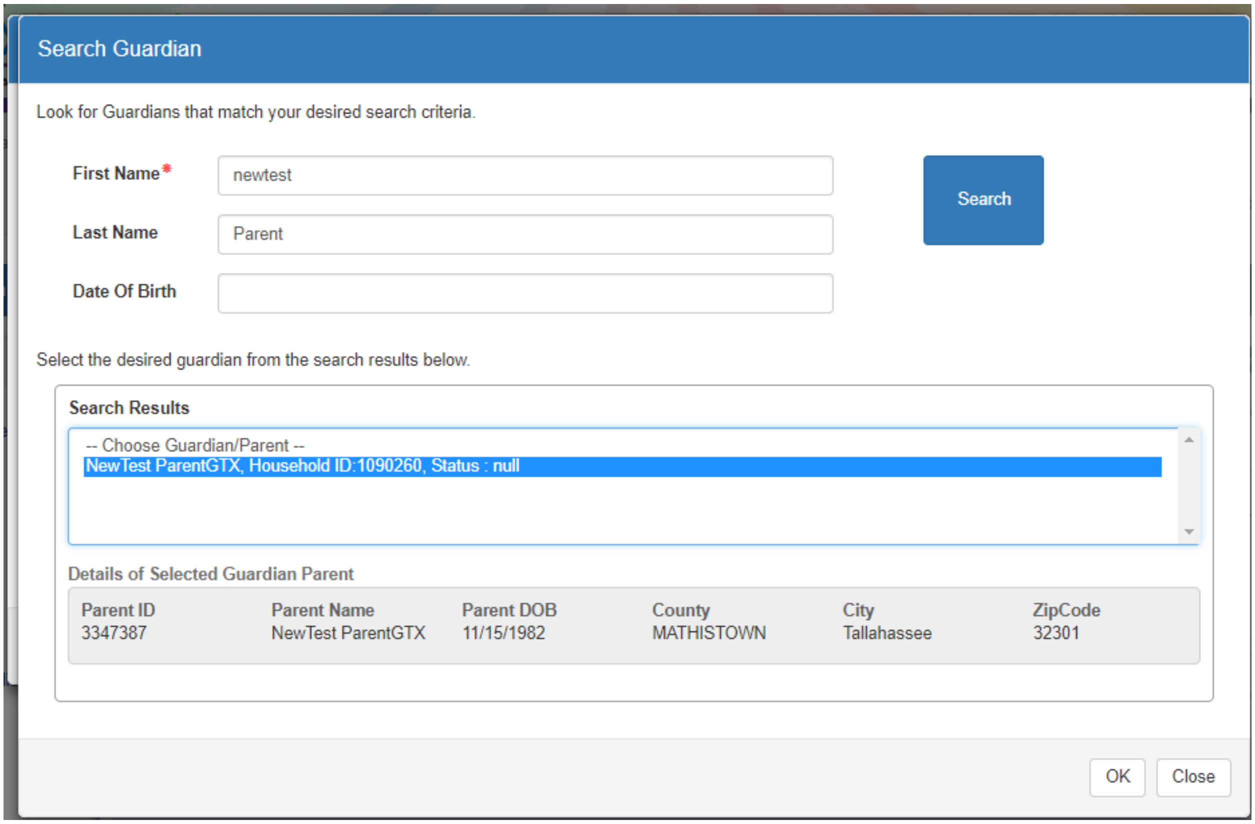
The Add Guardian screen displays. Fill in the required fields and click **Save**.



After clicking **Save**, a confirmation message displays: Added New Parent/Guardian Successfully. Click **OK**.



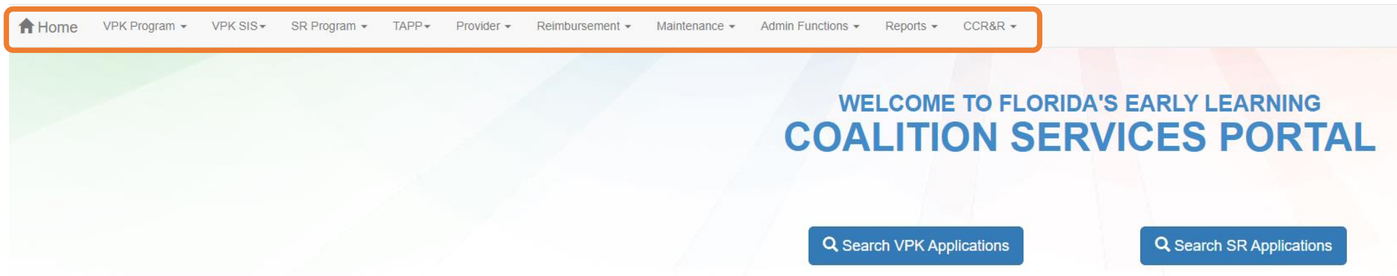
Search for the newly-added guardian and they appear in the search results.



PROVIDER PROCESSES

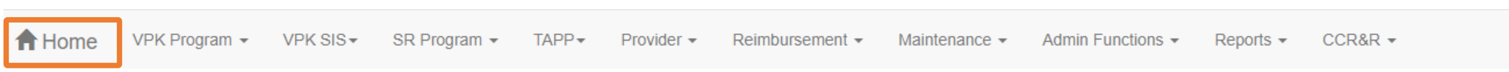
Coalition Services Portal Main Page Navigation

The Navigation Bar is near the top of the page.



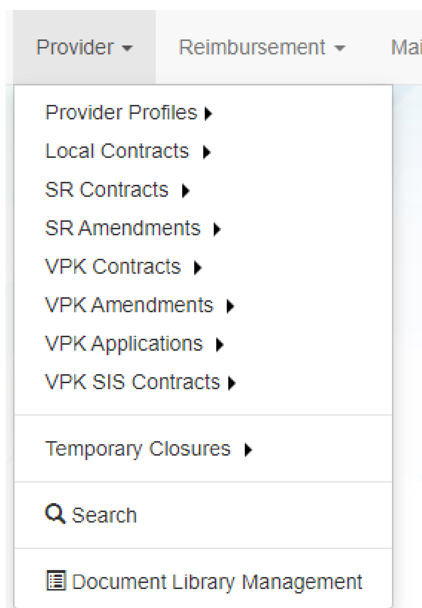
Home Button

The **Home** button will take the coalition user to the Coalition Services Portal main page.



Provider Menu

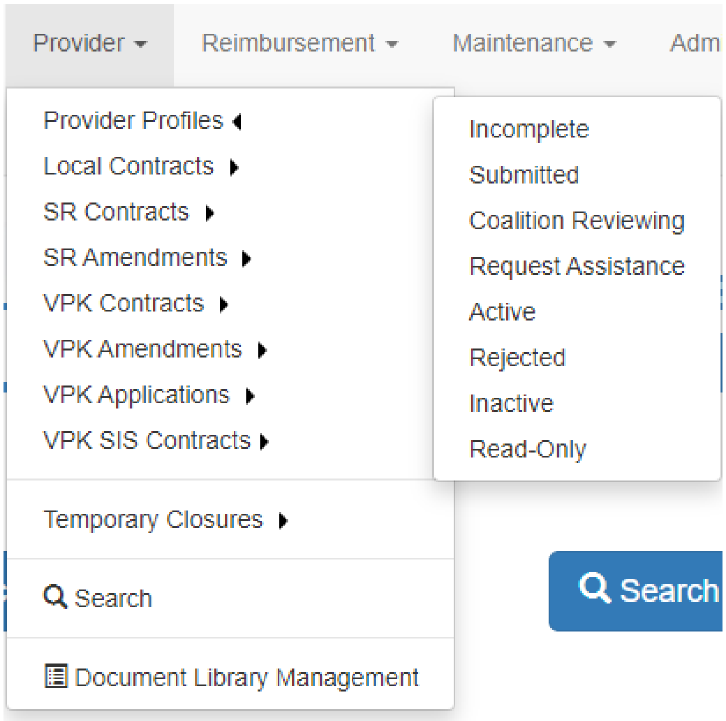
Clicking the **Provider** menu will activate the dropdown menu.



Provider Profiles

Clicking **Provider Profiles** will display all possible provider profile statuses.

Click on a status to see all provider profiles with that status.



Contracts & Amendments

The Contracts and Amendments functions allows a coalition admin to view a list of provider contracts and provider contract amendments in the local early learning coalition service area.

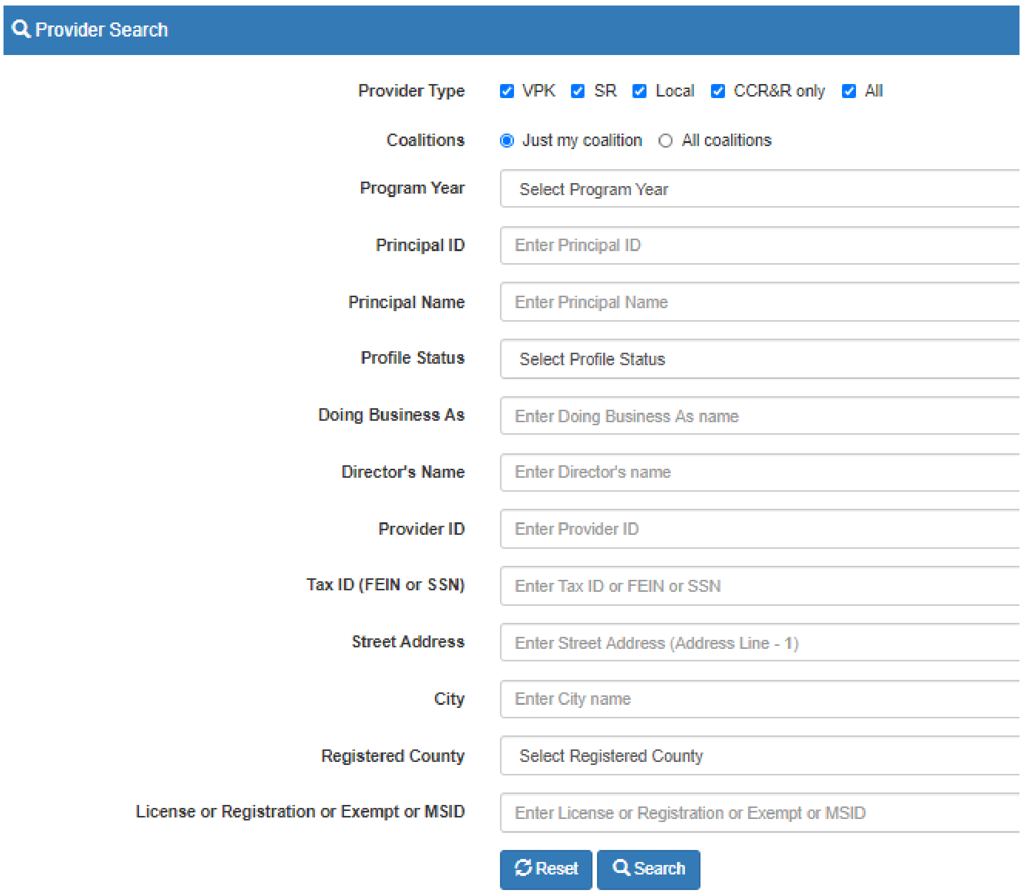
Temporary Closures

The Temporary Closures menu allows a coalition admin to view a list of Incomplete, Submitted, and Processed temporary closures from providers.

Provider Search

The Search function allows a coalition user to quickly search for provider profiles.

NOTE: To ensure accurate searches, click the dropdown menu when changing search terms (business name, provider ID, etc.) or starting a new search. Do not use the **Back** button on the internet browser.



Coalition users can also search for providers outside of their coalition service area (select **All coalitions** radio button) and will have read-only access to that provider profile. A provider may want to contract with multiple coalitions, so before the contract is certified, a coalition can have read-only access to that potential provider's profile.

After the coalition user clicks the **Search** button, the following will display. To view the Administrative Review screen of the provider profile, the user will click the **Profile ID** link of the desired record.

Provider Search Results 78 Total Records

Show 10 entries

First « 1 2 3 4 5 6 7 » Last

Provider ID	Profile ID	Registration Number	Program Year	Profile Status	Submitted Date	Doing Business As	Director Name	Tax ID	Principal Id	Principal Name	Street Address	Address Line2	City
21581	154407	exempt	2020 - 2021	Read-Only	03/30/2021	Debbie's Little Campers #2	Debbie Brown	88886432	16321	Debbie's Little Campers	130 MAIN ST		Tallahassee
21582	130397	OEL580151222	2020 - 2021	Read-Only		de Lugo's Test Daycare Center, LLC		OEL580151222	16322	de Lugo's Test Daycare Center, LLC	1222 Pine Hill RD.		Tallahassee
21621	158477	12234	2020 - 2021	Read-Only	04/29/2021	Shweta Fun house	Shweta Test	233	16346	Shweta Fun house	443 Glenmore Drive		Tallahassee
21621	180254	12234	2021 - 2022	Active	02/02/2022	Shweta Fun house	Shweta Test	233	16346	Shweta Fun house	443 Glenmore Drive		Tallahassee
22745	137782	56209	2020 - 2021	Read-Only	11/24/2020	Ventura Day School	Polly Avalos	654320	15662	Ventura Prod Provider Test 2	1 Shumark Oak Dr		Tallahassee
22745	158272	56209	2021 - 2022	Active	04/28/2021	Ventura Day School	Polly Avalos	654320	15662	Ventura Prod Provider Test 2	1 Shumark Oak Dr		Tallahassee
22745	177252	56209	2022 - 2023	Active	01/20/2022	Ventura Day School	Polly Avalos	654320	15662	Ventura Prod Provider Test 2	1 Shumark Oak Dr		Tallahassee
22947	143009	EXEMPT	2020 - 2021	Read-Only	01/28/2021	Emma's Stars	Jill Test	54654654654	16538	Emma's Stars	Capital Circle		tallahassee
22947	169082	EXEMPT	2021 - 2022	Active	08/30/2021	Emma's Stars	Jill Test	54654654654	16538	Emma's Stars	Capital Circle		tallahassee
22947	177255	EXEMPT	2022 - 2023	Incomplete		Emma's Stars	Jill Test	54654654654	16538	Emma's Stars	Capital Circle		tallahassee

To view the Manage Users screen, which displays the users and user roles for the provider, the user will click the **Provider ID** link of the desired record.

Provider Search Results 78 Total Records

Show 10 entries

First « 1 2 3 4 5 6 7 » Last

Provider ID	Profile ID	Registration Number	Program Year	Profile Status	Submitted Date	Doing Business As	Director Name	Tax ID	Principal Id	Principal Name	Street Address	Address Line2	City
21581	154407	exempt	2020 - 2021	Read-Only	03/30/2021	Debbie's Little Campers #2	Debbie Brown	88886432	16321	Debbie's Little Campers	130 MAIN ST		Tallahassee
21582	130397	OEL580151222	2020 - 2021	Read-Only		de Lugo's Test Daycare Center, LLC		OEL580151222	16322	de Lugo's Test Daycare Center, LLC	1222 Pine Hill RD.		Tallahassee
21621	158477	12234	2020 - 2021	Read-Only	04/29/2021	Shweta Fun house	Shweta Test	233	16346	Shweta Fun house	443 Glenmore Drive		Tallahassee
21621	180254	12234	2021 - 2022	Active	02/02/2022	Shweta Fun house	Shweta Test	233	16346	Shweta Fun house	443 Glenmore Drive		Tallahassee
22745	137782	56209	2020 - 2021	Read-Only	11/24/2020	Ventura Day School	Polly Avalos	654320	15662	Ventura Prod Provider Test 2	1 Shumark Oak Dr		Tallahassee
22745	158272	56209	2021 - 2022	Active	04/28/2021	Ventura Day School	Polly Avalos	654320	15662	Ventura Prod Provider Test 2	1 Shumark Oak Dr		Tallahassee
22745	177252	56209	2022 - 2023	Active	01/20/2022	Ventura Day School	Polly Avalos	654320	15662	Ventura Prod Provider Test 2	1 Shumark Oak Dr		Tallahassee
22947	143009	EXEMPT	2020 - 2021	Read-Only	01/28/2021	Emma's Stars	Jill Test	54654654654	16538	Emma's Stars	Capital Circle		tallahassee
22947	169082	EXEMPT	2021 - 2022	Active	08/30/2021	Emma's Stars	Jill Test	54654654654	16538	Emma's Stars	Capital Circle		tallahassee
22947	177255	EXEMPT	2022 - 2023	Incomplete		Emma's Stars	Jill Test	54654654654	16538	Emma's Stars	Capital Circle		tallahassee

The following will display. Click the **Manage Users** button to view the users.

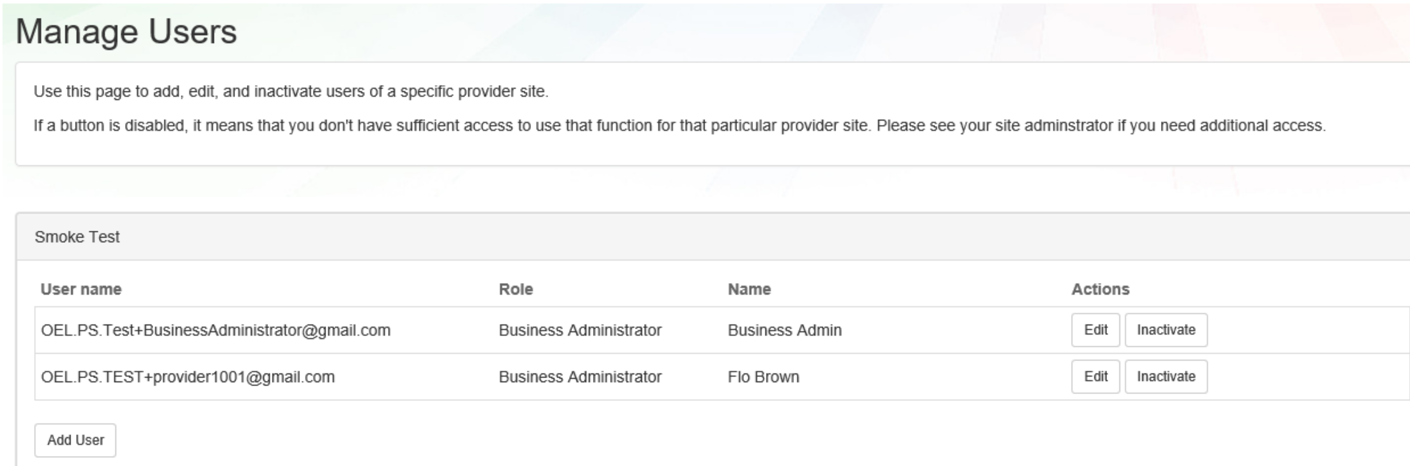
NOTE: Manage Users information is not available for providers outside of a coalition's service area.

Manage Site

Use this page to edit or inactivate a specific provider site.

If a button is disabled, it means that you don't have sufficient access to use that function for that particular provider site. Please see your site adminstrator if you need additional access.

Location name	License number	Address	Actions
Smoke Test	333	250 MARRIOTT DR TALLAHASSEE, FL 32301-2983	Edit Manage Users



Provider User Roles:

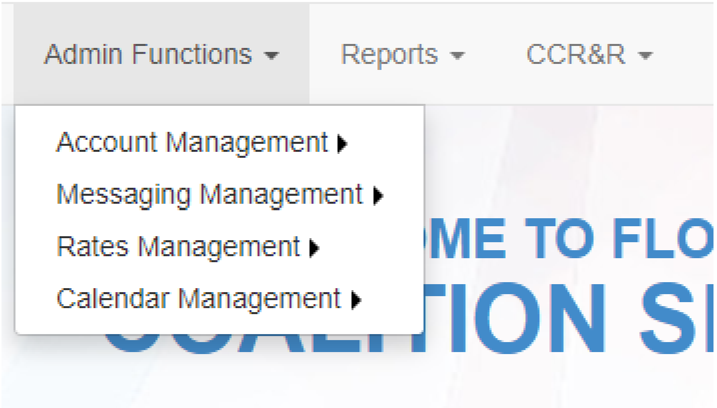
- Business Administrator – Able to edit the provider profile and principal business information that is shared among associated provider sites; able to add provider sites and users; submit profiles and profile updates; and create contracts. This role would typically be assigned to an owner.
- Site Administrator – Able to edit the provider profile associated to their site add provider users for a site, but cannot create a new site. This role would typically be assigned to a principal or director.
- User – Able to perform administrative tasks based on permissions granted by the Business Administrator or Site Administrator. This role would typically be assigned to teachers and aides.

NOTE: With Release 5.4, Coalition Admins can promote a Site Administrator or User to Business Administrator by clicking the **Edit** button on the Manage Users page.

Document Library Management

The Document Library Management function allows a coalition user to review documents uploaded to the provider profile.

Admin Functions Menu



Admins will be able to do the following functions for providers:

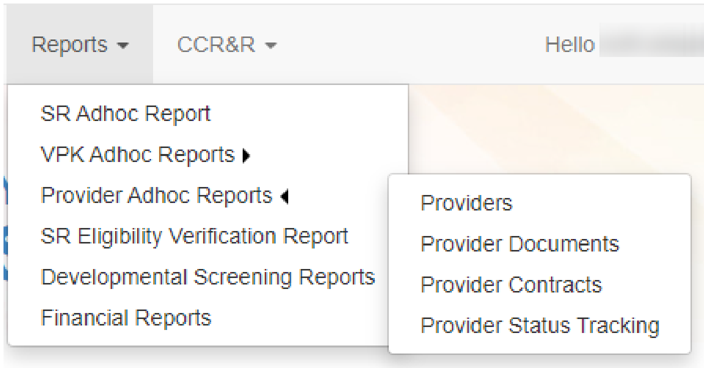
- Account Management – Manage accounts for coalition staff and providers within the coalition service area.
- Messaging management – Send messages to individual providers, providers based on services (SR, VPK, CCR&R) or all providers in the coalition service area.
- Rates management – Manage SR and VPK rates.
- Calendar Management – Set reimbursable closure days and school calendars for providers within the coalition service area.

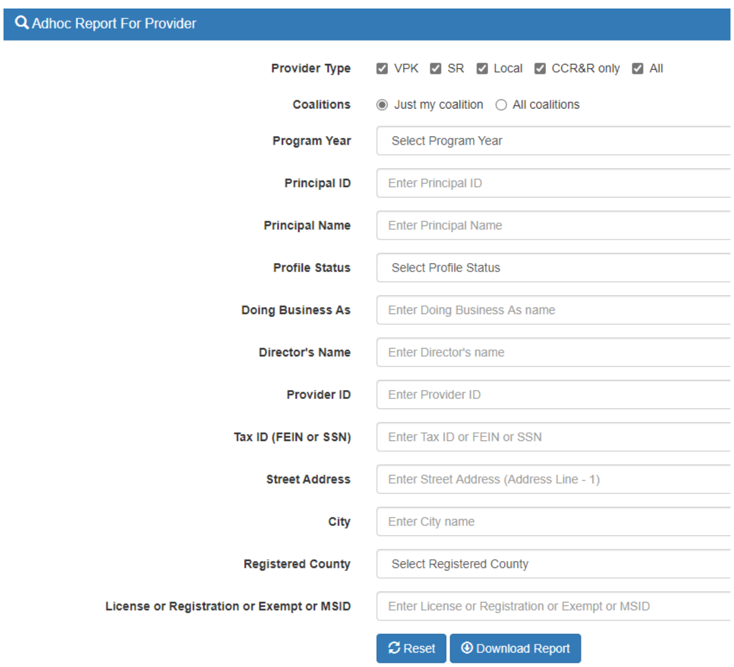
NOTE: Only coalition admin or DEL admin users will be able to view and access the Admin Functions menu.

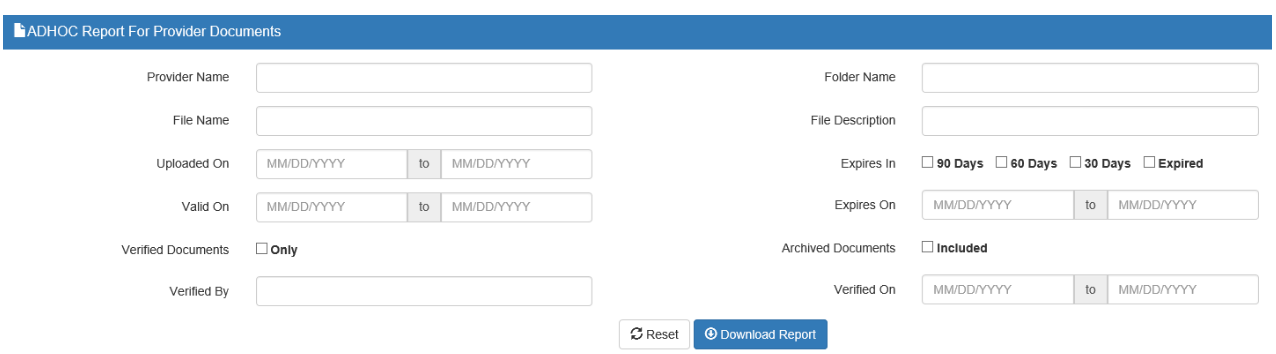
Reports Menu

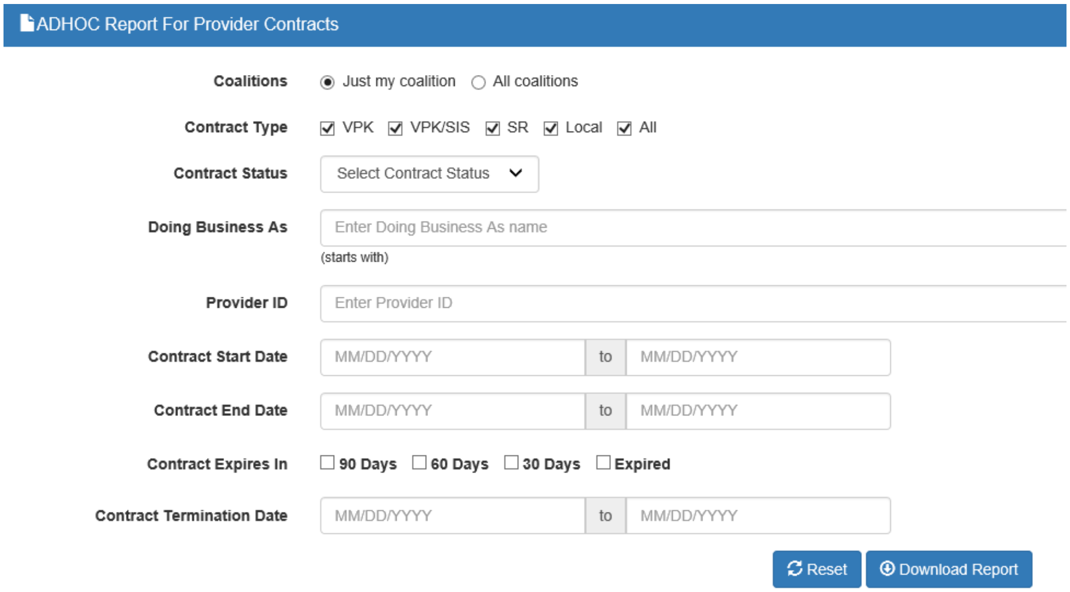
Clicking the Reports menu will display the list of available reports.

NOTE: Only coalition admin or DEL admin users will be able to view and access the Reports menu.









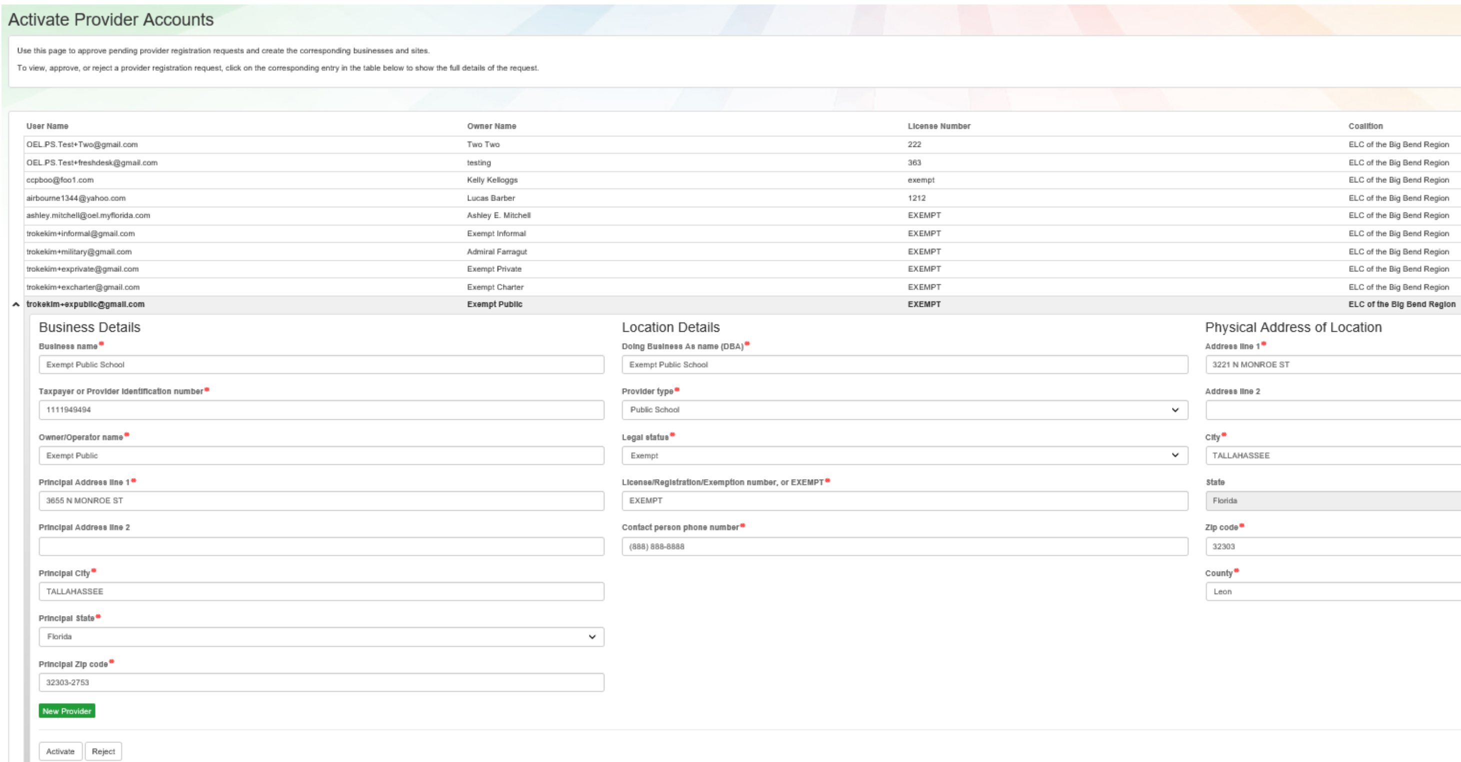
The Provider Status Tracking Adhoc Report generates a report that displays profile, contract, and principal information for providers in a coalition service area.

ProviderPrincipalID	ProviderID	ProviderProfileID	PrincipalBusinessName	DoingBusinessAs	ProviderTypeDescription	ProviderTypeOnContract	ProviderStatus	ProfileStatus	LegalStatus	ProviderProfileID
37	695	962	Mitchell Large Family Child Care Home	MITCHELL LARGE FAMILY CHILD CARE HOME	Large Family Child Care Home		Migrated-Unclaimed	Imported	Licensed	962
39	790	1098	Little Pioneers Preschool	LITTLE PIONEERS PRESCHOOL	Center		Migrated-Unclaimed	Imported	Licensed	1098
68	1192	1621	The Child's Garden	THE CHILD'S GARDEN	Center		Migrated-Unclaimed	Imported	Licensed	1621
141	2677	3676	Attentive Childcare and Pre-K LLC	ATTENTIVE CHILDCARE & PRE-K LLC (SUE)	Large Family Child Care Home		Migrated-Unclaimed	Imported	Licensed	3676
346	1182	1610	Townsend-Danzy Family Day Care Home	TOWNSEND-DANZY FAMILY DAY CARE HOME	Family Child Care Home		Migrated-Unclaimed	Imported	Licensed	1610

Activating a Provider Account

Use this page to approve pending provider registration requests and create the corresponding businesses and sites.

To view, approve or reject a provider registration request, click on the corresponding entry in the table below to show the full details of the request.



When a provider account is activated, an email will be sent by **DONOTREPLY@oel.myflorida.com**.

Hello Jim Ledbetter,

The Provider Portal registration request you submitted for Jim's House of Learnin' 2 has been approved. You may now log on to the Provider Portal with the user name and password you registered with.

ELC of the Big Bend Region
(866) 973-9030
http://www.elcbigbend.org/

Please do not reply to this message. Replies to this message are routed to an unmonitored mailbox. If you have any questions, please contact your Early Learning Coalition at the number listed above.

Provider Profile Status Definitions

Incomplete

The profile is not complete. The provider has to complete the required fields, certify, sign and submit the profile. Coalitions cannot change the status of an **Incomplete** profile; however, coalition users have read-only access to assist the provider in completing the profile.

Request Assistance

The provider needs help to finish or edit the profile.

Submitted

The profile has been completed and submitted by the provider for coalition review. The profile is not editable by the provider while in **Submitted** status.

Coalition Reviewing

To review a **Submitted** profile, click the **Change Profile Status** button at the top of the Administrative Review page.

Active

The coalition has reviewed the profile and supporting document(s) and determined that the provider is eligible to receive funding.

Inactive

The profile is no longer active, due to a specific reason selected by the coalition user. **Inactive** profiles cannot be edited.

Rejected

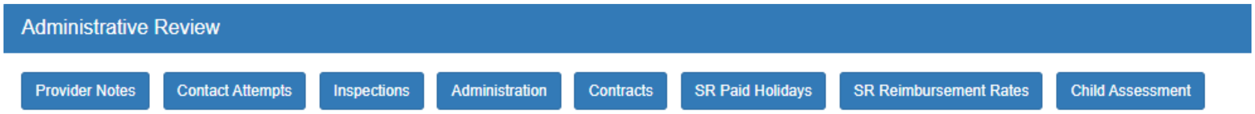
The profile is missing information that is necessary to make a decision regarding eligibility to receive funding. **Rejected** status is used to return the profile to the provider for edits.

Read-Only

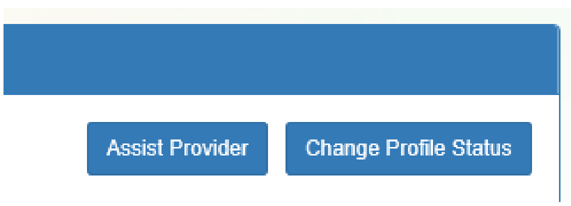
The profile is no longer active, due to the program year expiring. Profiles for past program years cannot be edited.

Coalition User Task Bar

At the top of the Administrative Review page is a list of buttons used to maintain and process a Provider Profile.



Provider Notes	Click to view or add a case note.
Contact Attempts	Click to log a provider contact attempt.
Inspections	Click to view or upload inspections.
Administration	Click to update provider information.
Contracts	Click to manage contracts.
SR Paid Holidays	Click to manage contracted SR provider paid holidays.
SR Reimbursement Rates	Click to manage contracted SR provider reimbursement rates.
Child Assessment	Click to input child assessment data (not yet available) and reimburse child assessment differentials.

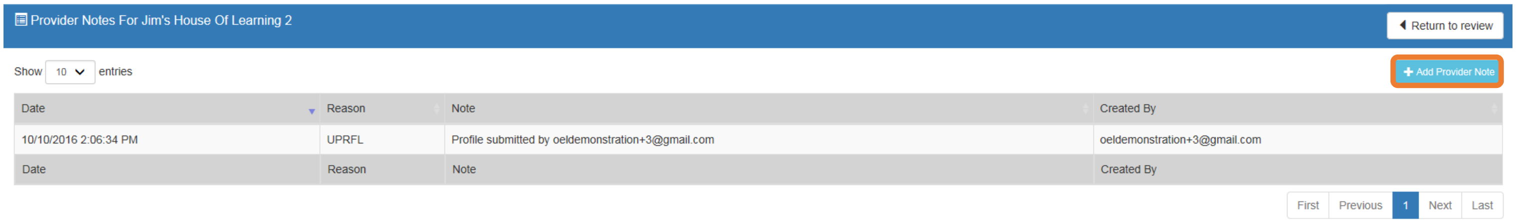


Assist Provider	Click to assist a provider with profile changes.
Change Profile Status	Click to change the status of a provider profile.

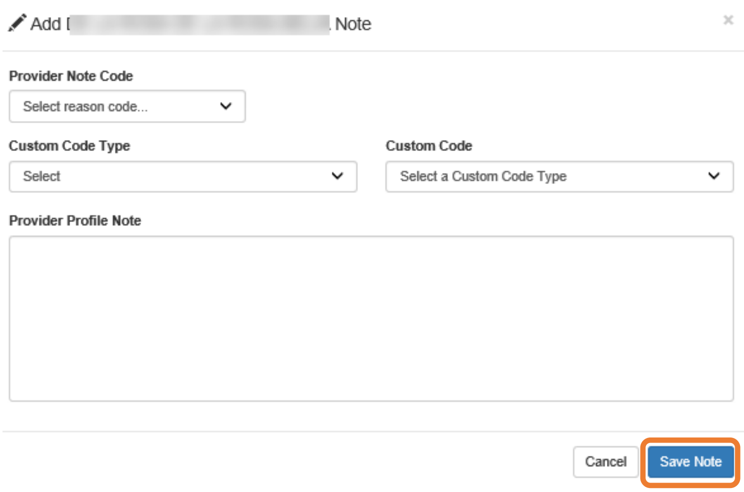
Adding a Provider Note

The coalition user must click the **Provider Notes** button to add a Provider Note.

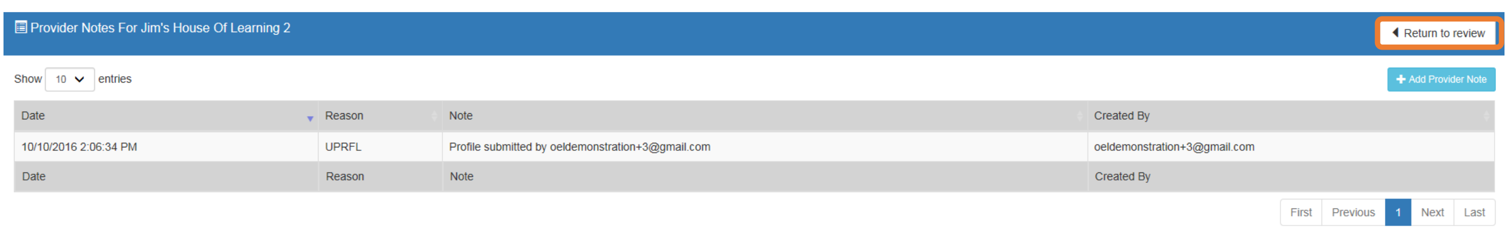
Then, click the **+Add Provider Note** button.



The coalition user will then select a Provider Note Code, Custom Code Type, and Custom Code (if applicable) and complete the note field. Click the **Save Note** button to add the note.



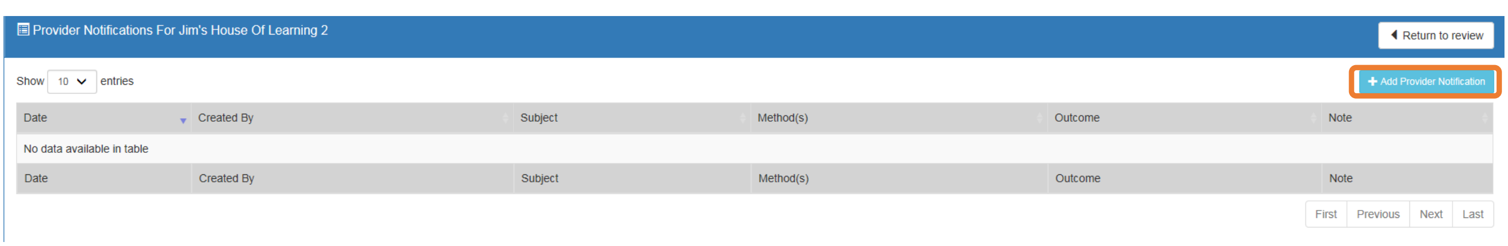
Click the **Return to review** button to go back to the Administrative Review page.



Adding a Contact Attempt

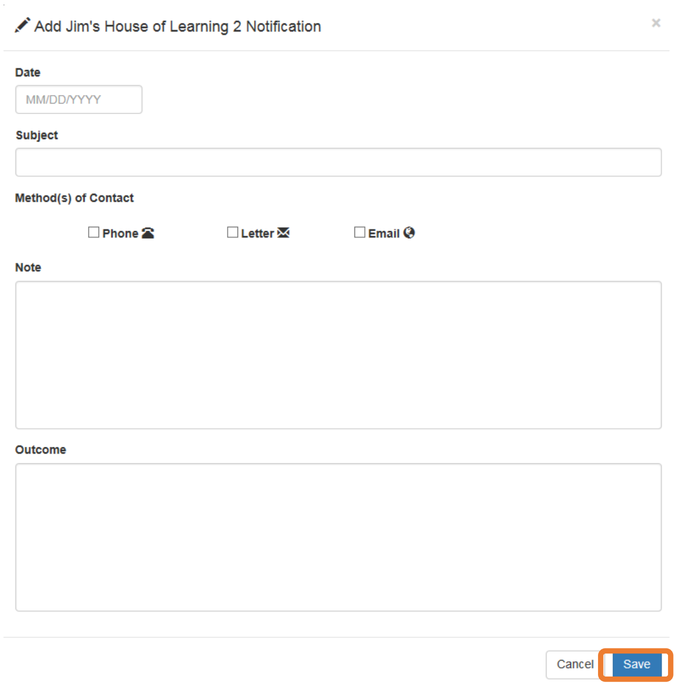
The coalition user must click the **Contact Attempts** button to add a Provider Notification.

Then, click the **+Add Provider Notification** button.

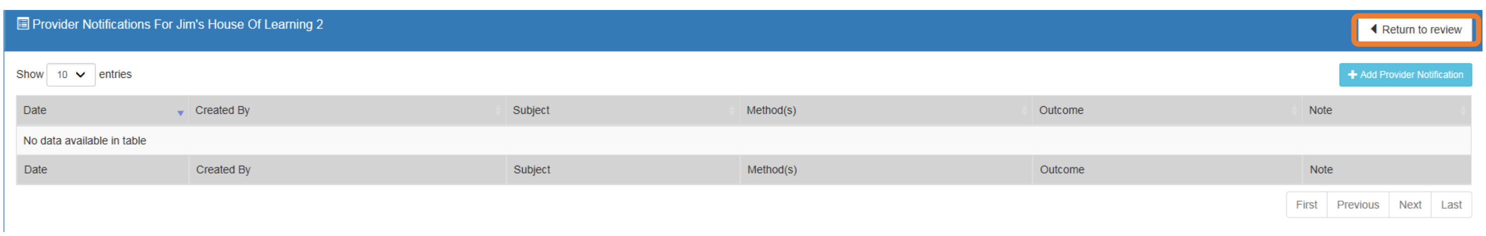


The coalition user will complete the Date and Subject fields, select which Method(s) of Contact were used, and complete the Note and Outcome fields. Click the **Save** button to add the notification.

NOTE: A contact attempt does not create a provider note.



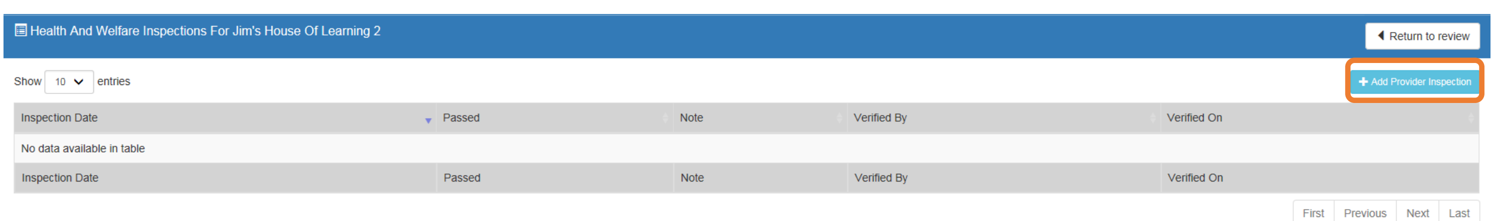
Click the **Return to review** button to go back to the Administrative Review page.



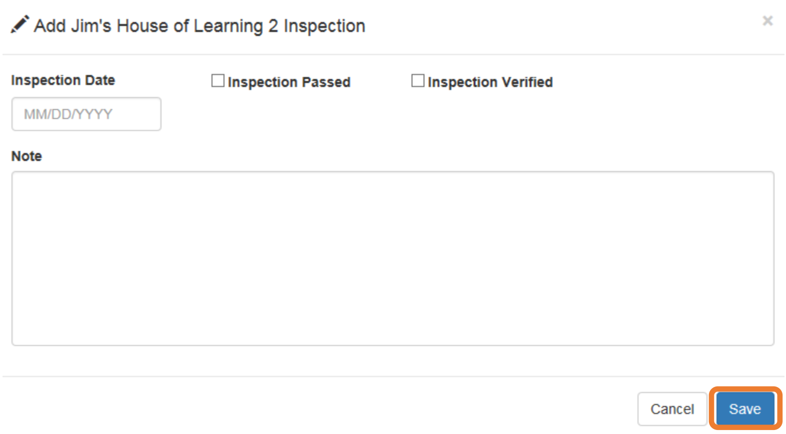
Adding an Inspection

The coalition user must click the **Inspections** button to add a Provider Inspection.

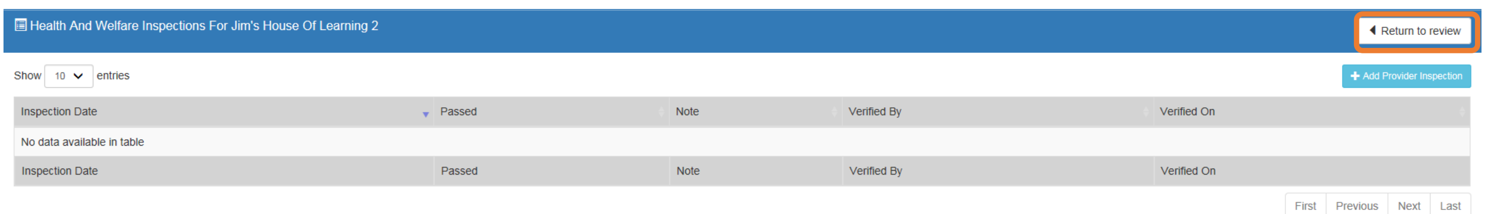
Then, click the **+Add Provider Inspection** button.



The coalition user will complete the Date field, select the inspection result, and complete the Note field. Click the **Save** button to add the inspection.

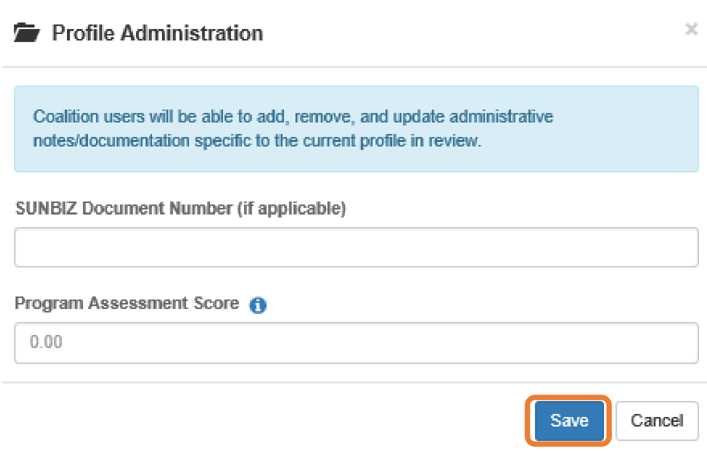


Click the **Return to review** button to go back to the Administrative Review page.



Adding Administrative Information

The coalition user must click the **Administration** button to update administrative information.



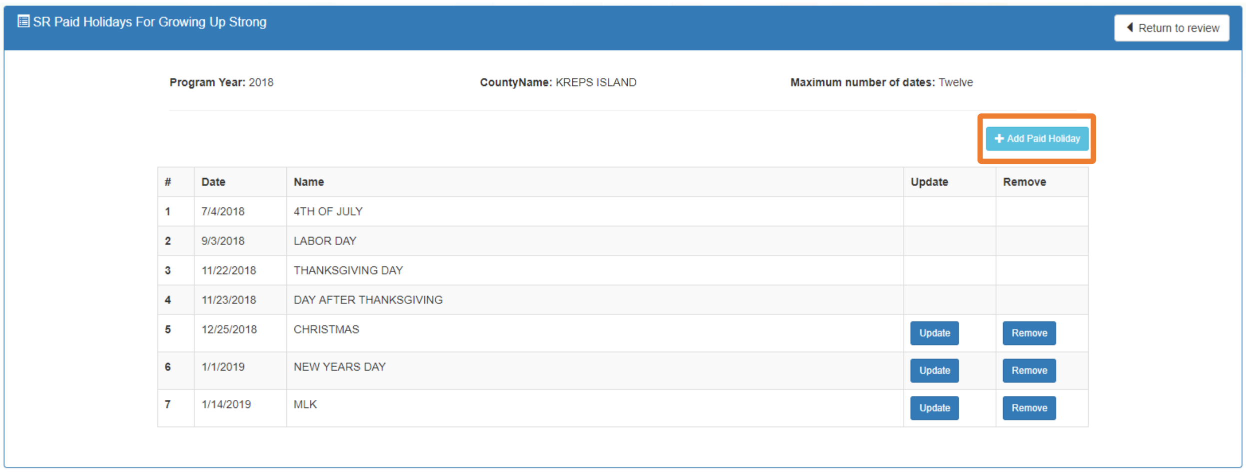
The coalition user will complete the SUNBIZ Document Number and Program Assessment Score. Click the **Save** button to add the number.

Adding SR Paid Holidays

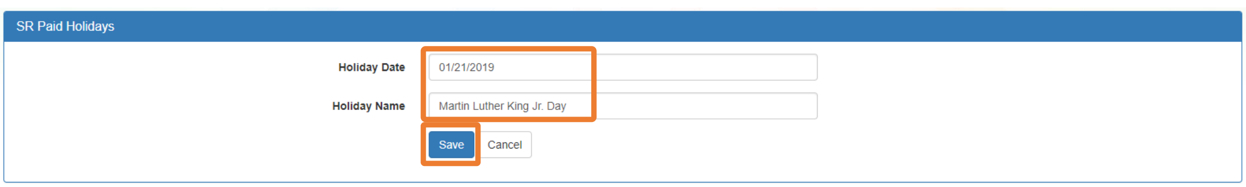
Once an SR contract is certified, the provider's paid holidays must be set up. On the Administrative Review menu, click the **SR Paid Holidays** button. The provider's SR Paid Holidays for the profile year displays.

The page may pre-populate with days if they are available from the online SR contract or Coalition SR Holiday Schedule (established on the **Admin > Calendar Management > SR Holiday Schedule** page). While this information may be pre-populated for convenience, the remaining steps should be followed to ensure the correct paid holidays are recorded.

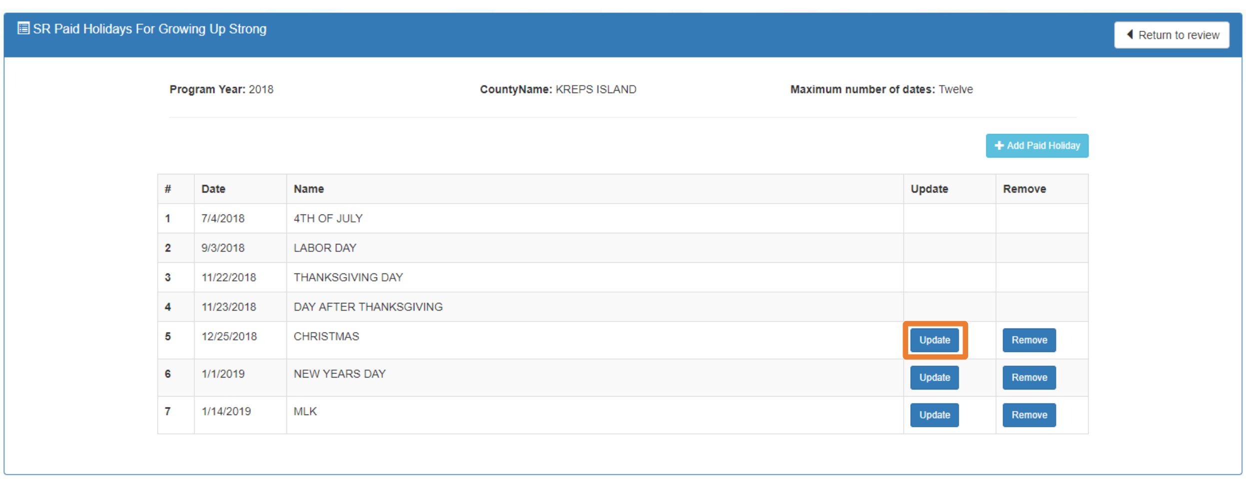
To add a new paid holiday, click the **+ Add Paid Holiday** button.



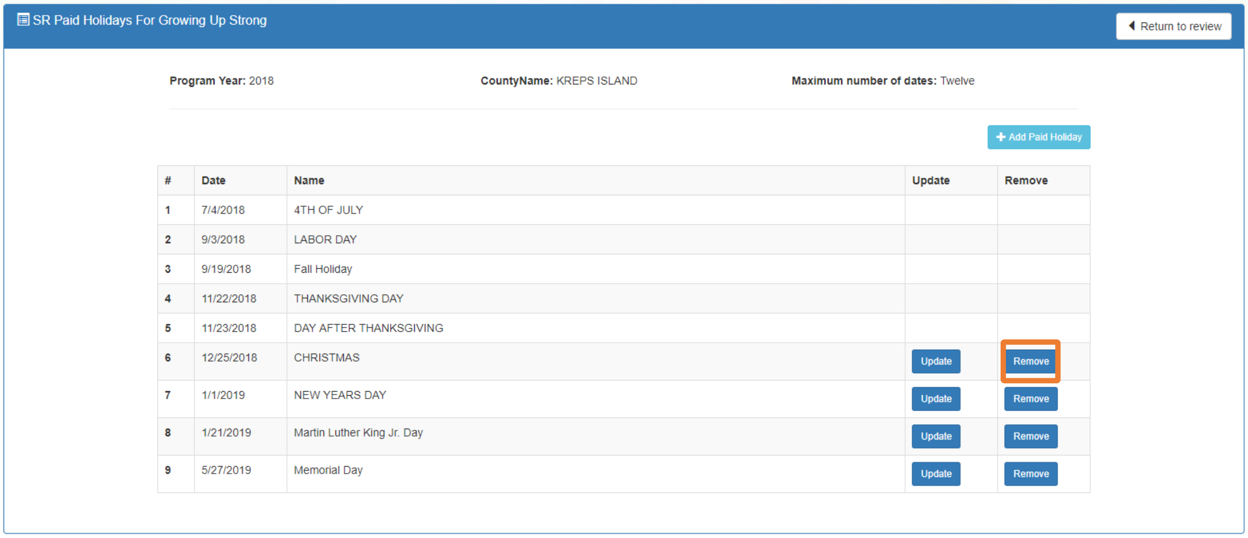
Enter the Holiday Date and Holiday Name. Then, click the **Save** button.



To update a paid holiday, click the **Update** button. The saved holidays may be edited. Days that have occurred in the past cannot be updated or removed. When complete, click **Save**.



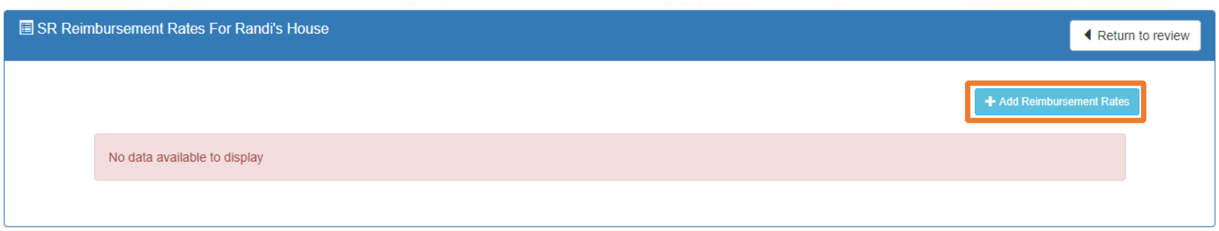
To remove a paid holiday, click the **Remove** button. Days that have occurred in the past cannot be updated or removed.



Adding SR Reimbursement Rates

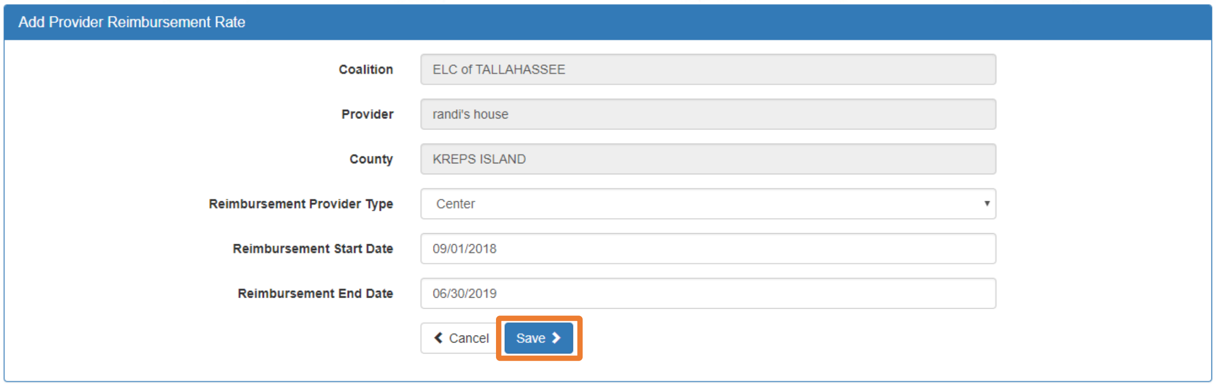
Once an SR contract is certified, the provider's reimbursement rates must be set up. On the Administrative Review menu, click the **SR Reimbursement Rates** button. The provider's SR Reimbursement Rate plan(s) display.

To establish a new rate plan, click on the **Add Reimbursement Rates** button.

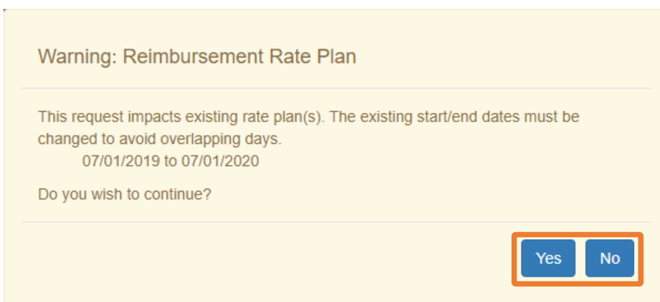


The rate plan settings page displays. Enter the **Reimbursement Start Date** and **Reimbursement End Date**. Click **<u>Save</u>**.

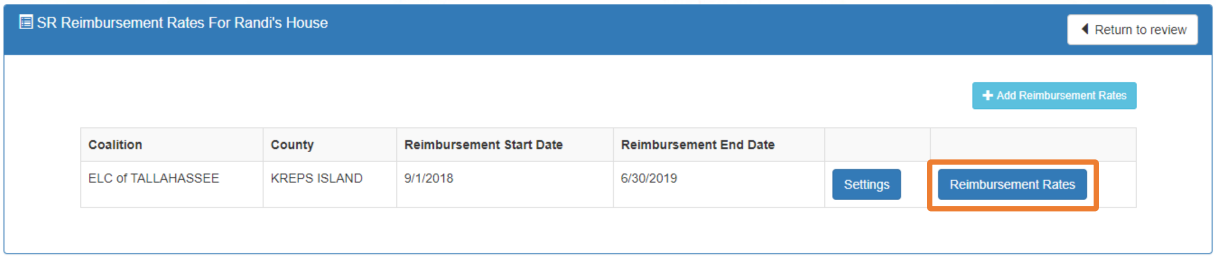
NOTE: If multiple rate plans are needed to address a rate change, continue to set up the first rate plan for the original start and end dates. Then, additional rate plans can be created as shown in *Amending SR Reimbursement Rates (by adding another rate plan)*.



The provider's reimbursement rate plan page appears. Rate plans cannot overlap. If a rate plan is entered that overlaps, then a validation message displays. Clicking the **<u>Yes</u>** button will change the rate plan to prevent overlapping dates. Clicking the **<u>No</u>** button will discard the rate plan change.



Click **Reimbursement Rates**.



The provider's rates for the rate plan appears.

2022-2023 Reimbursement Rate Plans

Effective July 1, 2022, the Approved Provider Reimbursement Rate without Gold Seal (column C) shall equal the Coalition Reimbursement Rates in column B, except when the Provider's Private Pay Rate (column A) is zero. When column A is zero, column C will be zero. Also, effective July 1, 2022, there is no provider private pay rates upper limit (column F).

A note displays at the top of the Rate Plan: *Special needs rate will be negotiated up to twenty (20) percent above the maximum approved base reimbursement rate established for infant care by the coalition pursuant to Rule 6M-4.500, F.A.C. The negotiated rate will be based on the level of care needed for an individual child.

SR Reimbursement Rates - 16 - -

Unit of Care: Full-Time Daily Rates Rates in effect on: 7/1/2022

Edit Provider Rates | Edit Differential Rates

* Special needs rate will be negotiated up to twenty (20) percent above the maximum approved base reimbursement rate established for infant care by the coalition pursuant to Rule 6M-4.500, F.A.C. The negotiated rate will be based on the level of care needed for an individual child.

		A	B	C	D	E	F	G	H	I	J	K
Care Code	Description	Provider's Private Pay Rates	Coalition Reimbursement Rates	Approved Provider Reimbursement Rate without Gold Seal	Gold Seal Differential (Column B × percentage)	Approved Provider Reimbursement Rate with Gold Seal (Column C + D)	Provider's Private Pay Rates Upper Limit (Column A + 20%)	QPI Differential Rate (Column C × tier percentage)	Local QI Level Differential Rate (Column C × tier percentage)	Total Payment Rate (Column E + G + H)	Contracted Slots Differential Rate (per child flagged for contracted slots)	Child Assessment Differential Rate (Column C × tier percentage)
INF	<12 Months	$0.00	$50.00	$50.00	$0.00	$0.00	-	$5.00	$0.00	$5.00	$4.00	$2.50
TOD	12 <24 Months	$0.00	$40.24	$40.24	$0.00	$0.00	-	$4.02	$0.00	$4.02	$4.00	$2.01
2YR	24 <36 Months	$45.00	$37.45	$37.45	$7.49	$44.94	-	$3.75	$0.00	$48.69	$4.00	$1.87
PR3	36 <48 Months	$40.00	$30.00	$30.00	$6.00	$36.00	-	$3.00	$0.00	$39.00	$4.00	$1.50
PR4	48 <60 Months	$40.00	$28.55	$28.55	$5.71	$34.26	-	$2.86	$0.00	$37.12	$4.00	$1.43
PR5	60 <72 Months	$40.00	$27.00	$27.00	$5.40	$32.40	-	$2.70	$0.00	$35.10	$4.00	$1.35
SCH	In School	$39.00	$19.86	$19.86	$3.97	$23.83	-	$1.99	$0.00	$25.82	$0.00	-

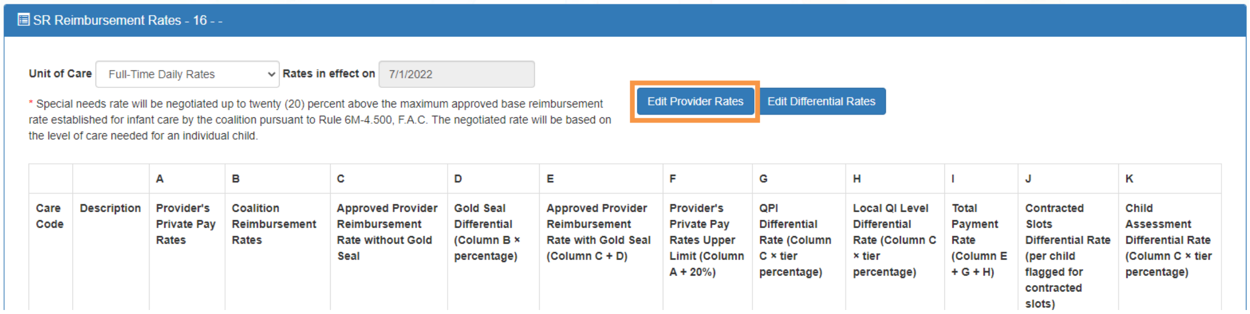
- Column A = displays amounts from the provider's contract for private pay rates (captured at the time of contract initiation from the provider's profile).
- Column B = displays amounts from the Coalition's SR Plan Rates (established on the **Admin Functions > Rates Management > SR Plan Rates** page).
- Column C = displays the approved provider reimbursement rate without Gold Seal (same as column B except when column A is zero. If column A is zero, column C shall be zero).
- Column D = displays the Gold Seal differential (column C x the percentage established on the **Admin Functions > Rates Management > SR Plan Rates** page).
- Column E = displays the approved provider reimbursement rate with Gold Seal (column C + D). Gold Seal participation is established on the Edit Differentials tab and should match the contract or latest amendment.
- Column F = this column is not applicable, as there is no longer a provider private pay rates upper limit.
- Column G = displays the QPI differential rate (column C x tier percentage). QPI participation is established on the Edit Differentials tab and should match the contract or latest amendment.
- Column H = displays the Local QI differential rate (column C x tier percentage). QI participation is established on the Edit Differentials tab and should match the contract.

- Column I = displays the total payment to provider (column E + G + H).
- Column J = displays the total contracted slot differential rate available to selected children. Contracted Slots participation is established on the Edit Differentials tab and should match the contract or latest amendment.
- Column K = child assessment differential rate (column C x tier percentage). Child assessment participation is established on the Edit Differentials tab and should match the contract or latest amendment.

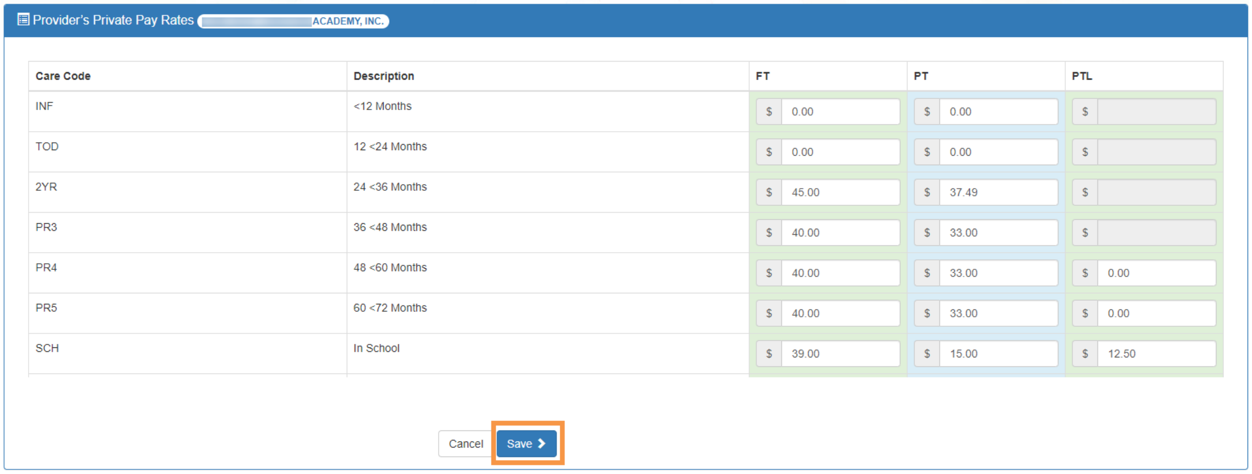
While some information may be pre-populated for convenience, the remaining steps should be followed to ensure the correct provider reimbursement rates are recorded.

Edit Provider Rate

Click the **Edit Provider Rates** button. The private pay rates page displays. Review and/or enter the provider's private pay rates (column A) for the established rate plan date range and click **Save**.

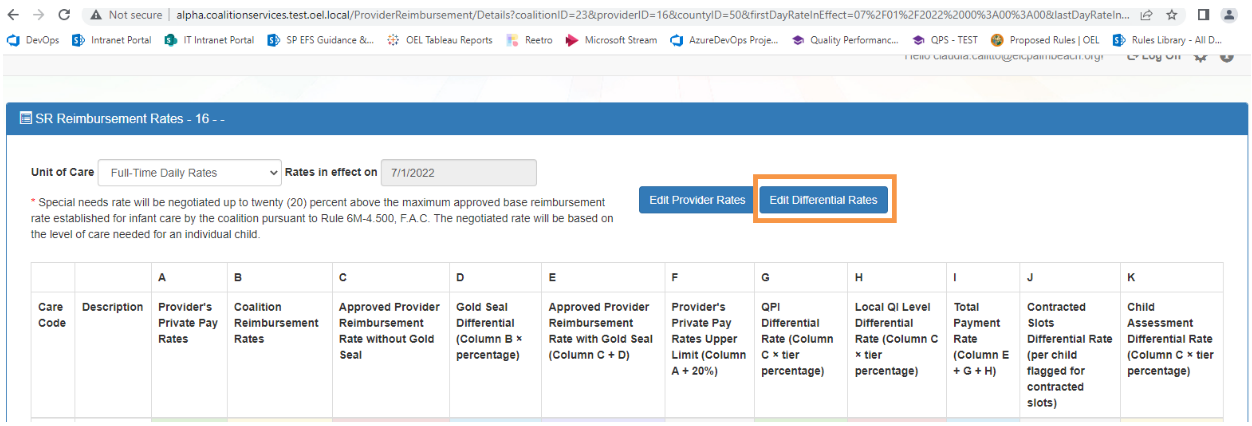


NOTE: Rates may be edited on or before the rate plan start date, after which they cannot be edited unless payment has not been issued yet. At that point, a new rate plan must be created.



Edit Differentials

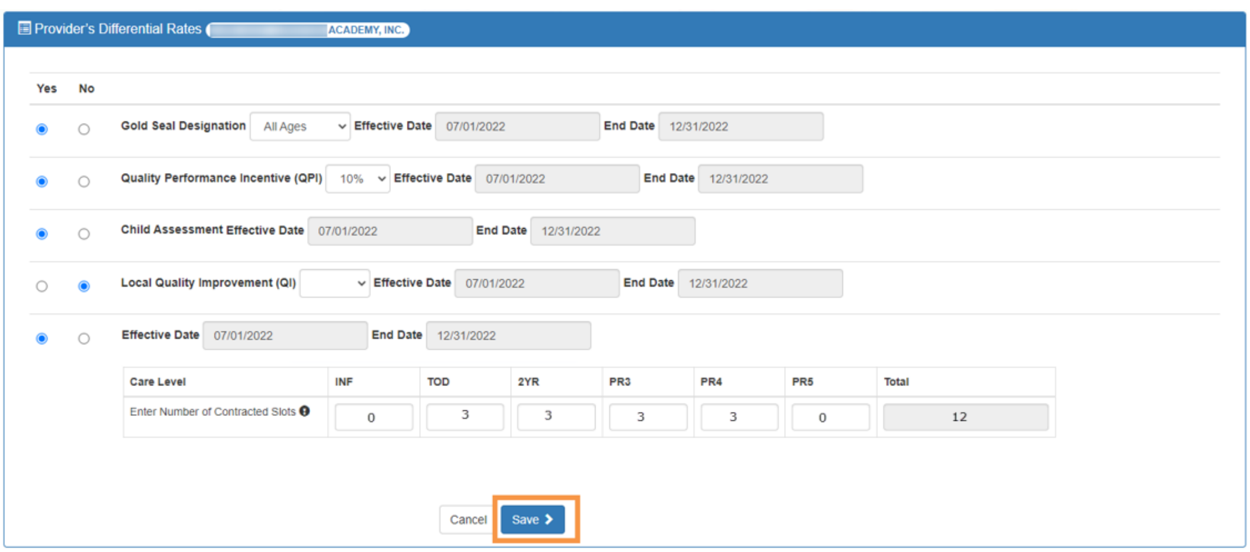
Next, click the **Edit Differential Rates** button.



The differential rates page displays. Review and/or edit the differential rate settings (columns E, G, H, I, and K) for the established rate plan date range and click **Save**. Differential rates are turned on by selecting the **Yes** radio button and the tier level.

NOTES:

- The Effective Date and End Date match the established rate plan and cannot be changed. If a differential applies to a length of time other than the established rate plan, an additional plan must be created. See *Amending SR Reimbursement Rates (by adding another rate plan).*
- Providers participating in contracted slots require the total number of slots per care level which are automatically populated on the differentials page from the SR contract upon certification. (Children receiving a contracted slot must be identified within the **SR Program > SR Provider Enrollment** work queues.) See *Contracted Slots*.



2019-2020 Reimbursement Rate Plans

A note displays at the top of the Rate Plan – "* Reimbursable rate is reduced because the amount exceeds the provider's private pay rate upper limit set in Column F." Any rates marked by a *, show the provider is near the upper limit (Column F) with the differential, and the amount shown is what the provider will reimbursed.

NOTE: The rate plans for 2019-2020 allow the provider to exceed the private pay rate. For 2019-2020, the Provider cannot exceed Column F – 20% above the private pay rate.

SR Reimbursement Rates - 8469 - -

Unit of Care: Full-Time Daily Rates | Rates in effect on: 7/1/2019

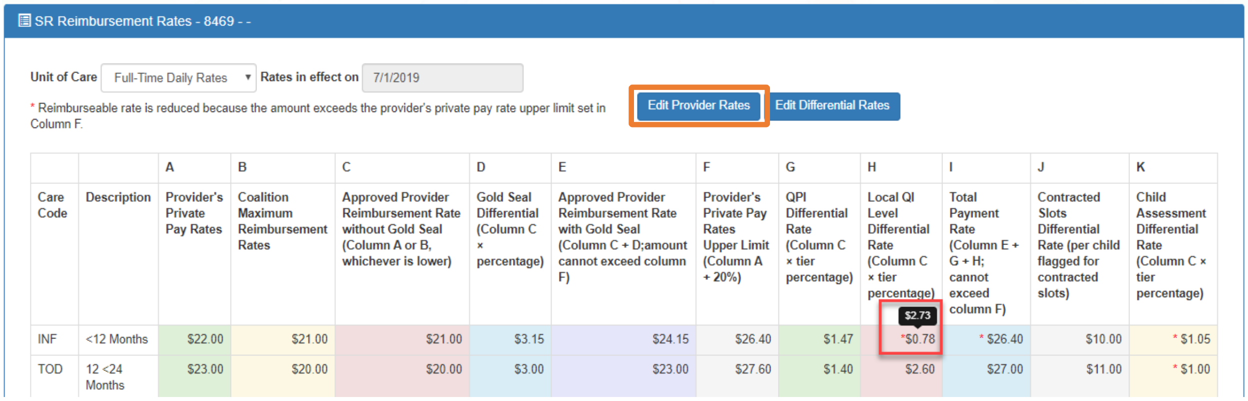
* Reimburseable rate is reduced because the amount exceeds the provider's private pay rate upper limit set in Column F.

Edit Provider Rates | Edit Differential Rates

		A	B	C	D	E	F	G	H	I	J	K
Care Code	Description	Provider's Private Pay Rates	Coalition Maximum Reimbursement Rates	Approved Provider Reimbursement Rate without Gold Seal (Column A or B, whichever is lower)	Gold Seal Differential (Column C × percentage)	Approved Provider Reimbursement Rate with Gold Seal (Column C + D;amount cannot exceed column F)	Provider's Private Pay Rates Upper Limit (Column A + 20%)	QPI Differential Rate (Column C × tier percentage)	Local QI Level Differential Rate (Column C × tier percentage)	Total Payment Rate (Column E + G + H; cannot exceed column F)	Contracted Slots Differential Rate (per child flagged for contracted slots)	Child Assessment Differential Rate (Column C × tier percentage)
INF	<12 Months	$22.00	$21.00	$21.00	$3.15	$24.15	$26.40	$1.47	*$0.78	* $26.40	$10.00	* $1.05
TOD	12 <24 Months	$23.00	$20.00	$20.00	$3.00	$23.00	$27.60	$1.40	$2.60	$27.00	$11.00	* $1.00
2YR	24 <36 Months	$24.00	$19.50	$19.50	$2.93	$22.43	$28.80	$1.37	$2.54	$26.34	$12.00	$0.98
PR3	36 <48 Months	$25.00	$19.00	$19.00	$2.85	$21.85	$30.00	$1.33	$2.47	$25.65	$13.00	$0.95
PR4	48 <60 Months	$26.00	$19.00	$19.00	$2.85	$21.85	$31.20	$1.33	$2.47	$25.65	$14.00	$0.95
PR5	60 <72 Months	$27.00	$19.00	$19.00	$2.85	$21.85	$32.40	$1.33	$2.47	$25.65	$15.00	$0.95
SCH	In School	$15.00	$10.00	$10.00	$1.50	$11.50	$18.00	$0.00	$1.30	$12.80	$0.00	$0.00
SPCR	Special Needs	$20.70	$21.00	$20.70	$0.00	$20.70	$24.84	$1.45	*$2.69	* $24.84	$0.00	* $1.04

- Column A = displays amounts from the provider's contract for private pay rates (captured at the time of contract initiation from the provider's profile).
- Column B = displays amounts from the Coalition's SR Plan Rates (established on the **Admin Functions > Rates Management > SR Plan Rates** page).
- Column C = displays the approved provider reimbursement rate without Gold Seal (the lower of column A or B).
- Column D = displays the Gold Seal differential (column C x the percentage established on the **Admin Functions > Rates Management > SR Plan Rates** page).
- Column E = displays the approved provider reimbursement rate with Gold Seal (column C + D; amount cannot exceed column F; Gold Seal participation is established on the Edit Differentials tab).
- Column F = displays the provider's private pay rate upper limit (column A x 20%)
- Column G = displays the QPI differential rate (column C x tier percentage; QPI participation is established on the Edit Differentials tab).
- Column H = displays the Local QI differential rate (column C x tier percentage; QI participation is established on the Edit Differentials tab).
- Column I = displays the total payment to provider (column E + G + H; cannot exceed column F).
- Column J = displays the total contracted slot differential rate available to selected children (Contracted Slots participation is established on the Edit Differentials tab).
- Column K = child assessment differential rate (column C x tier percentage; child assessment participation is established on the Edit Differentials tab).

Hovering over a rate marked with a *, displays the calculated amount prior to reaching the upper limit (Column F). The rate shown with a *, is the amount the provider will be reimbursed.



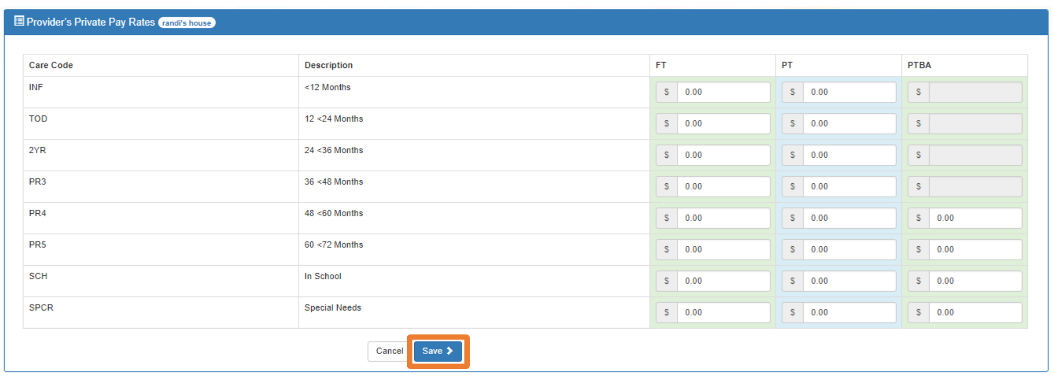
		A	B	C	D	E	F	G	H	I	J	K
Care Code	Description	Provider's Private Pay Rates	Coalition Maximum Reimbursement Rates	Approved Provider Reimbursement Rate without Gold Seal (Column A or B, whichever is lower)	Gold Seal Differential (Column C × percentage)	Approved Provider Reimbursement Rate with Gold Seal (Column C + D;amount cannot exceed column F)	Provider's Private Pay Rates Upper Limit (Column A + 20%)	QPI Differential Rate (Column C × tier percentage)	Local QI Level Differential Rate (Column C × tier percentage)	Total Payment Rate (Column E + G + H; cannot exceed column F)	Contracted Slots Differential Rate (per child flagged for contracted slots)	Child Assessment Differential Rate (Column C × tier percentage)
INF	<12 Months	$22.00	$21.00	$21.00	$3.15	$24.15	$26.40	$1.47	$2.73 *$0.78	* $26.40	$10.00	* $1.05
TOD	12 <24 Months	$23.00	$20.00	$20.00	$3.00	$23.00	$27.60	$1.40	$2.60	$27.00	$11.00	* $1.00

While some information may be pre-populated for convenience, the remaining steps should be followed to ensure the correct provider reimbursement rates are recorded.

Edit Provider Rate

Click the **<u>Edit Provider Rates</u>** button. The private pay rates page displays. Review and/or enter the provider's private pay rates (column A) for the established rate plan date range and click **<u>Save</u>**.

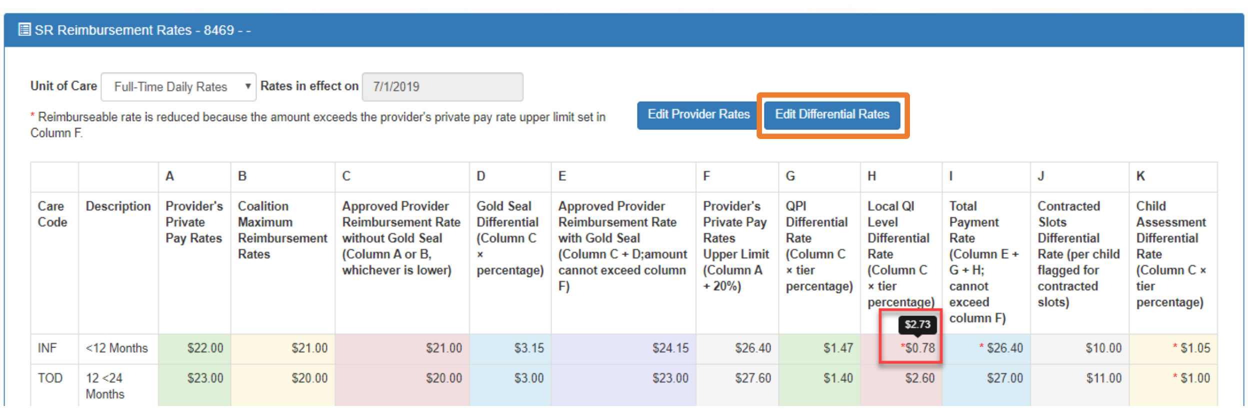
NOTE: Rates may be edited on or before the rate plan start date, after which they cannot be edited unless payment has not been issued yet. At that point, a new rate plan must be created.



Care Code	Description	FT	PT	PTBA
INF	<12 Months	$ 0.00	$ 0.00	$
TOD	12 <24 Months	$ 0.00	$ 0.00	$
2YR	24 <36 Months	$ 0.00	$ 0.00	$
PR3	36 <48 Months	$ 0.00	$ 0.00	$
PR4	48 <60 Months	$ 0.00	$ 0.00	$ 0.00
PR5	60 <72 Months	$ 0.00	$ 0.00	$ 0.00
SCH	In School	$ 0.00	$ 0.00	$ 0.00
SPCR	Special Needs	$ 0.00	$ 0.00	$ 0.00

Edit Differentials

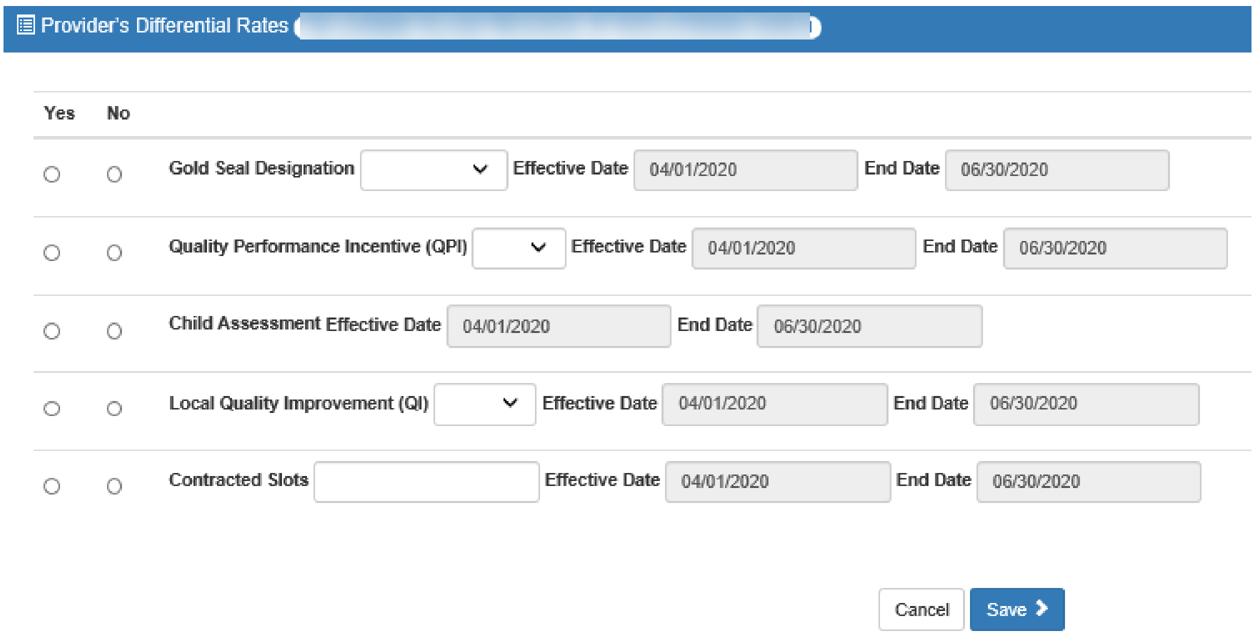
Next, click the **<u>Edit Differential Rates</u>** button.



		A	B	C	D	E	F	G	H	I	J	K
Care Code	Description	Provider's Private Pay Rates	Coalition Maximum Reimbursement Rates	Approved Provider Reimbursement Rate without Gold Seal (Column A or B, whichever is lower)	Gold Seal Differential (Column C × percentage)	Approved Provider Reimbursement Rate with Gold Seal (Column C + D;amount cannot exceed column F)	Provider's Private Pay Rates Upper Limit (Column A + 20%)	QPI Differential Rate (Column C × tier percentage)	Local QI Level Differential Rate (Column C × tier percentage)	Total Payment Rate (Column E + G + H; cannot exceed column F)	Contracted Slots Differential Rate (per child flagged for contracted slots)	Child Assessment Differential Rate (Column C × tier percentage)
INF	<12 Months	$22.00	$21.00	$21.00	$3.15	$24.15	$26.40	$1.47	$2.73 *$0.78	* $26.40	$10.00	* $1.05
TOD	12 <24 Months	$23.00	$20.00	$20.00	$3.00	$23.00	$27.60	$1.40	$2.60	$27.00	$11.00	* $1.00

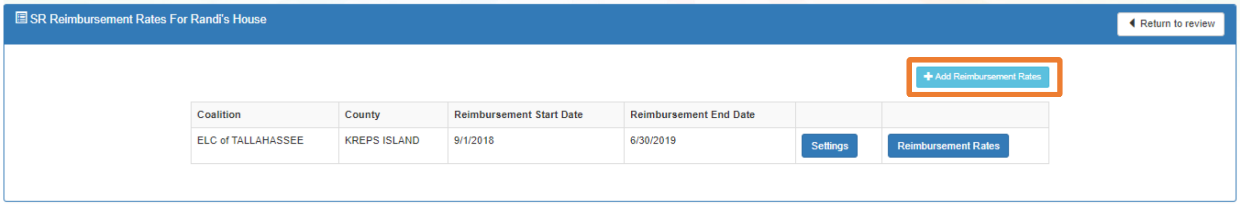
The differential rates page displays. Review and/or edit the differential rate settings (columns E, G, H, I, and K) for the established rate plan date range and click **Save**. Differential rates are turned on by selecting the **Yes** radio button and the tier level.

NOTE: The Effective Date and End Date match the established rate plan and cannot be changed. If a differential applies to a length of time other than the established rate plan, an additional plan must be created. See *Amending SR Reimbursement Rates (by adding another rate plan).* Providers participating in contracted slots require the total number of slots to be selected and rate amounts entered. (Children receiving a contracted slot must be identified within the **SR Program > SR Provider Enrollment** work queues.) See *Contracted Slots*.

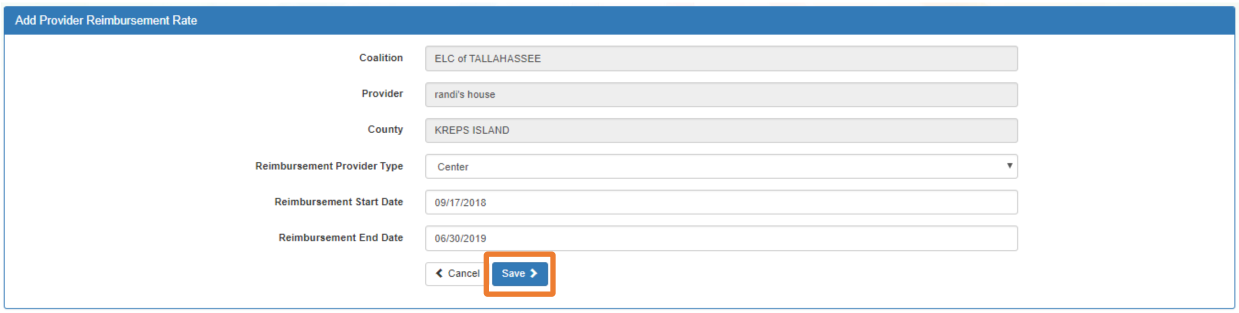


Amending SR Reimbursement Rates (by adding another rate plan)

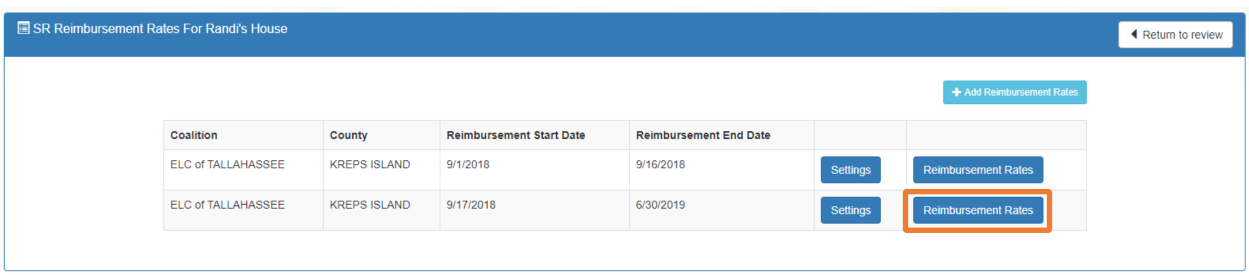
Open the provider's admin page from their profile. Click the **SR Reimbursement Rates** button. The provider's reimbursement rate plan page appears. Click on the **Add Reimbursement Rates** button.



The rate plan settings page appears. Enter the first day that the new rate plan is effective for the Reimbursement Start Date, then Enter the Reimbursement End Date and click **Save**.



Now, a new rate plan appears. The existing rate plan's Reimbursement End Date is changed by the system to end a day prior to the new rate plan's Reimbursement Start Date. Click on the **Reimbursement Rates** button for the new rate plan and proceed to review/modify the **Provider Rates** and **Differential Rates** accordingly.

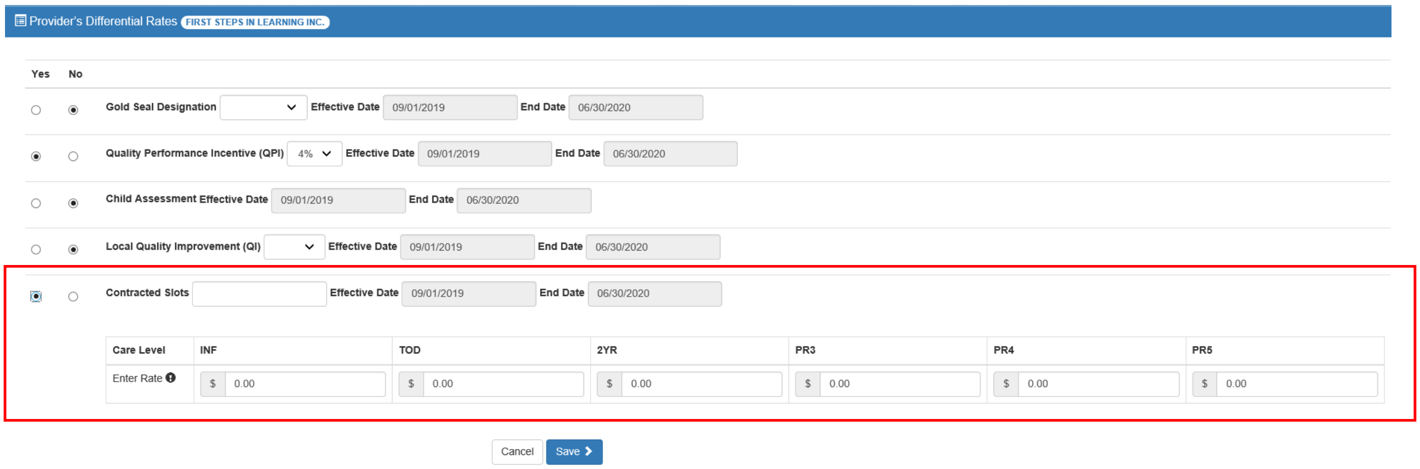


Contracted Slots

Setting Up a Provider with Contracted Slots

Using the provider's SR Reimbursement rates from their profile (Private Pay Rates tab, bottom section), click the **Edit Differentials** button. Turn on the Contracted Slots differential rates by selecting the **Yes** radio button, then click **Save**.

Providers participating in contracted slots require the total number of slots to be filled in and rate amounts entered for each level of care.



Enrolling a Child in a Contracted Slot

The child has to have an active SR enrollment with the provider. If the enrollment has been terminated, the child will not be able to be enrolled in a contracted slot.

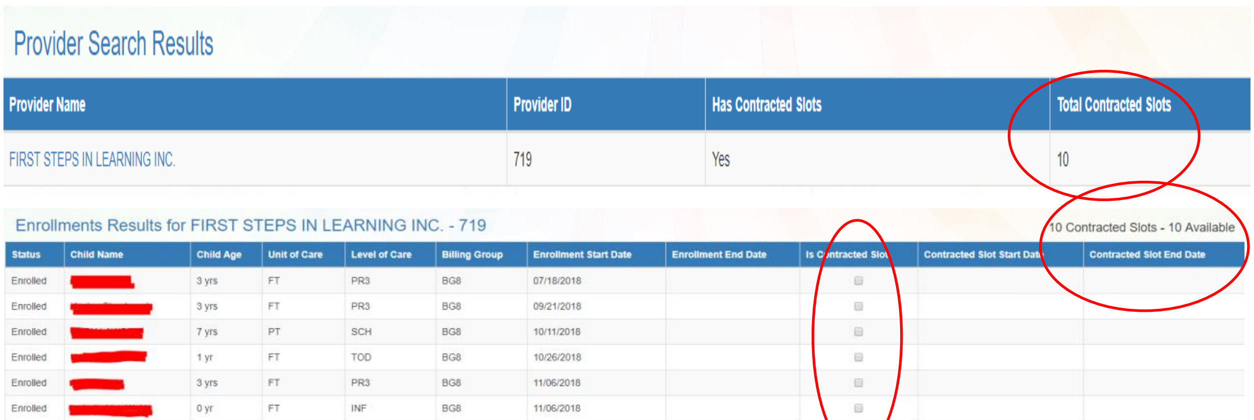
The children receiving a contracted slot must be identified within the **SR Program > SR Provider Enrollment** work queues. Search by provider name. The number of contracted slots for the provider are displayed.

Providers that do not have contracted slots will not have the checkboxes to select a child for contracted slots enrollments.

Enrollments Results for HAMPSHIRE ACADEMY, INC - 348

Status	Child Name	Child Age	Unit of Care	Level of Care	Billing Group	Enrollment Start Date	Enrollment End Date
Enrolled	[redacted]	2 yrs	FT	2YR	BG8	06/13/2018	
Enrolled	[redacted]	2 yrs	FT	2YR	BG8	06/12/2018	
Enrolled	[redacted]	2 yrs	FT	2YR	BG1	06/20/2018	
Enrolled	[redacted]	2 yrs	FT	2YR	BG8	07/27/2018	
Enrolled	[redacted]	7 yrs	FT	SCH	BG3R	08/07/2018	
Enrolled	[redacted]	2 yrs	FT	2YR	BG1	09/10/2018	
Enrolled	[redacted]	3 yrs	FT	PR3	BG1	09/10/2018	
Enrolled	[redacted]	3 yrs	FT	PR3	BG8	09/26/2018	

Providers that have contracted slots will have checkboxes to select a child for contracted slots enrollments, and the number of available contracted slots is displayed.



Provider Search Results

Provider Name	Provider ID	Has Contracted Slots	Total Contracted Slots
FIRST STEPS IN LEARNING INC.	719	Yes	10

Enrollments Results for FIRST STEPS IN LEARNING INC. - 719

10 Contracted Slots - 10 Available

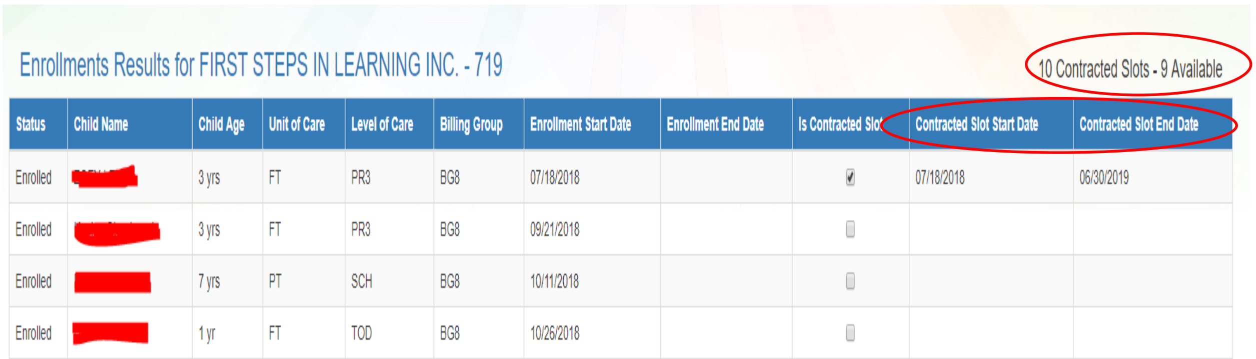
Status	Child Name	Child Age	Unit of Care	Level of Care	Billing Group	Enrollment Start Date	Enrollment End Date	Is Contracted Slot	Contracted Slot Start Date	Contracted Slot End Date
Enrolled	[redacted]	3 yrs	FT	PR3	BG8	07/18/2018		☐		
Enrolled	[redacted]	3 yrs	FT	PR3	BG8	09/21/2018		☐		
Enrolled	[redacted]	7 yrs	PT	SCH	BG8	10/11/2018		☐		
Enrolled	[redacted]	1 yr	FT	TOD	BG8	10/26/2018		☐		
Enrolled	[redacted]	3 yrs	FT	PR3	BG8	11/06/2018		☐		
Enrolled	[redacted]	0 yr	FT	INF	BG8	11/06/2018		☐		

The child's name, age, unit of care, level of care, billing group and enrollment dates are displayed.

Click on a contracted slots checkbox. A pop-up displays to enter the contracted slots enrollment dates.

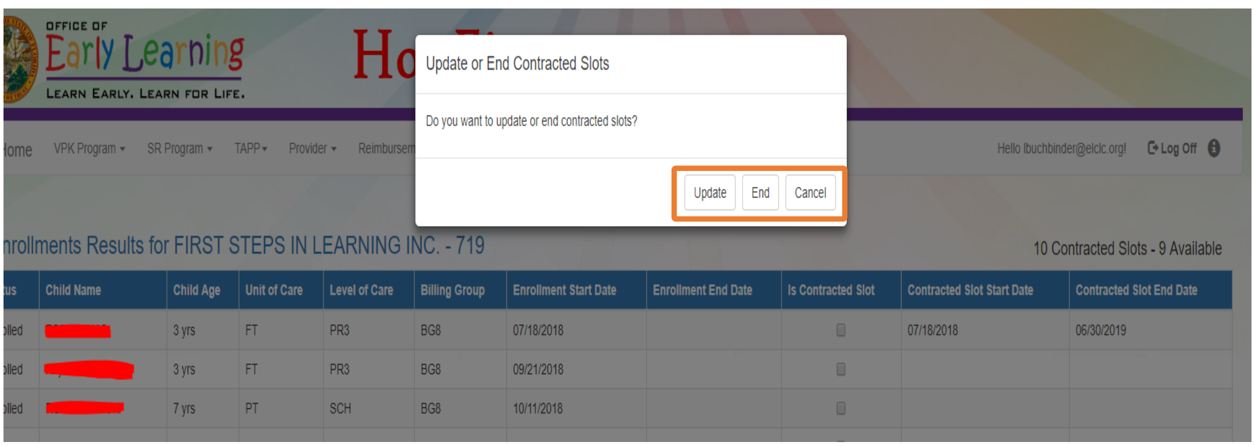
By checking the contracted slots checkbox, the Start and End date fields become required. The contracted slots dates do not have to coincide with the child exact enrollment dates, but the contracted slot start date cannot be prior to the SR enrollment Start Date. The Contracted Slot End date cannot be more than 60 days after the SR enrollment End Date. The contracted slots dates have to be within the provider's contracted slot agreement effective dates.

The provider is not allowed to select more than the amount of slots they have are contracted to have. If the provider has 10 slots in their contract, the coalition user can only fill 10 slots. Each time a slot is filled, the available slots decrease.



The termination date for the Contracted Slots enrollment can be postponed for up to 60 consecutive calendar days if a child ages out when school starts, leaves the program, or has a schedule change that is no longer Full-Time (FT).

Clicking a checked contracted checkbox displays the Update or End question.

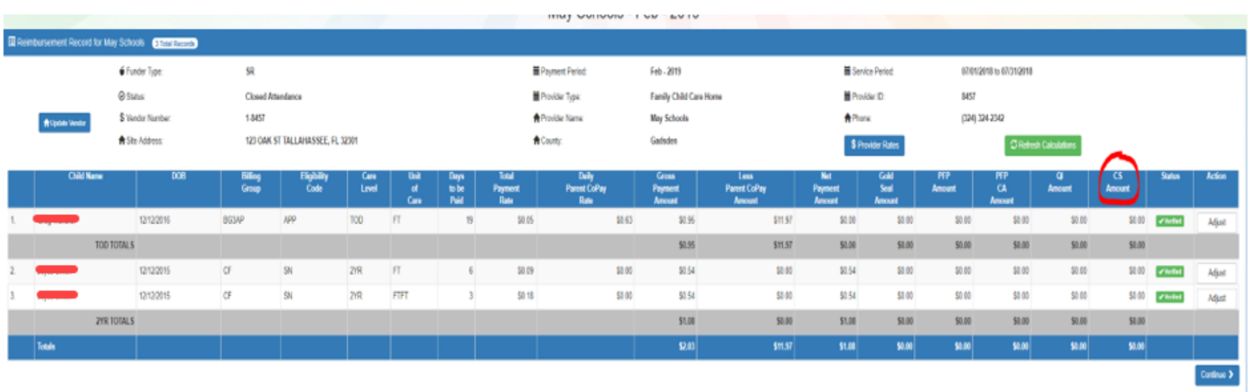


Selecting **End** will populate the current date, then click **Save**.

Selecting **Update** will require a new end date. The end date cannot be greater than 60 days after the SR enrollment end date. The new end date must be within the current billing period and cannot be in a previous month.

The provider will not see any indication of contracted slots enrollment on their enrollment and attendance roster.

The coalition will see the child’s contracted slot enrollment and rate in the provider’s Closed Attendance, Reimbursement Record.



Reimbursement Record for May Schools 3 Total Records

Funder Type: SR
Status: Closed Attendance
Vendor Number: 1-8457
Site Address: 123 OAK ST TALLAHASSEE, FL 32301
Payment Period: Feb - 2019
Provider Type: Family Child Care Home
Provider Name: May Schools
County: Gadsden
Service Period: 07/01/2018 to 07/31/2018
Provider ID: 8457
Phone: (324) 324-2342

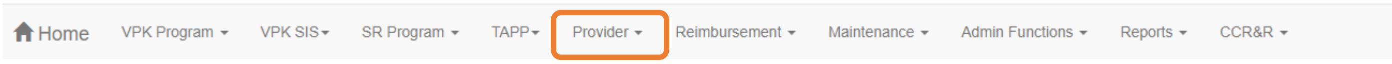
Update Vendor | $ Provider Rates | Refresh Calculations

	Child Name	DOB	Billing Group	Eligibility Code	Care Level	Unit of Care	Days to be Paid	Total Payment Rate	Daily Parent CoPay Rate	Gross Payment Amount	Less Parent CoPay Amount	Net Payment Amount	Gold Seal Amount	PFP Amount	PFP CA Amount	QI Amount	CS Amount	Status	Action
1.	[redacted]	12/12/2016	BG3AP	APP	TOD	FT	19	$0.05	$0.63	$0.95	$11.97	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	Verified	Adjust
	TOD TOTALS									$0.95	$11.97	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00		
2.	[redacted]	12/12/2015	CF	SN	2YR	FT	6	$0.09	$0.00	$0.54	$0.00	$0.54	$0.00	$0.00	$0.00	$0.00	$0.00	Verified	Adjust
3.	[redacted]	12/12/2015	CF	SN	2YR	FTFT	3	$0.18	$0.00	$0.54	$0.00	$0.54	$0.00	$0.00	$0.00	$0.00	$0.00	Verified	Adjust
	2YR TOTALS									$1.08	$0.00	$1.08	$0.00	$0.00	$0.00	$0.00	$0.00		
	Totals									$2.03	$11.97	$1.08	$0.00	$0.00	$0.00	$0.00	$0.00		

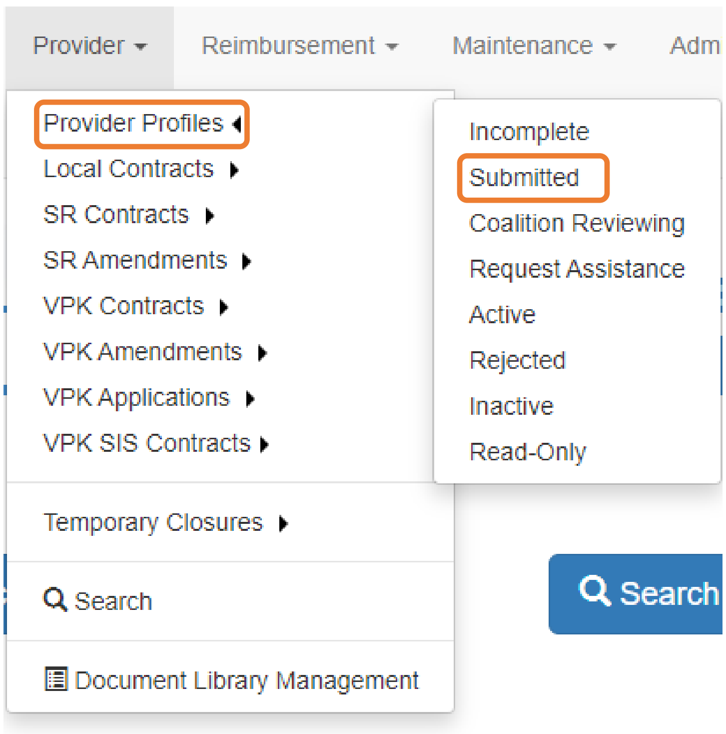
Continue

Processing a Provider Portal Profile

From the Home screen, the coalition user will click the **Provider** menu.

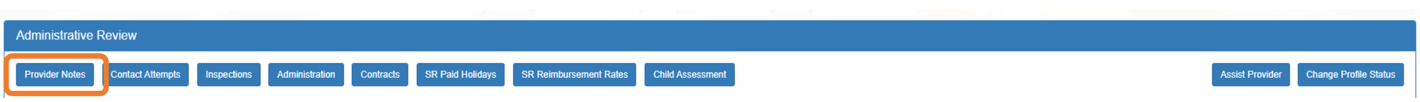


Then, the coalition user will click the Provider Profiles and select **Submitted** work queue to review a list of all submitted profile requests. Coalition staff may click the provider ID link to open a profile.

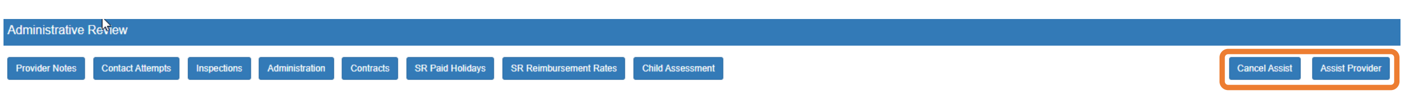


Request Assistance

Providers may request assistance from coalitions by using the Request Assistance feature. When selected by the provider, requests appear in the **Request Assistance** work queue. Coalition staff may click the provider ID link to open a profile. Once a profile is open, coalition staff may review the Provider Notes to locate information regarding the reason for the request.

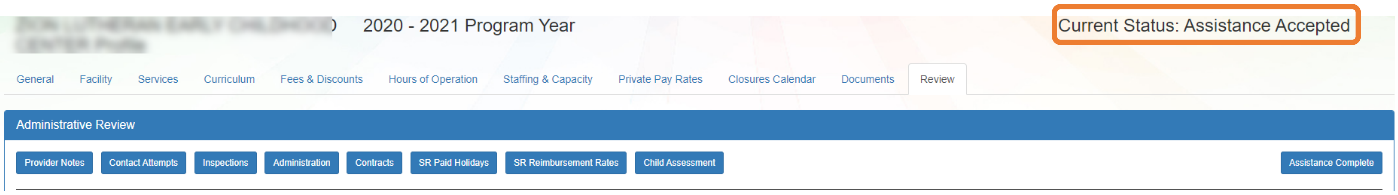


Next, coalition staff may select the **Cancel Assist** button or **Assist Provider** button.

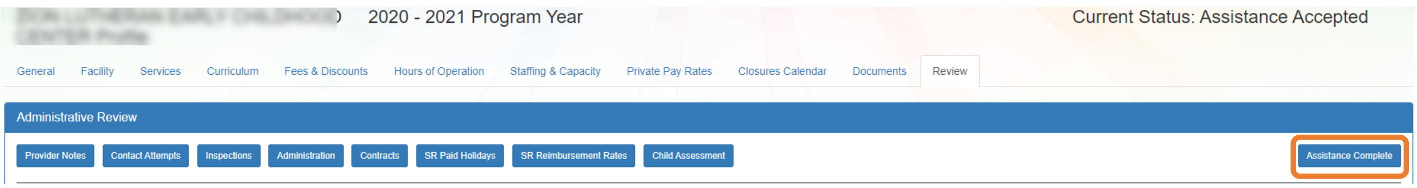


The **Cancel Assist** button will cancel the request and the provider will again be able to edit the profile. The profile status returns to its prior status.

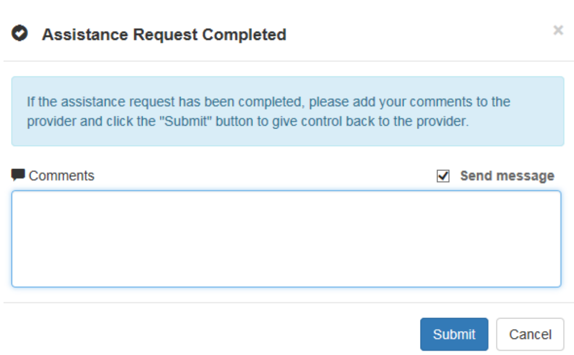
The **Assist Provider** button places the profile in a status that allows coalition users to edit the profile. After clicking the **Assist Provider** button, the profile status will change to **Assistance Accepted**.



Once the coalition user has finished editing the provider profile, click the **Assistance Complete** button.

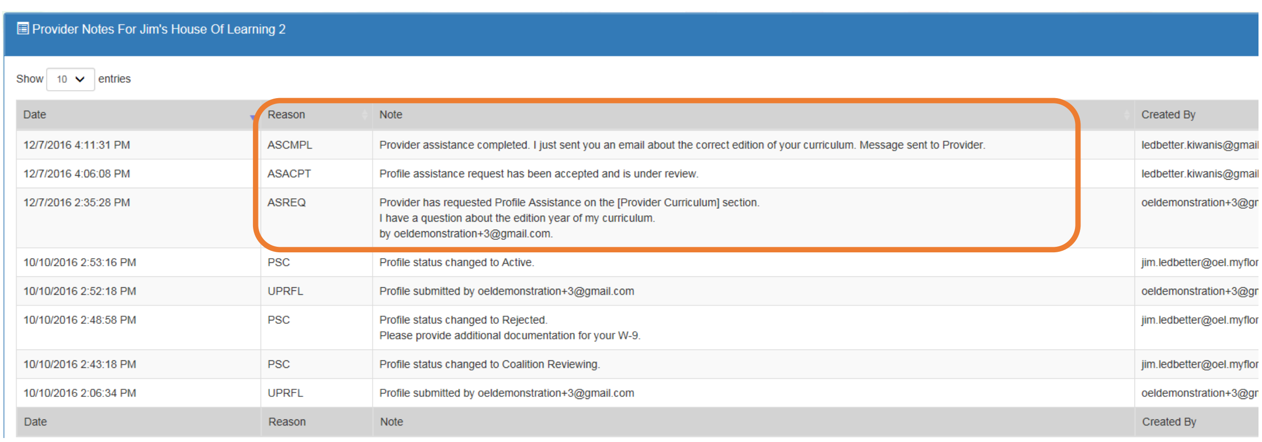


Then, the coalition user will fill in the Comments section of the **Assistance Request Completed** pop-up and click **Submit**.



If a provider needs help uploading a document, and the coalition has an electronic copy of the document, the provider may use the Need Assistance function to allow the coalition to upload the document.

Provider Notes will be generated to reflect the acceptance of the assistance request and the comment included after completing the assistance.



Provider Notes For Jim's House Of Learning 2

Show 10 entries

Date	Reason	Note	Created By
12/7/2016 4:11:31 PM	ASCMPL	Provider assistance completed. I just sent you an email about the correct edition of your curriculum. Message sent to Provider.	ledbetter.kiwanis@gmail
12/7/2016 4:06:08 PM	ASACPT	Profile assistance request has been accepted and is under review.	ledbetter.kiwanis@gmail
12/7/2016 2:35:28 PM	ASREQ	Provider has requested Profile Assistance on the [Provider Curriculum] section. I have a question about the edition year of my curriculum. by oeldemonstration+3@gmail.com.	oeldemonstration+3@gr
10/10/2016 2:53:16 PM	PSC	Profile status changed to Active.	jim.ledbetter@oel.myflor
10/10/2016 2:52:18 PM	UPRFL	Profile submitted by oeldemonstration+3@gmail.com	oeldemonstration+3@gr
10/10/2016 2:48:58 PM	PSC	Profile status changed to Rejected. Please provide additional documentation for your W-9.	jim.ledbetter@oel.myflor
10/10/2016 2:43:18 PM	PSC	Profile status changed to Coalition Reviewing.	jim.ledbetter@oel.myflor
10/10/2016 2:06:34 PM	UPRFL	Profile submitted by oeldemonstration+3@gmail.com	oeldemonstration+3@gr
Date	Reason	Note	Created By

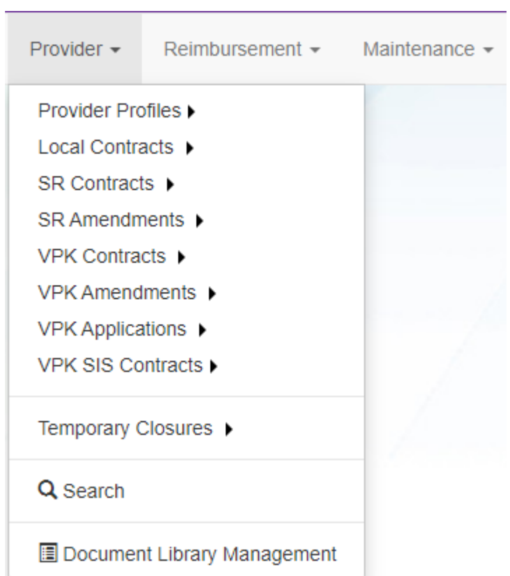
The provider profile will now return to the previous status, and the provider will again be able to edit the profile. However, if changes were made by the coalition, the provider profile will become Incomplete. The provider user may review the changes, sign and certify, and submit to the coalition.

Assist Provider

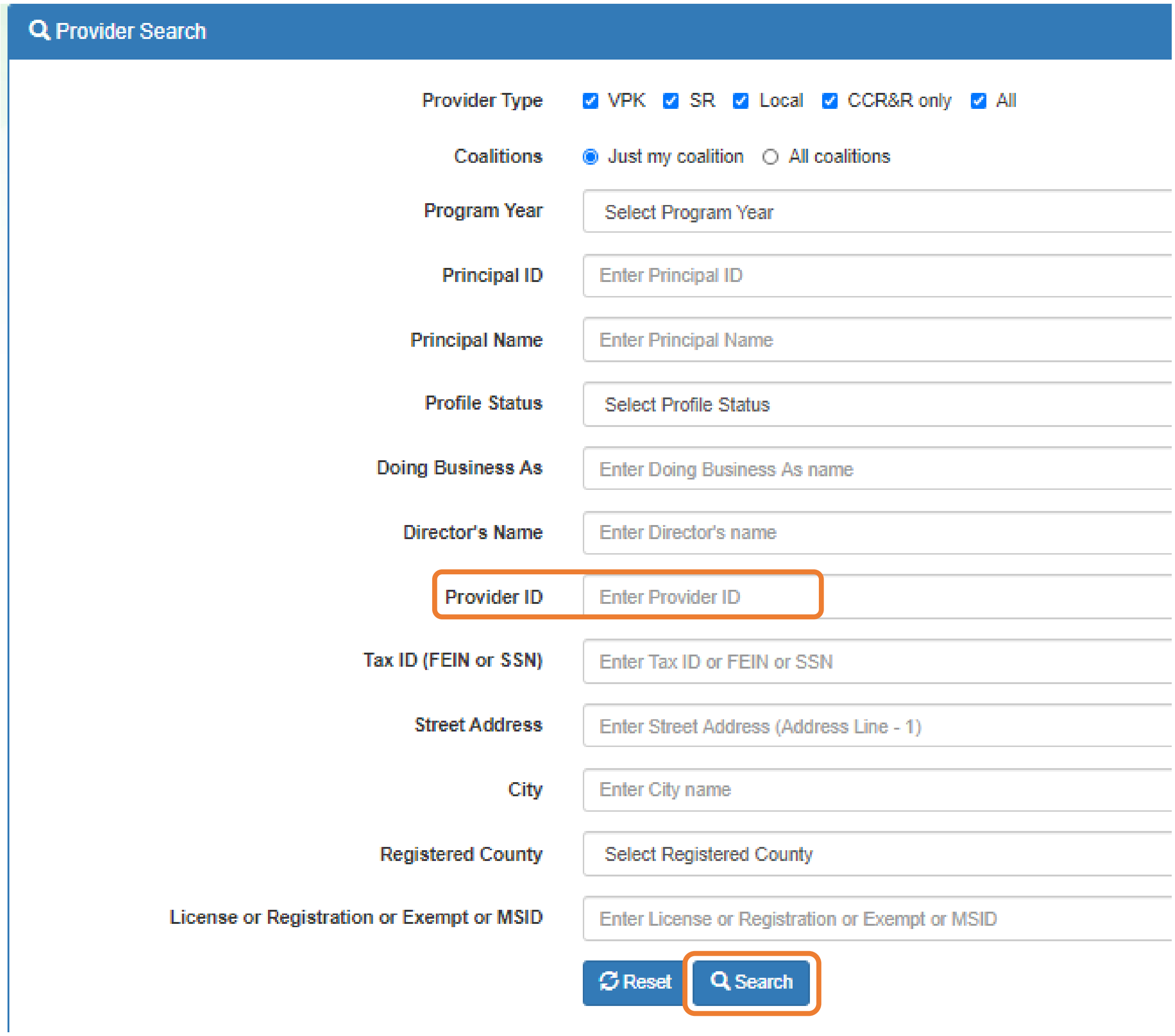
In addition to the Request Assistance feature available to providers, coalition users can also help providers through the Assist Provider feature. This feature allows coalition users to put a provider profile in Assistance Accepted status and make edits to the profile without the provider having to submit a request for assistance. The initial profile status has a role in the steps required for editing and the resulting status. For example, if the initial provider profile status is Active*, when the assistance is completed, the profile status becomes Incomplete in order for the provider to review and approve the changes. Other initial statuses are maintained when the assistance is completed (i.e. Incomplete stays Incomplete after assistance is completed). Editing is not available for Imported or Inactive profile statuses. Additionally, if the initial provider profile status is Submitted**, the status must first be changed to Coalition Reviewing in order for editing to occur. See the chart below:

Initial Profile Status	Editing Available	Coalition Reviewing Necessary	Resulting Status
Incomplete	Yes	No	Incomplete
Submitted**	**No**	**Yes**	**Submitted**
Coalition Reviewing	Yes	No	Coalition Reviewing
Request Assistance	Yes	No	Varies
Active*	Yes	No	**Incomplete**
Rejected	No	No	Rejected
Inactive, Imported	No	N/A	N/A

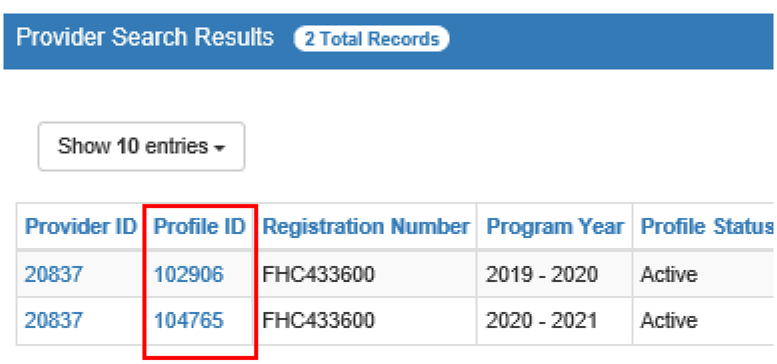
Go to **Provider > Search**.



Enter the provider ID, Click **Search**.

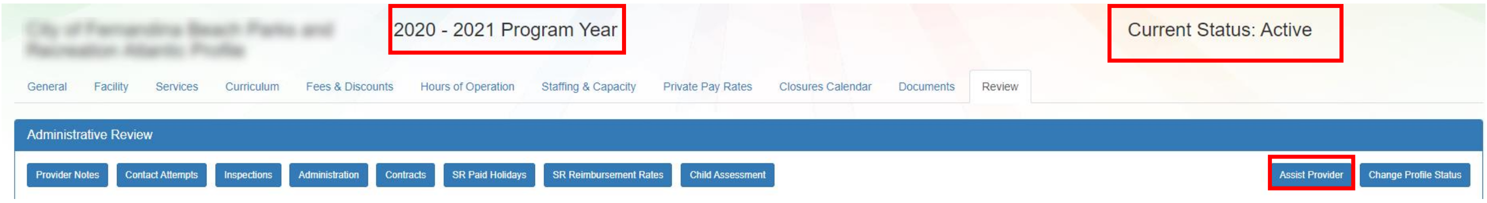


Identify the Program Year / Profile Status that needs assistance. Click the Profile ID.

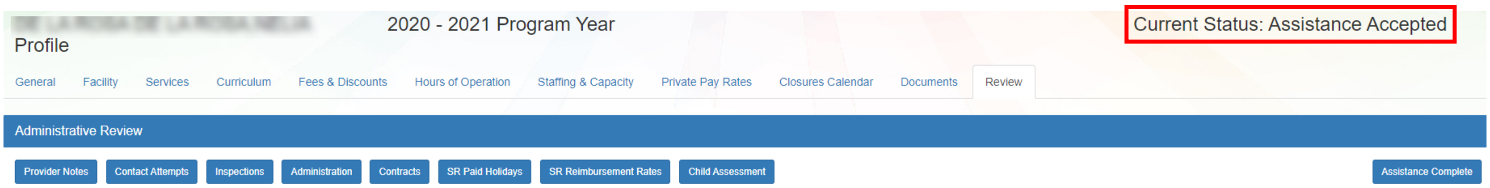


Provider ID	Profile ID	Registration Number	Program Year	Profile Status
20837	102906	FHC433600	2019 - 2020	Active
20837	104765	FHC433600	2020 - 2021	Active

Click the **Assist Provider** button.

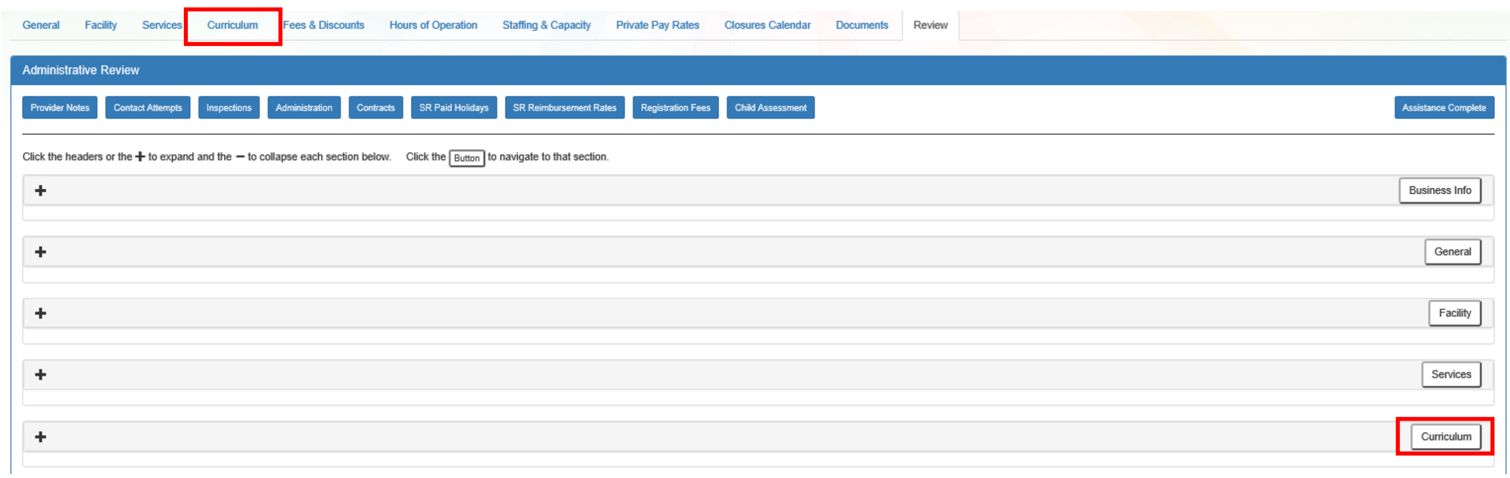


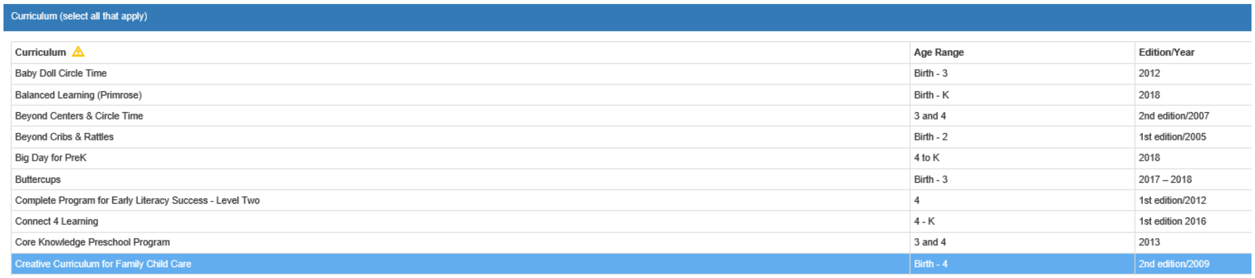
The current status on the provider profile changes to **Assistance Accepted**. All tabs on the provider profile are accessible and the fields are editable with the exception of some fields on the Facility tab.



A provider note is added: “Coalition initiated Request Assistance to assist provider”

Make any necessary edits to the profile.

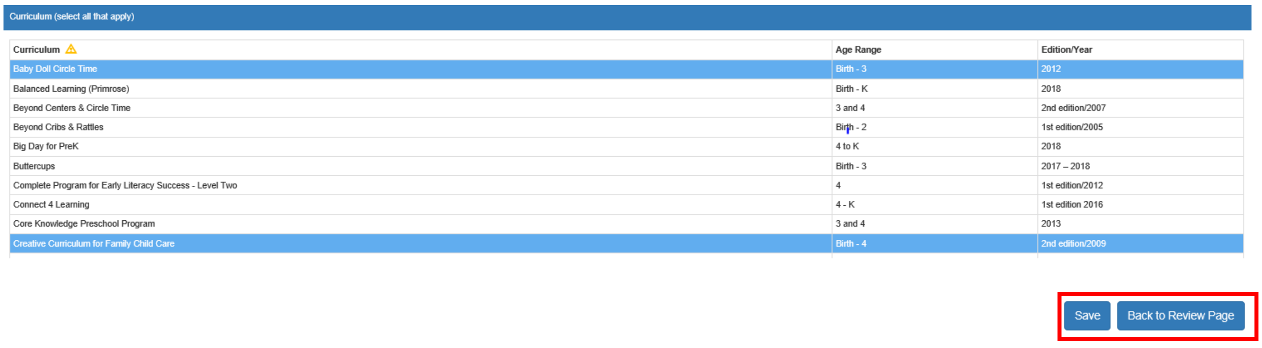




Curriculum (select all that apply)

Curriculum	Age Range	Edition/Year
Baby Doll Circle Time	Birth - 3	2012
Balanced Learning (Primrose)	Birth - K	2018
Beyond Centers & Circle Time	3 and 4	2nd edition/2007
Beyond Cribs & Rattles	Birth - 2	1st edition/2005
Big Day for PreK	4 to K	2018
Buttercups	Birth - 3	2017 – 2018
Complete Program for Early Literacy Success - Level Two	4	1st edition/2012
Connect 4 Learning	4 - K	1st edition 2016
Core Knowledge Preschool Program	3 and 4	2013
Creative Curriculum for Family Child Care	Birth - 4	2nd edition/2009

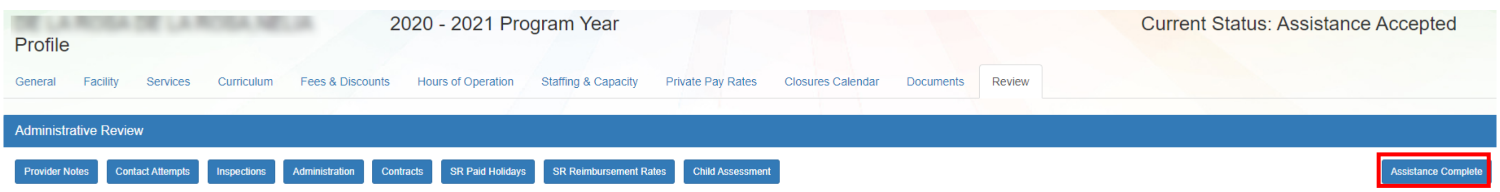
Save all changes and click **Back to Review Page**.



Curriculum (select all that apply)

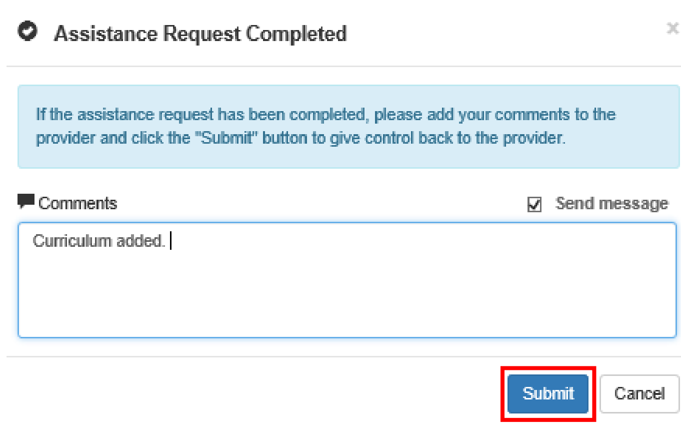
Curriculum	Age Range	Edition/Year
Baby Doll Circle Time	Birth - 3	2012
Balanced Learning (Primrose)	Birth - K	2018
Beyond Centers & Circle Time	3 and 4	2nd edition/2007
Beyond Cribs & Rattles	Birth - 2	1st edition/2005
Big Day for PreK	4 to K	2018
Buttercups	Birth - 3	2017 – 2018
Complete Program for Early Literacy Success - Level Two	4	1st edition/2012
Connect 4 Learning	4 - K	1st edition 2016
Core Knowledge Preschool Program	3 and 4	2013
Creative Curriculum for Family Child Care	Birth - 4	2nd edition/2009

Click the **Assistance Complete** button.

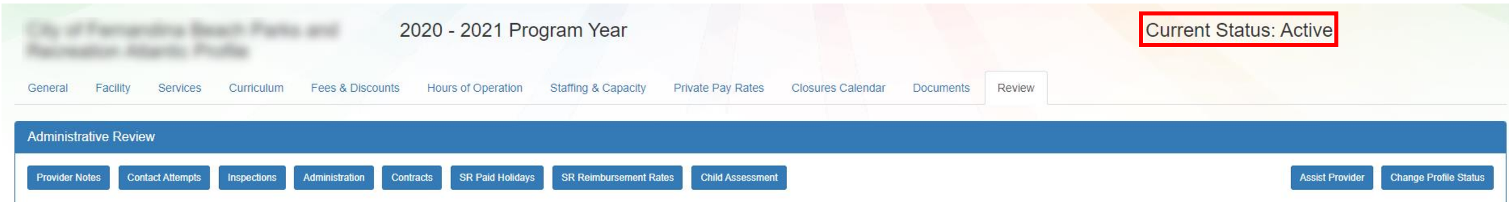


A pop-up displays. Write a comment in the comment box and click **Submit**.

NOTE: *Send message* is checked by default. When *Send message* is checked, a message is sent to the provider and a provider note is written; when it is un-selected, only a provider note is written.



The current status changes back to **Active**.

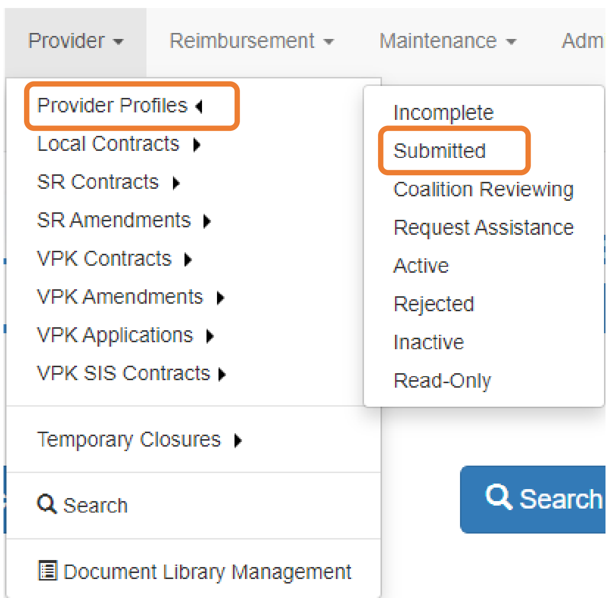


A provider note is added: “Provider assistance completed. Message sent to provider.” The provider note will also include any comments entered.

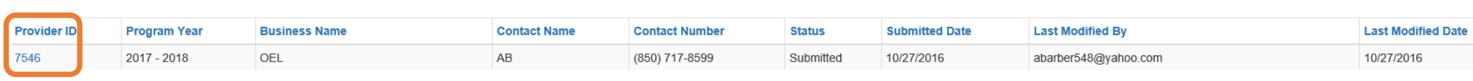
4/6/2020 3:29:51 PM	ASCMPL		Provider assistance completed. Curriculum added. Message sent to Provider.

Coalition Reviewing Status

To process a provider profile, the coalition user will select the **Submitted** work queue.

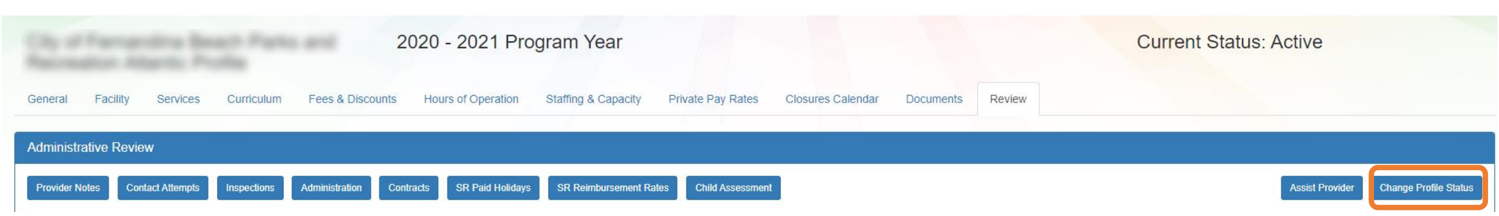


Then, the coalition user will click the **Provider ID** link of the record assigned to review.

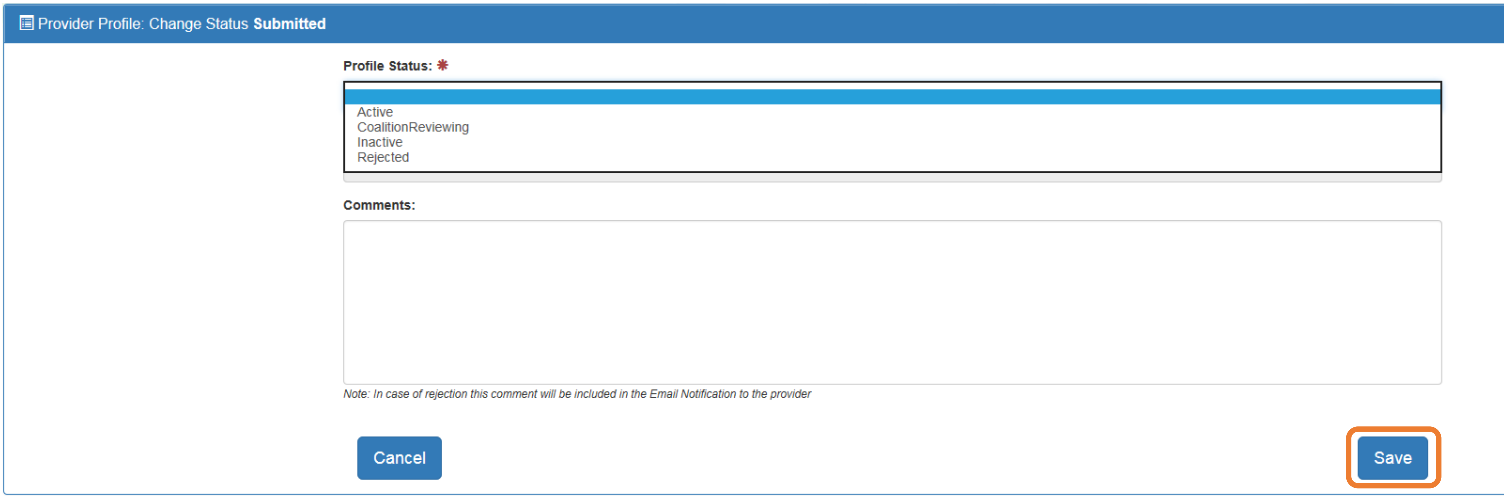


Provider ID	Program Year	Business Name	Contact Name	Contact Number	Status	Submitted Date	Last Modified By	Last Modified Date
7546	2017 - 2018	OEL	AB	(850) 717-8599	Submitted	10/27/2016	abarber548@yahoo.com	10/27/2016

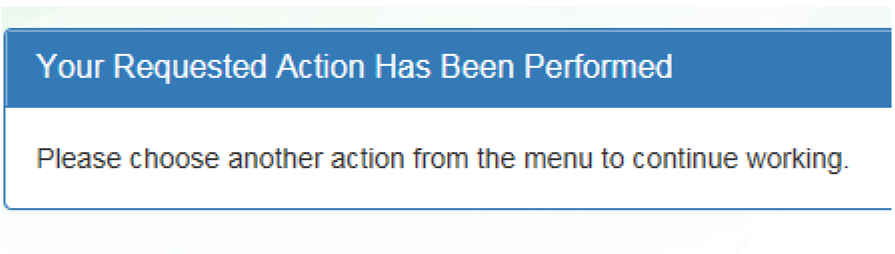
The Administrative Review page will display. Click the **Change Profile Status** button to change the profile status to **Coalition Reviewing**.



Then, click the **Save** button to continue.



Once the status is changed to **Coalition Reviewing**, the following page will display:



To begin the review process, the coalition user will go back to the Provider Profiles Quick Access Dropdown Queue, select **Coalition Reviewing**, and find the profile that was set to **Coalition Reviewing**.

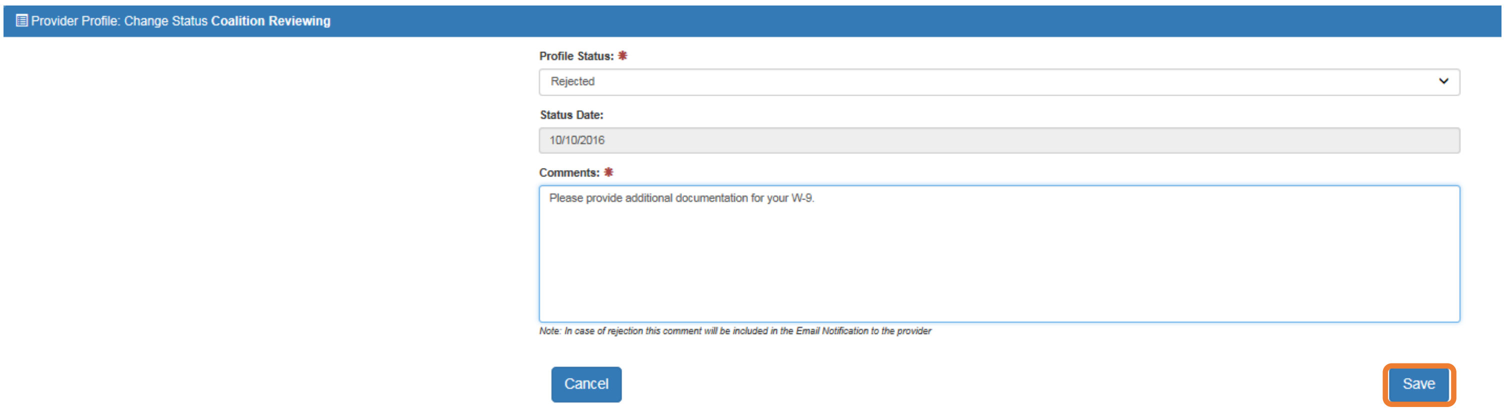
After coalition review, the profile can be changed to **Rejected**, **Inactive**, or **Active** status. If the profile does not have the information needed to determine if the provider is eligible for funding, the profile should be **Rejected**. If the provider is no longer providing School Readiness or Voluntary Prekindergarten services, the profile should be set to **Inactive**. If the coalition determines the provider is eligible to receive funding, the profile should be set to **Active**.

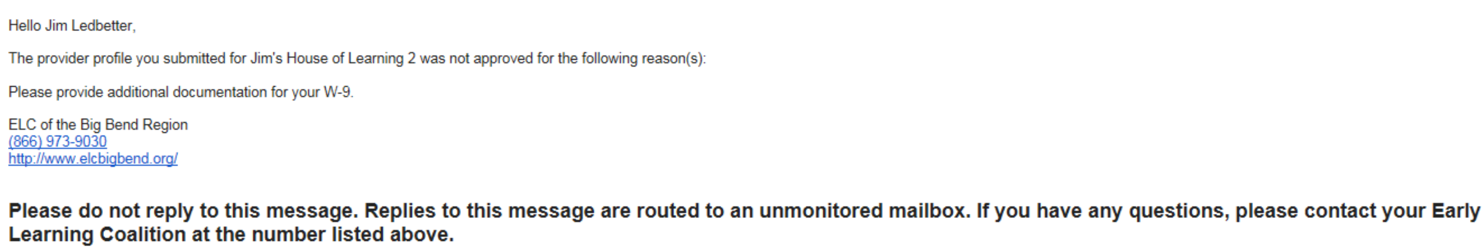
Rejected Status

To reject a profile, the coalition user must click the **Change Profile Status** button.

Once on the Change Profile Status page, select **Rejected** in the Profile Status dropdown menu.

Enter the reason for the rejection in the comments section; the comment will be included in the automated email sent to the Provider Portal user from **DONOTREPLY@oel.myflorida.com**. After entering all required fields, click **Save** to proceed.





Hello Jim Ledbetter,

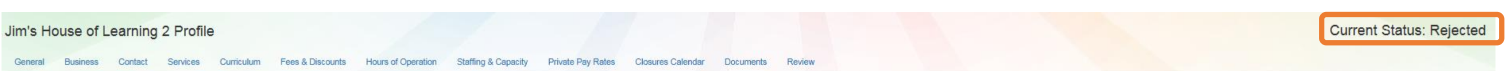
The provider profile you submitted for Jim's House of Learning 2 was not approved for the following reason(s):

Please provide additional documentation for your W-9.

ELC of the Big Bend Region
(866) 973-9030
http://www.elcbigbend.org/

Please do not reply to this message. Replies to this message are routed to an unmonitored mailbox. If you have any questions, please contact your Early Learning Coalition at the number listed above.

The status has been updated at the top of the review page.



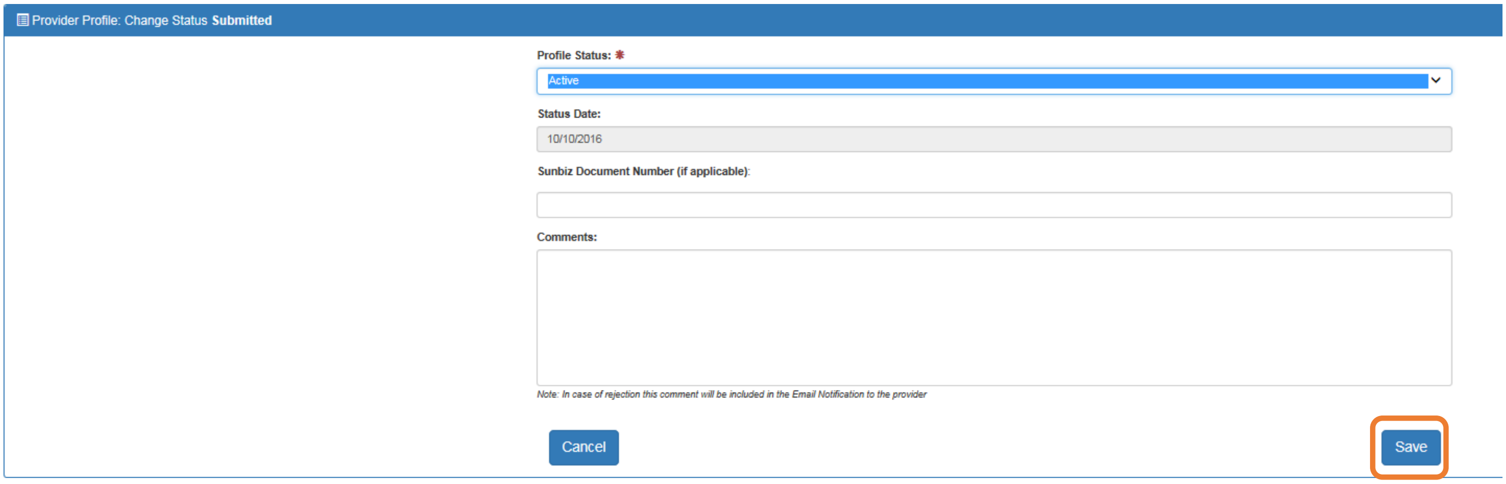
Once in **Rejected** status, the coalition user or coalition admin will not be able to edit the profile until the profile is resubmitted by the Provider Portal user.

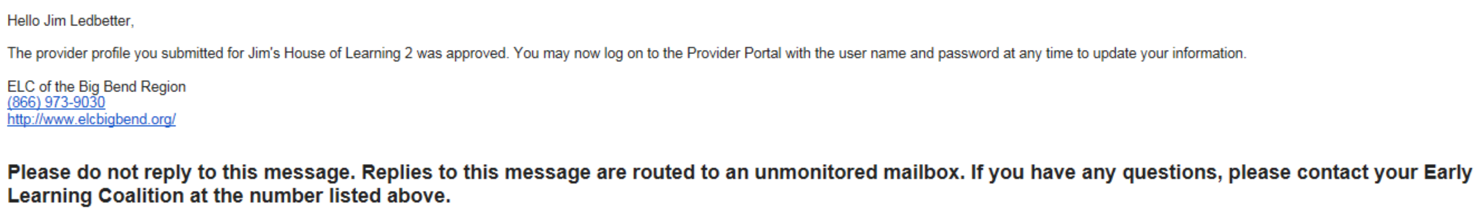
Active Status

To activate a profile, the coalition user must click the **<u>Change Profile Status</u>** button.

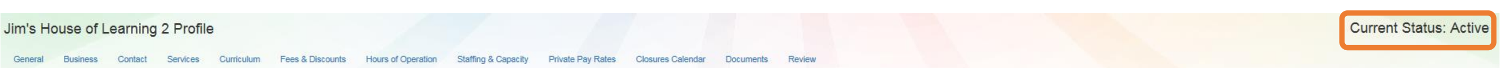
Once on the Change Profile Status page, select **Active** in the Profile Status dropdown menu.

An automated email will be sent to the Provider Portal user from **DONOTREPLY@oel.myflorida.com**. After entering all required fields, click **<u>Save</u>** to proceed.



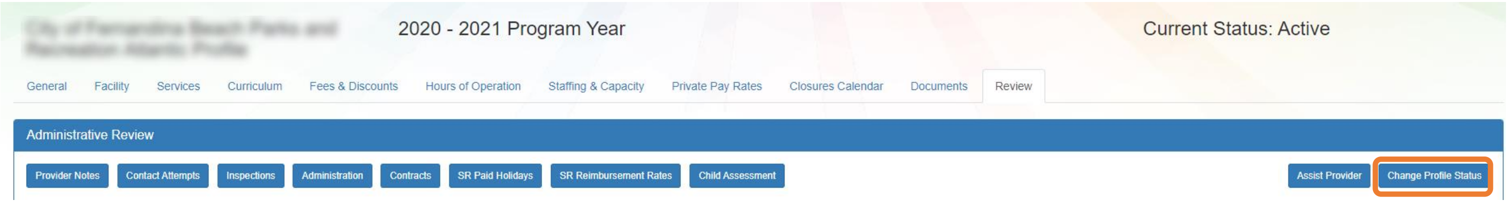


The status has been updated at the top of the review page.

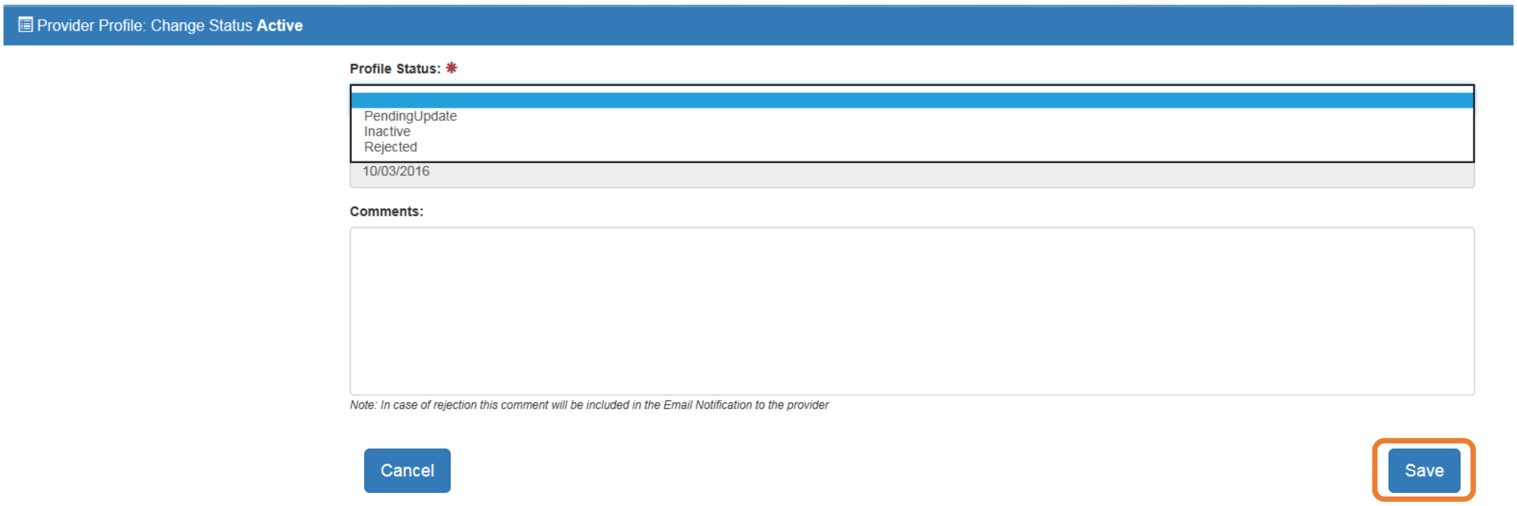


Changing Profile Status

Once the coalition user is ready to update the status of a profile, click the **<u>Change Profile Status</u>** button.



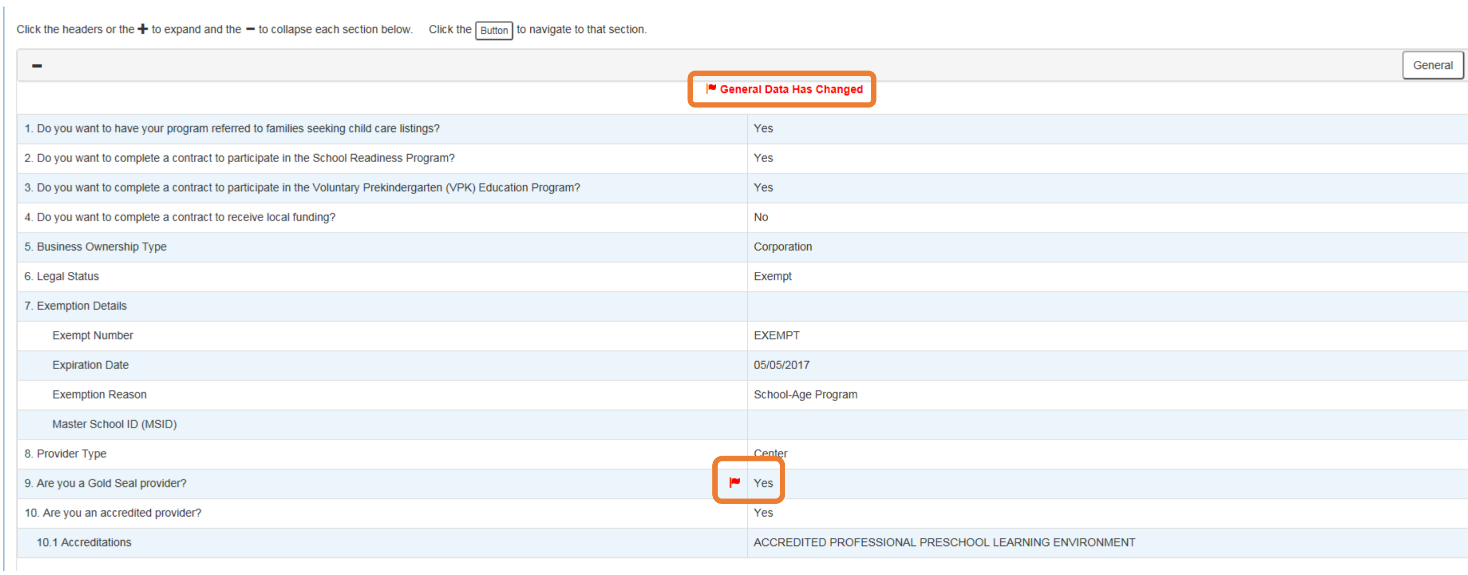
Once the new status is selected, the coalition user has the ability to add a comment and click the **<u>Save</u>** button.



Provider Profile Edits

After a provider profile has been set to Active status, if the provider makes a change and re-submits the profile, a notification will appear on the Administrative Review page to notify the coalition user that a change has been made to a profile section.

To see what specific answer has changed, expand the section that has the red flag and another red flag will show what answer has changed.



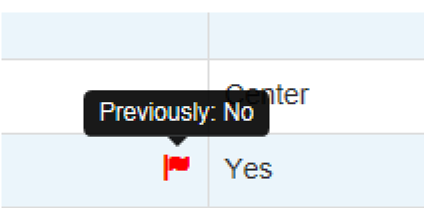
Click the headers or the + to expand and the − to collapse each section below. Click the Button to navigate to that section.

General

General Data Has Changed

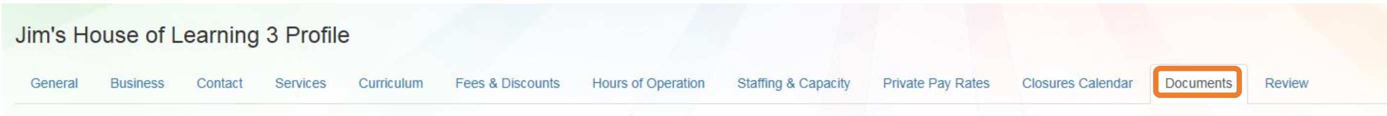
1. Do you want to have your program referred to families seeking child care listings?	Yes
2. Do you want to complete a contract to participate in the School Readiness Program?	Yes
3. Do you want to complete a contract to participate in the Voluntary Prekindergarten (VPK) Education Program?	Yes
4. Do you want to complete a contract to receive local funding?	No
5. Business Ownership Type	Corporation
6. Legal Status	Exempt
7. Exemption Details	
Exempt Number	EXEMPT
Expiration Date	05/05/2017
Exemption Reason	School-Age Program
Master School ID (MSID)	
8. Provider Type	Center
9. Are you a Gold Seal provider?	Yes
10. Are you an accredited provider?	Yes
10.1 Accreditations	ACCREDITED PROFESSIONAL PRESCHOOL LEARNING ENVIRONMENT

To see what the previous answer was, hover over the red flag.

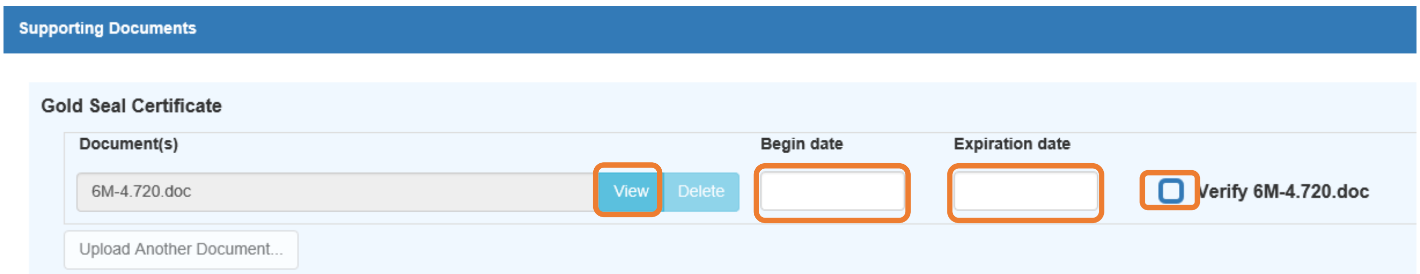


Verifying Documents

Provider documents can be verified and have a begin date and expiration date added by clicking the **Documents** tab from the Administrative Review page.



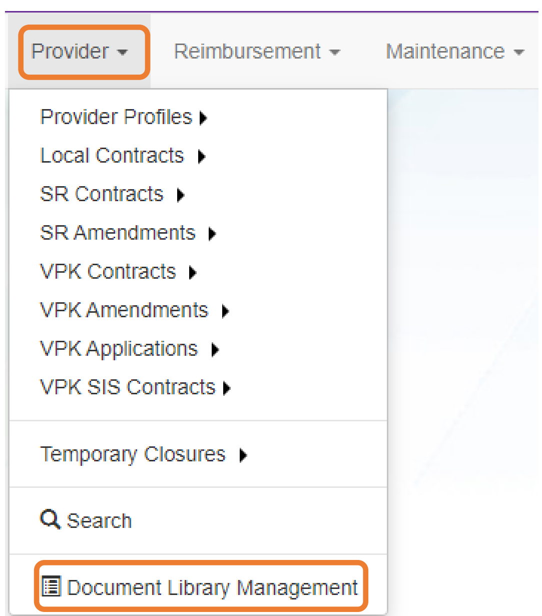
A coalition user will then view the document by clicking the **View** button, complete the Begin date and Expiration date for the document, and verify the document by clicking the check box. A coalition user can re-verify a document for a subsequent contract year even if the document was verified in the previous contract year.



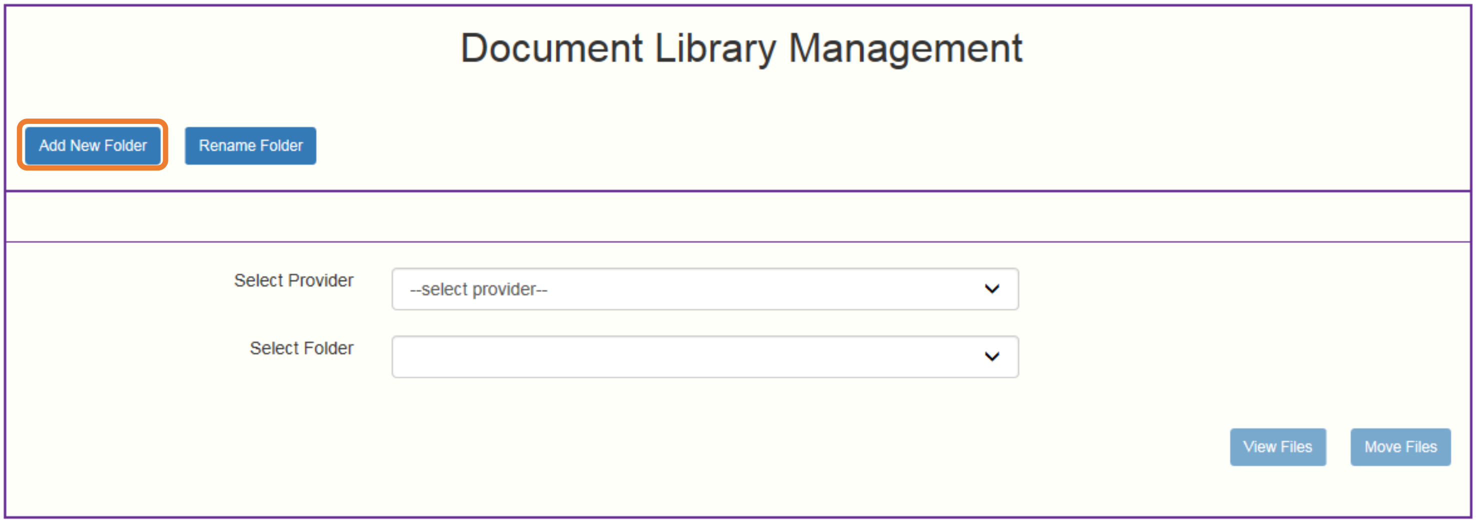
Document Library Management

The Document Library Management function allows a coalition user to review documents uploaded to the Provider Profile.

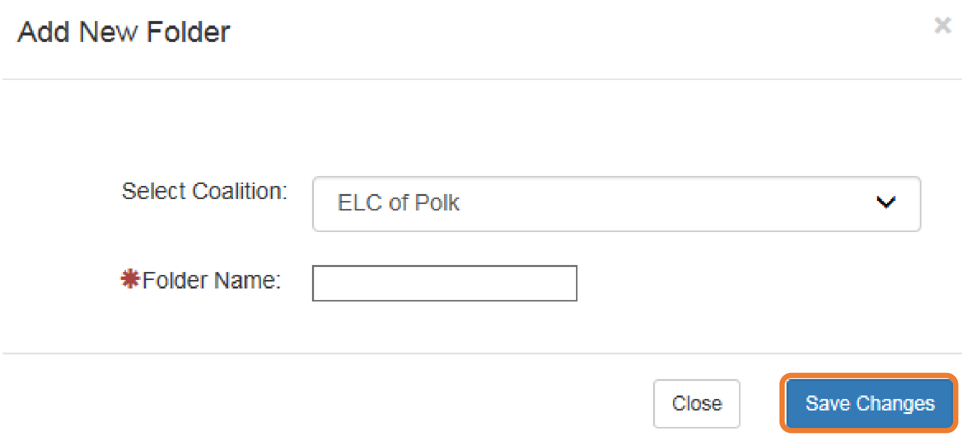
To access the Document Library Management function, coalition users will click the **Provider** button and then **Document Library Management**.



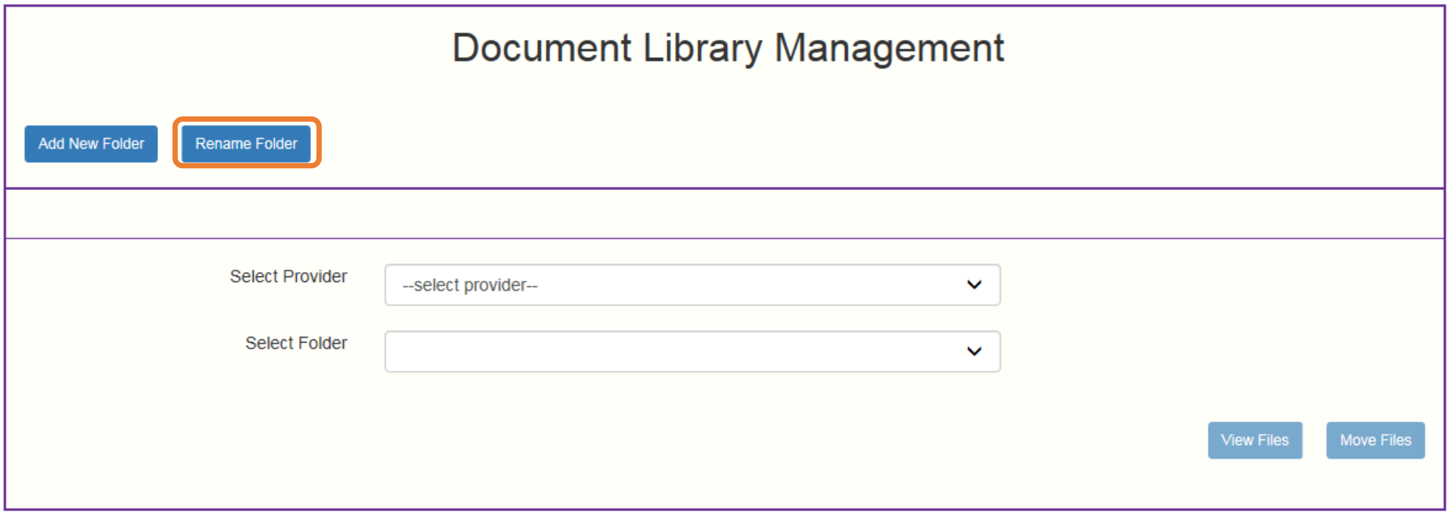
The folder list is standard for all providers, but a coalition-specific folder can be added. To add a new folder, coalition users will click the **Add New Folder** button.

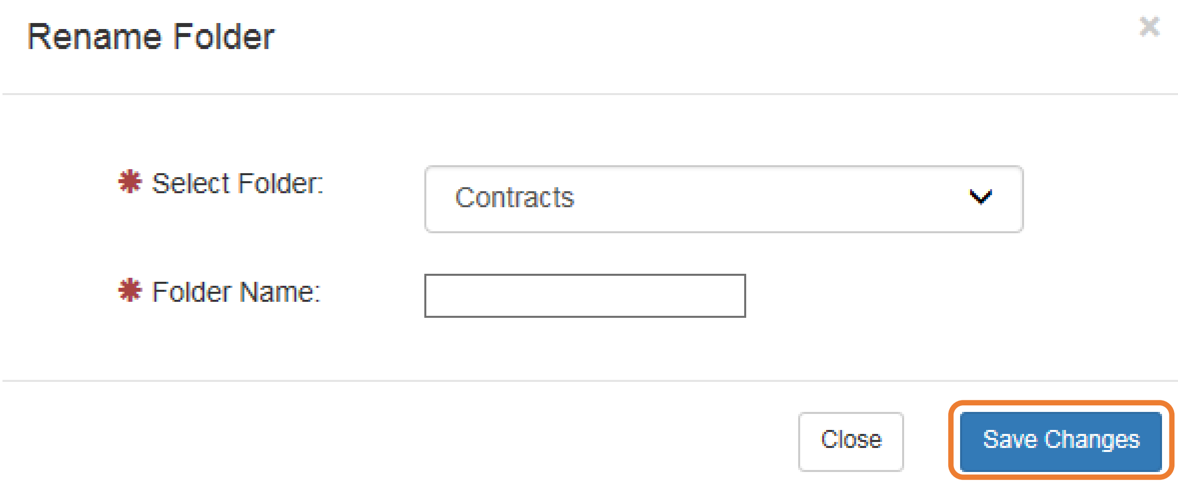


The coalition user will then create the new folder name and click the **Save Changes** button.



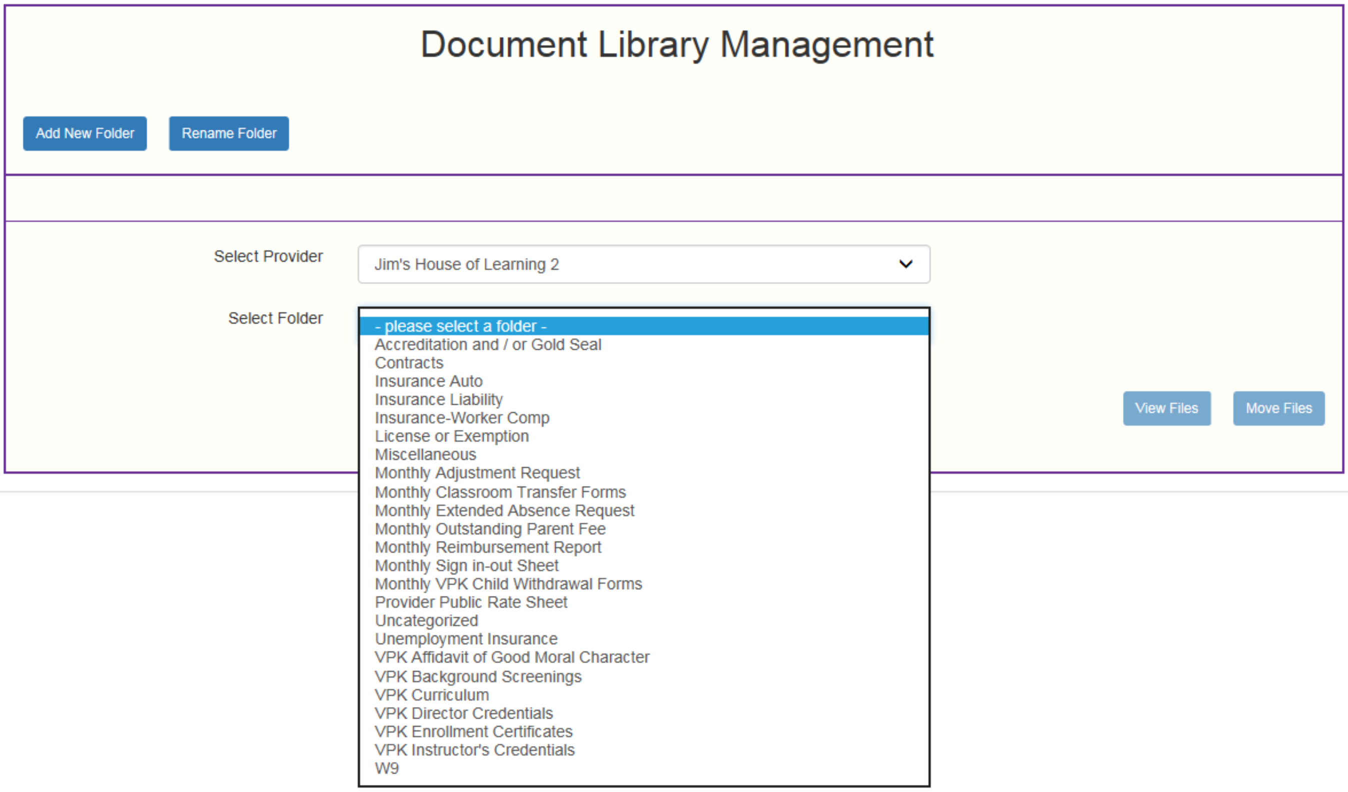
To rename a folder that is not predefined, coalition users will click the **Rename Folder** button.



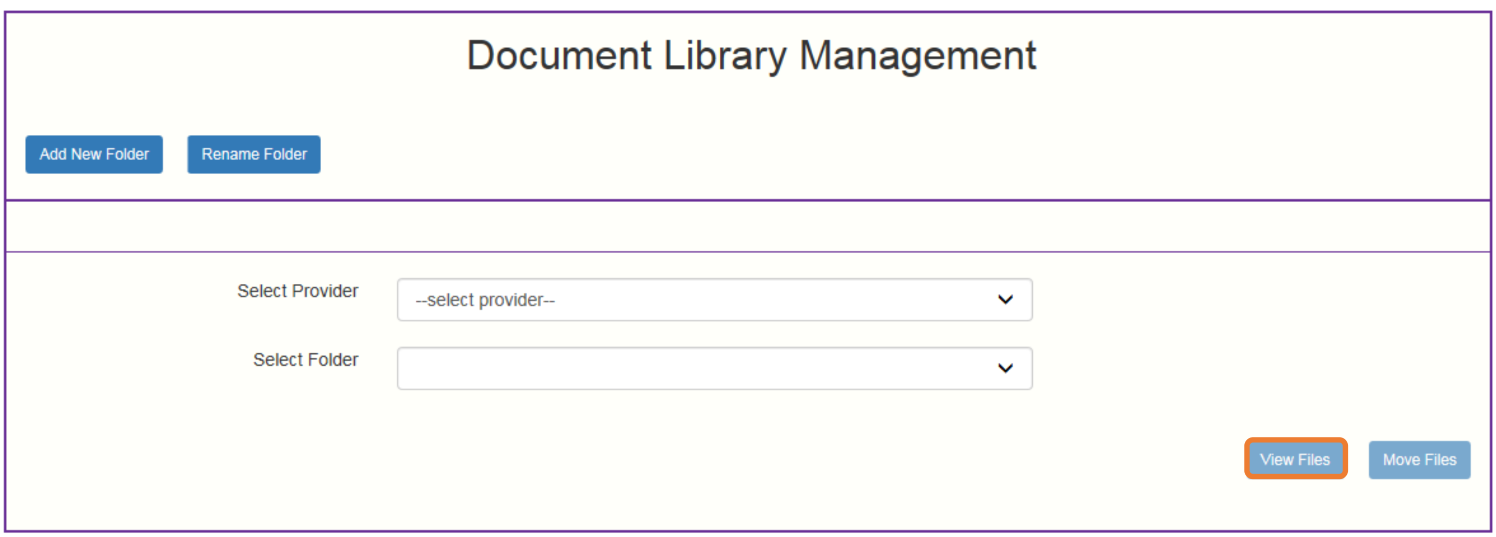


The coalition user will then select the folder, rename the folder and click the **Save Changes** button.

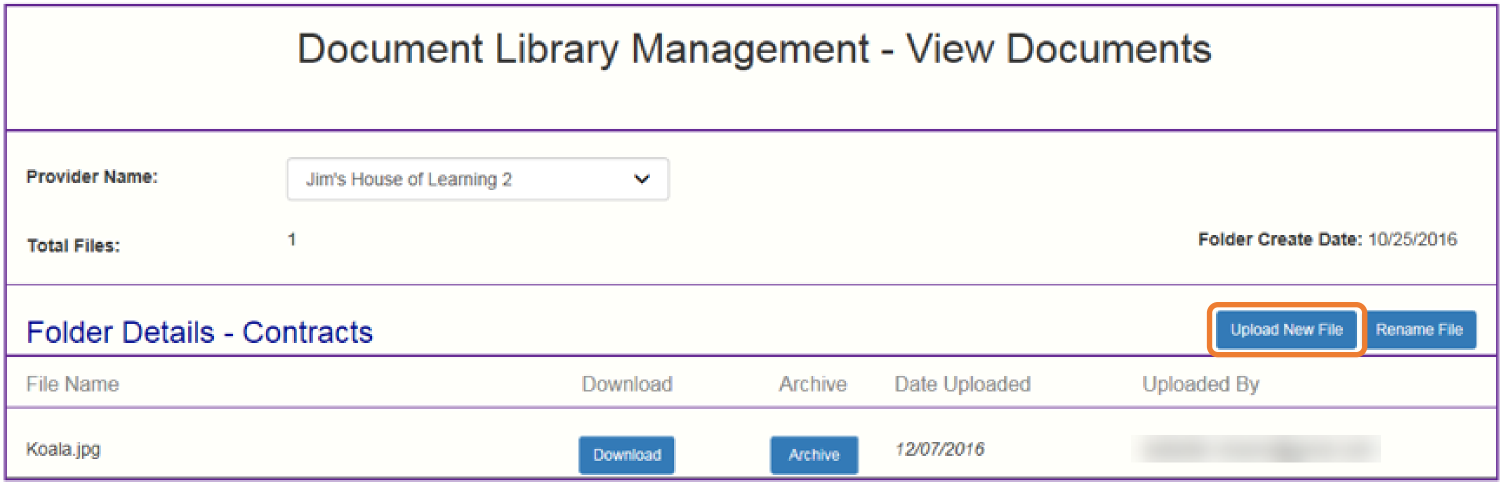
The folder list is standard for all coalitions.

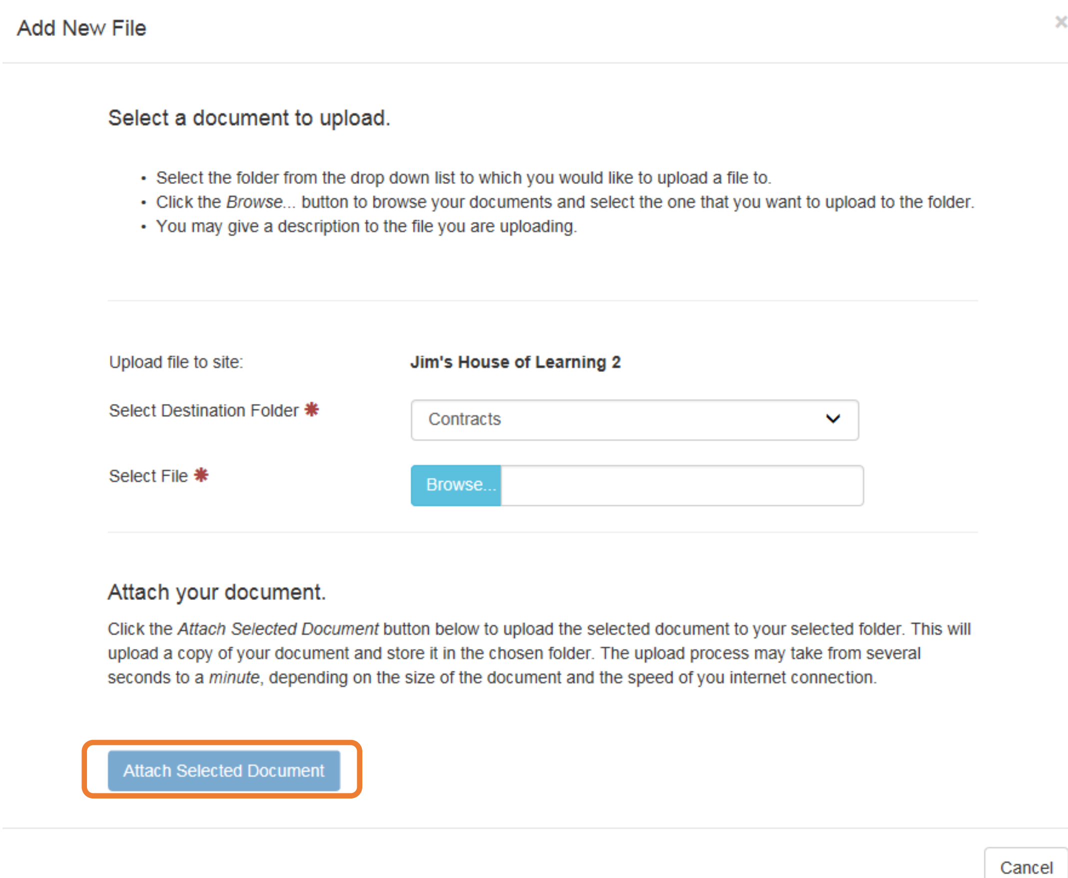


Coalition users can view a provider's documents by selecting a provider and folder, then clicking **View Files**.

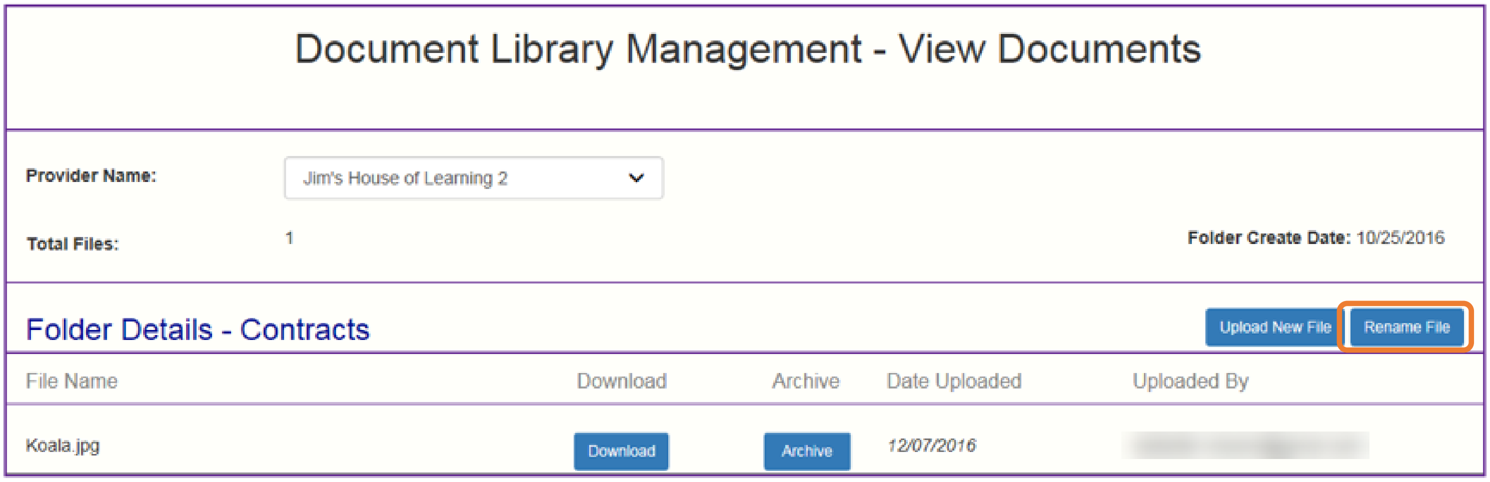


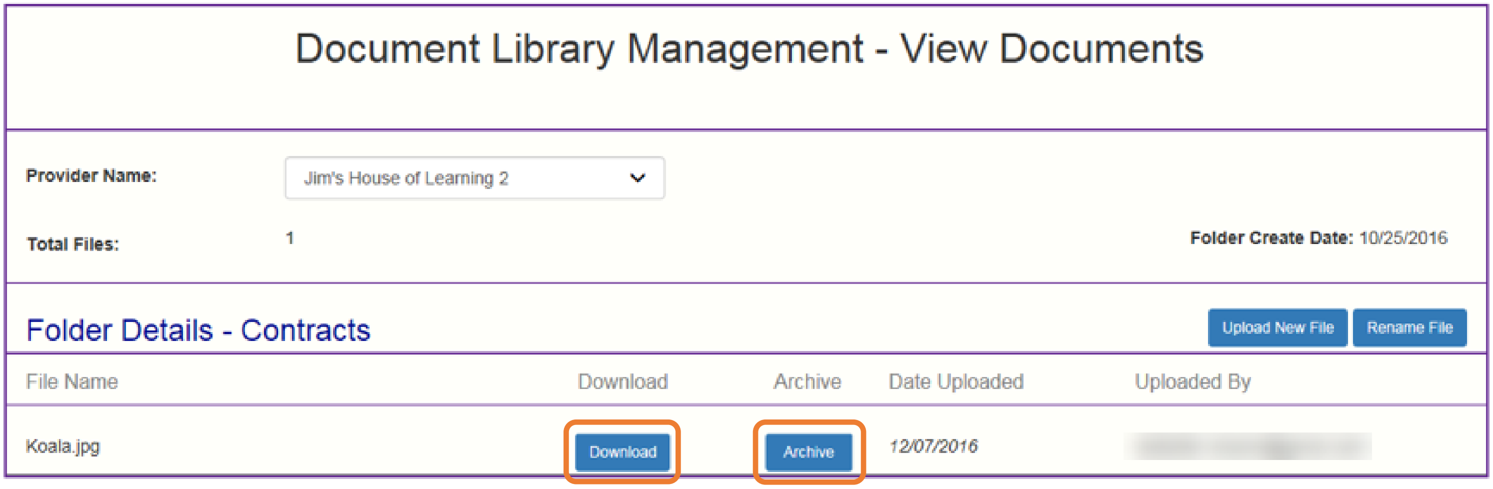
Coalition users can upload a new file to a provider's folder by clicking the **Upload New File** button, browsing for the file and clicking the **Attach Selected Document** button to complete the upload.





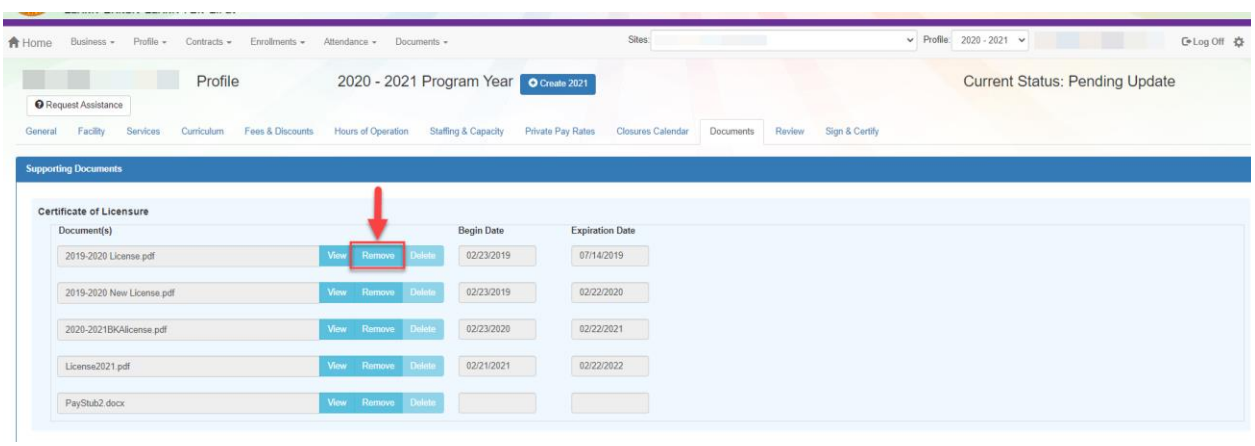
Coalition users can rename a file in a provider's folder by clicking the **Rename File** button, selecting the file, inserting a new file name and clicking the **Save Changes** button.





Coalition users can download or archive a document in a provider's folder by clicking the **Download** or **Archive** button, respectively. If the provider has reached the maximum number of documents allowed on the Profile Documents tab, archiving documents will free up room to allow additional documents to be uploaded for coalition verification.

Providers can also archive documents by clicking the **Remove** button to remove a document from the profile documents screen and archive it in the appropriate Document Library Management folder.



Provider Address Changes

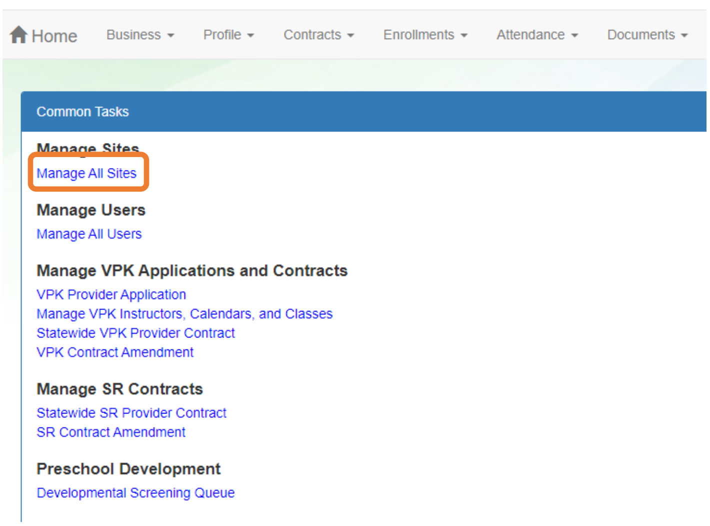
If a provider has a change to the facility address, there are several scenarios to consider, based on whether a new DCF license number is created.

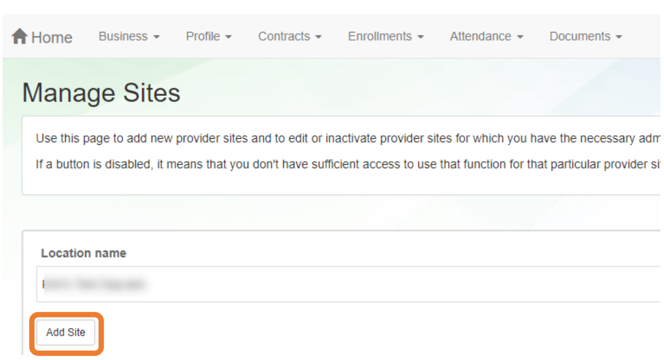
- Scenario 1: NEW DCF license number/local licensing number/registration number, SAME owner
- Scenario 2: NEW DCF license number/local licensing number/registration number, NEW owner **OR** SAME DCF license number/local licensing number/registration number, NEW owner not already in EFS Mod
- Scenario 3: SAME DCF license number/local licensing number/registration number, NEW owner already in EFS Mod

Scenario 1

A provider is opening a new provider facility/site, or a facility/site is moving, but the owner is the same.

If the provider has a change to the Facility Address and a new DCF license number/local licensing number/registration number is assigned, the provider will create a new site by clicking the Manage All Sites link on the Provider Dashboard, then click the **Add Site** button. They will then fill out the new facility information. This will create a new Provider ID, but keep the new facility under the same EIN/SSN and Principal ID.





All contracts under the old facility will need to be terminated and initiated under the new profile and Provider ID.

If the Facility Address and the Business Address (Principal Address) are the same and both need to change, please submit a Service Desk ticket so a data fix can be completed. Please indicate if the Mailing Address and Payment Mailing Address are also changing, along with the Facility Address and Business Address (Principal Address). The Business tab can have different addresses for the Business Address (Principal Address), Mailing Address, and Payment Mailing Address.

Scenario 2

A provider is opening a new provider facility/site under a new owner or different EIN/SSN **OR** same DCF license number/local licensing number/registration number and a new owner not already in EFS Mod.

If a new provider facility/site is opening under a new owner, which means a new DCF license number/local licensing number/registration number AND a new EIN/SSN and Principal ID, the provider will need to create a new Provider Portal account by going to https://providerservices.floridaearlylearning.com/Account/Register and entering the new information. This new information will generate a new Principal ID and new Provider ID.

This scenario is also applicable if a provider facility/site has an ownership change, the DCF license number/local licensing number/registration number is the same, but the new owner does not already have a provider facility/site in EFS Mod.

Scenario 3

A provider facility/site has an ownership change, the DCF license number/local licensing number/registration number is the same, and the new owner already has a provider facility/site in EFS Mod.

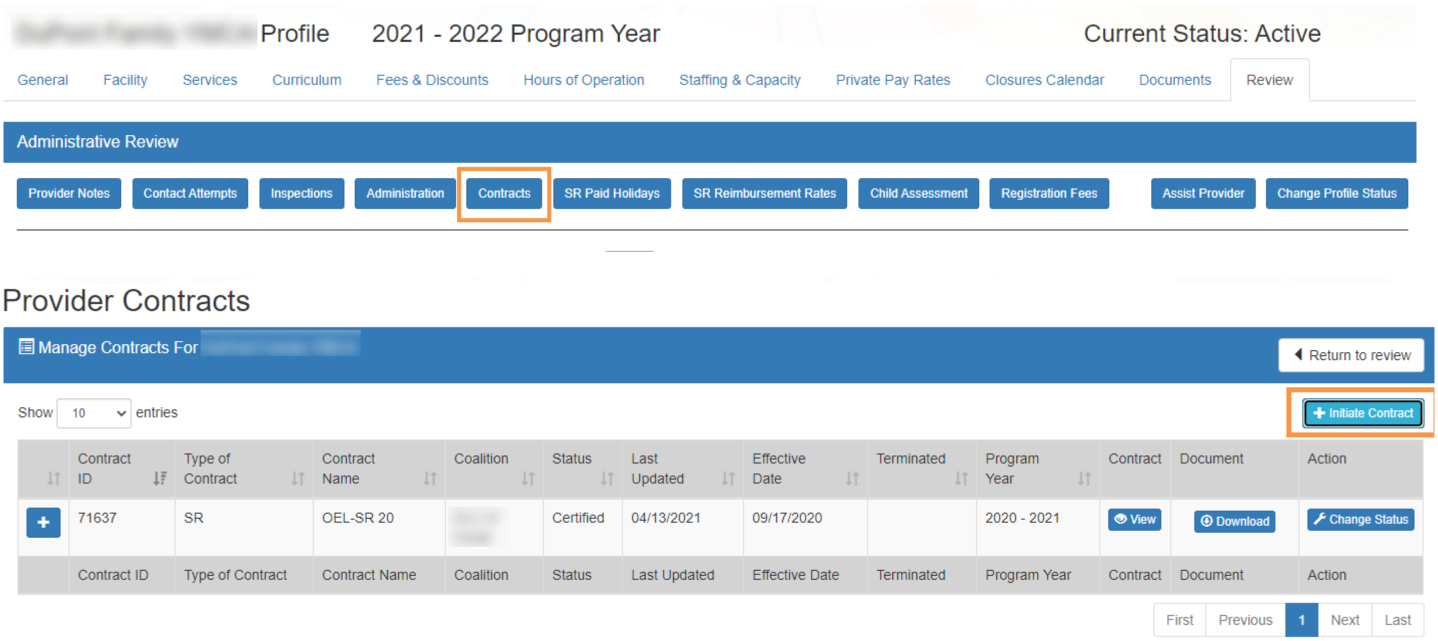
Please submit a Service Desk ticket to change the Principal ID and EIN/SSN from the old owner to the new owner.

Provider Contracting

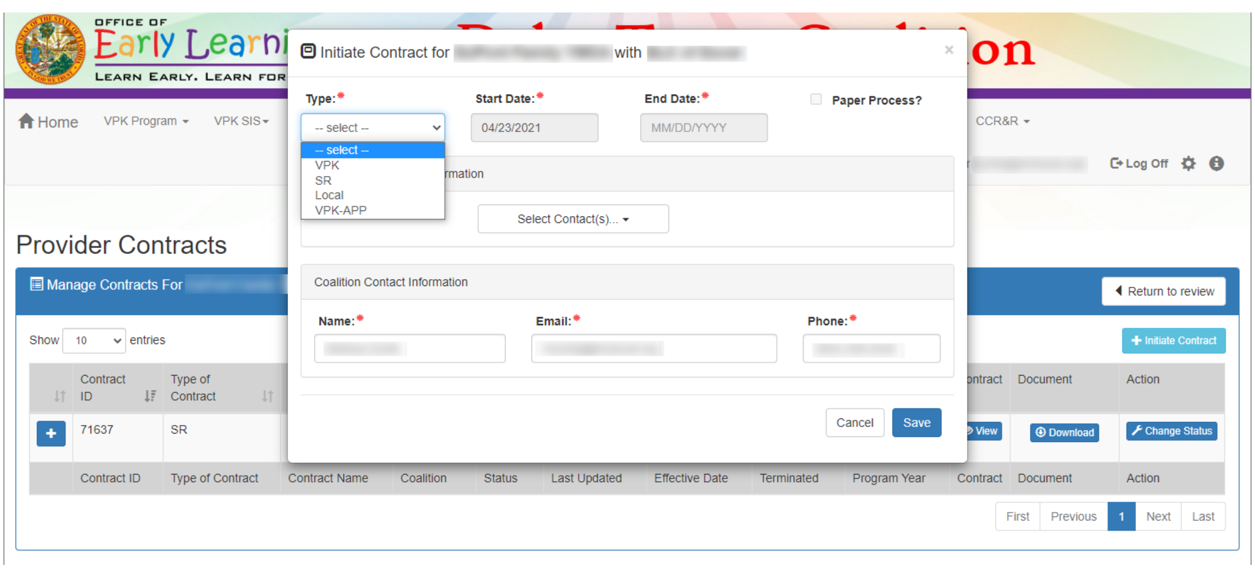
Prior to initiating SR contracts for a program year, the coalition must establish the SR Plan Rates (under **Admin Functions > Rates Management > SR Plan Rates**) and the SR Holiday Schedule (under **Admin Functions > Calendar Management > SR Holiday Schedule**).

Initiating a Contract

Only providers with an Active profile are eligible to have an electronic contract initiated, and only coalition admins have the ability to initiate a contract. On the provider Administrative Review page, the coalition admin must click the **Contracts** button, then, on the manage contracts page, click the **+Initiate Contract** button.

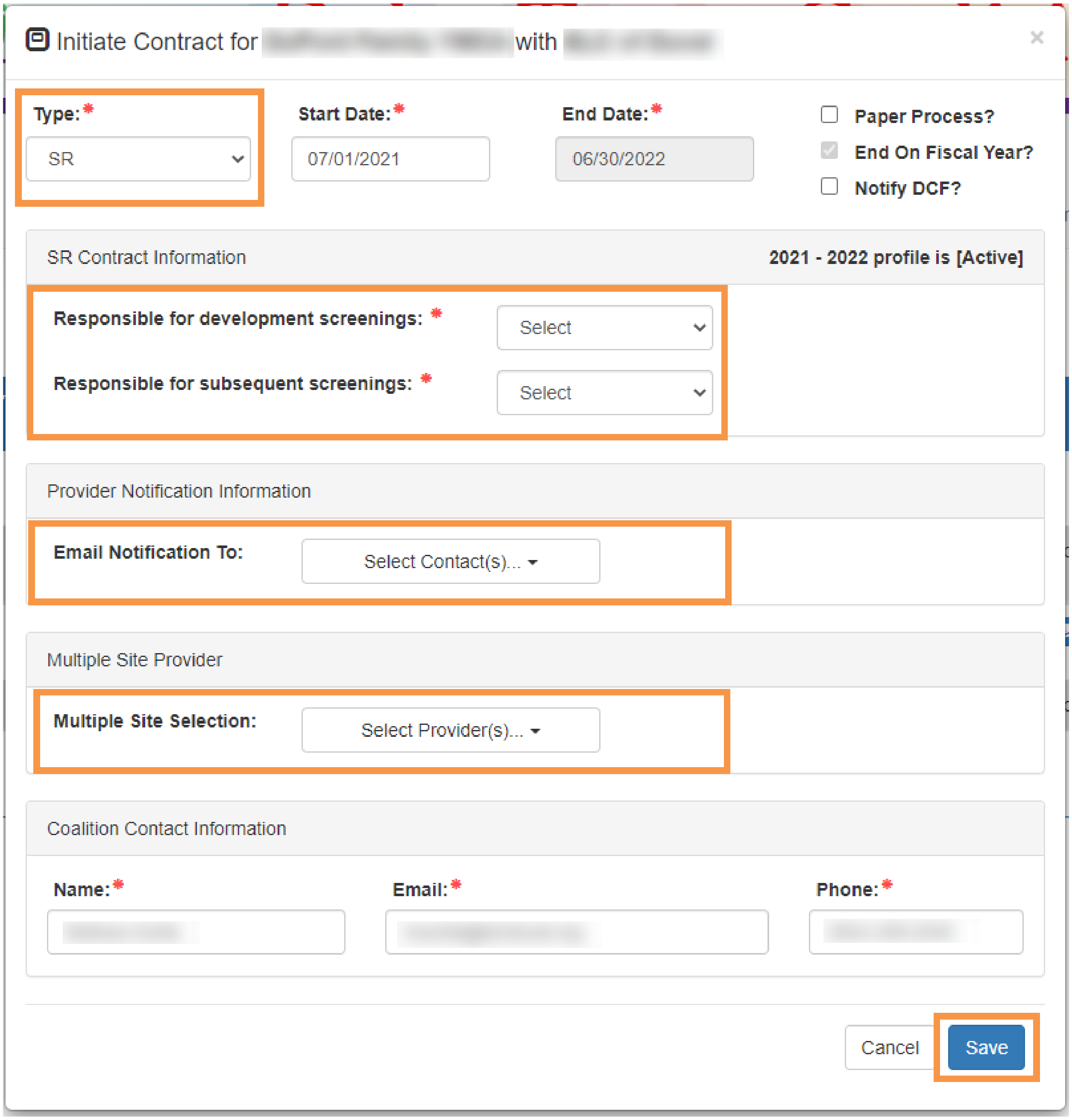


Select a contract type from the **Type** dropdown menu.

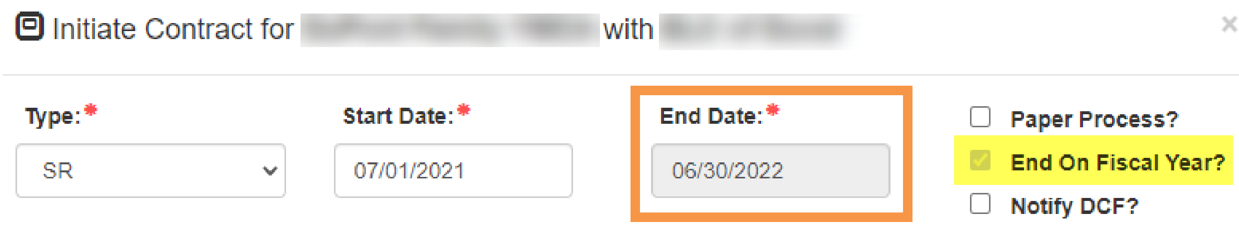


SR Contract

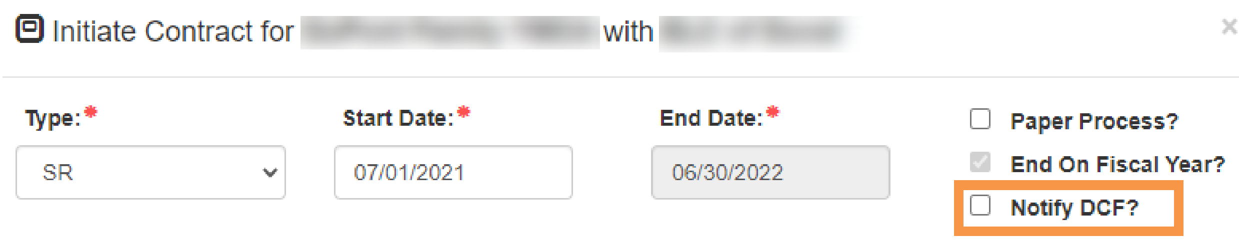
SR contracts will default to an electronic process. Paper contracts cannot be created for SR. Select the start date (cannot be a date in the past), select the responsible parties for development screenings and subsequent development screenings, select notification recipient(s), select multiple sites (if needed), and update the coalition contact information (if needed).



The contract end date defaults to the end of the fiscal year.

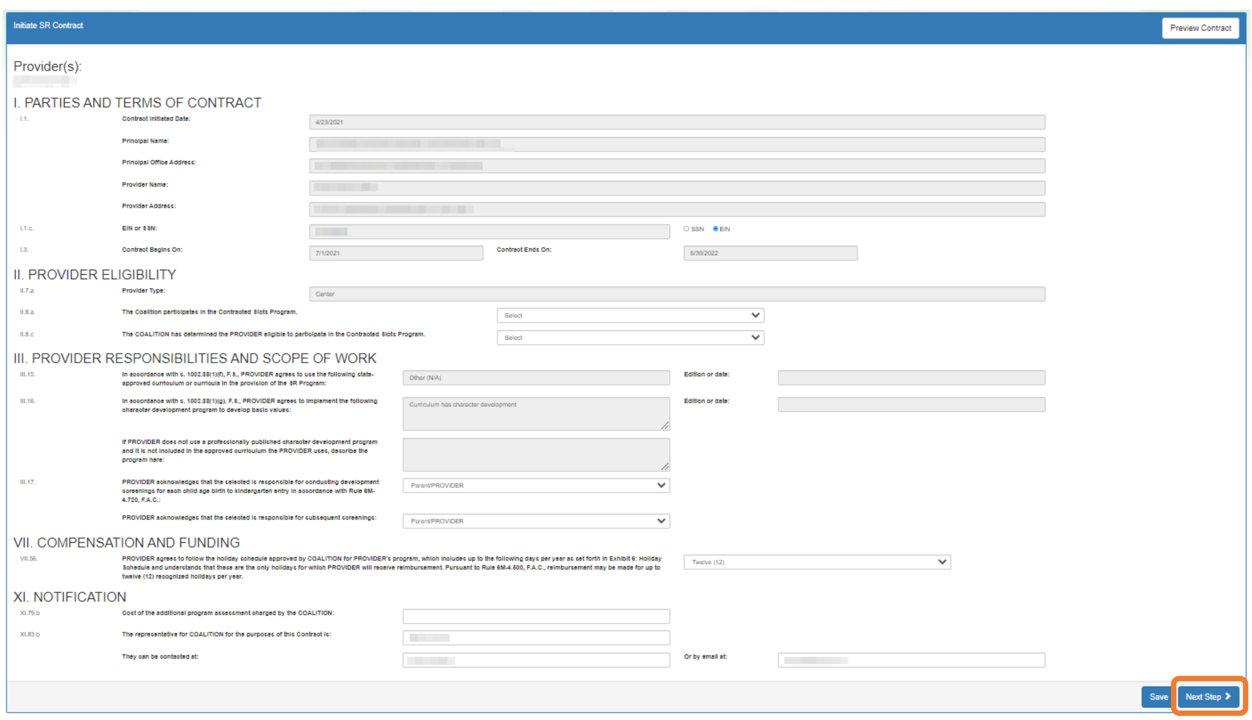


The coalition can elect to have DCF notified of a contract initiation process. DCF will also then receive notifications of a certified and terminated contract.



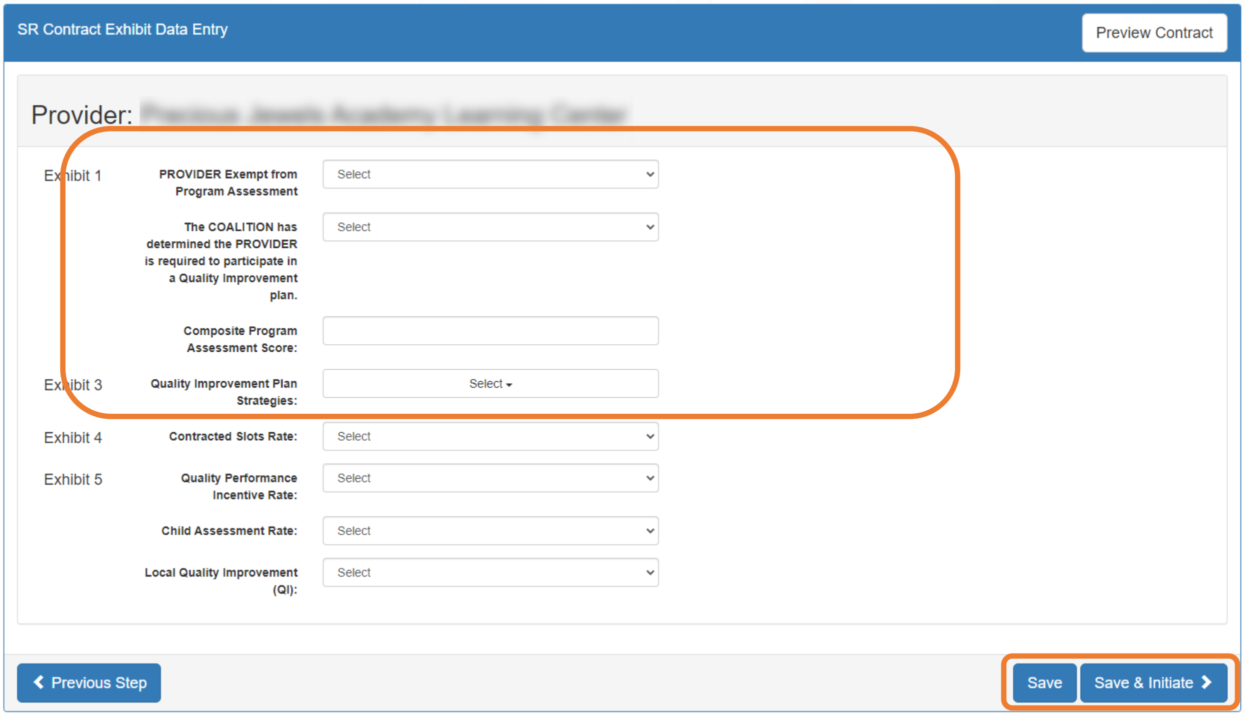
When the fields are completed, click the **Save** button.

After the **Save** button is clicked, the following data entry page displays. Select the EIN or SSN radio button and complete the fields (all are required), then click **Next Step**.

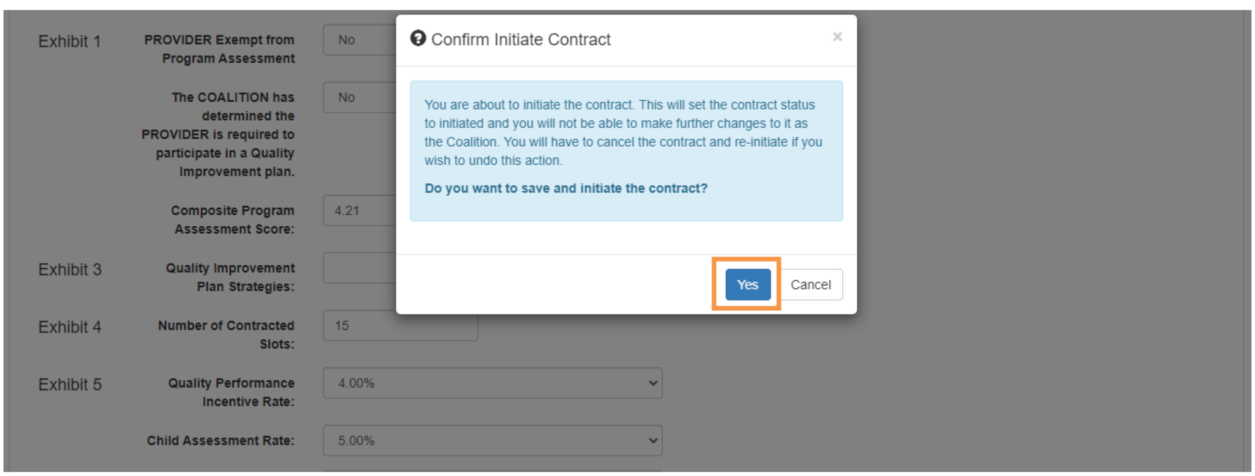


After clicking **Next Step**, the following data entry page displays. Select from the dropdown fields, then click **Save & Initiate**.

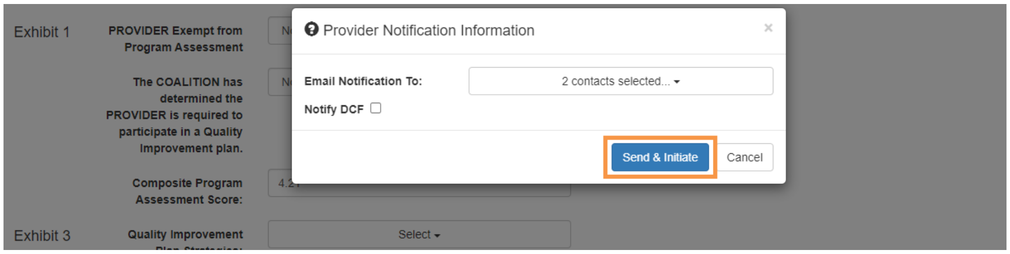
NOTE: The same Quality Improvement Plan Strategies cannot be selected.



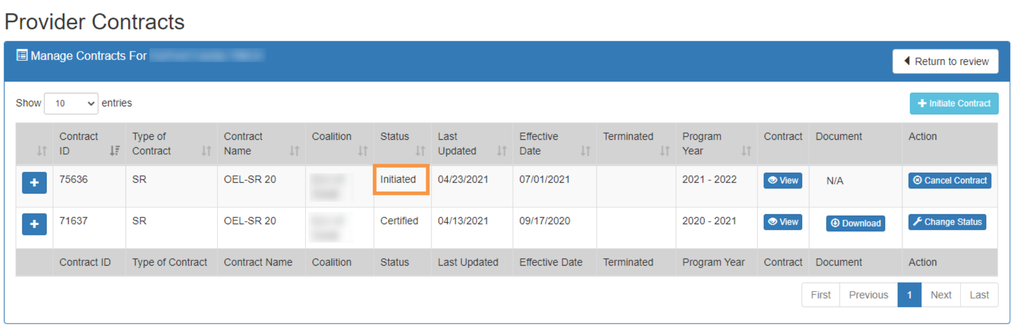
After clicking the **Save & Initiate** button, the following displays. Click **Yes** to continue.



After clicking **Yes**, the following displays. Select email address recipient(s) from the **Email Notification To:** dropdown, then click **Send & Initiate**.

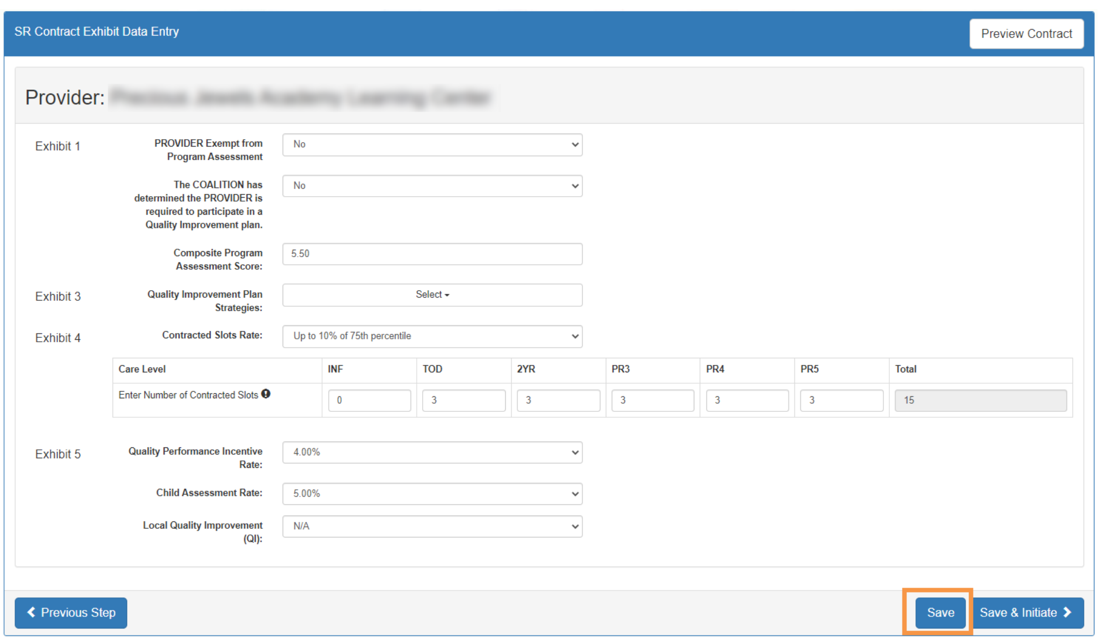


Navigate to the provider manage contracts page. The SR contract has a status of Initiated and is available on the provider portal for the provider to edit.



Edit a Drafted Contract

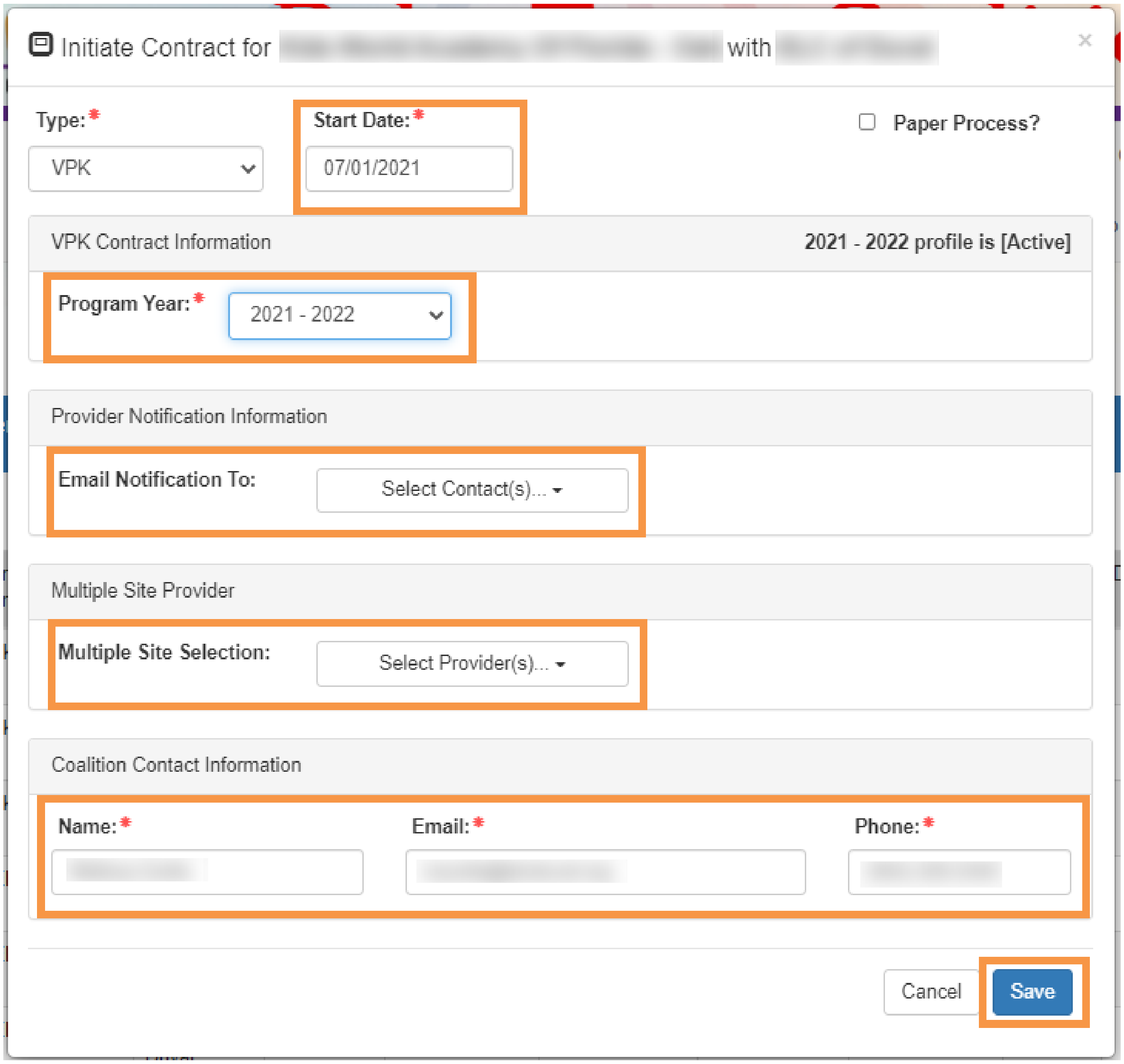
After completing all fields on the exhibit data entry page, if the coalition user clicks the **Save** button instead of the **Save & Initiate** button and exits contract initiation, the contract is given a **"Drafted"** status.



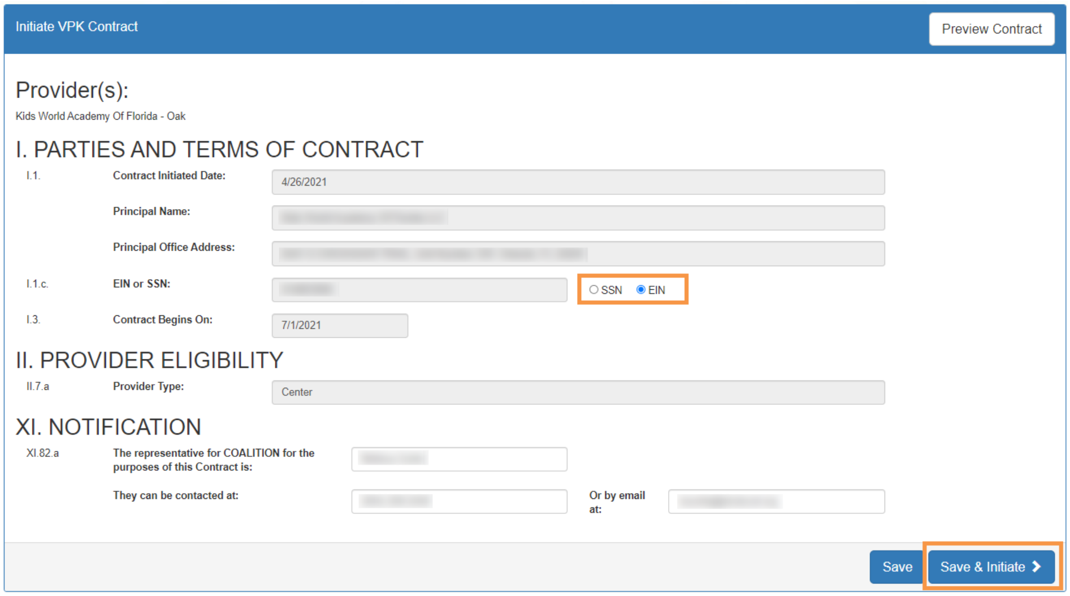
To edit a **"Drafted"** contract, navigate to the provider manage contracts page. Click the **Edit Draft** button for the drafted contract.

VPK Contract

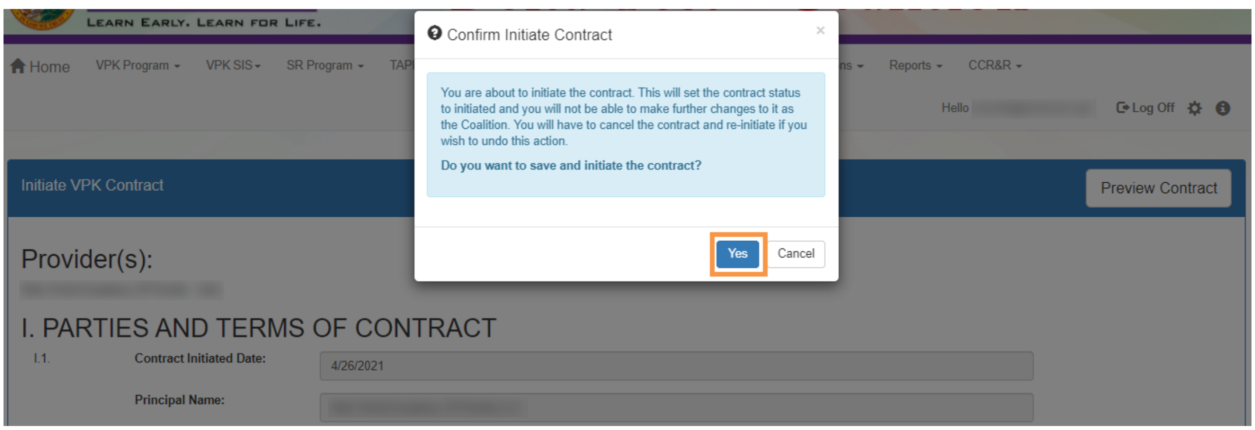
VPK contracts will default to an electronic process. Paper contracts cannot be created for VPK. Select the program year, start date, select notification recipient(s), select multiple sites (if needed), and update the coalition contact information (if needed). Then click the **Save** button.



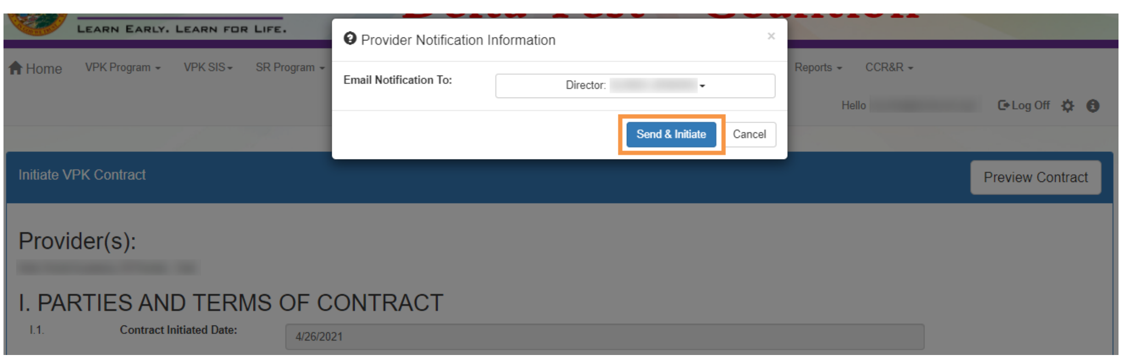
After the **Save** button is clicked, the following page displays. Select the EIN or SSN radio button. Update the coalition representative contact information (if needed). Then click **Save & Initiate**.



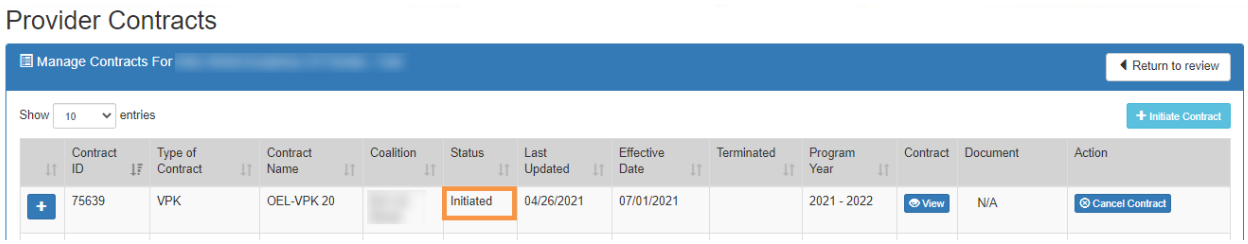
After clicking the **Save & Initiate** button, the following message displays. Click **Yes** to continue.



After clicking **Yes**, the following displays. Select email recipient(s) from the **Email Notification To:** dropdown, then click **Send & Initiate**.

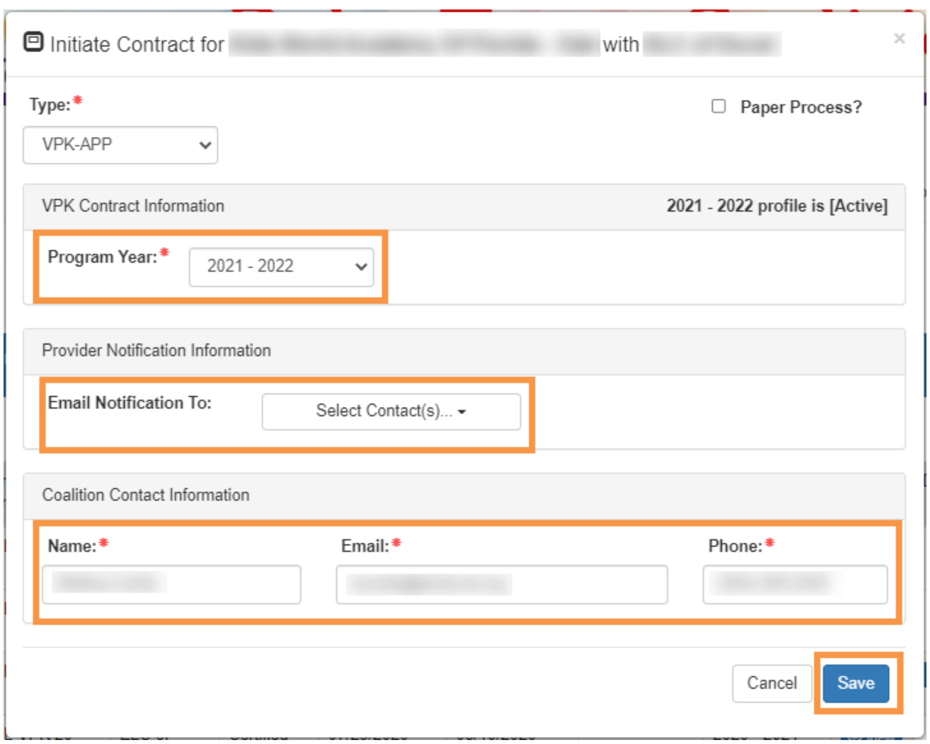


Navigate to the provider manage contracts page. The VPK contract has a status of **Initiated** and is available on the provider portal for the provider to edit.

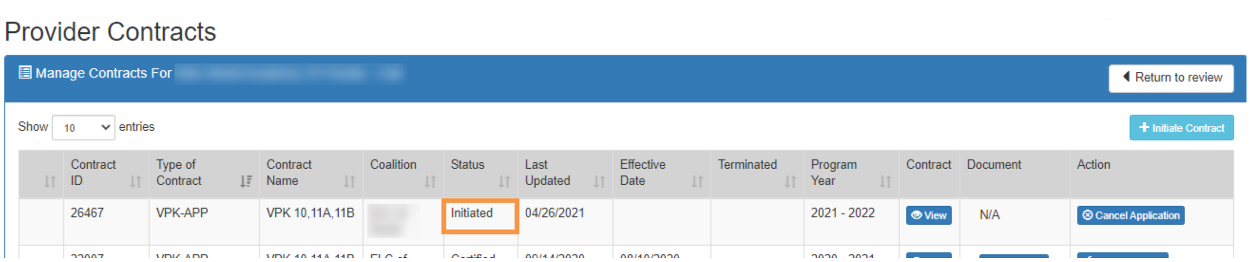


VPK-APP

VPK-APPs (VPK Provider Applications) – the VPK 10, VPK 11A, and VPK 11B – will default to an electronic process. Paper contracts cannot be created for VPK-APPs. Select the program year, notification recipient(s), and update the coalition contact information (if needed). Then click the **Save** button.



The VPK-APP has a status of **Initiated** and is available on the provider portal for the provider to edit.

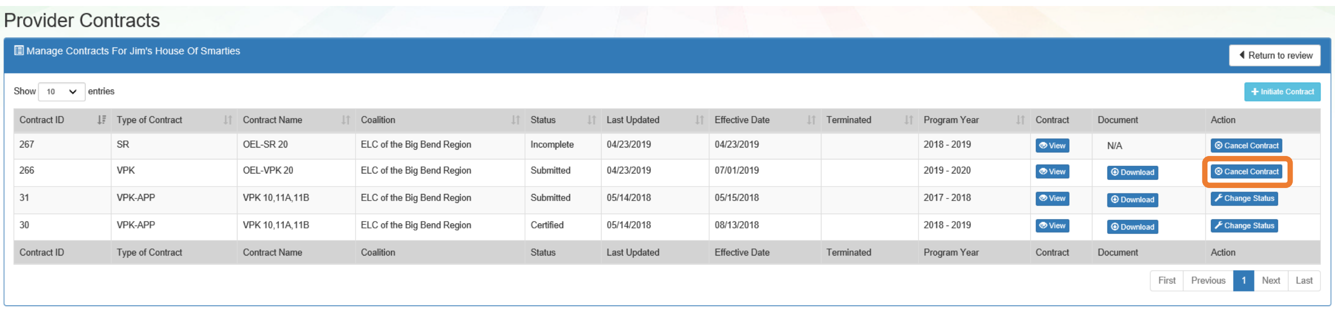


School Board/District Contracts

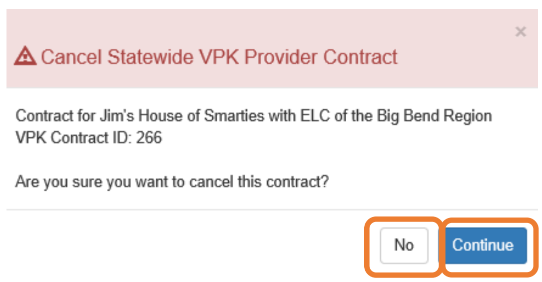
For SR and VPK contracts with a school board/district, the contract can be downloaded as a .pdf and printed.

Cancelling a Contract

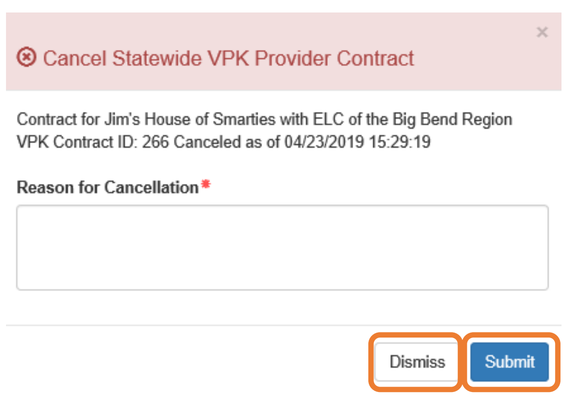
A VPK Provider Application, VPK Contract or SR Contract can be cancelled if the contract status is **Initiated, Incomplete, Submitted, Coalition Reviewing or Reviewed.** The only statuses when a contract cannot be cancelled is **Rejected** or **Certified**. To cancel a contract, click the **Cancel** button. The below example is for cancelling a VPK Provider Application, so the button reads **Cancel Application**. If a VPK Contract or SR Contract is cancelled, the button will read **Cancel Contract**.



After clicking the **Cancel Application** button, the following message will display. Click the **No** or **Continue** button.

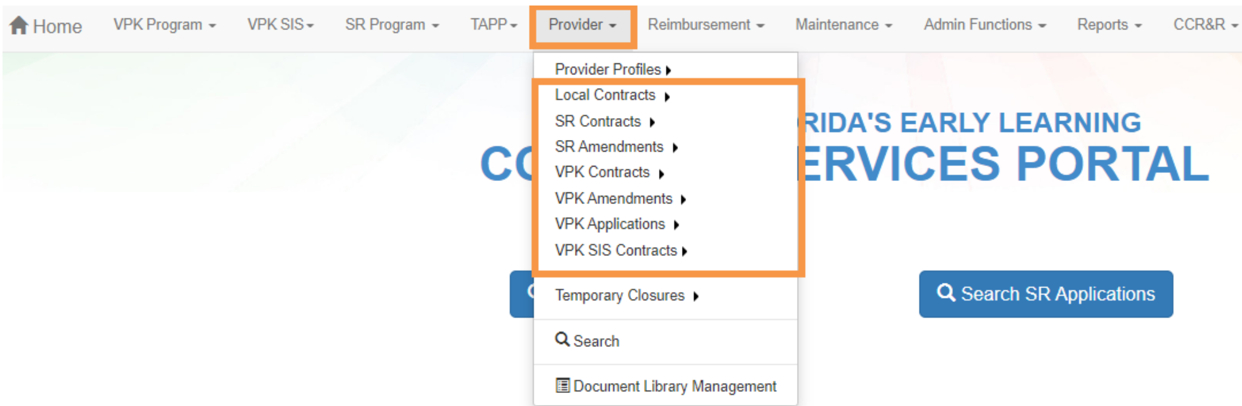


After clicking the **Continue** button, the following message will display. Enter a reason, and click the **Submit** button. Click the **Dismiss** button to not cancel the application/contract.

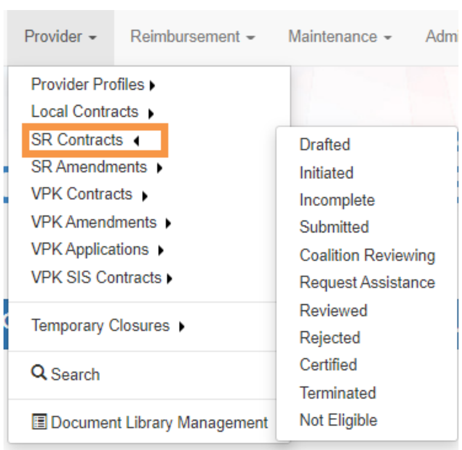


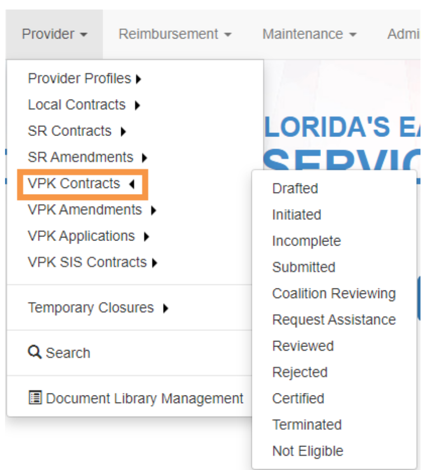
Processing a Contract

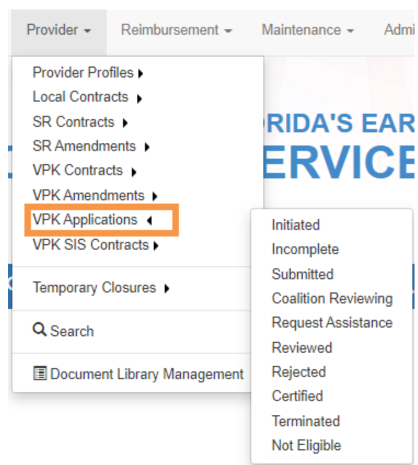
Select any of the contract options from the **Provider** dropdown menu to see a list of contracts with the selected status.



SR, VPK and VPK Provider Application contracts share most of the same contract statuses, while Local contracts have a limited number of statuses.







Contract Status Definitions

Drafted

The coalition has started the provider contract process for a provider with an **Active** profile.

Initiated

The coalition has edited the provider contract draft, and the contract has been sent to the provider.

Incomplete

The provider has started, but not submitted, a contract.

Submitted

The authorized provider representative has electronically signed the contract and has submitted it to the coalition to be certified.

Coalition Reviewing

The coalition is actively reviewing the contract.

Request Assistance (not yet available)

The provider has requested assistance to complete the contract.

Reviewed

The coalition has reviewed, but not certified, the contract.

Rejected

The contract has missing or incorrect information that is necessary to approve the contract. Rejecting a contract will allow the provider to correct contract inputs that occurred during the contract edit process (such as signatures). Data that are populated in the contract from the provider profile cannot be changed by rejecting the contract. This information has to be corrected in the provider profile. Then, a new contract will need to be initiated to gather the new profile information.

Certified

The authorized coalition representative has signed and certified the contract, and the provider is ready to provide early learning services.

Terminated

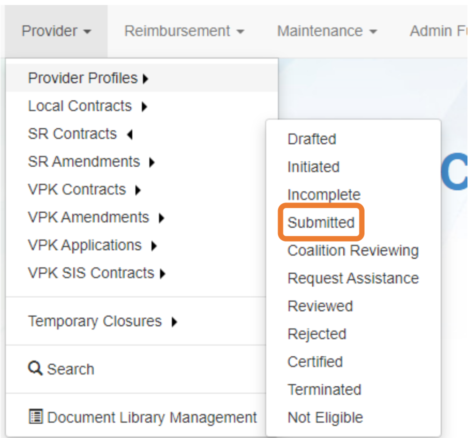
The coalition or provider, for one of several reasons, has revoked a provider contract: inactive provider, termination for cause, termination for fraud, emergency circumstances or provider decision.

Not Eligible

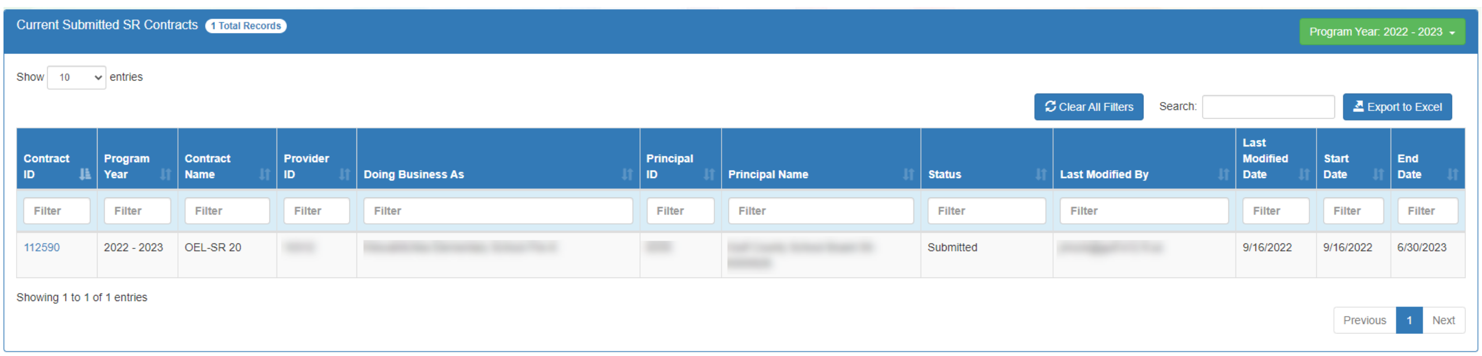
The coalition has determined that the provider is not eligible for a contract.

Reviewing a Contract

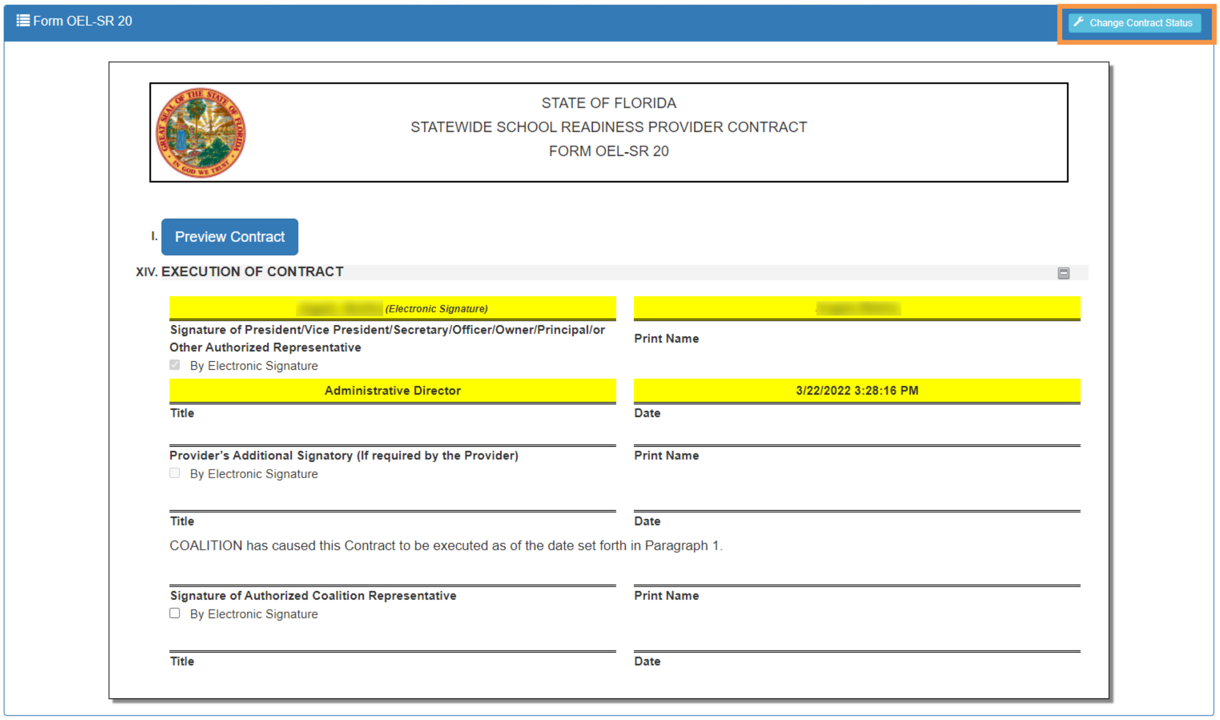
To review a contract, the coalition user will click the **Provider** dropdown menu, select a contract type (e.g. SR, VPK, VPK Application, etc.) and click **Submitted** to see all submitted contracts for that contract type.



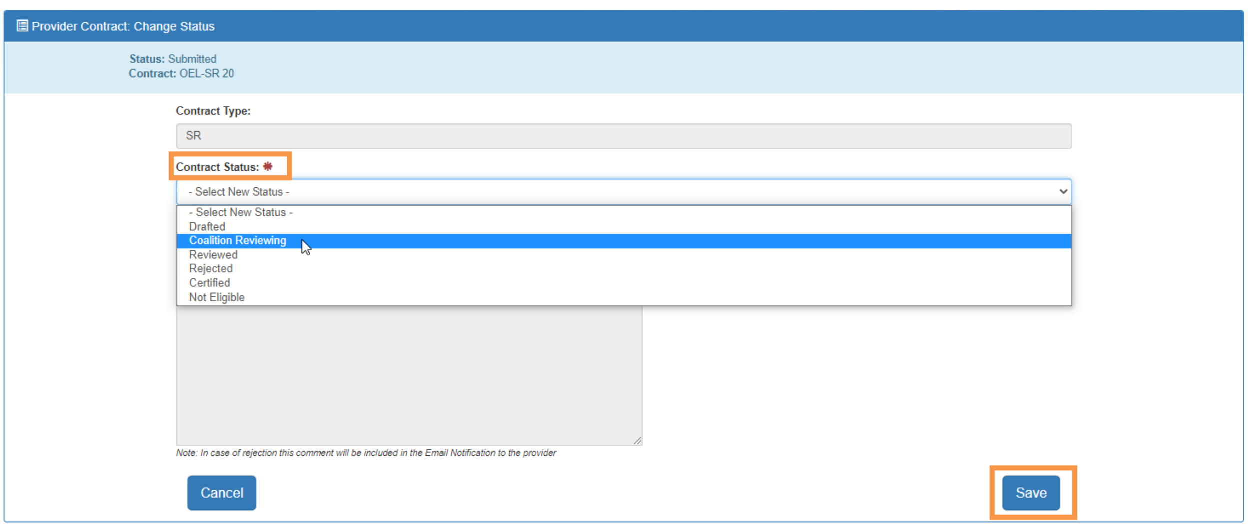
Click the **Contract ID** of the desired contract.



Then, the following displays. Click the **Change Contract Status** button.



The following displays. Select **Coalition Reviewing** from the **Contract Status** dropdown menu and click **Save**.



Signing a Contract

While on the signatures page, the coalition admin can view the contract by clicking **Preview Contract**. The document viewer opens in a new browser tab. User can scroll through the pages or select the print icon to view a printable copy in PDF format.

Form OEL-SR 20 Change Contract Status

STATE OF FLORIDA
STATEWIDE SCHOOL READINESS PROVIDER CONTRACT
FORM OEL-SR 20

Preview Contract

XIV. EXECUTION OF CONTRACT

[redacted] *(Electronic Signature)*	[redacted]
Signature of President/Vice President/Secretary/Officer/Owner/Principal/or Other Authorized Representative ☑ By Electronic Signature	Print Name
Administrative Director	3/22/2022 3:28:16 PM
Title	Date
Provider's Additional Signatory (If required by the Provider) ☐ By Electronic Signature	Print Name
Title	Date

COALITION has caused this Contract to be executed as of the date set forth in Paragraph 1.

Signature of Authorized Coalition Representative ☐ By Electronic Signature	Print Name
Title	Date

1 of 23 100%

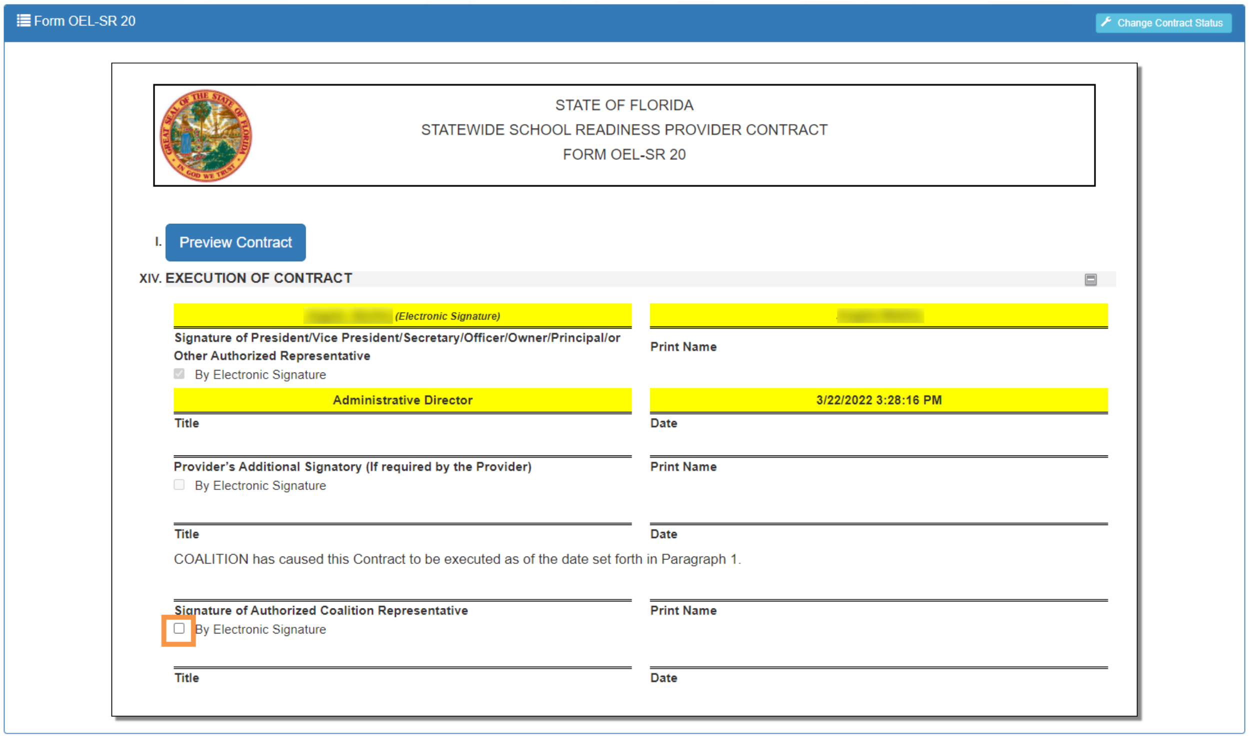
STATE OF FLORIDA
STATEWIDE SCHOOL READINESS PROVIDER CONTRACT
FORM DEL-SR 20

I. PARTIES AND TERMS OF CONTRACT

1. **Parties.** This Contract is made and entered into this _1st_ day of _July_, 20_22_, by and between the Early Learning Coalition of _[redacted] County_ (herein referred to as "COALITION"), and _[redacted] LEARNING CENTER, INC._ doing business as (if applicable), _[redacted] Learning Center_ (herein referred to as "PROVIDER"), with its principal offices located at _[redacted]_ and its provider physical site address (if the single site provider physical site address is different from principal office address) located at _[redacted]_.

a. **Multiple Public School Locations.** If PROVIDER is a school district executing a single Contract on behalf of multiple public school School Readiness (SR) Program PROVIDERS, a list of their names and their physical addresses are included in Exhibit 1: PROVIDER Location List. Thereafter, PROVIDER shall include each location listed in Exhibit 1.

To electronically sign the contract, click the **By Electronic Signature** checkbox.



Form OEL-SR 20

Change Contract Status

STATE OF FLORIDA
STATEWIDE SCHOOL READINESS PROVIDER CONTRACT
FORM OEL-SR 20

I. Preview Contract

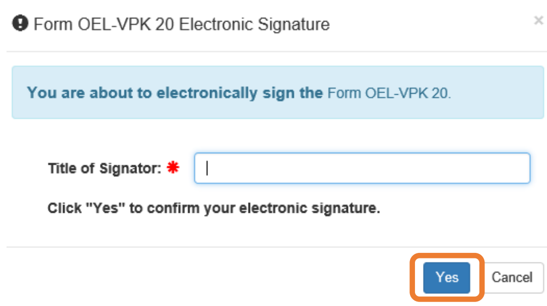
XIV. EXECUTION OF CONTRACT

(Electronic Signature)	
Signature of President/Vice President/Secretary/Officer/Owner/Principal/or Other Authorized Representative	**Print Name**
By Electronic Signature	
Administrative Director	**3/22/2022 3:28:16 PM**
Title	**Date**
Provider's Additional Signatory (If required by the Provider)	**Print Name**
By Electronic Signature	
Title	**Date**

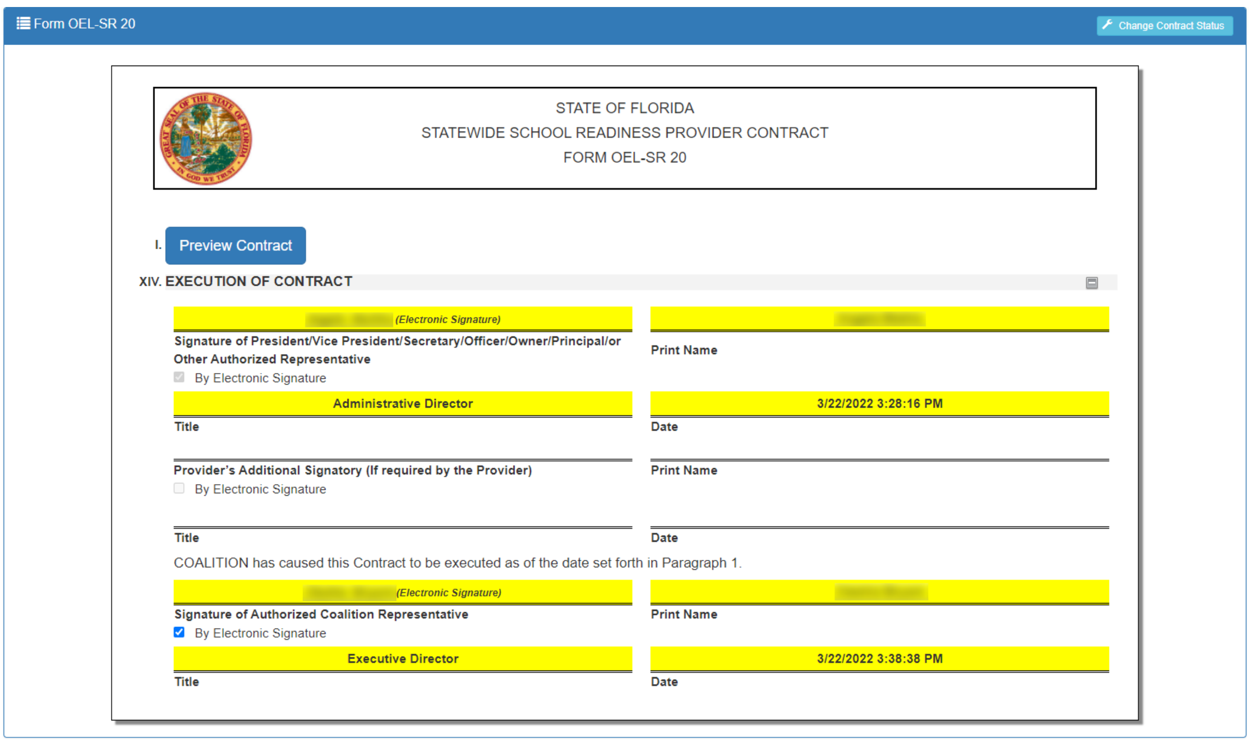
COALITION has caused this Contract to be executed as of the date set forth in Paragraph 1.

Signature of Authorized Coalition Representative	**Print Name**
By Electronic Signature	
Title	**Date**

After clicking the checkbox, the following message displays. Enter the **Title of Signator** and click **Yes**.

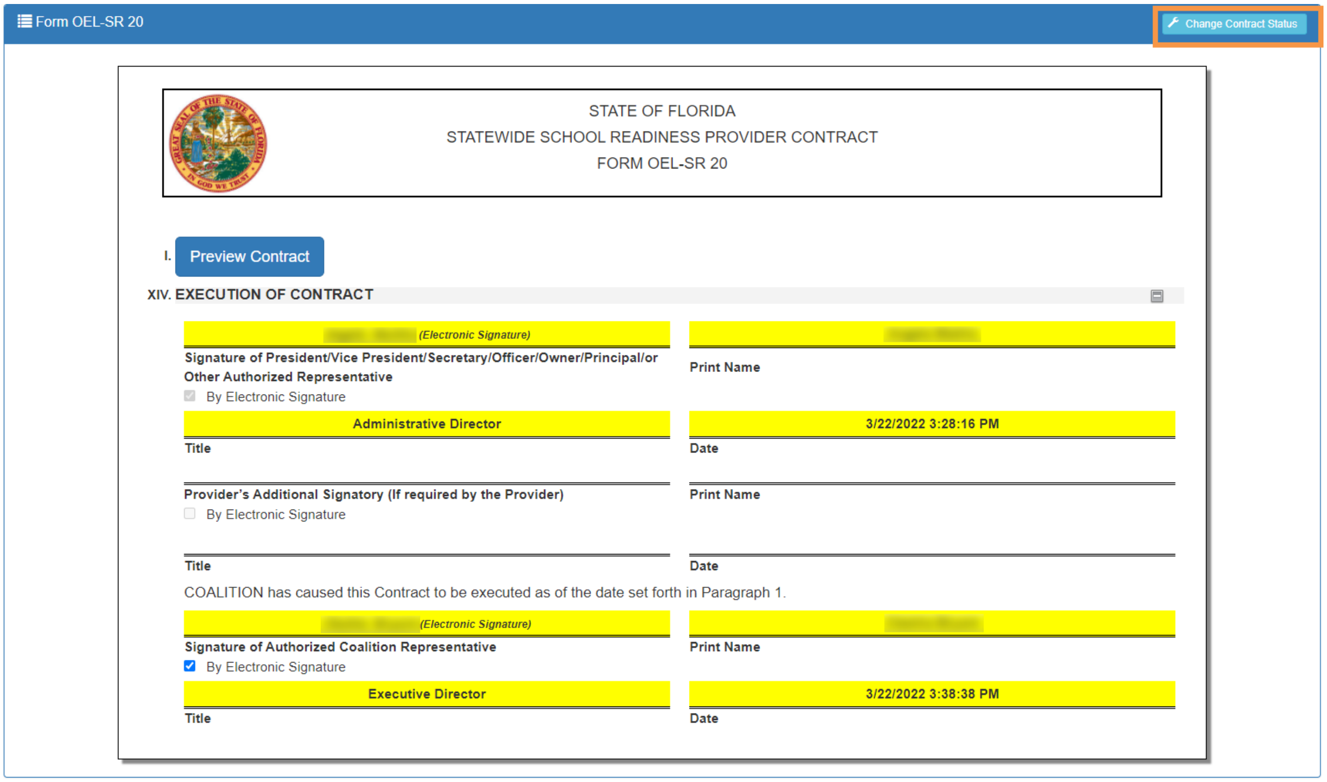


After clicking the **Yes** button, the electronic signature of the signatory, printed name, title, and the date/time will populate, highlighted in yellow.

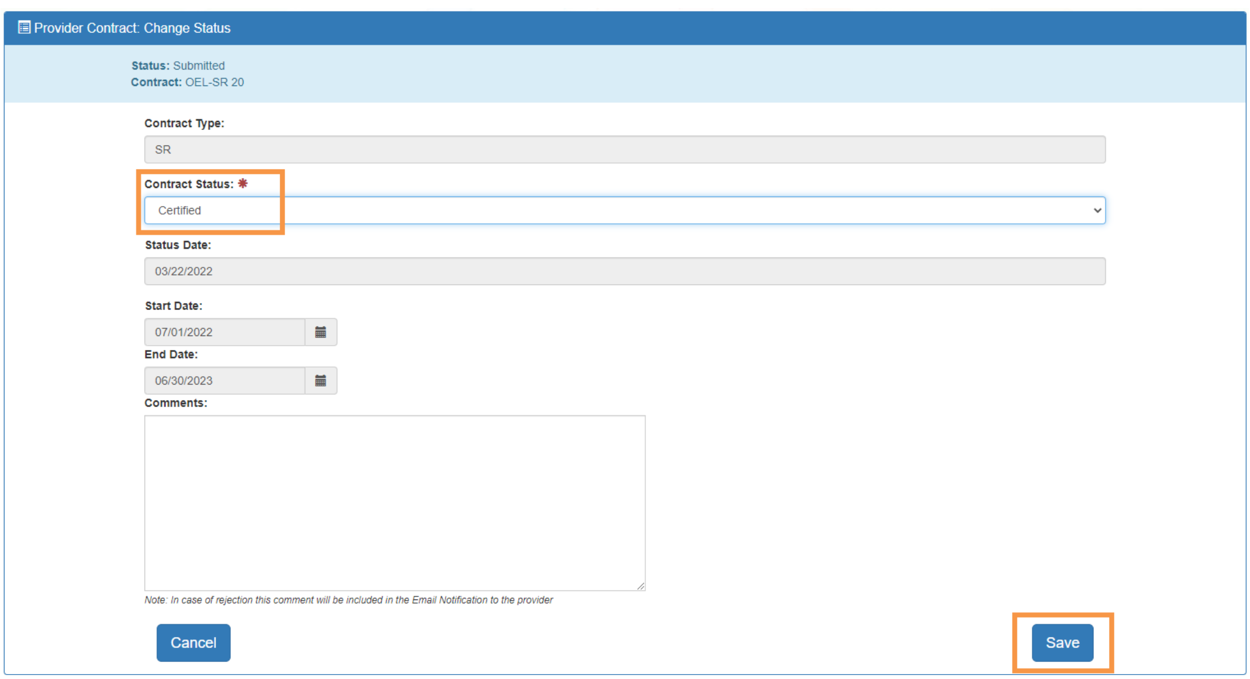


Certifying a Contract

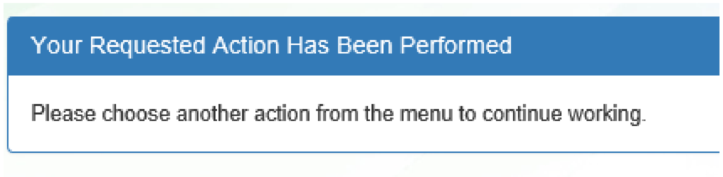
Once the contract has been electronically signed by the coalition representative, the coalition admin can certify the contract by clicking the **Change Contract Status** button.



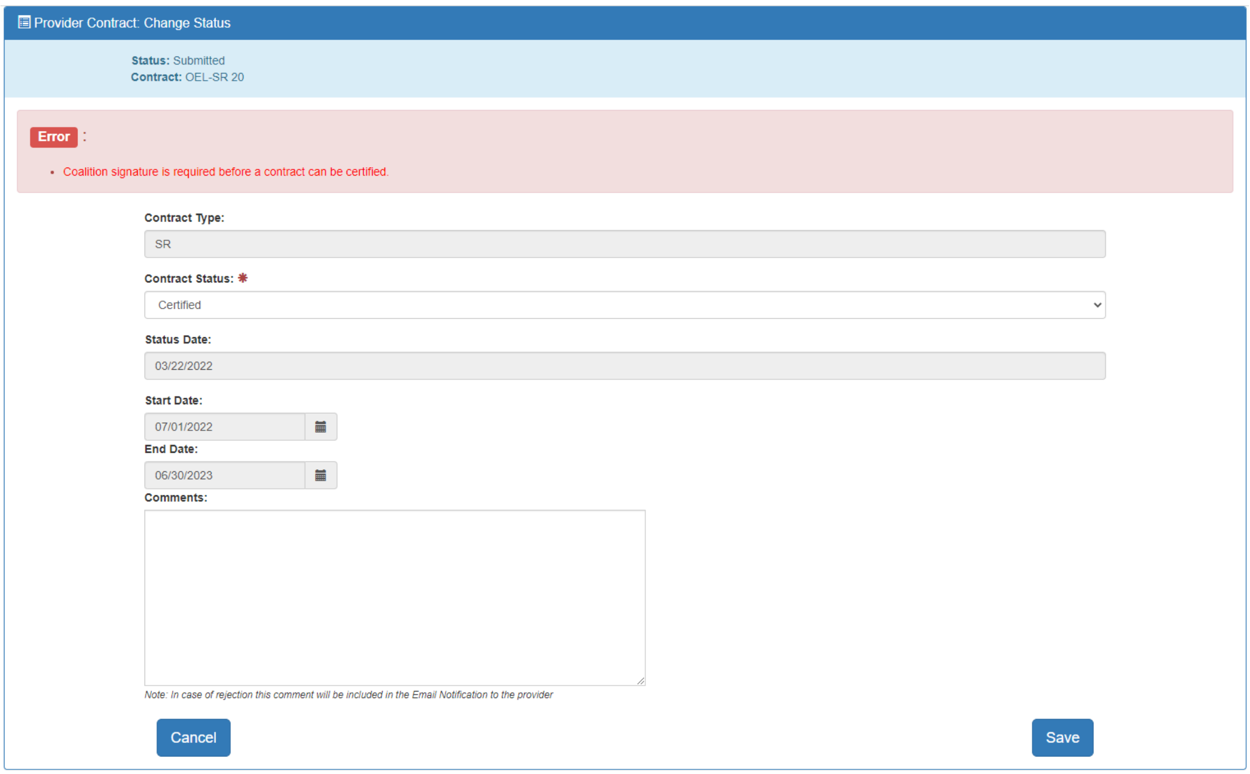
After the **Change Contract Status** button is clicked, the following will display. The coalition admin will change the Contract Status to Certified and click **Save**.



After the **Save** button is clicked, the following displays.

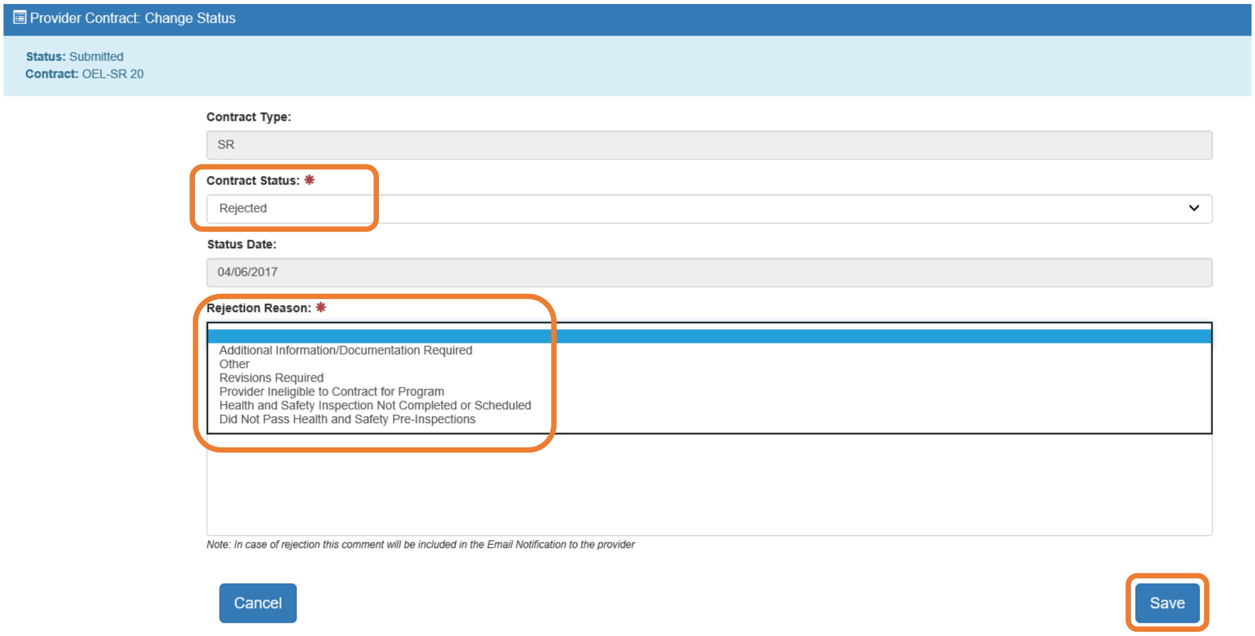


If the contract was not electronically signed, the following error message will display. Click **Cancel** and return to the electronic signatures page to sign the contract.



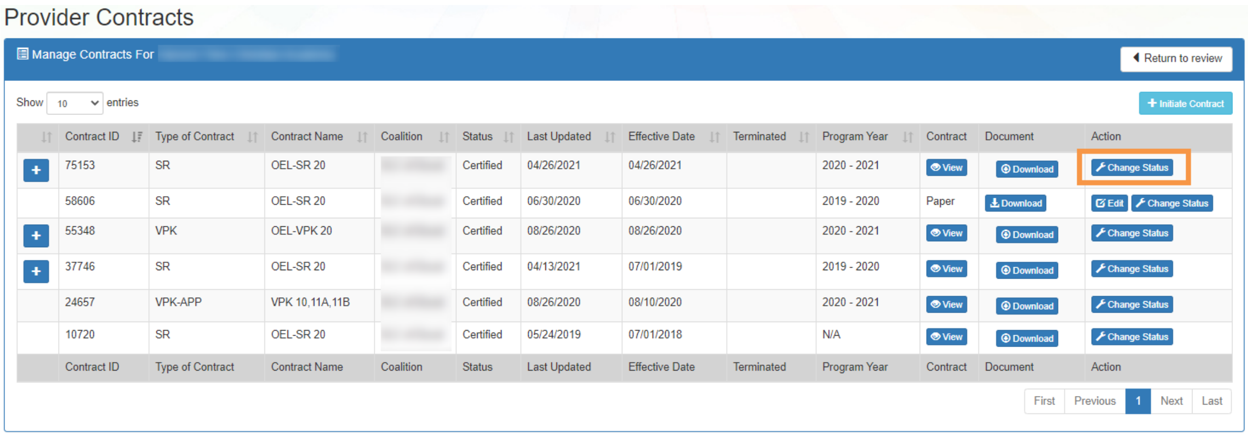
Rejecting a Contract

To reject a contract, the coalition admin will select a Contract Status of **Rejected**, select a **Rejection Reason** and click **Save**.

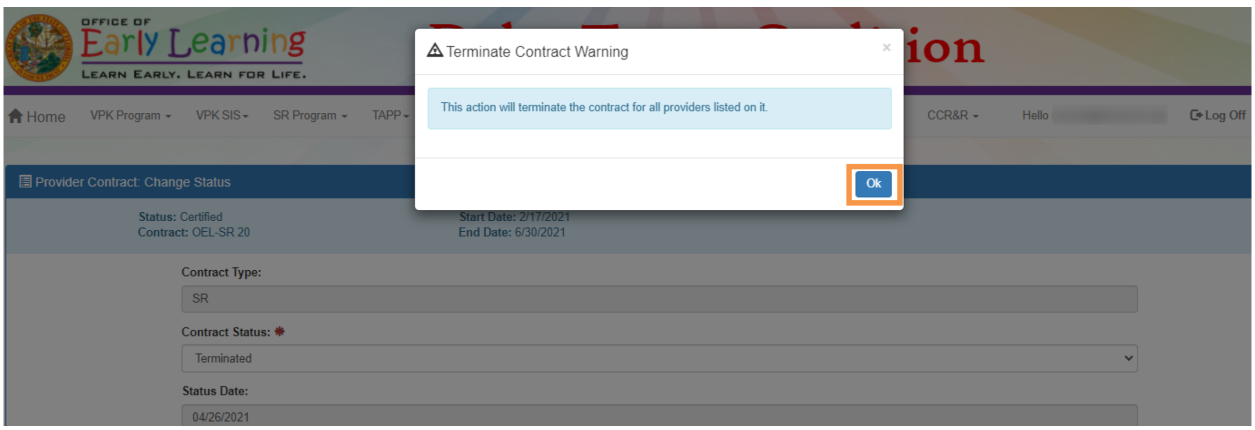


Terminating a Contract

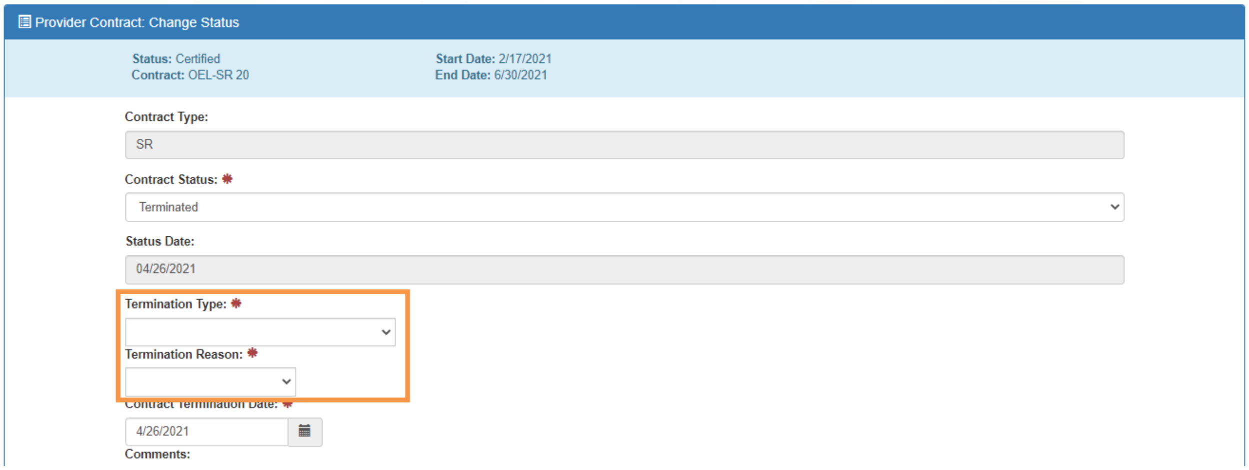
To terminate a **Certified** SR or VPK contract, from the provider manage contract page, the coalition admin will click the **Change Status** button.

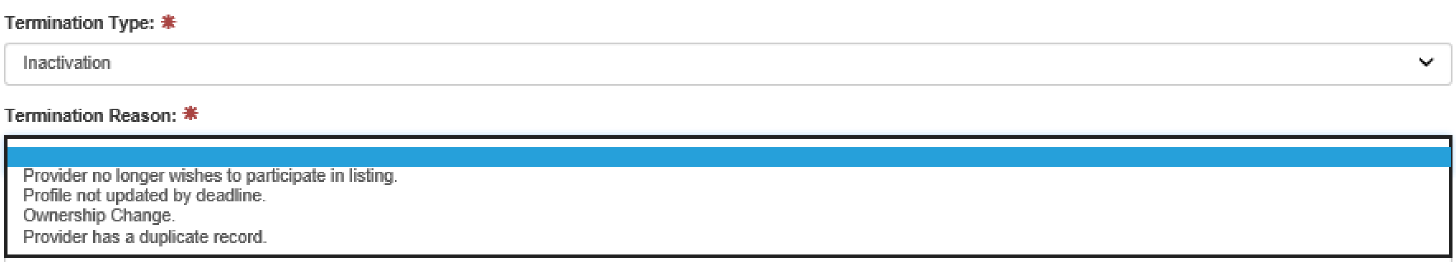


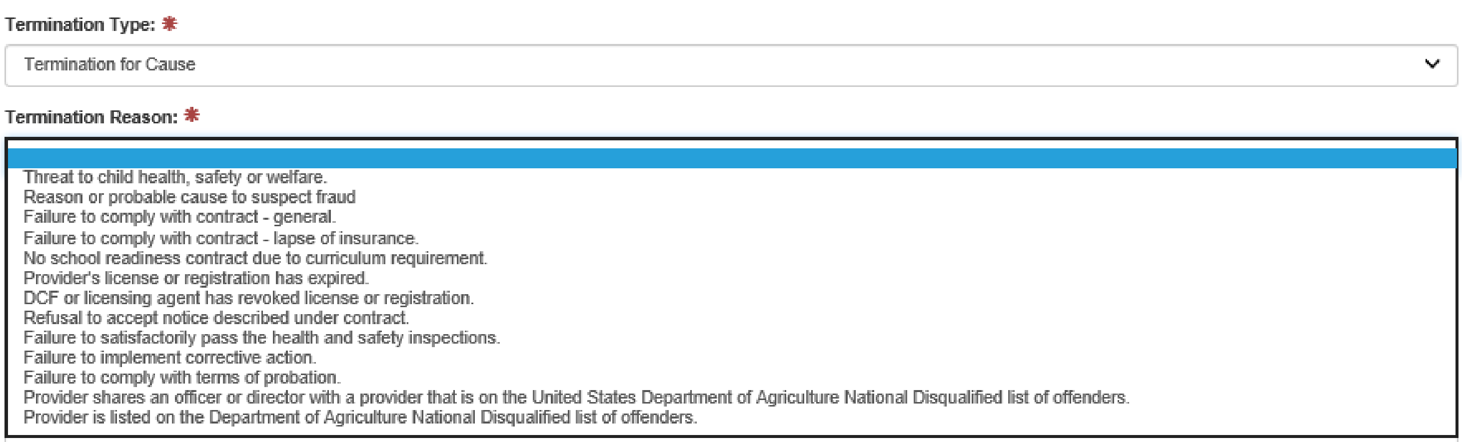
Select a **Contract Status** of **Terminated**. The following message displays. Click the **Ok** button to continue.



Next, select a **Termination Type** and corresponding **Termination Reason**.







Termination Type: *

Suspension

Termination Reason: *

Suspected fraud.

Termination Type: *

Termination for Fraud, 5 year Revocation

Termination Reason: *

Convicted of, found guilty of, or pleads guilty or nolo contendere to public assistance fraud.

Termination Type: *

Termination for Cause, 5 year Revocation

Termination Reason: *

Provider shares an officer or director with a provider that is convicted of, found guilty of, pleads guilty or nolo contendere regardless of adjudication to public assistance fraud- ineligible for funding for a 5 year period.
Action or lack of action which threatens the health and safety or welfare of children
Failure to satisfactorily pass the health and safety inspections
Material failure to comply with terms of contract -including lapse in liability insurance, or not being a legally operating provider.
Failure to implement corrective action.
Failure to comply with terms of probation.
Provider fails to implement approved improvement plan or staff development plan. Ineligible for VPK funding for a 5 year period.
Provider is on probation 3 or 3+ years without Good Cause Exemption.
Failure to comply with pre and post assessment requirements.
Refusal to accept any notice in which the coalition is required to send to the provider.

Termination Type: *

Termination for National Disqualification

Termination Reason: *

Provider placed on USDA National Disqualified List

Termination Type: *

Emergency Termination

Termination Reason: *

Notification by the Department of Children and Families or local licensing agency that actions or inactions of the provider pose an immediate and serious danger to the health and safety or welfare of children.

Termination Type: *

Termination By Provider

Termination Reason: *

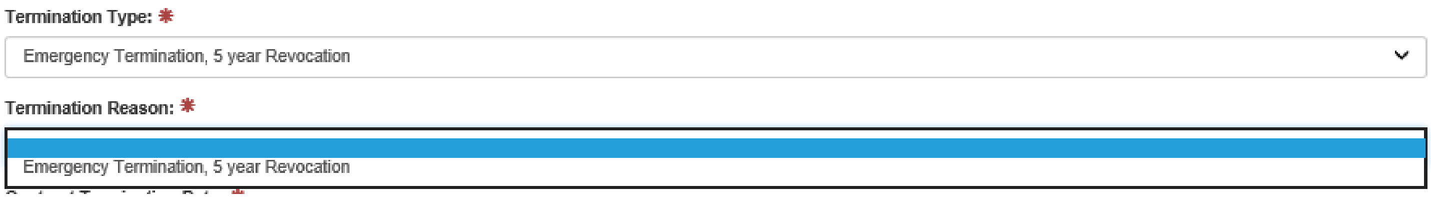
Provider is no longer in business.
Provider is deceased.
Provider no longer wishes to accept SR funding.
Provider no longer wishes to accept VPK funding
Provider has completed their 540 or 300 instructional hours for their current contract.
Ownership of the child care site/location has changed.

Termination Type: *

Appeal - Pending

Termination Reason: *

Provider can not receive SR or VPK funding until the appeals process is completed.



Enter comments, then click the **Save** button.

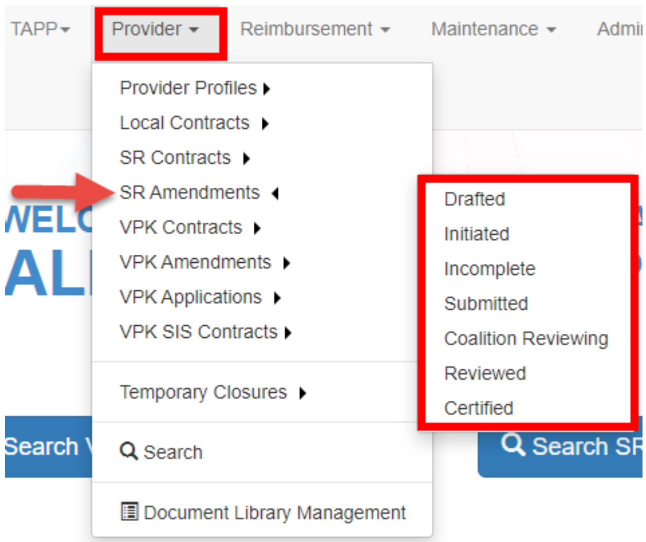
Amending a Contract

Please note the following prerequisites to amend a provider contract:

1. The contract to be amended must be certified.
2. Any existing amendments to the current program year contract must be certified before a new amendment to the contract can be initiated.
3. Amendments can be backdated to the date of the contract or latest **Certified** amendment for the same program year.

SR Contract Amendment

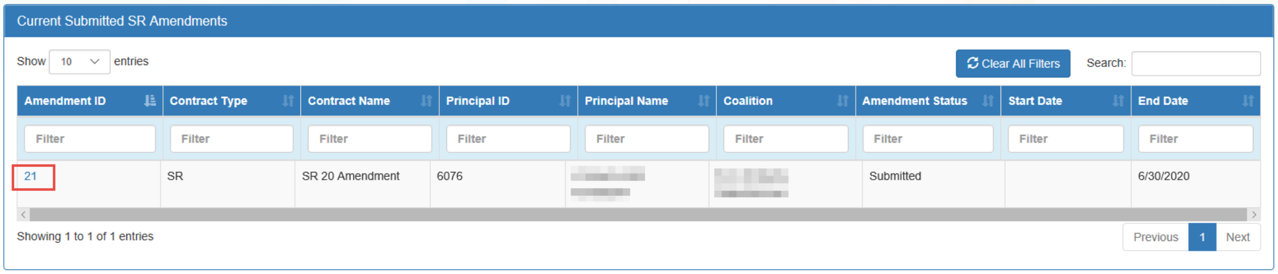
To access the SR contract amendment work queues, navigate to **Provider > SR Amendments**.

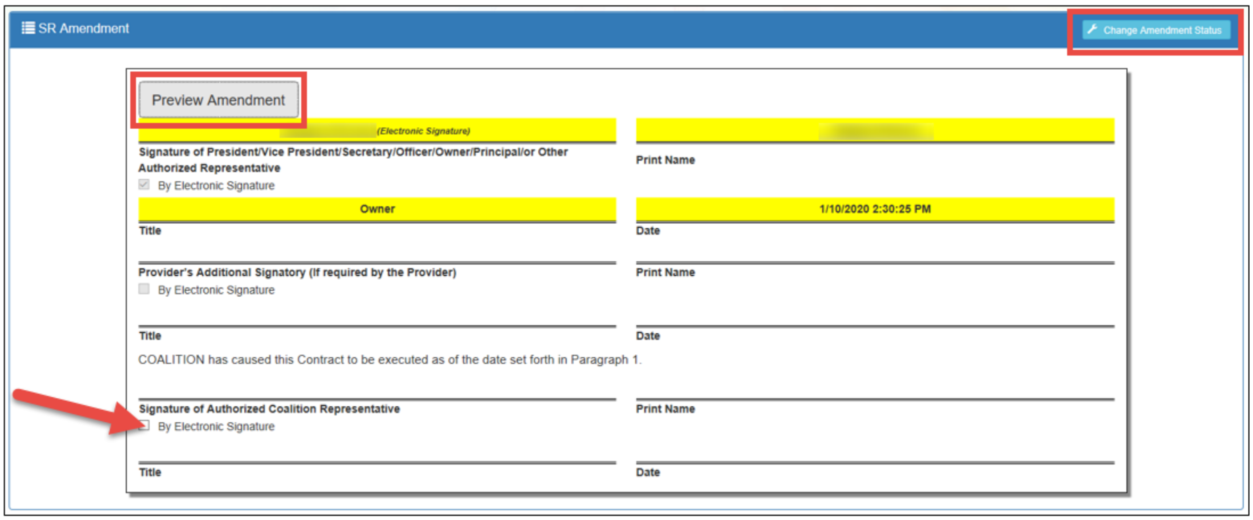


The amendment queues correspond to each of the amendment statuses:

- Drafted
- Initiated
- Incomplete
- Submitted
- Coalition Reviewing
- Reviewed
- Certified

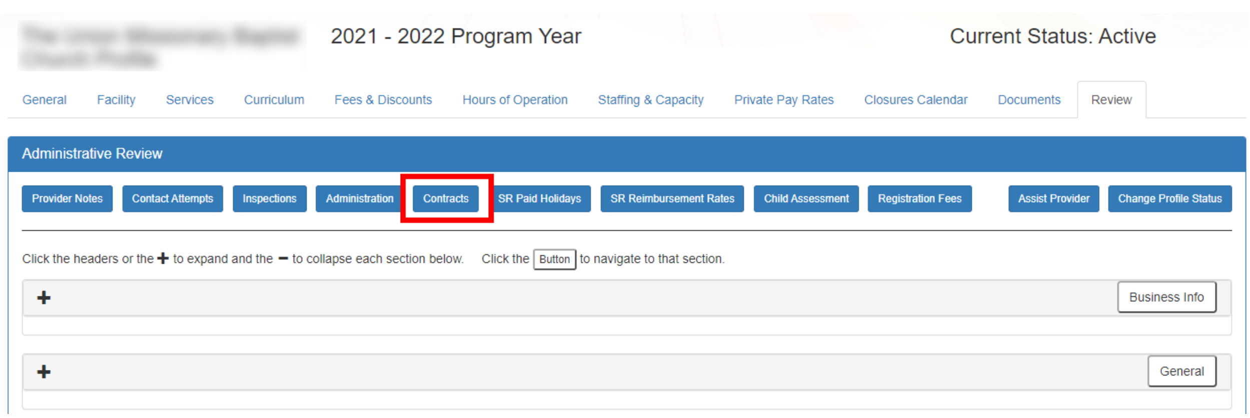
Select a queue. Click the Amendment ID link to preview, sign, and change the amendment status, depending on the amendment stage.





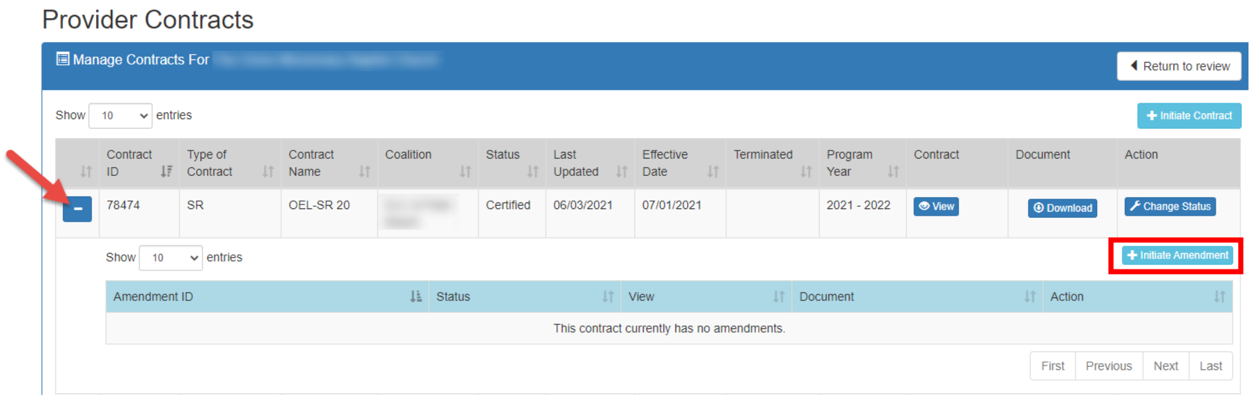
Manually Initiating an Amendment (Non-Profile-Related Changes)

From the provider profile Administrative Review page, click **Contracts**.

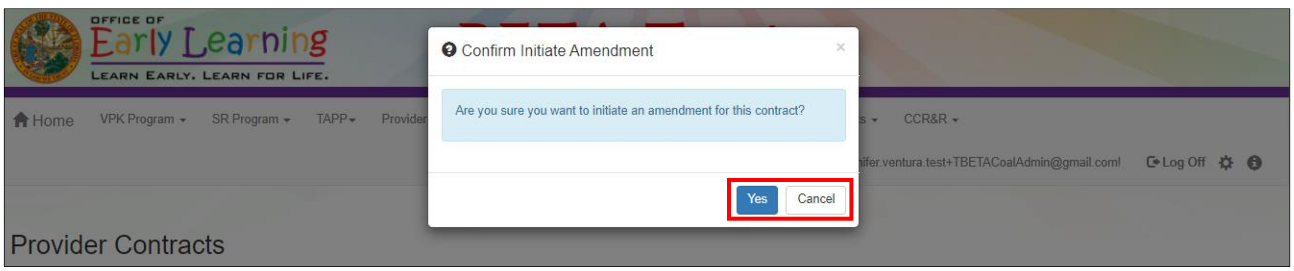


The Manage Contracts page for the provider displays. Click the plus sign “+” to the left of the SR 20 contract to expand the amendment section. Then, click the **Initiate Amendment** button.

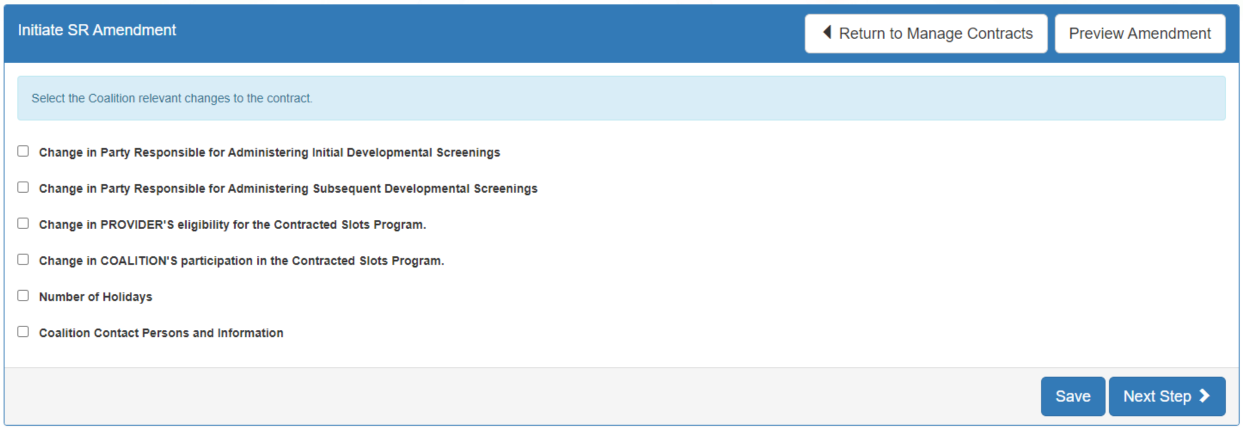
NOTE: The contract and any of its existing amendments must be in **Certified** status before a new amendment can be initiated.



Click **Yes** to confirm and initiate an amendment or click **Cancel** to close the confirmation window.



When **Yes** is clicked, the Initiate SR Amendment page for coalition-relevant changes displays.

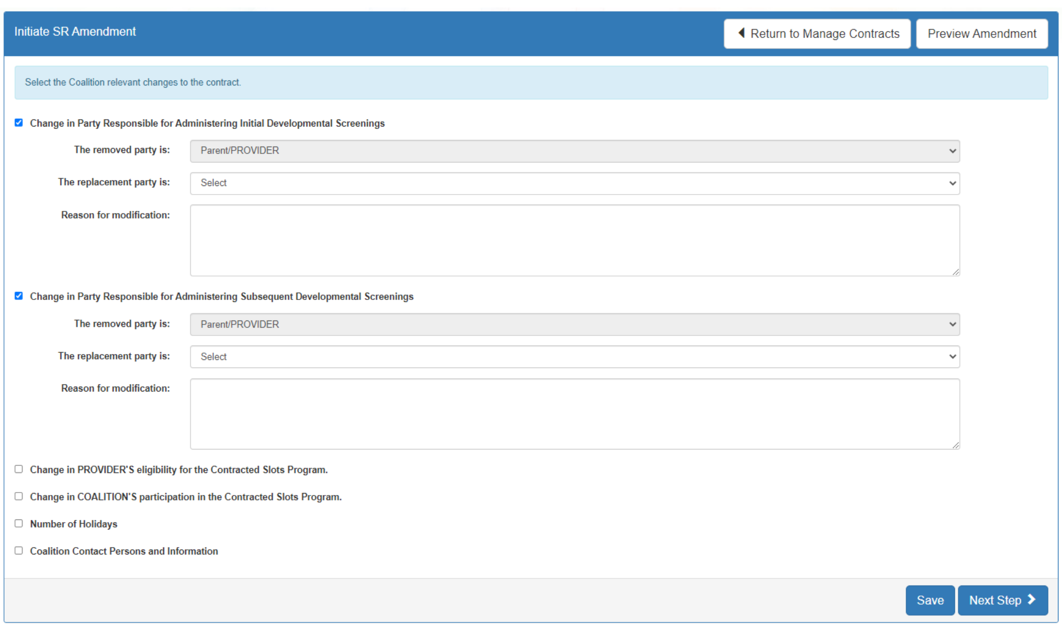


The coalition-relevant changes that can be manually selected are:

- Change in Party Responsible for Administering Initial Developmental Screenings
- Change in Party Responsible for Administering Subsequent Developmental Screenings
- Change in PROVIDER'S eligibility for the Contracted Slots Program
- Change in COALITION'S participation in the Contracted Slots Program
- Number of Holidays – This is the coalition-approved number of holidays per year
- Coalition Contact Persons and Information

When a box is selected, fields for the previous value, new value, and reason for modification appear. The previous value is pre-populated, and the user must select or type in the new value and the reason for modification.

NOTE: A reason for modification is not captured for "Number of Holidays" and "Coalition Contact Persons and Information," similar to the 20A



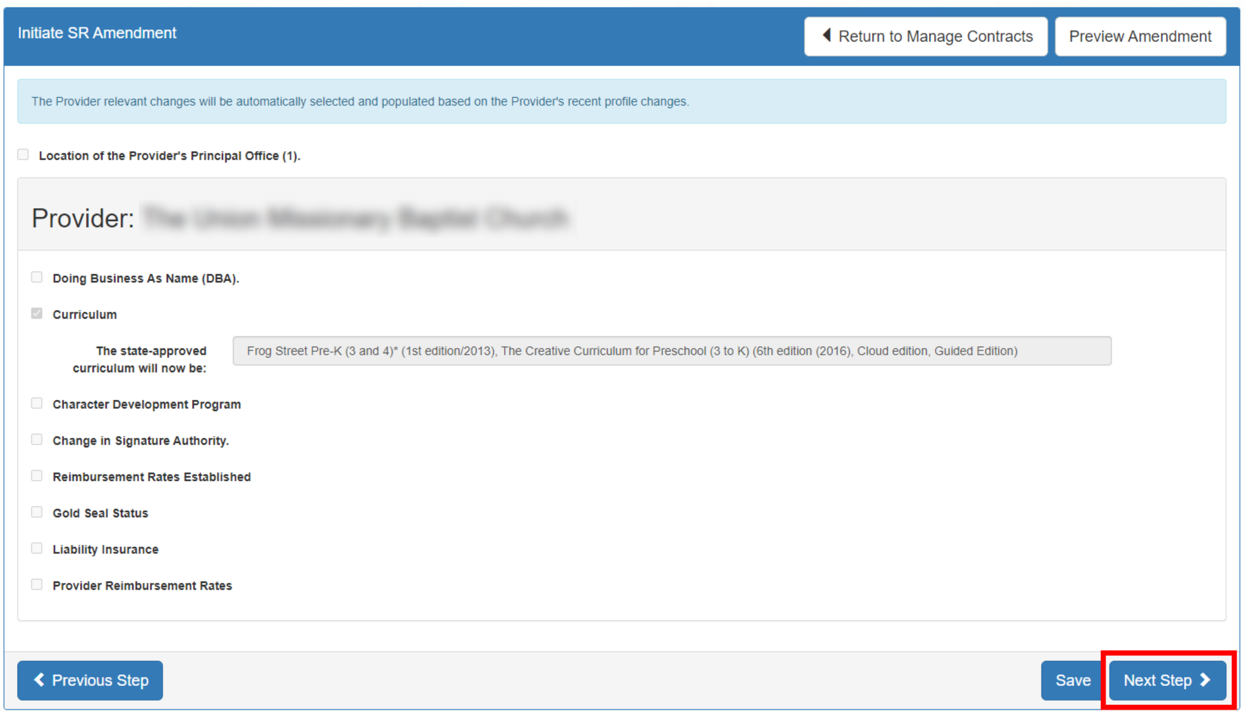
NOTE: The **Preview Amendment** button is available to view the SR 20A form throughout the amendment process.

Select the box for one or more coalition-relevant changes, choose the new selection from the dropdown menu, enter the reason for modification if applicable, then click **Next Step**.

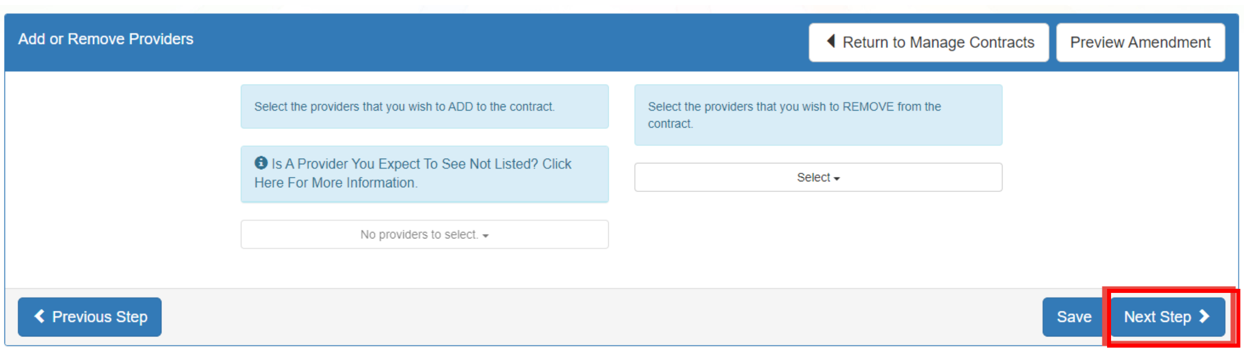
The Initiate SR Amendment page for provider-relevant (principal Location and profile) changes displays.

The boxes on this page are automatically selected if the provider made changes to those items after the contract or latest amendment was executed. Click **Next Step** to proceed.

NOTE: Provider-relevant changes will be covered later in the "Provider-Related Changes" section.

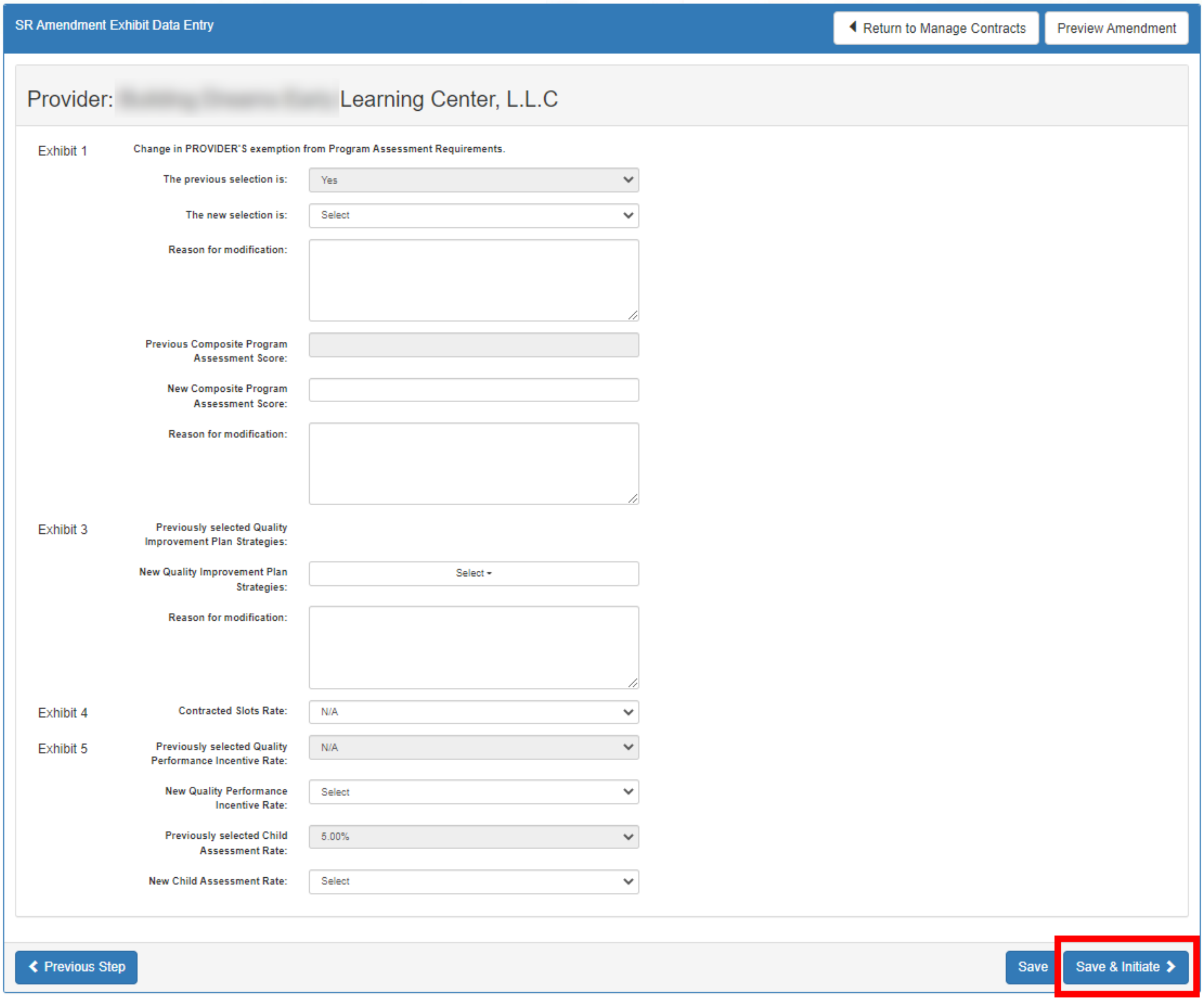


The Add or Remove Providers page displays for adding or removing provider(s) from the contract, if applicable. Click **Next Step** to proceed.

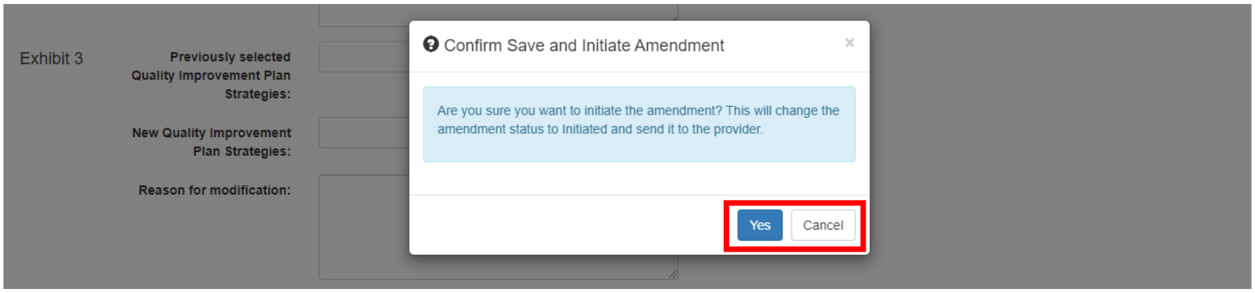


NOTE: Adding or removing providers will be covered later in the "Adding or Removing Providers" section.

After clicking **Next Step**, the SR Contract Exhibit Data Entry page displays. The previous fields are populated with the selections from the contract or latest amendment. Make any new selections, if applicable, enter the reason for modification, then click **Save & Initiate**.

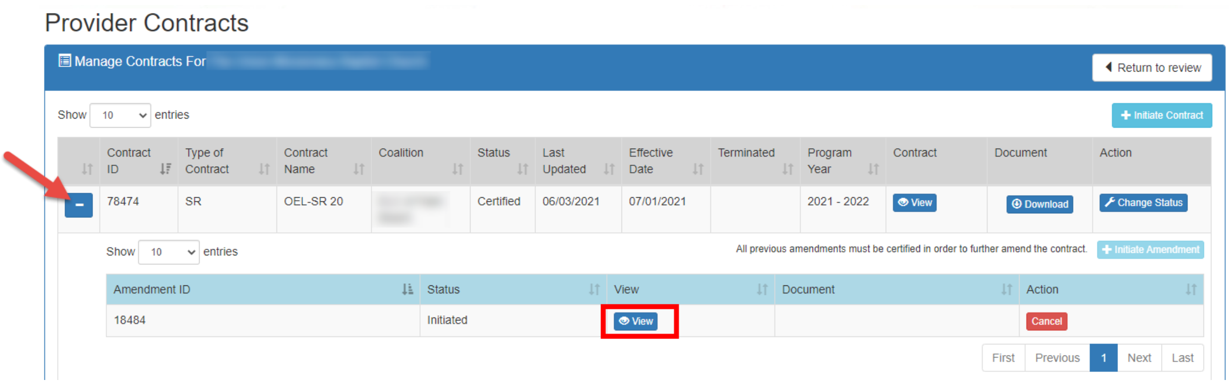


The Confirm Save and Initiate Amendment pop-up message appears. Click **Yes** to initiate the amendment and send it to the provider, or **Cancel** to close the message.

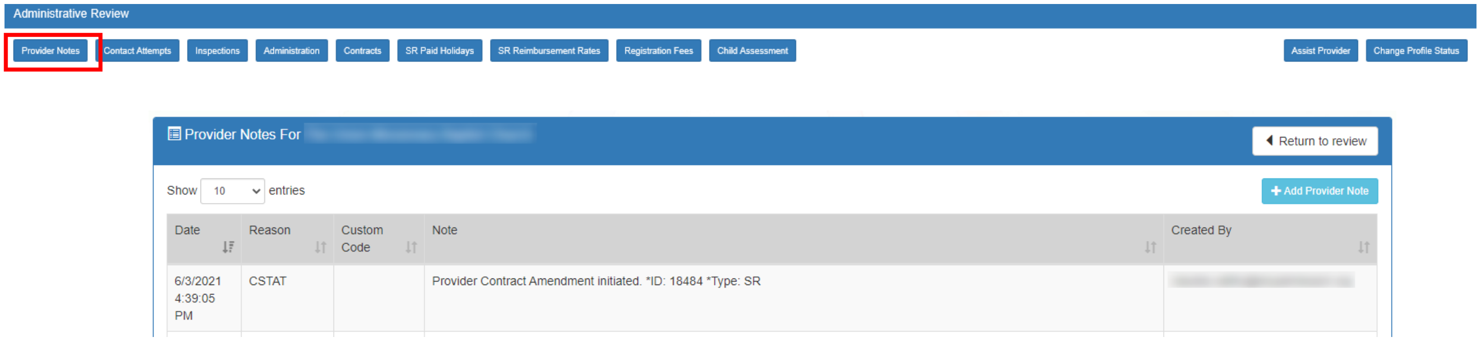


When the **Yes** button is clicked, the user is navigated to the Manage Contracts page. Click the plus "+" sign to the left of the SR 20 contract to expand the amendment section. The amendment is in **Initiated** status.

To preview the initiated SR 20A form and any associated exhibits, click the **View** button



To verify that a provider note was written when the amendment was initiated, click the **Return to review** button to return to the Administrative Review page, then click **Provider Notes**.



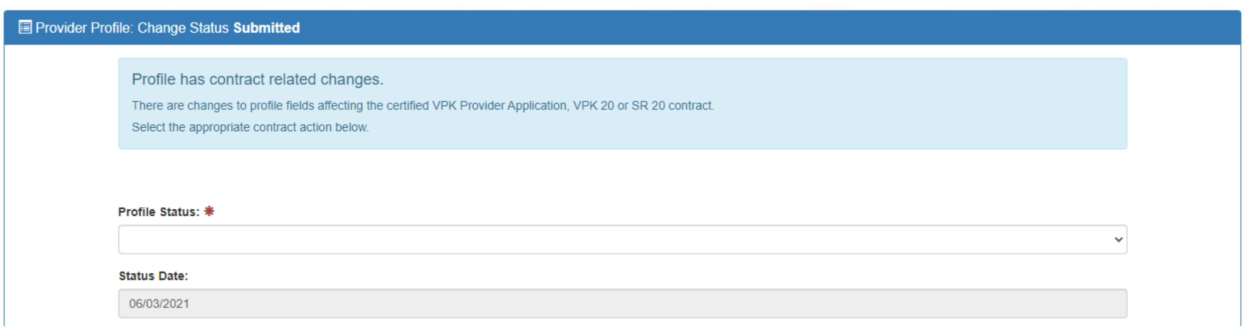
The amendment is now available in the **Provider > SR Amendments > Initiated** queue.

NOTE: An email notification is sent to the provider's contact email address when the SR amendment is initiated.

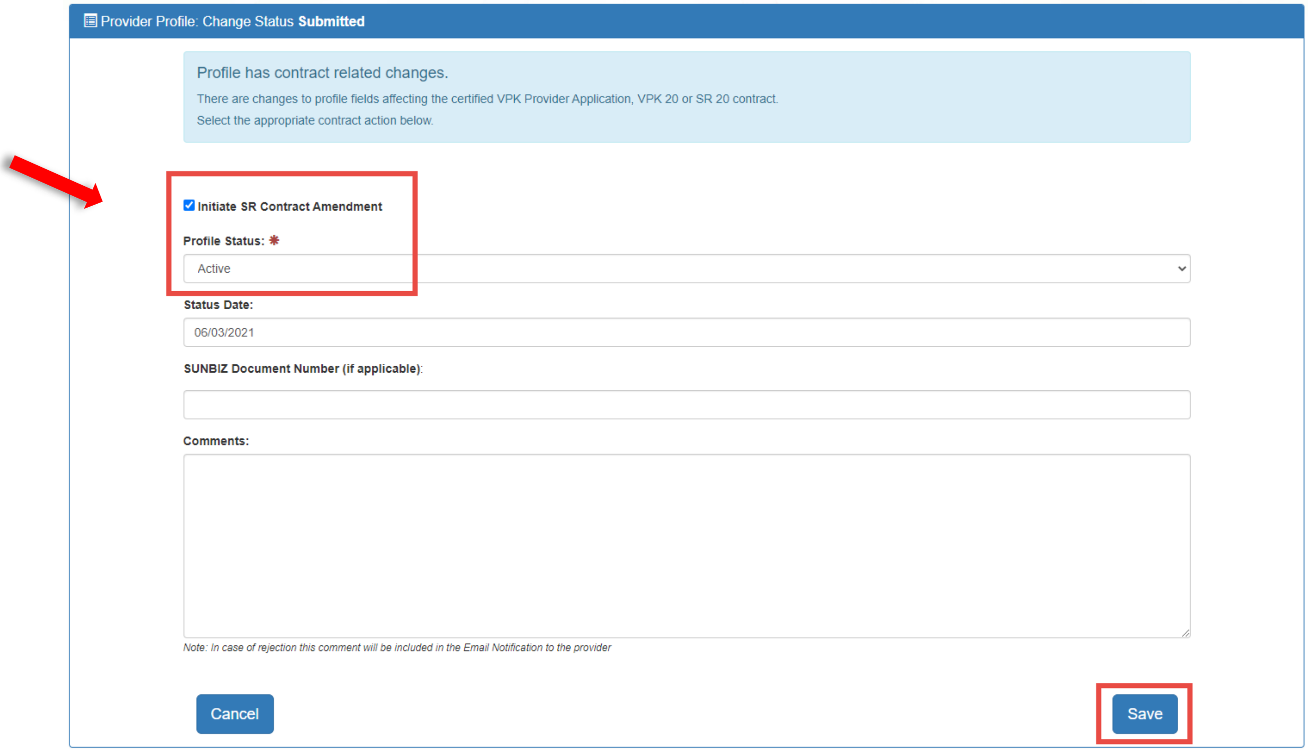
Provider-Related Contract Changes

When a provider makes changes to their profile that warrant an SR contract amendment and submits the profile, the coalition will have the option to automatically draft an amendment upon approving the provider profile.

When the coalition reviews the profile changes and clicks the **Change Profile Status** button on the provider Administrative Review page, a message informs the user that the profile has contract-related changes.



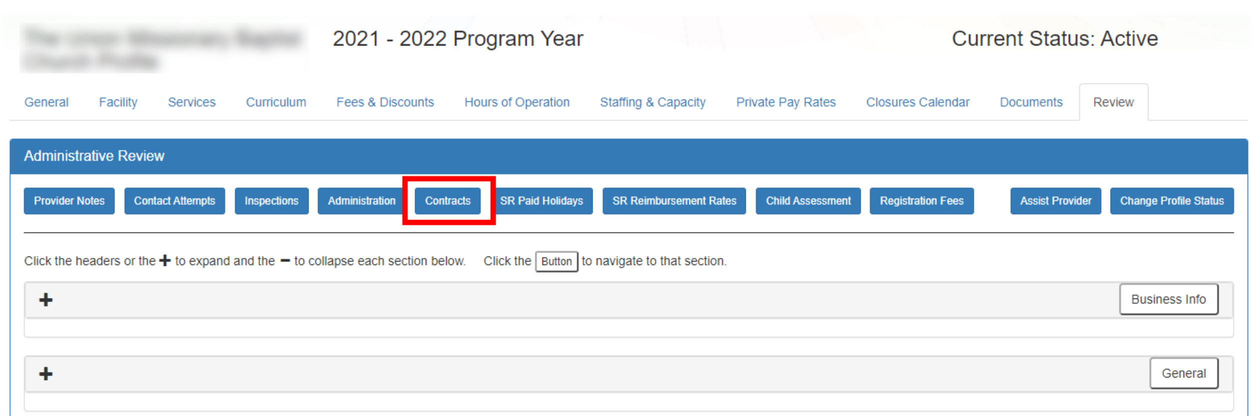
When the profile status is set to **Active**, the option to initiate an SR contract amendment appears (checked).



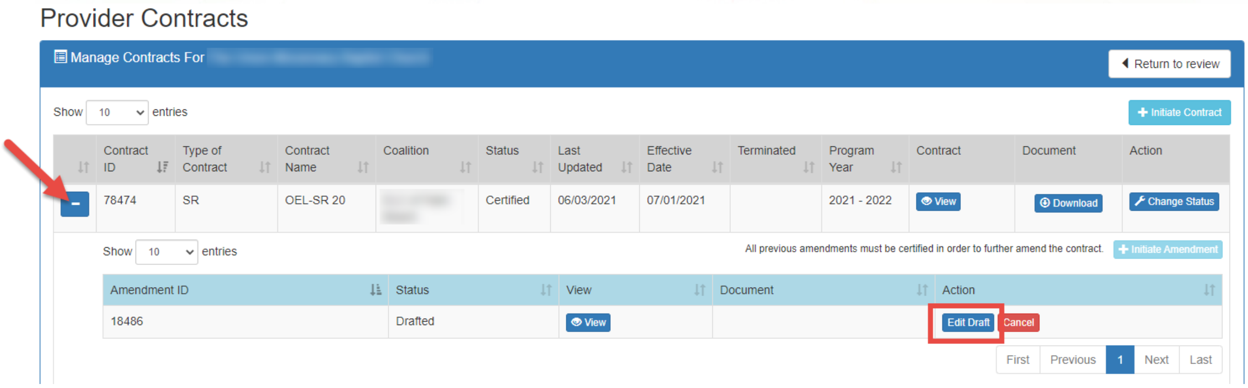
NOTE: If the coalition unchecks the box and saves, an SR amendment will not be drafted. If the user later decides to initiate an amendment, they can do so manually from the Manage Contracts page for the provider. The manually-initiated amendment will include the profile changes.

To create the amendment, leave the “Initiate SR Contract Amendment” box selected and click **Save**.

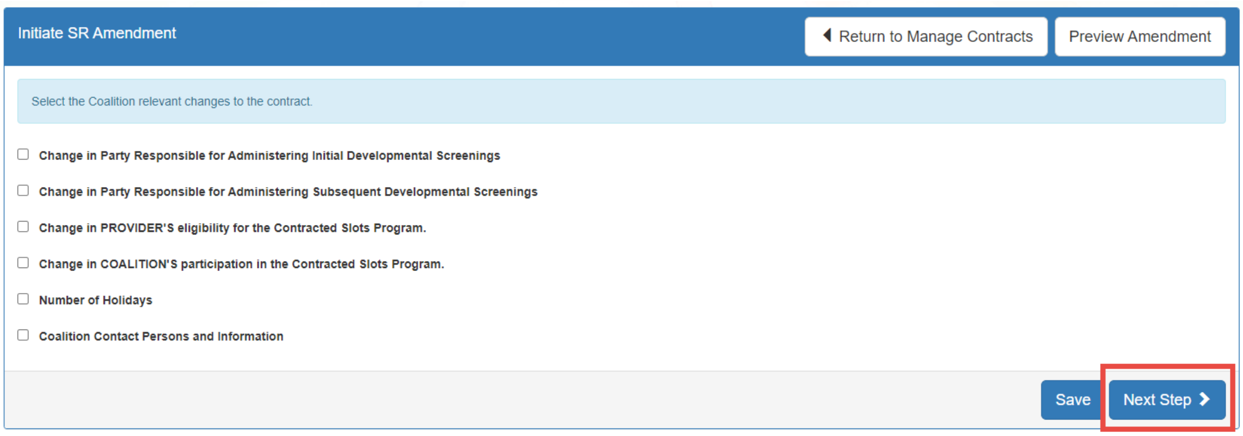
Navigate to the provider’s Administrative Review page and click the **Contracts** button to access the Manage Contracts page.



The Manage Contracts page for the provider displays. Click the plus “+” sign to the left of the SR 20 contract to expand the amendment section. The auto-generated amendment is in **Drafted** status. Click the **Edit Draft** button.



Click the **Next Step** button on the coalition-relevant changes page.



The Initiate SR Amendment page for provider-relevant (principal location and profile) changes displays.

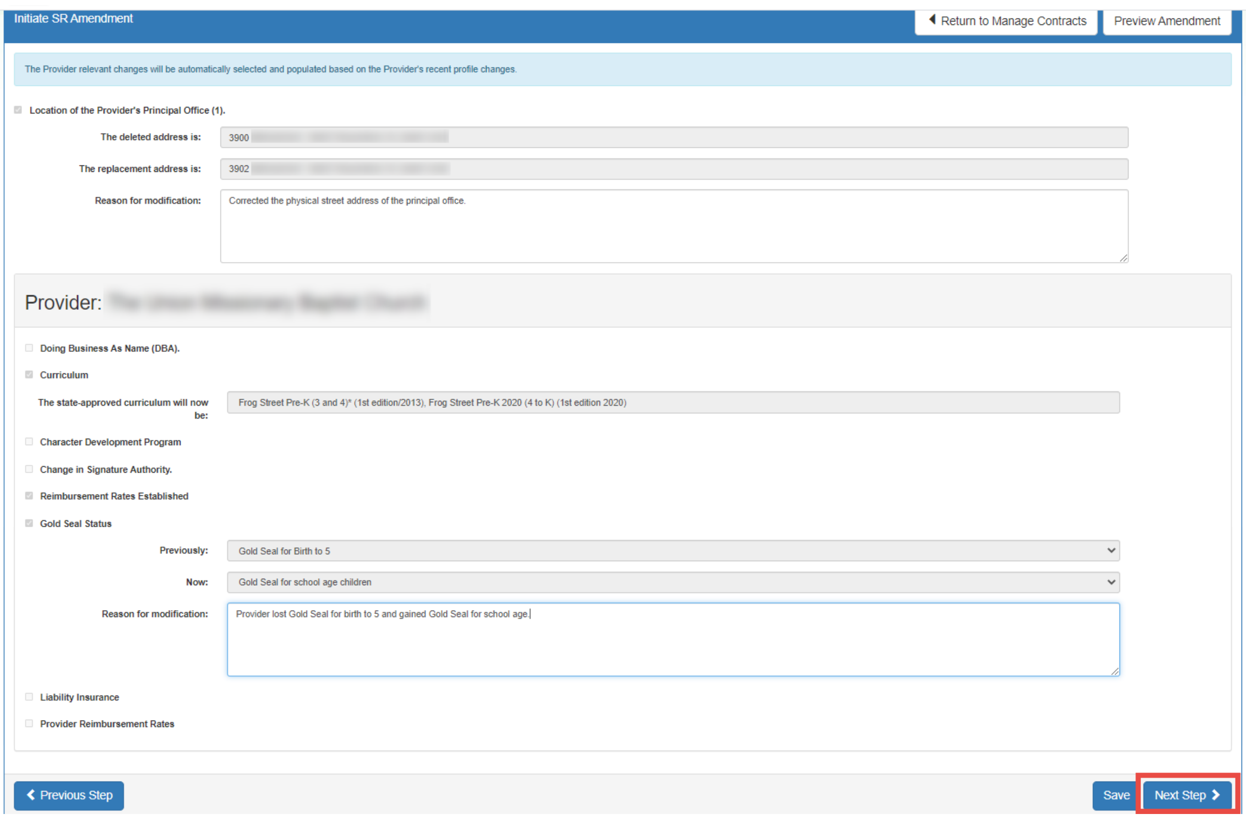
If the profile change is one of those listed on the provider-relevant changes page, the applicable box would be checked, sometimes with the new value. Enter a reason for the modification if applicable, then click **Next Step**.

If the provider modified one or more of the items listed below, the box is automatically selected on the provider-relevant changes page:

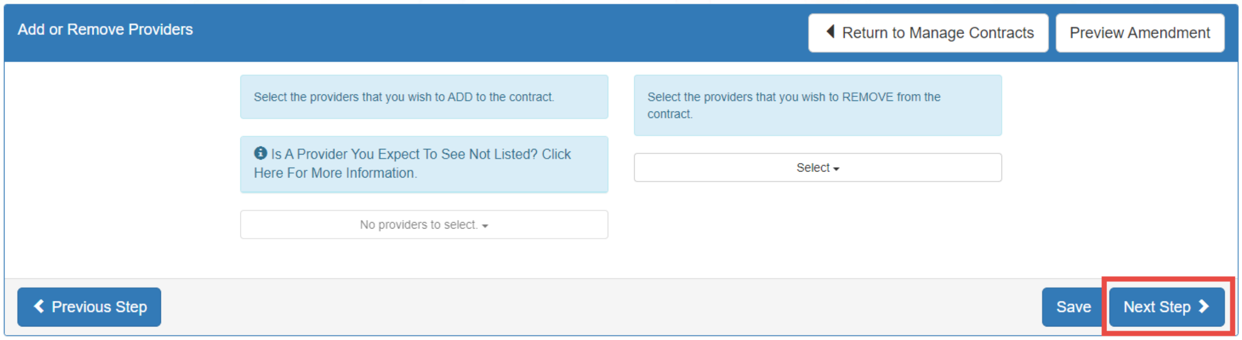
- Location of the Provider's Principal Office – This is selected if the principal business physical address was modified
- Doing Business As Name (DBA)
- Curriculum
- Character Development Program
- Change in Signature Authority
- Gold Seal Status
- Liability Insurance – This is selected if a new verified liability insurance document was uploaded since the contract or latest amendment and the begin date starts on or after the date the amendment is initiated
- Provider Reimbursed Rates – This is selected if there was a change to the differential question on the profile Private Pay Rates page, SR daily rates, registration fees, and/or operational hours

NOTE: "Reimbursement Rates Established" is not a change by the provider, but it is automatically selected if the COALITION modifies its SR max rates.

The previous and/or new values are populated based on changes to the provider's business info or profile. Enter a reason for modification if applicable, then click **Next Step**.

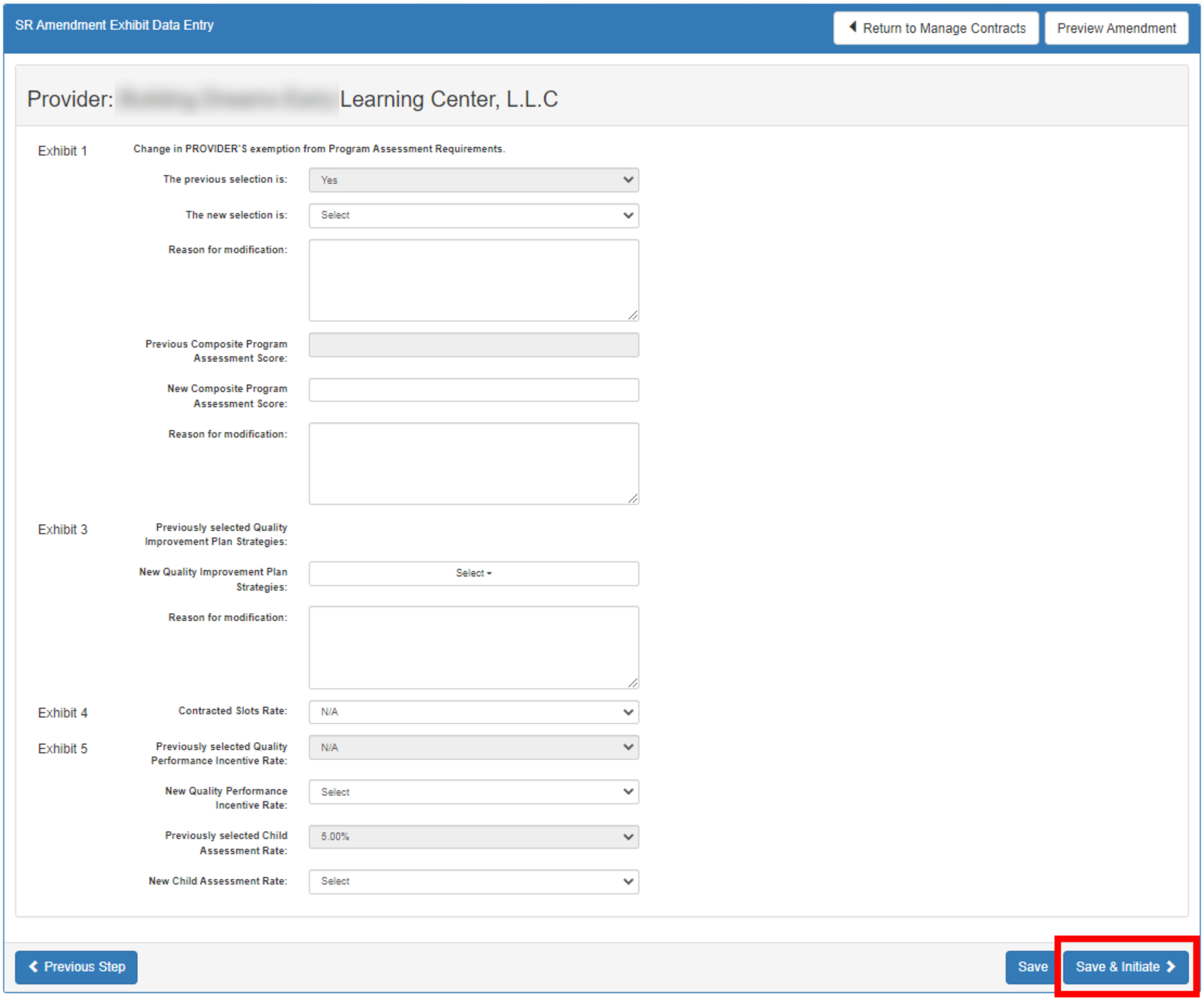


The Add or Remove Providers page displays for adding provider(s) or removing provider(s) from the contract if applicable. Click **Next Step** to proceed.

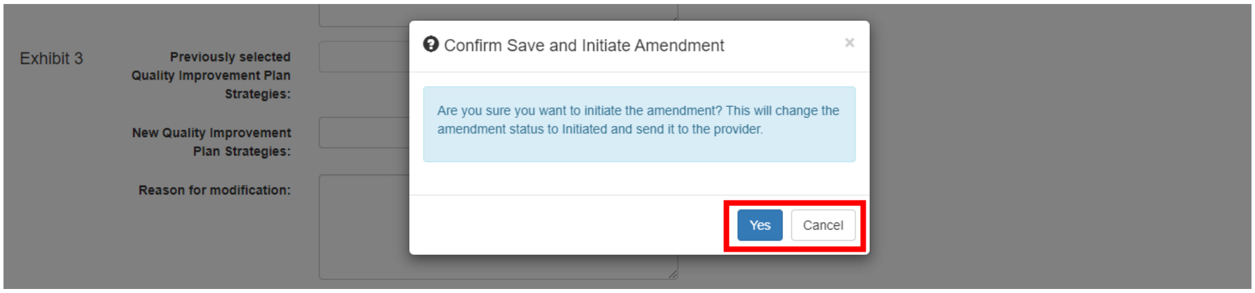


NOTE: Adding or removing providers will be covered later in the "Adding or Removing Providers" section.

The SR Contract Exhibit Data Entry page displays. The previous fields are populated with the selections from the contract or latest amendment. Make any new selections if applicable and enter the reason for modification. Then click **Save & Initiate**.

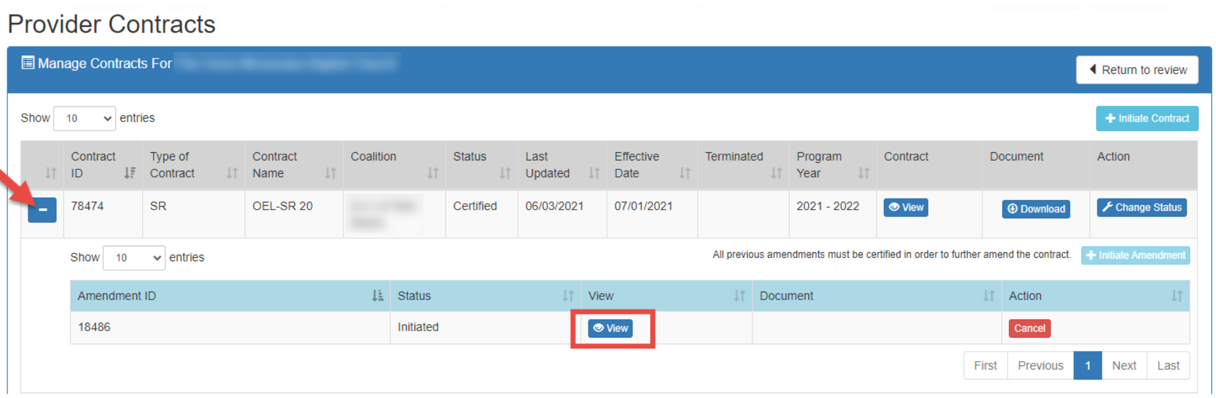


The Confirm Save and Initiate Amendment pop-up message appears. Click **Yes** to initiate the amendment and send it to the provider or **Cancel** to close the message.

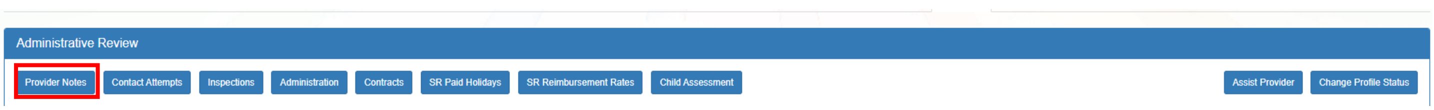


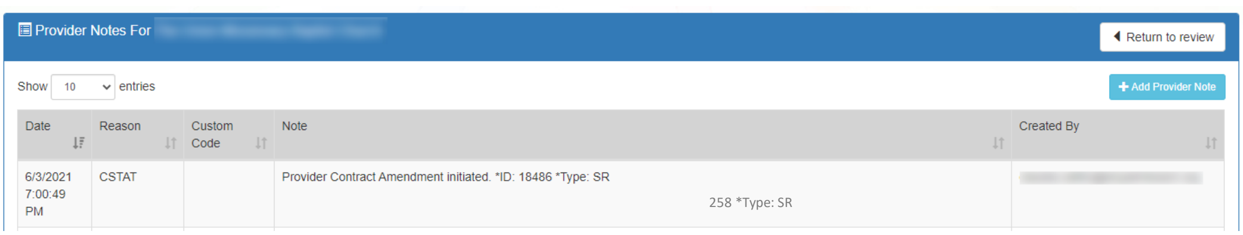
When the **Yes** button is clicked, the user is navigated to the Manage Contracts page. Click the plus "+" sign to the left of the SR 20 contract to expand the amendment section. The amendment is in **Initiated** status.

To preview the initiated SR 20A form and any associated exhibits, click the **View** button.



To verify that a provider note was written when the amendment was initiated, click the **Return to review** button to return to the Administrative Review page, then click **Provider Notes**.





The amendment is now available in the **Provider > SR Amendments > Initiated** queue.

NOTE: An email notification is sent to the provider's contact email address when the SR amendment is initiated.

Adding or Removing Providers

For multiple-site providers, the Add or Remove Providers page allows the coalition to add provider(s) or remove provider(s) from the contract.

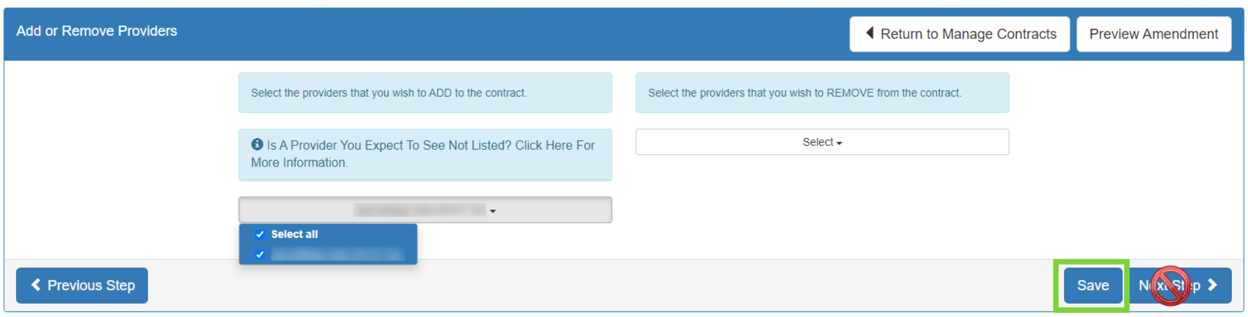
NOTE: If a provider you expect to see is not listed, it may be due to:

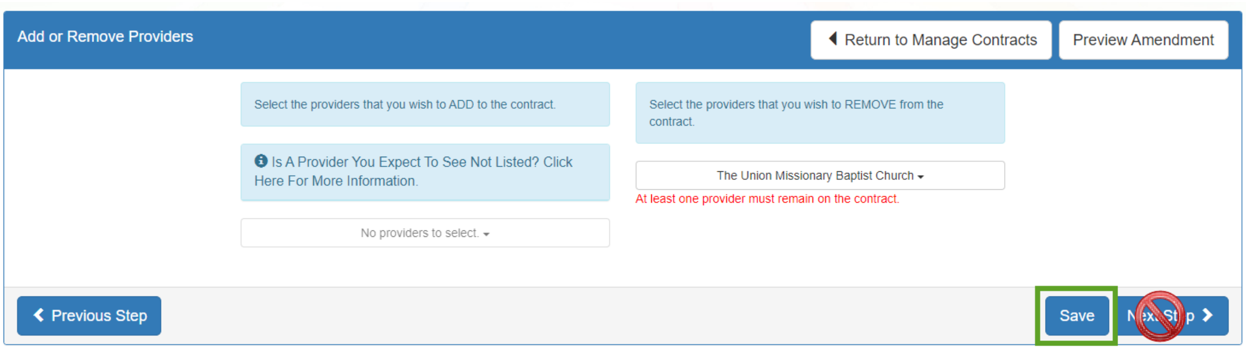
- The provider has a certified or in-progress SR 20 contract with the initiating coalition for the same program year
- The provider did not complete the health and safety inspection by DCF (question #2.1 on the profile General tab is "No")
- The provider has invalid (expired) curricula
- The provider's legal status or provider type does not match the provider(s) currently on the contract

To add an eligible provider to the contract, select the provider from the ADD list. Then, click **Save**.

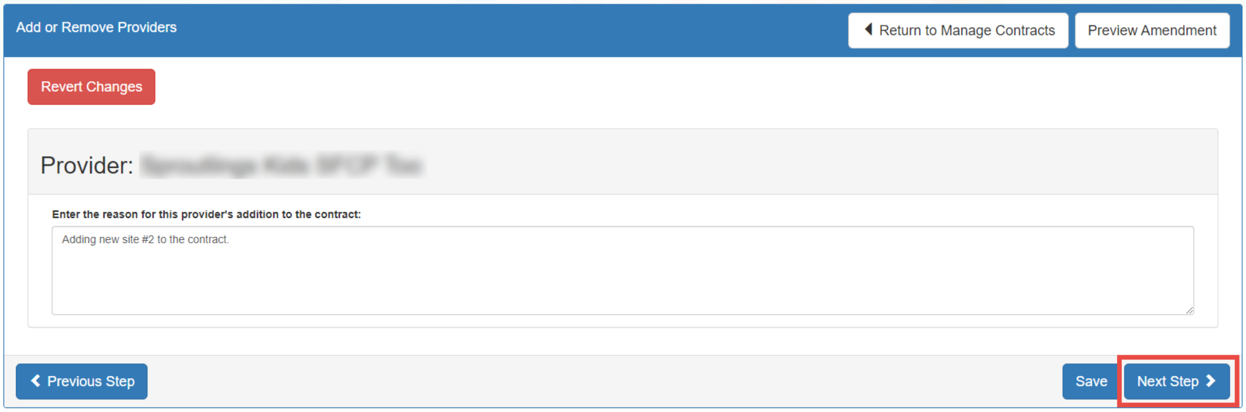
To remove a provider, select the provider from the REMOVE list, then click the **Save** button. At least one provider must remain on the contract.

Clicking **Save** on this page will bring up the reason for modification box.



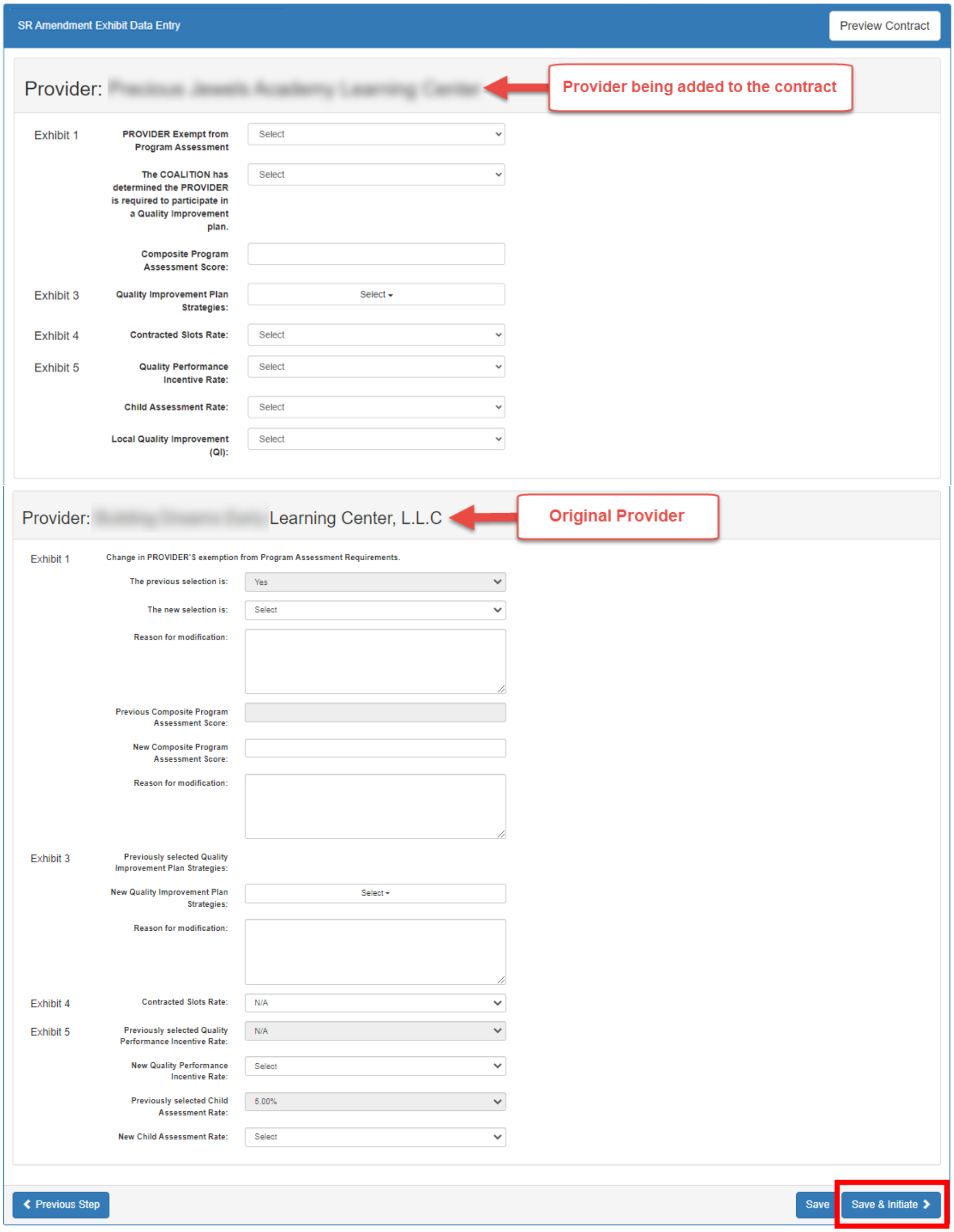


After selecting the provider(s) and clicking **Save**, then click **Next Step**.

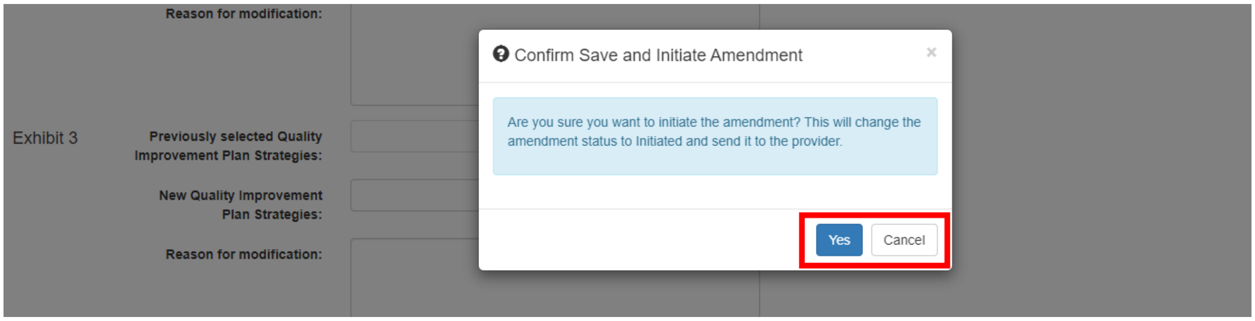


NOTE: To abandon changes and return to the Add or Remove Providers page, click the **Revert Changes** button.

Next, the Exhibit Data entry page displays for any added providers and original provider(s) on the contract. Complete all applicable fields for the added provider(s). On the original provider, amend any selections if applicable, then click **Save & Initiate**.



The Confirm Save and Initiate Amendment pop up message appears. Click **Yes** to initiate the amendment and send it to the provider or **Cancel** to close the message.

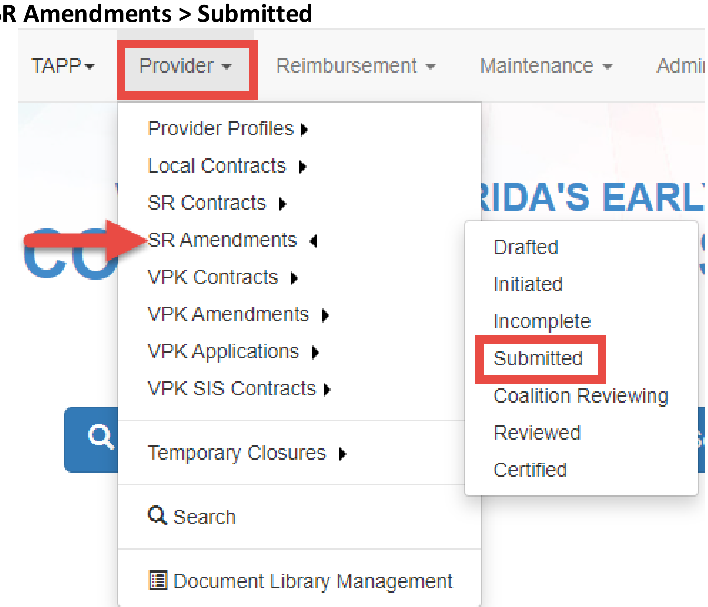


After clicking **Yes**, the amendment status changes to **Initiated** and the amendment is available in the **Provider > SR Amendments > Initiated** queue.

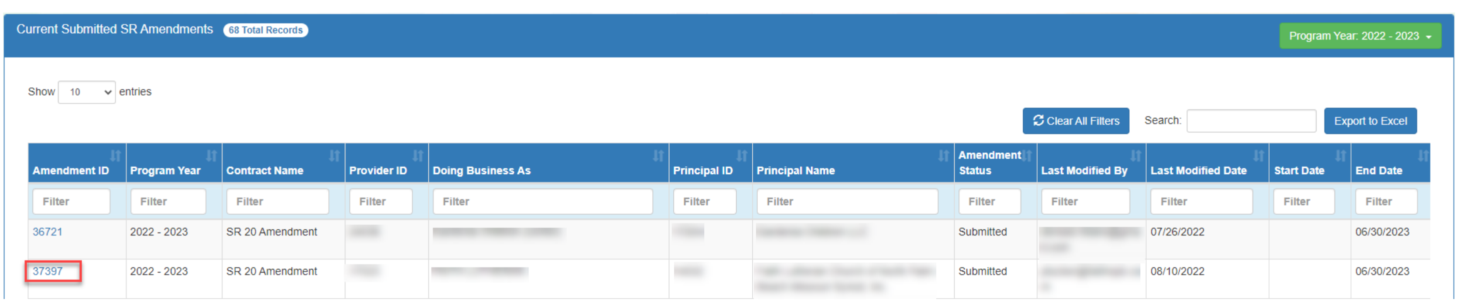
Reviewing and Certifying an SR Amendment

When the provider has submitted an SR amendment, the amendment will be available in the SR Amendments Submitted queue.

Navigate to **Provider > SR Amendments > Submitted**

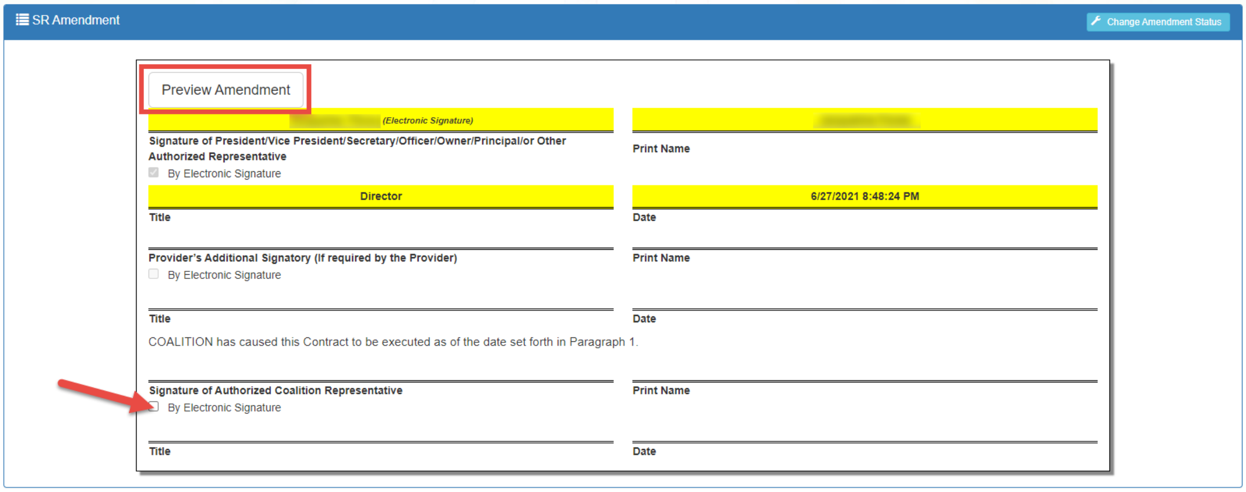


Click the **Amendment ID** link for the provider.



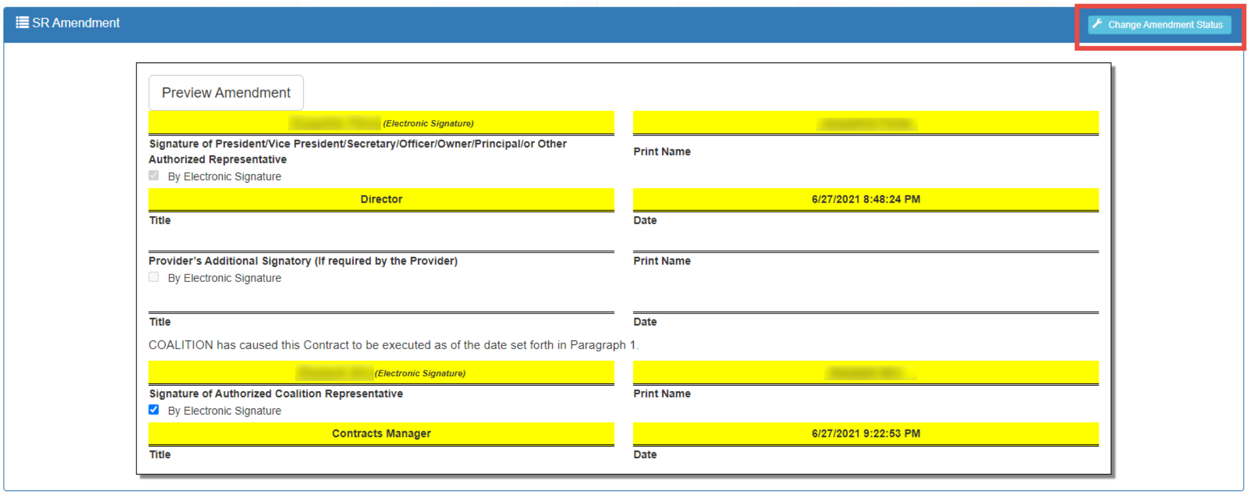
On the signatures page, click **<u>Preview Amendment</u>** to view the SR 20A form in a new browser tab.

To electronically sign the amendment, click the “By Electronic Signature” box for the coalition.



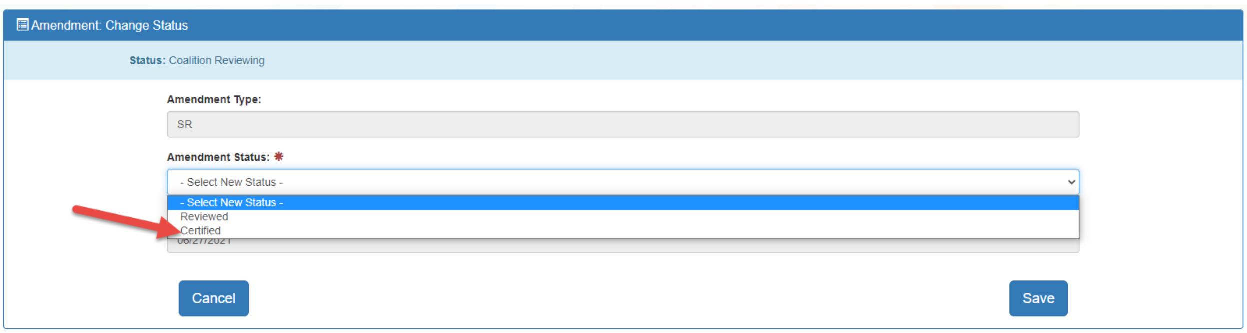
The SR Amendment Electronic Signature pop-up window appears. Enter the Title of Signator (NOT the Signator’s name), then click **<u>Yes</u>**. To close the window without signing, click **<u>Cancel</u>**.

When **Yes** is clicked, the coalition user's electronic signature, printed name, title, and the date are populated on the signatures page. Click **Change Amendment Status** to proceed.



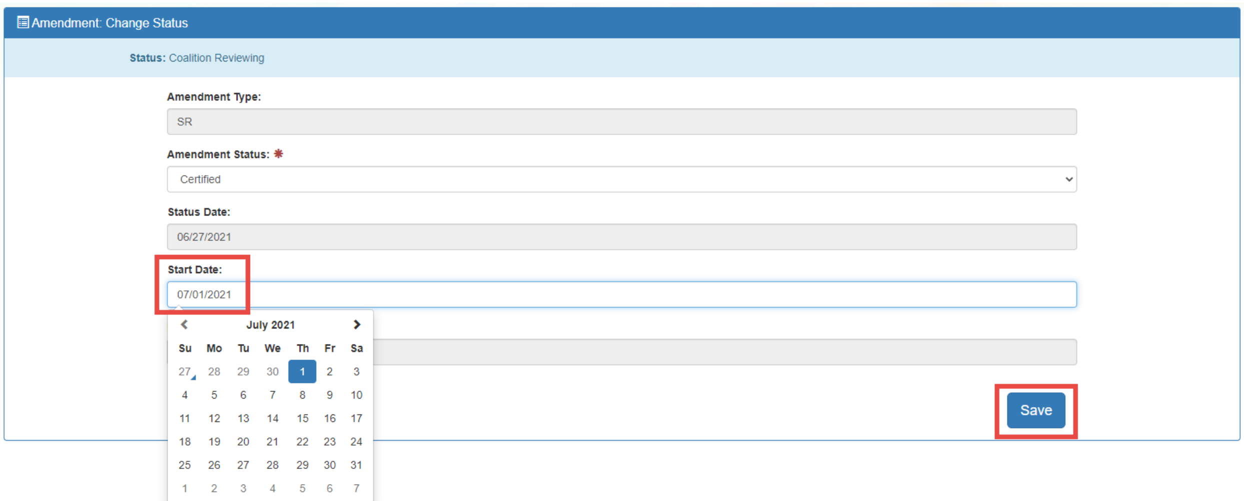
NOTE: To remove the coalition's signature, deselect the "By Electronic Signature" box and click **Yes** in the confirmation modal. To place the amendment in **Coalition Reviewing** or **Reviewed** status, click the **Change Amendment Status** button. Select a status and click **Save**. To access the amendment, navigate to the **Provider > SR Amendments > Coalition Reviewing** OR **Reviewed** queue.

After electronically signing the contract and clicking **Change Amendment Status**, set the amendment status to **Certified**.



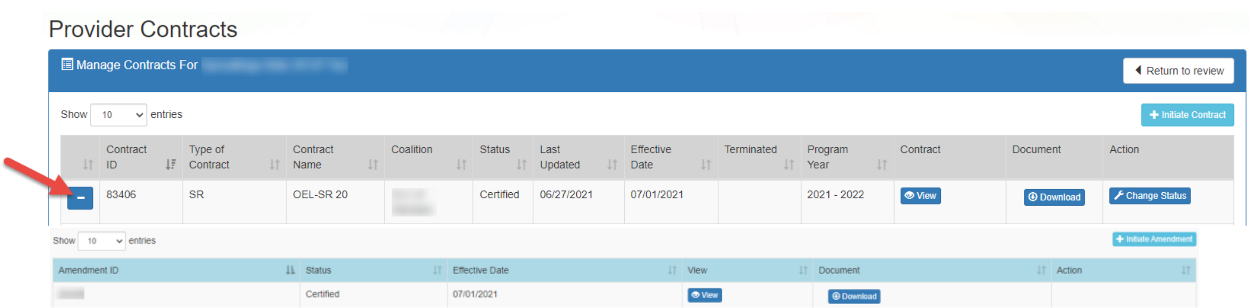
Enter the amendment start date, then click **Save**.

NOTE: Amendments can be backdated to the effective date of the contract or latest certified amendment for the same program year. Amendments can also be future dated up to the contract/amendment end date.

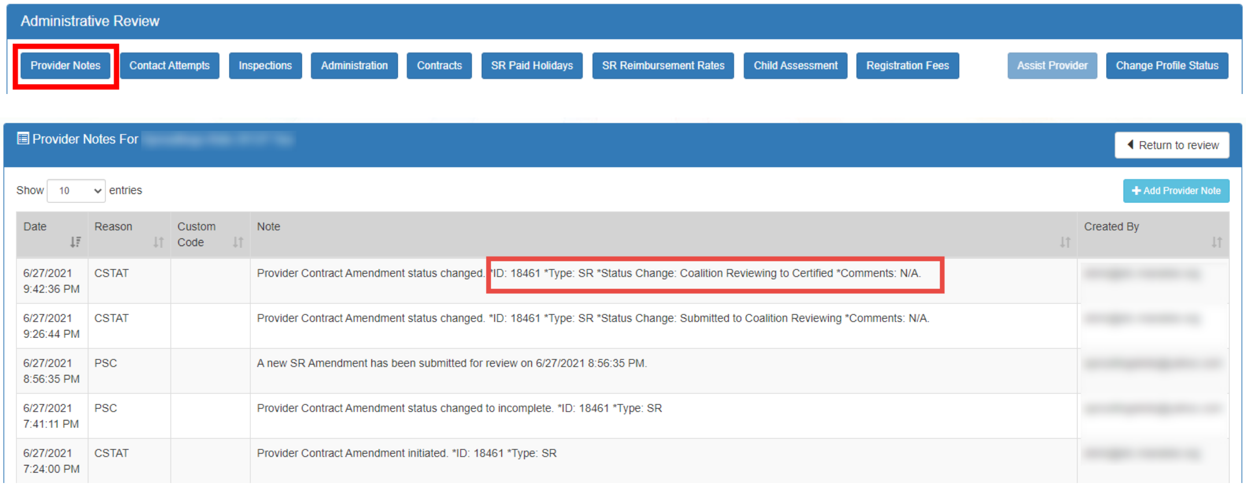


Navigate to the provider's Manage Contracts page to view the certified amendment. Click the plus "+" sign to the left of the SR 20 contract to expand the amendment section. The amendment is in **Certified** status.

To download a PDF of the certified SR 20A and any associated exhibits, click the **Download** button.



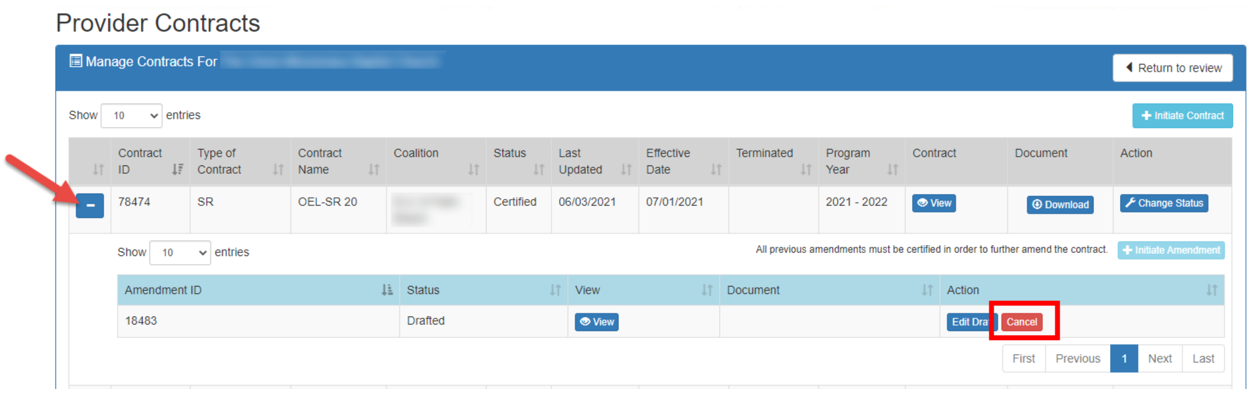
To verify that a provider note was written when the amendment was certified, click the **Return to review** button to return to the Administrative Review page, then click **Provider Notes**.



The amendment is available in the **Provider > SR Amendments > Certified** queue.

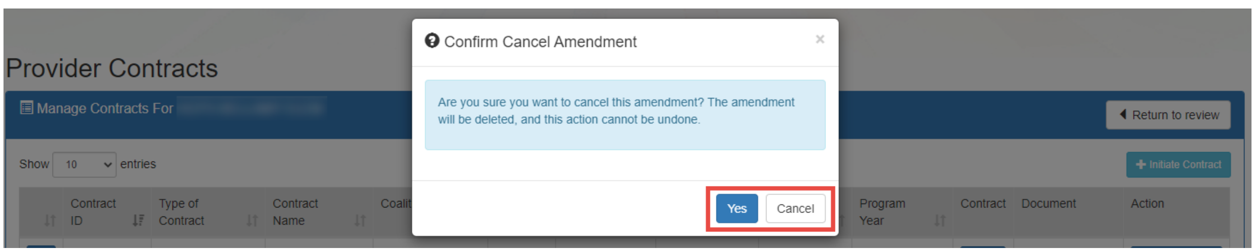
Cancelling an SR Amendment

Cancelling an amendment will delete the amendment from the system. To cancel an amendment at any stage prior to being certified, on the Manage Contracts page, click the plus "+" sign to the left of the contract to expand the amendment section. Then, click the red **Cancel** button.



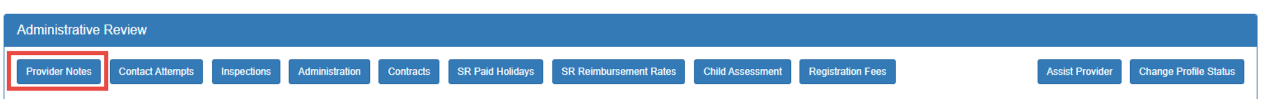
NOTE: Once the amendment is certified, the **Cancel** button is no longer available for that amendment.

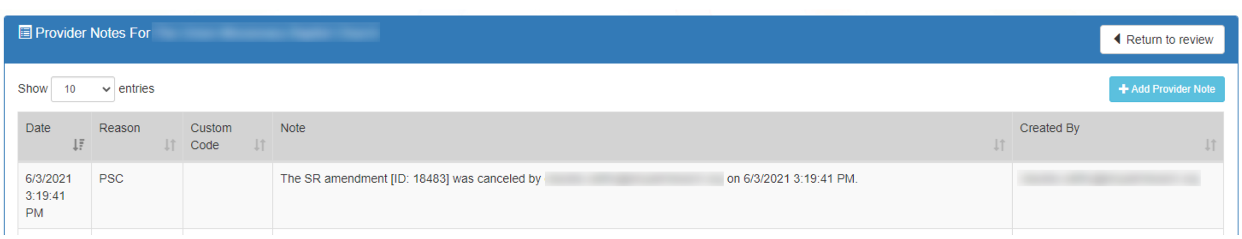
The Confirm Cancel Amendment pop-up message displays. Click **Yes** to permanently delete the amendment, or **Cancel** to close the message.



When **Yes** is selected, the amendment is deleted from the system and is no longer visible on the provider Manage Contracts page.

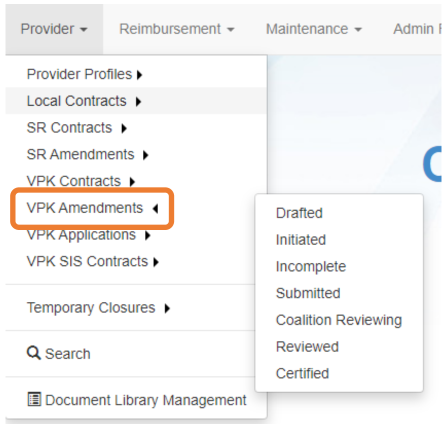
To view the provider note for a canceled amendment, click the **Return to review** button to return to the Administrative Review page, then click **Provider Notes**.





VPK Contract Amendment

To access the VPK contract amendment work queues, navigate to **Provider > VPK Amendments**.



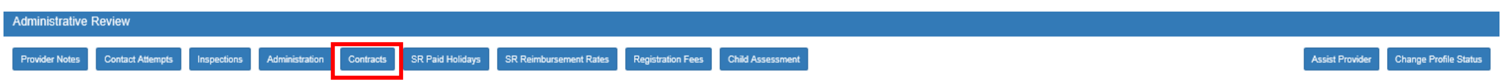
The amendment queues are:

- Drafted
- Initiated
- Incomplete
- Submitted
- Coalition Reviewing
- Reviewed
- Certified

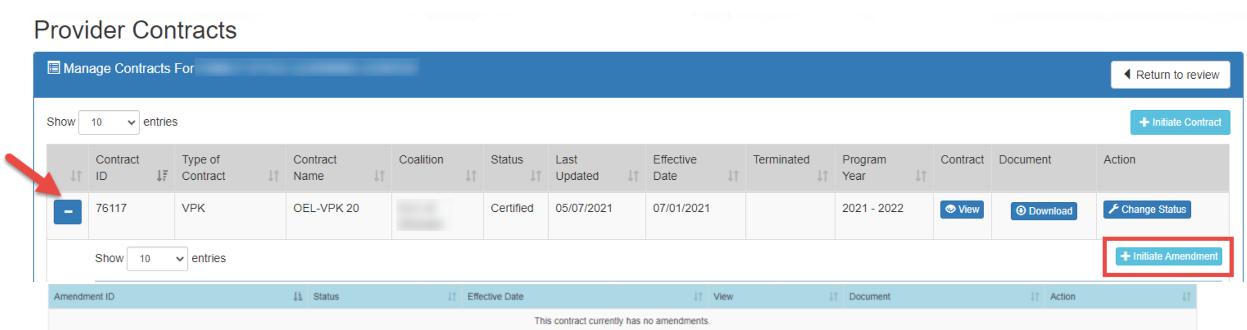
NOTE: The queues correspond to each of the available amendment statuses.

Initiating a VPK Amendment

From the provider profile Administrative Review page, click **Contracts**.

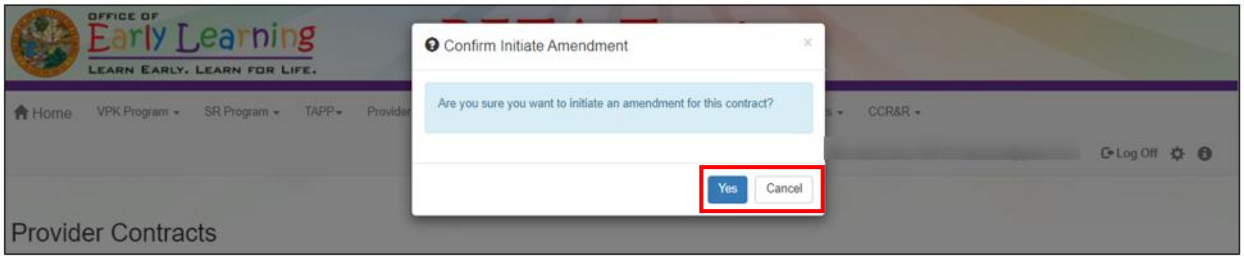


The Manage Contracts page for the provider displays. Click the plus "+" sign to the left of the VPK 20 contract to expand the amendment section. Then, click the **Initiate Amendment** button.

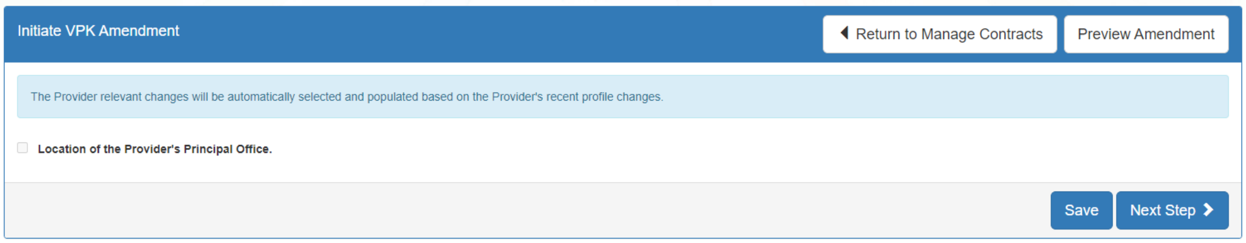


NOTE: The contract and any of its existing amendments must be in **Certified** status before a new amendment can be initiated for that contract.

A Confirm Initiate Amendment pop-up message displays. Click **Yes** to confirm that you want to initiate an amendment, or click **Cancel** to close the confirmation window.



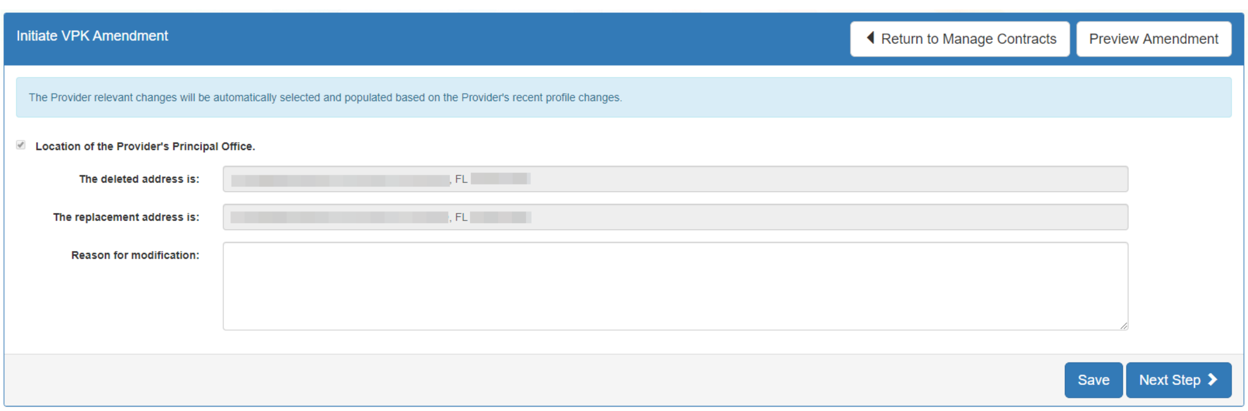
After clicking **Yes,** the Initiate VPK Amendment page for provider-relevant changes displays.



The box on this page is automatically selected if the principal office physical location (**Provider Portal** > **Business > Business Info > Physical Address Information**) has been modified since the contract or latest VPK amendment for the same contract year. The deleted and replacement addresses for the principal office's location are displayed.

If the location of the provider's principal office has changed, type in the reason for modification, then click **Next Step**. If there is no change, click **Next Step** to proceed.

NOTE: Do not initiate an amendment for location of the Provider's principal office if children are in care at that location. A change to the principal office physical location where children are in care requires a new VPK contract.

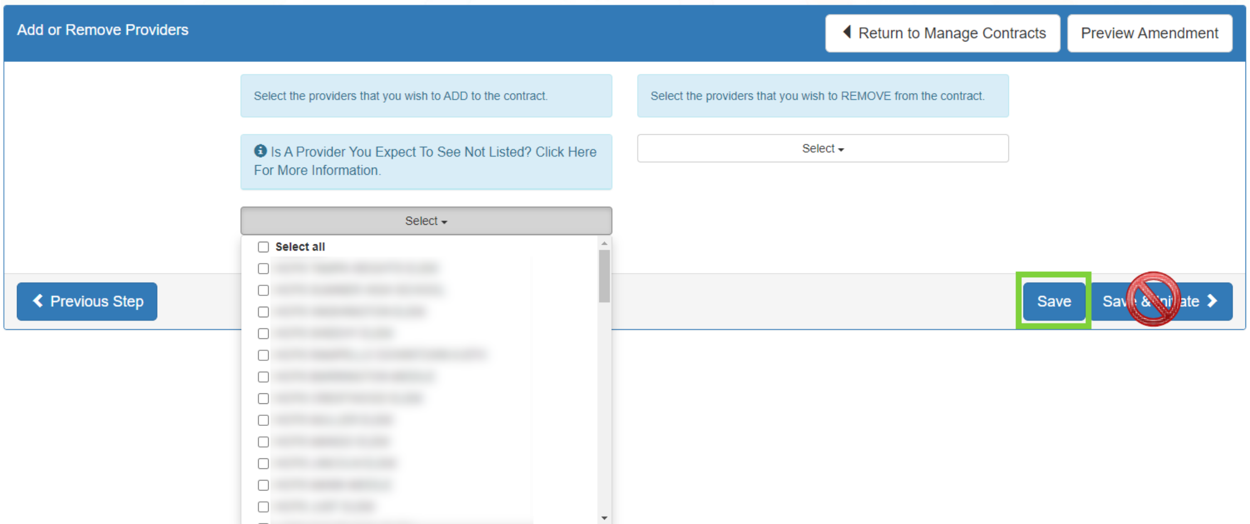


The Add or Remove Providers page displays for the user to add provider locations to, or remove locations from, the contract. If no changes are needed, click **Save & Initiate** to proceed.

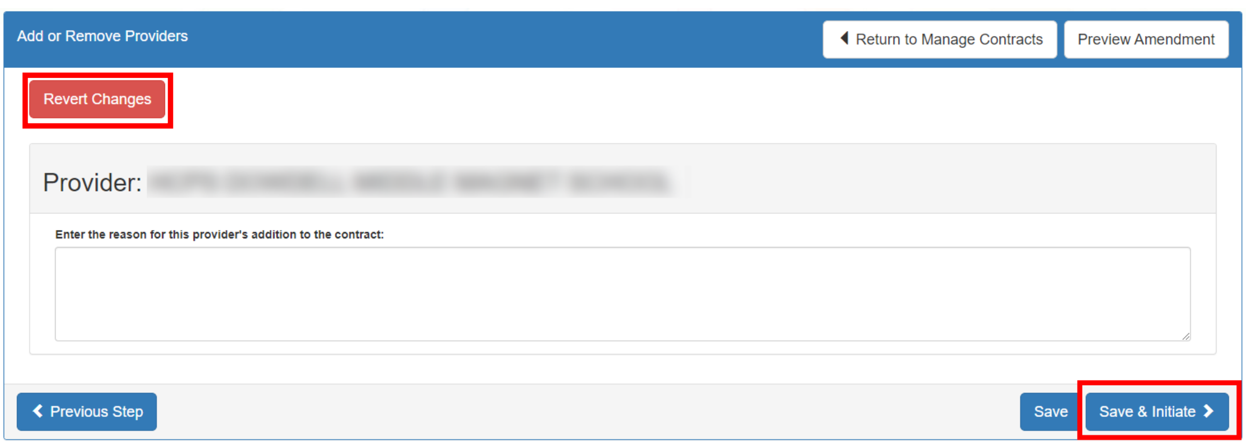
NOTE: If a provider you expect to see is not listed, it may be due to:

- The provider has an in-progress or certified VPK 20 contract for the same program year
- The provider has invalid (expired) curricula
- The provider's legal status or provider type does not match the provider(s) currently on the contract

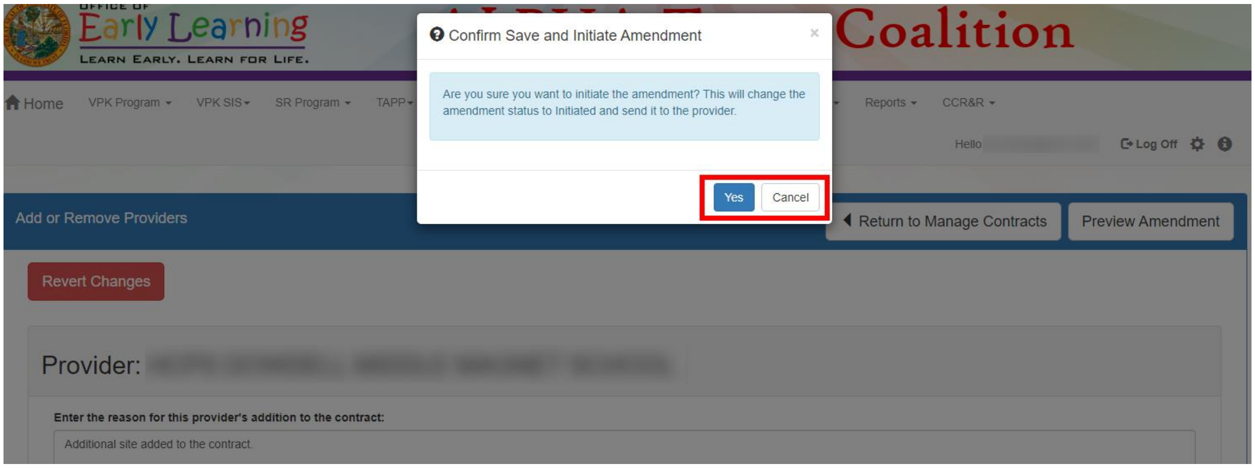
To add or remove eligible provider(s) from the contract, select the provider(s) from the list, then click **Save**. Clicking **Save** will bring up the reason for modification box.



Enter the reason for adding or removing provider(s), then click **Save & Initiate**. To abandon changes and return to the Add or Remove Providers page, click **Revert Changes**.

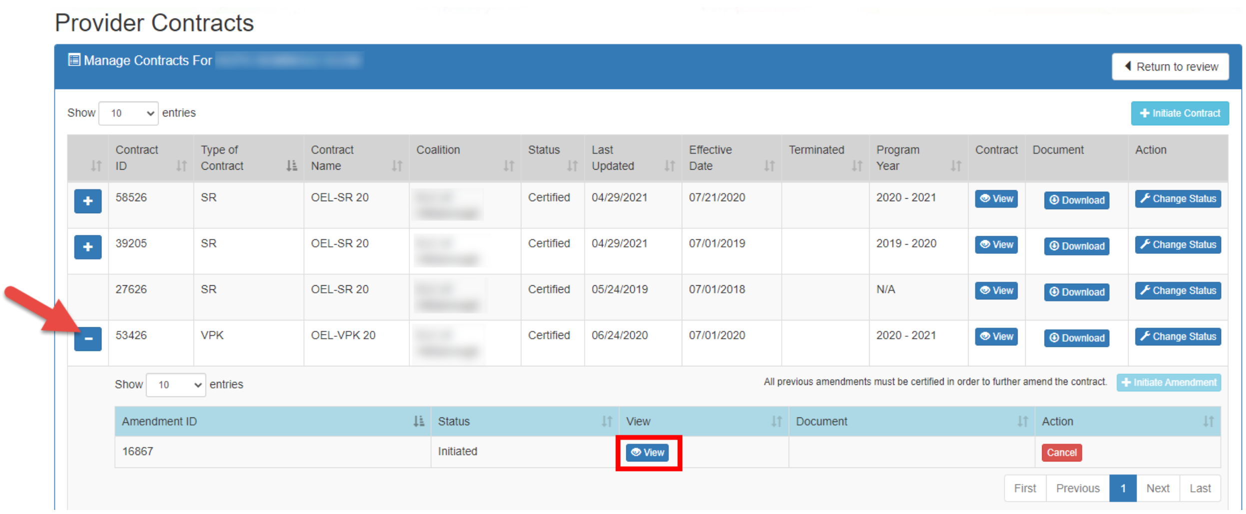


When **Save & Initiate** is clicked, the Confirm Save and Initiate Amendment pop-up message appears. Click **Yes** to initiate the amendment and send it to the provider, or **Cancel** to close the message.

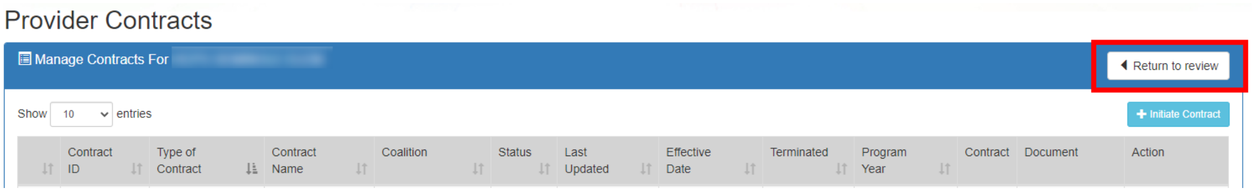


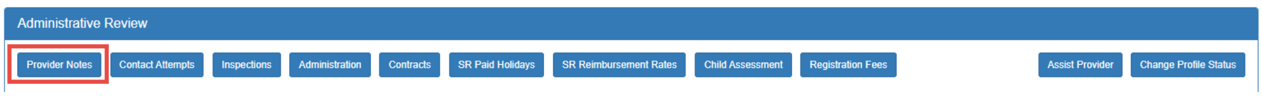
When the **Yes** button is clicked, the user is navigated to the Manage Contracts page. Click the plus "+" sign to the left of the VPK 20 contract to expand the amendment section. The amendment is in **Initiated** status.

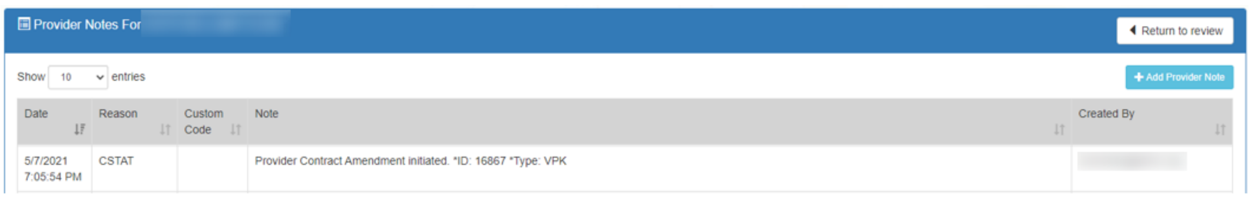
To preview the **Initiated** VPK 20A form, and any associated exhibits, click the **View** button.



To verify that a provider note was written when the amendment was initiated, click the **Return to review** button to return to the Administrative Review page.







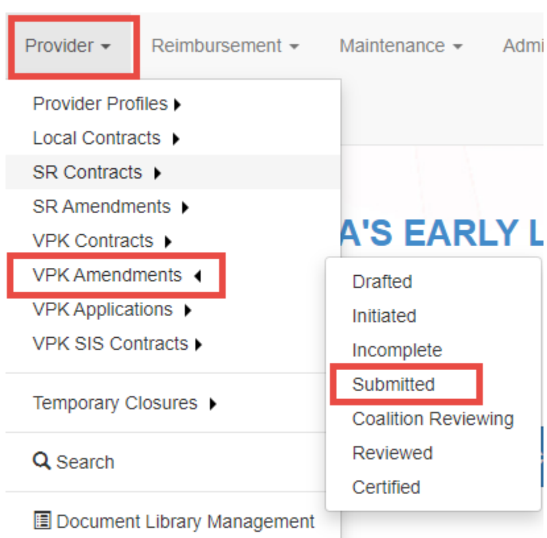
The amendment is now available at **Provider > VPK Amendments > Initiated**.

NOTE: An email notification is sent to the provider's contact email address when the VPK amendment is initiated.

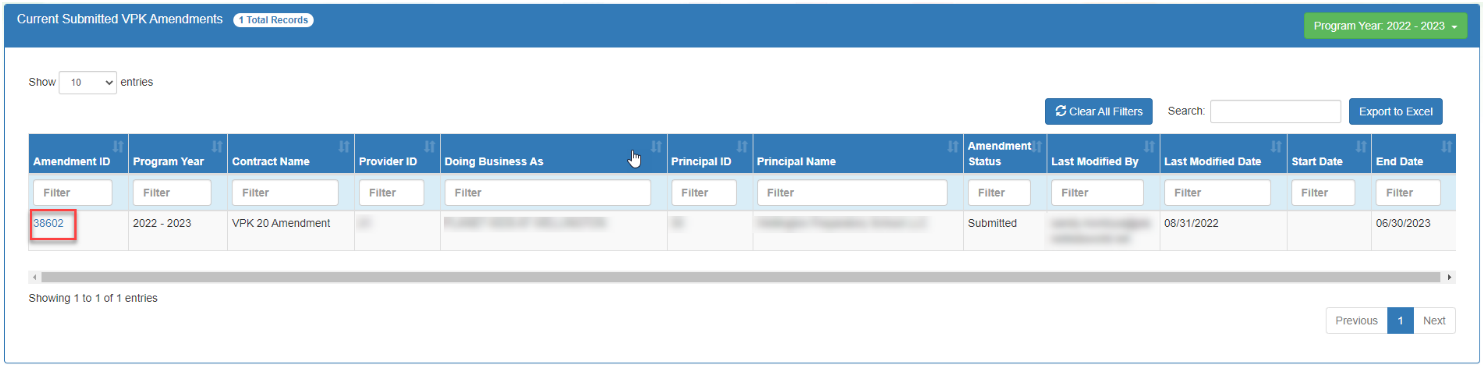
NOTE: If the provider decides to opt-in or opt-out of the VPK Advance Payment after the contract is **Certified**, an amendment must be initiated. If no other changes are needed, such as provider's principal office location or adding/removing providers, the coalition user will click the **Next Step** buttons to skip through those pages and click the **Save & Initiate** button. The provider will edit the amendment and select yes or no to the VPK Advance Payment options on the amendment and then submit the amendment to the coalition.

Reviewing and Certifying a VPK Amendment

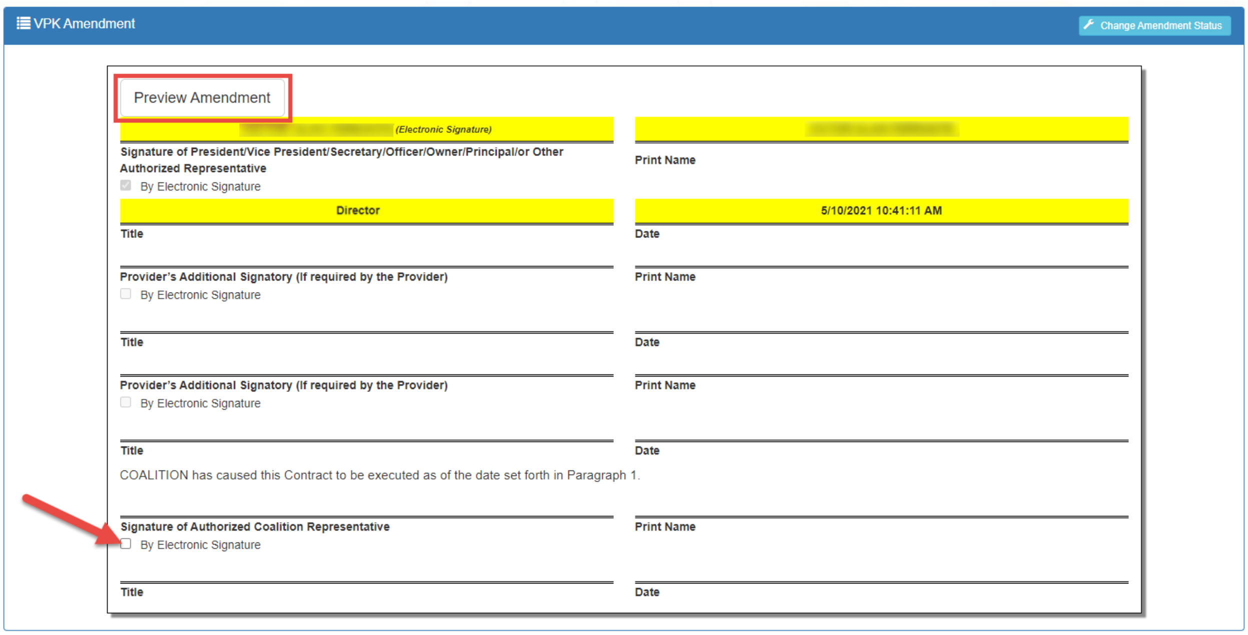
When the provider has signed and submitted the VPK amendment, navigate to **Provider > VPK Amendments > Submitted**.



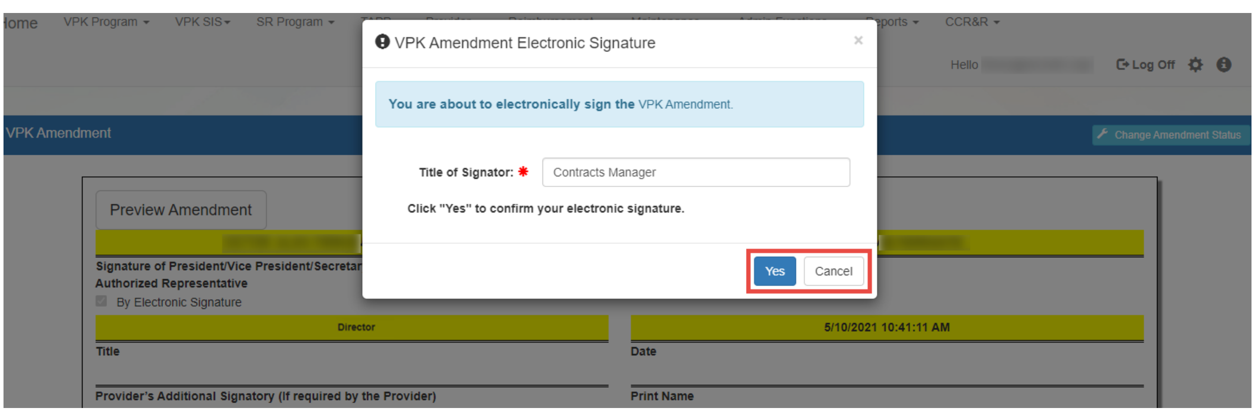
Click the Amendment ID link for the provider.



On the signatures page, click **Preview Amendment** to view the VPK 20A form. To sign the amendment, click the By Electronic Signature box for the authorized coalition representative.

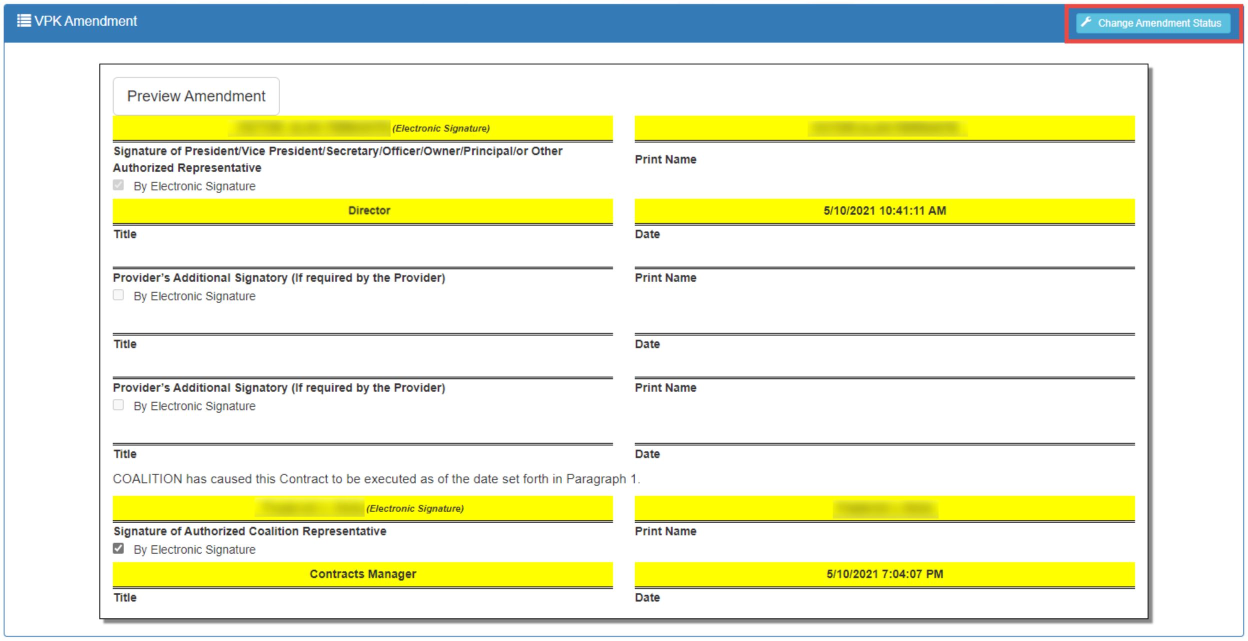


When the By Electronic Signature box is selected, the VPK Amendment Electronic Signature pop-up message displays. Enter the Title of Signator (not a name), then click **Yes**. To close the message without signing, click **Cancel**.

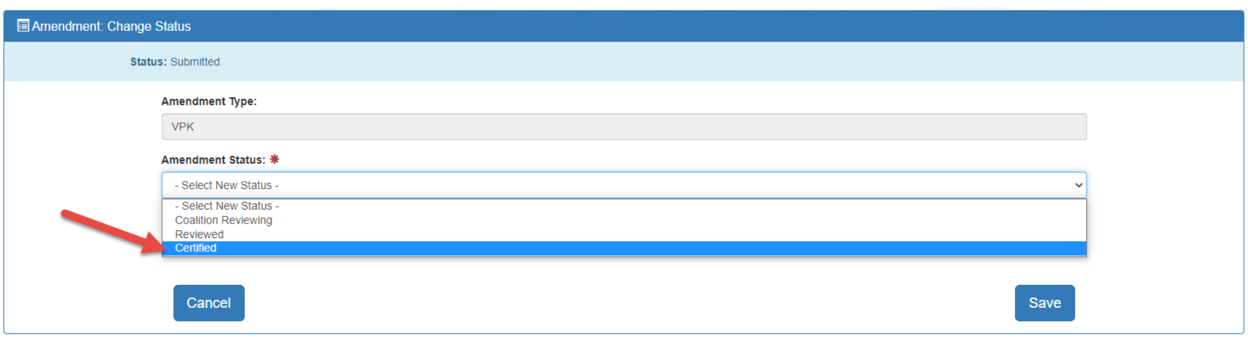


When **Yes** is clicked, the coalition user's name, title, and the date are populated on the signature page. To remove the coalition's signature, uncheck the By Electronic Signature box and click **Yes** in the pop-up message.

After signing the amendment, click the **Change Amendment Status** button.

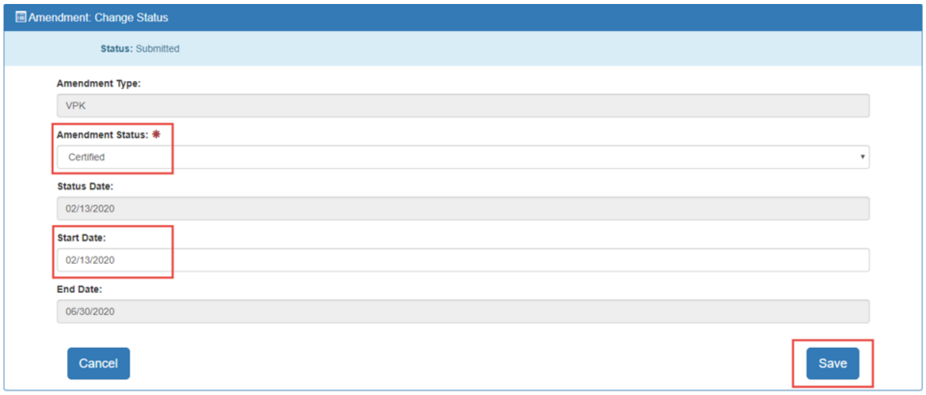


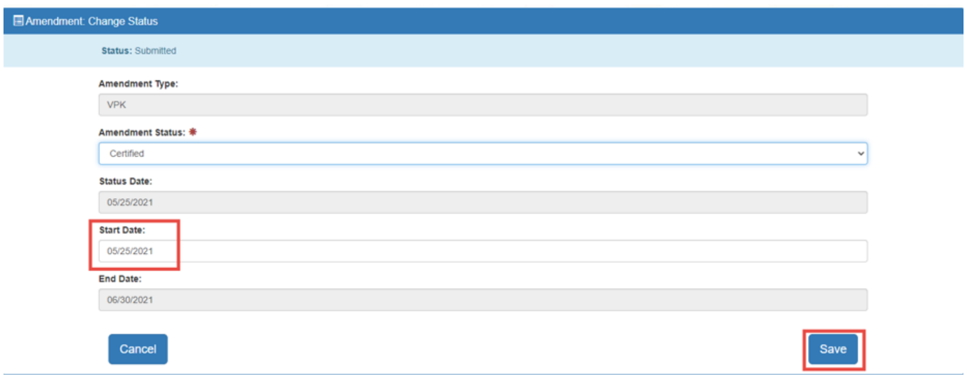
Set the amendment status to **Coalition Reviewing** or **Reviewed**, if applicable. When the contract is ready to be certified, click the **Change Amendment Status** button on the signatures page and set the amendment status to **Certified**.



Enter the amendment start date, then click **Save**.

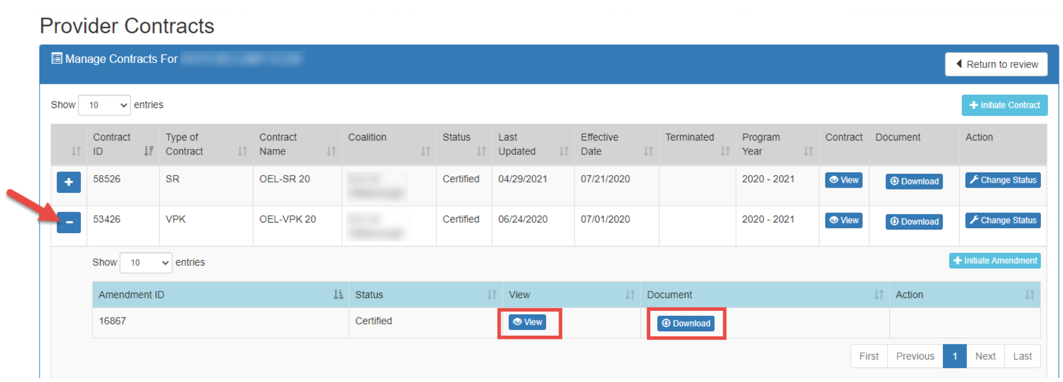
NOTE: Amendments can be backdated to the effective date of the contract or latest certified amendment for the same program year. Amendments can also be future dated up to the contract/amendment end date.





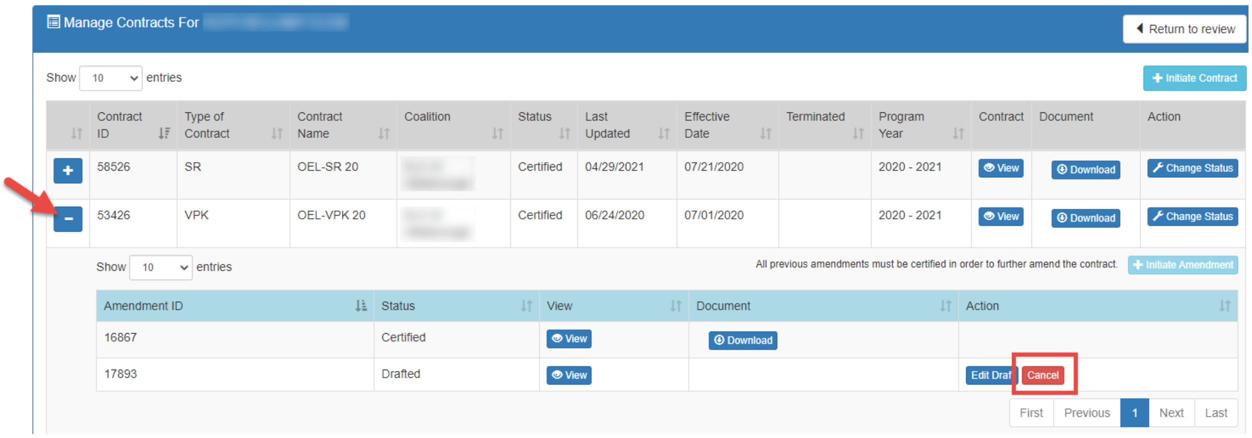
Navigate to the provider's Manage Contracts page to view the certified amendment. Click the plus "+" sign to the left of the VPK 20 contract to expand the amendment section. The amendment is in **Certified** status.

To preview the certified VPK 20A form and any associated exhibits, click the **View** button, or click the **Download** button to download the amendment as a PDF.



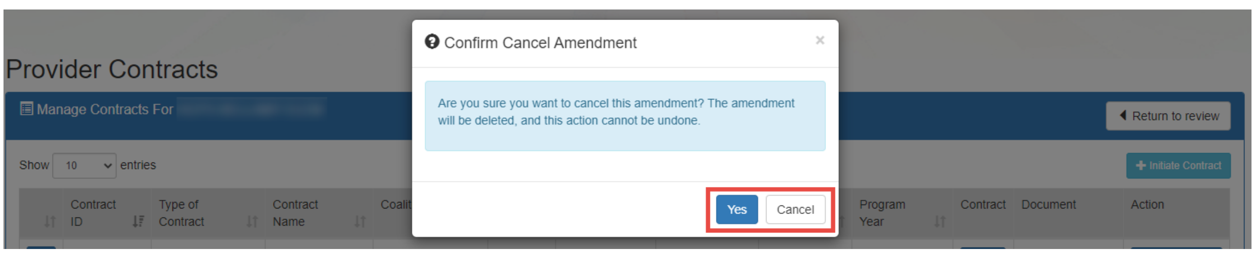
Cancelling a VPK Amendment

Cancelling an amendment will delete the amendment from the system. To cancel an amendment at any stage prior to being certified, from the Manage Contracts page, click the plus "+" sign to the left of the contract to expand the amendment section. Then, click the red **Cancel** button.



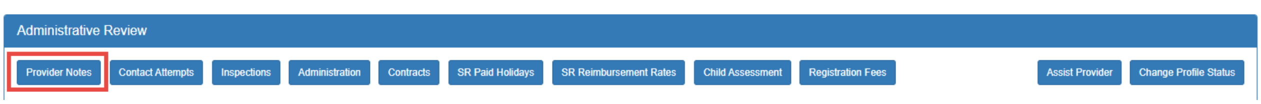
NOTE: Once the amendment is certified, the **Cancel** button is no longer available for that amendment.

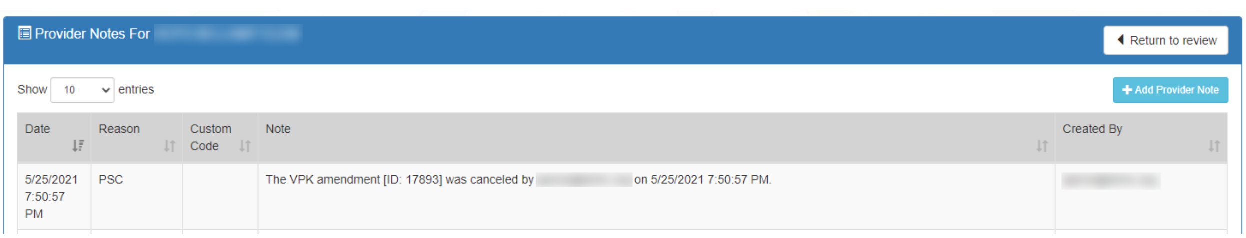
The Confirm Cancel Amendment pop-up message displays. Click **Yes** to permanently delete the amendment, or **Cancel** to close the message.



When **Yes** is selected, the amendment is deleted from the system and is no longer visible on the provider Manage Contracts page.

To view the provider note for a canceled amendment, click the **Return to review** button to return to the Administrative Review page, then click **Provider Notes**.

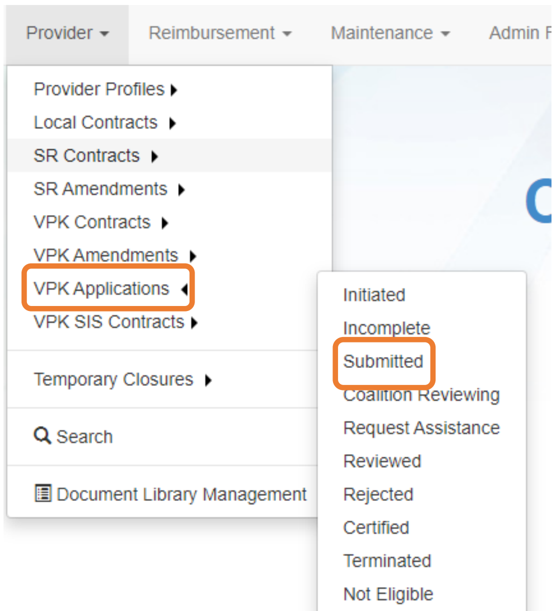




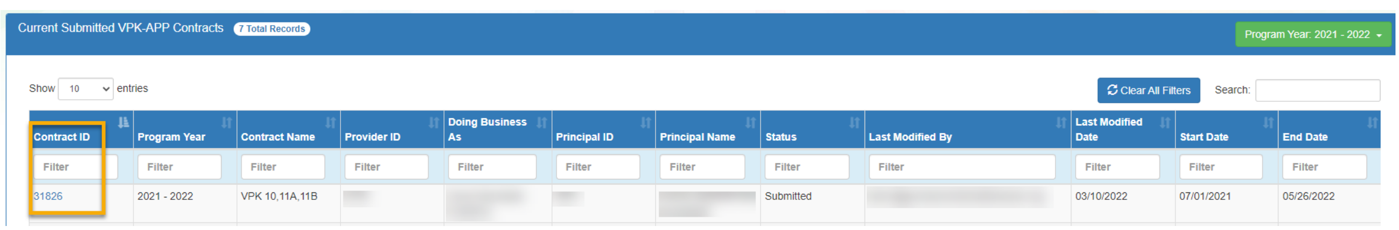
Processing a VPK-APP

Reviewing a VPK-APP

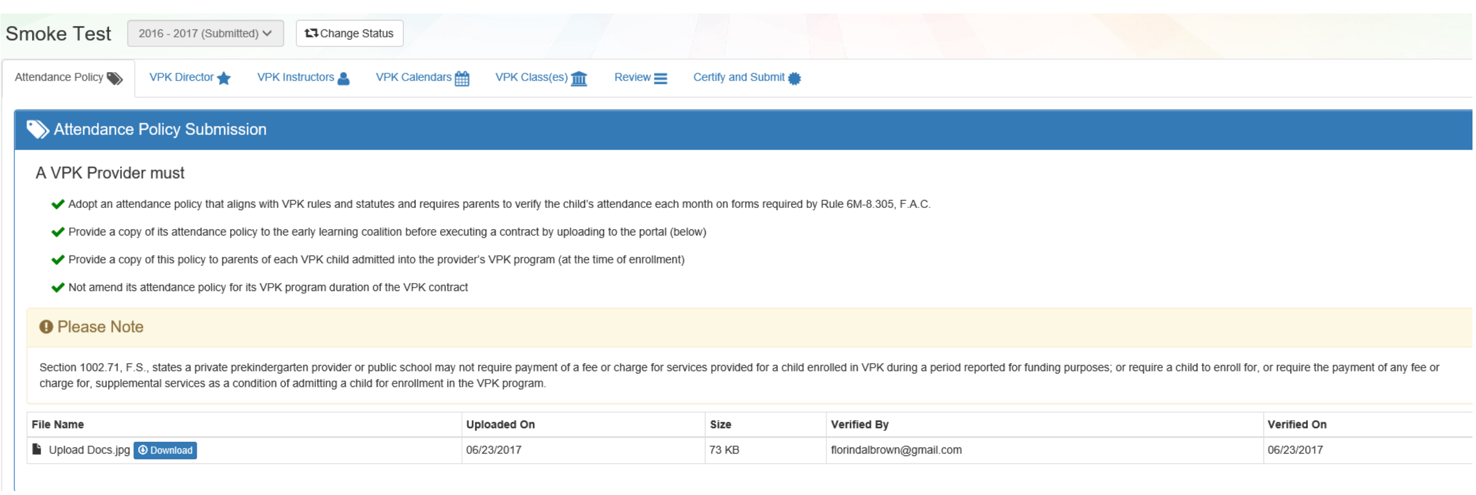
To review a VPK-APP, the coalition user will click the **Provider** dropdown menu, select VPK Applications and click **Submitted** to see all submitted VPK-APPs.



Click the Contract ID of the desired VPK-APP.

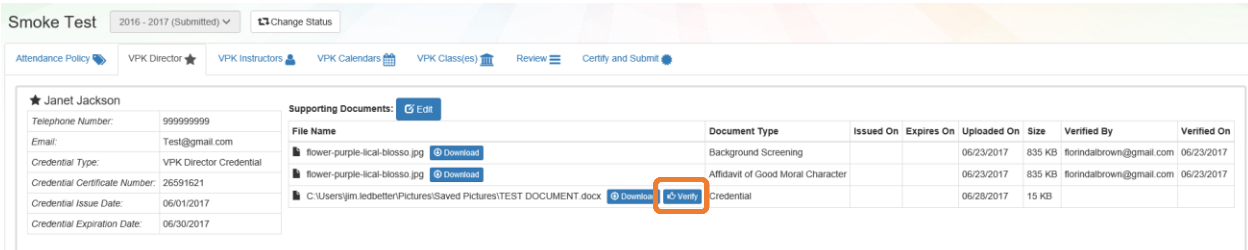


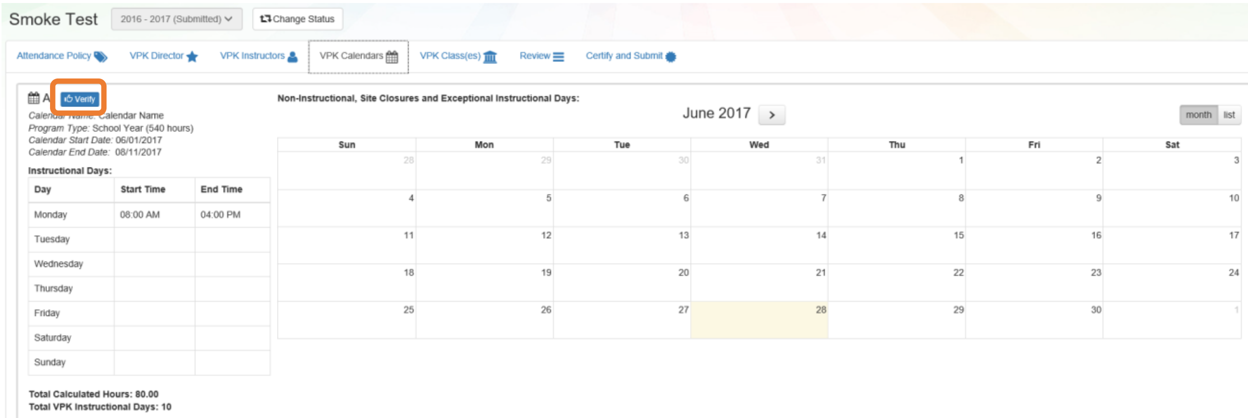
Then, the following will display.

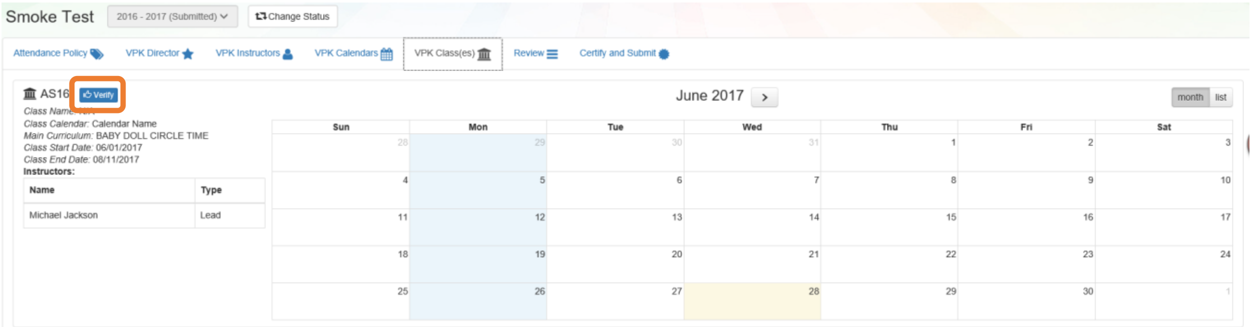


The coalition user can click on each tab to review the information.

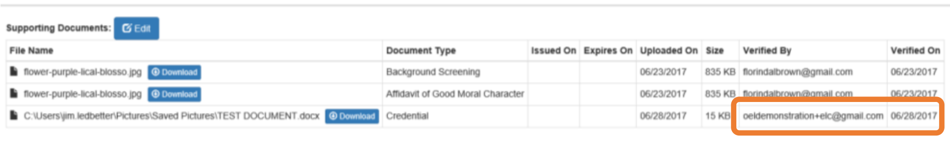
To verify a document, the coalition user can click the **Verify** button on the VPK Director, VPK Instructor, VPK Calendars and VPK Class(es) tabs.







After clicking the **Verify** button, the coalition user's email address and verification date will populate in each tab.



A

Verified By oeldemonstration+elc@gmail.com, On 06/28/2017

Calendar Name: Calendar Name

Program Type: School Year (540 hours)

Calendar Start Date: 06/01/2017

Calendar End Date: 08/11/2017

AS16

Verified By oeldemonstration+elc@gmail.com, On 06/28/2017

Class Name: N/A

Class Calendar: Calendar Name

Main Curriculum: BABY DOLL CIRCLE TIME

Class Start Date: 06/01/2017

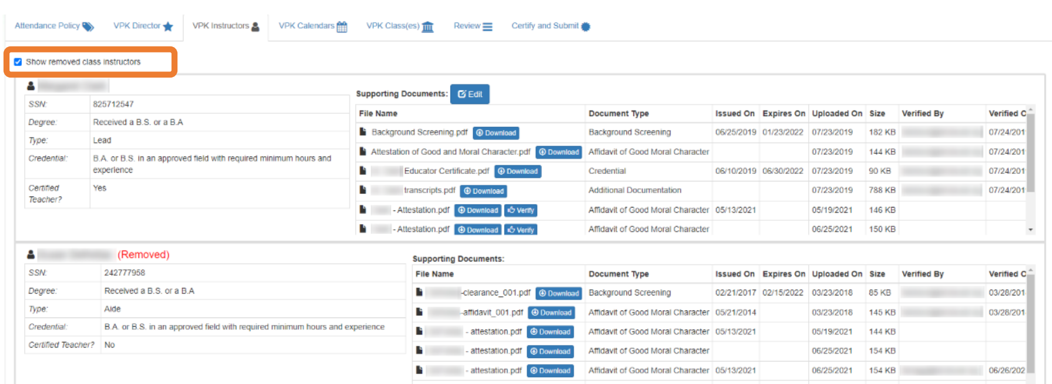
Class End Date: 08/11/2017

Viewing VPK-APP Removed Items

Items that have been removed from the VPK-APP by the provider can be viewed on the following tabs:

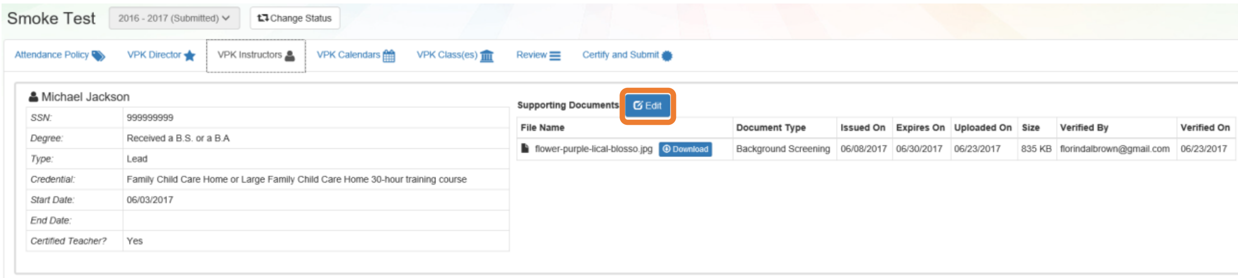
- VPK Director
- VPK Instructors
- VPK Calendars
- VPK Classes
- Review

On the VPK Director, VPK Instructors, VPK Calendars, and VPK Classes tabs, click the checkbox to show any removed items on each tab.

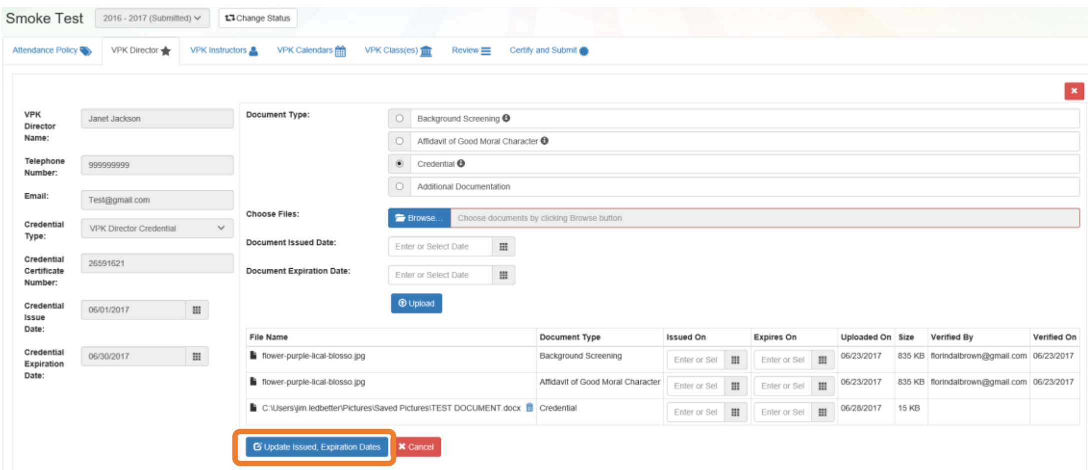


Editing a VPK-APP

Coalition users can click the **Edit** button on the VPK Director and VPK Instructors tabs to edit information. Documents may be uploaded by users, and un-verified documents may be deleted.

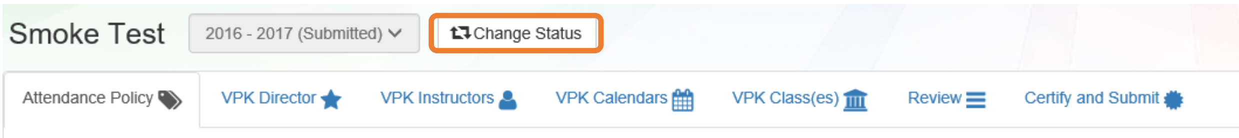


If edits are made to a tab, the coalition user must click the **Update** button to save the changes.

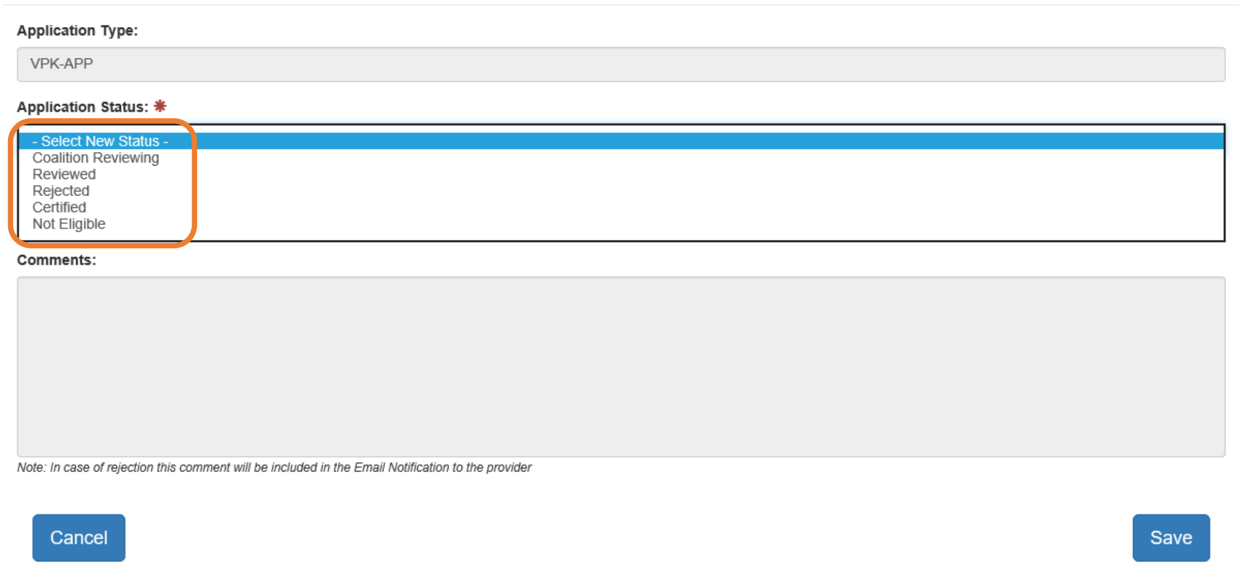


Changing VPK-APP Status

A coalition user can change a VPK-APP's status by clicking the **Change Status** button on any tab of the VPK-APP.



Then, select a new status.



VPK-APP Status Definitions

Coalition Reviewing

The coalition is actively reviewing the VPK-APP.

Reviewed

The coalition has reviewed, but not certified, the VPK-APP.

Rejected

The VPK-APP has missing or incorrect information that is necessary for approval.

Certified

The VPK-APP is approved.

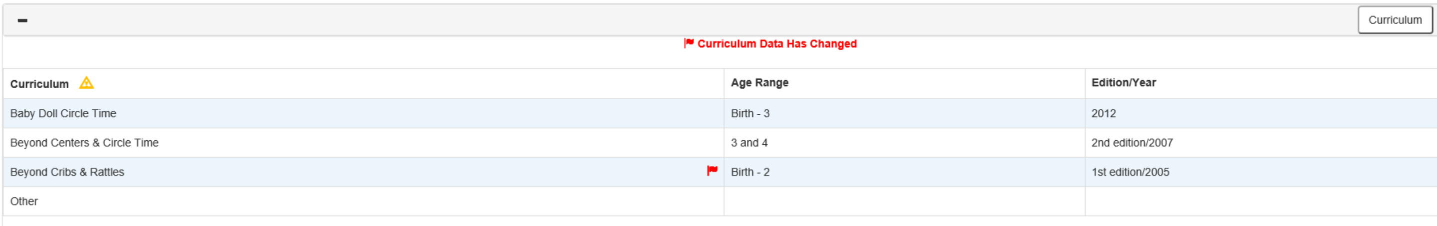
Not Eligible

The coalition has determined that the provider is not eligible for a VPK-APP.

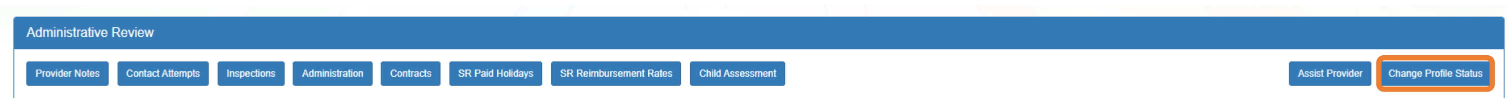
NOTE: The provider can edit the VPK-APP in any status, but must certify and submit the VPK-APP to notify the coalition that edits have been made.

Refreshing a VPK-APP

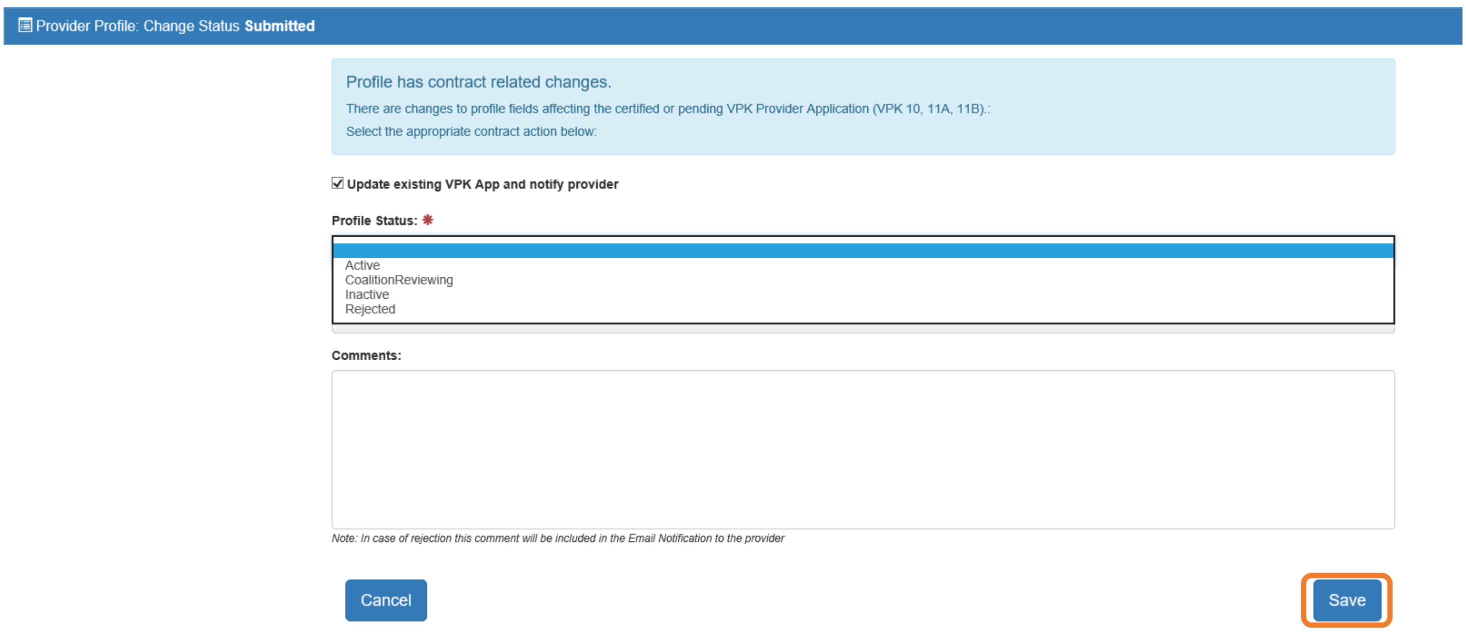
If a Provider Portal user has changed a profile field that affects the VPK-APP, the following will display on review.



After the coalition user clicks the **<u>Change Profile Status</u>** button…



…the following will display.



When the **Save** button is clicked, the provider's VPK-APP status will change to **Incomplete**. The Provider Portal user will then review the VPK-APP and re-submit the edited VPK-APP. If the coalition user un-checks the **Update existing VPK App and notify provider** checkbox, but decides to update and notify, the VPK-APP can be re-initiated again and the checkbox left checked.

Provider Contracts

Manage Contracts For Jim's House Of Canes & Gators — Return to review

Show 10 entries — Initiate Contract

Contract ID	Type of Contract	Contract Name	Coalition	Status	Last Updated	Start Date	End Date	Terminated	Contract	Document	Action
26804	VPK-SIS	VPK SIS 20S	ELC of the Big Bend Region	Terminated	06/26/2017	05/18/2017	6/30/2017	4/28/2017	Paper	None	Change Status
26788	VPK-SIS	VPK SIS 20S	ELC of the Big Bend Region	Certified	04/04/2017	04/04/2017	6/30/2017		Paper	None	Edit, Change Status
26731	SR	SR (Paper)	OEL	Terminated	06/30/2017	01/01/2017	1/1/2018	6/30/2017	Paper	None	Change Status
26723	SR	SR (Paper)	OEL	Terminated	04/05/2017	01/10/2017	1/10/2018	4/4/2017	Paper	None	Change Status
180	VPK	OEL-VPK 20	ELC of the Big Bend Region	Not Eligible	05/24/2017	07/01/2017	6/30/2018		View	N/A	Amend, Change Status
157	VPK	OEL-VPK 20	ELC of the Big Bend Region	Terminated	06/26/2017	07/01/2017	3/2/2019	6/26/2017	Paper	None	Amend, Change Status
156	VPK	OEL-VPK 20	ELC of the Big Bend Region	Terminated	05/26/2017	07/01/2017	6/30/2018	5/26/2017	View	N/A	Amend, Change Status
139	VPK	OEL-VPK 20	ELC of the Big Bend Region	Certified	04/04/2017	07/01/2017	6/30/2018		View	N/A	Amend, Change Status
45	VPK-APP	VPK 10,11A,11B	ELC of Palm Beach	Incomplete	08/11/2017	06/21/2017	7/27/2018		View	N/A	Change Status
Contract ID	Type of Contract	Contract Name	Coalition	Status	Last Updated	Start Date	End Date	Terminated	Contract	Document	Action

First Previous 1 Next Last

The provider owner and VPK director will receive the following email from **DONOTREPLY@oel.myflorida.com**.

From: <OELSystemTest@oel.myflorida.com>
Date: Wed, Aug 16, 2017 at 12:06 PM
Subject: Signature Required - VPK Provider Application Updated
To: alatham77@gmail.com
Cc: ME@nowhere.com

Hello,

The VPK Provider Application (VPK 10,11A, 11B) forms have been updated for Maggie Mae Daycare. Your review and signature is required. Please log on the Provider Portal and go to the Contracts menu, and choose Manage Contracts. On this page, locate your VPK-APP and click Edit. Review the VPK Provider Application information and submit your signature on the Certify and Submit tab.

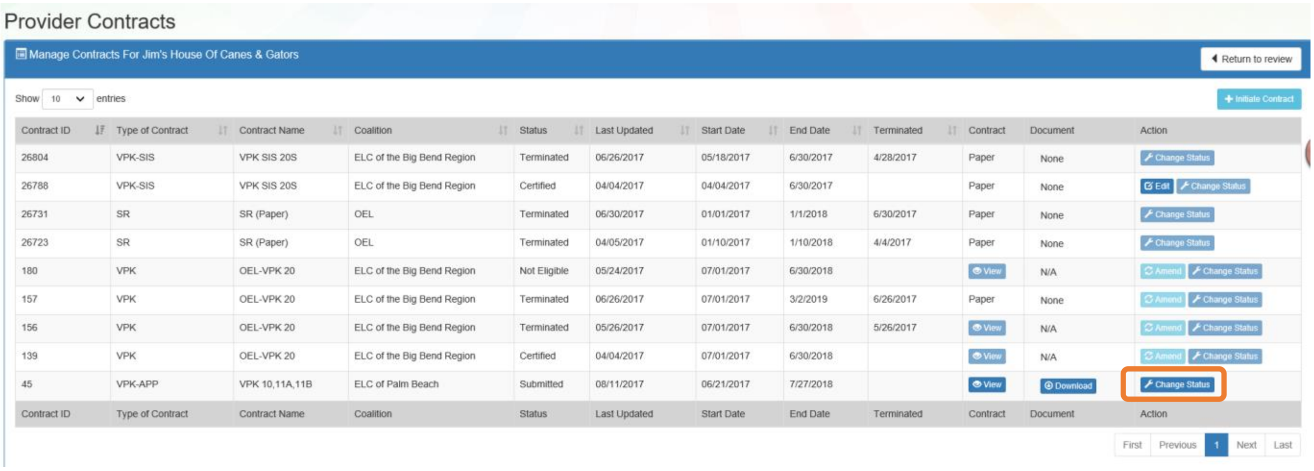
Please review and submit your signature as quickly as possible.

Thank you,

ELC of the Big Bend Region
(866) 973-9030
http://www.elcbigbend.org/

Please do not reply to this message. Replies to this message are routed to an unmonitored mailbox. If you have questions, please contact your early learning coalition.

After the Provider Portal user submits the edited VPK-APP, the coalition user will click the **<u>Change Status</u>** button…



Provider Contracts

Manage Contracts For Jim's House Of Canes & Gators

Return to review

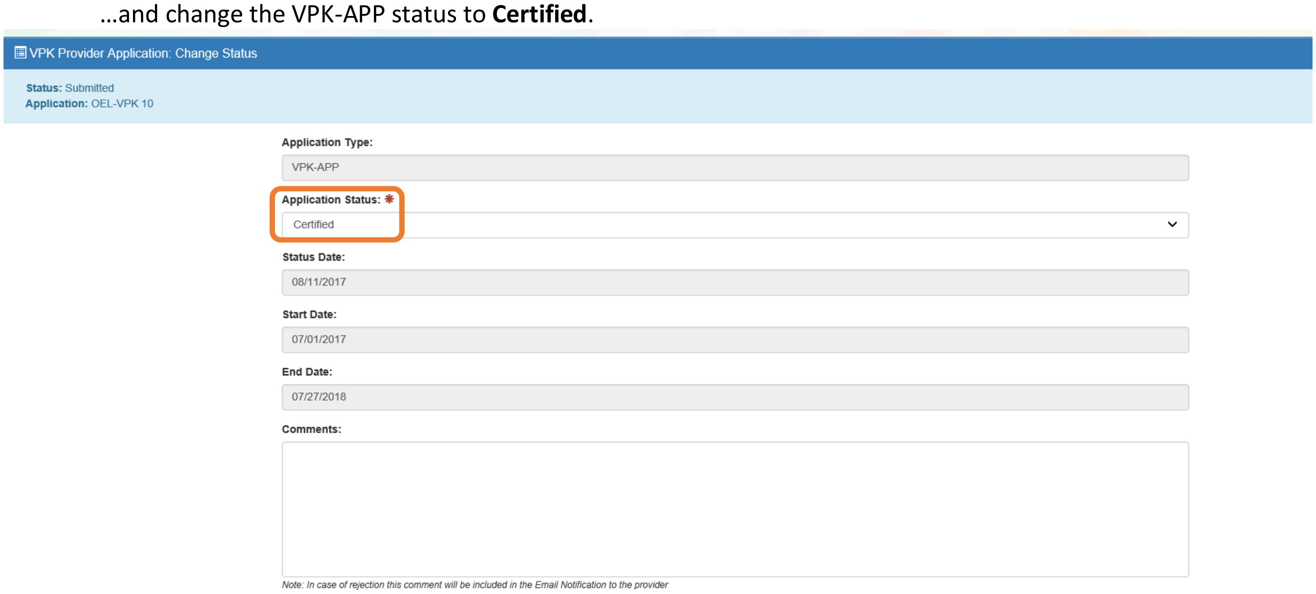
Show 10 entries

Initiate Contract

Contract ID	Type of Contract	Contract Name	Coalition	Status	Last Updated	Start Date	End Date	Terminated	Contract	Document	Action
26804	VPK-SIS	VPK SIS 20S	ELC of the Big Bend Region	Terminated	06/26/2017	05/18/2017	6/30/2017	4/28/2017	Paper	None	Change Status
26788	VPK-SIS	VPK SIS 20S	ELC of the Big Bend Region	Certified	04/04/2017	04/04/2017	6/30/2017		Paper	None	Edit Change Status
26731	SR	SR (Paper)	OEL	Terminated	06/30/2017	01/01/2017	1/1/2018	6/30/2017	Paper	None	Change Status
26723	SR	SR (Paper)	OEL	Terminated	04/05/2017	01/10/2017	1/10/2018	4/4/2017	Paper	None	Change Status
180	VPK	OEL-VPK 20	ELC of the Big Bend Region	Not Eligible	05/24/2017	07/01/2017	6/30/2018		View	N/A	Amend Change Status
157	VPK	OEL-VPK 20	ELC of the Big Bend Region	Terminated	06/26/2017	07/01/2017	3/2/2019	6/26/2017	Paper	None	Amend Change Status
156	VPK	OEL-VPK 20	ELC of the Big Bend Region	Terminated	05/26/2017	07/01/2017	6/30/2018	5/26/2017	View	N/A	Amend Change Status
139	VPK	OEL-VPK 20	ELC of the Big Bend Region	Certified	04/04/2017	07/01/2017	6/30/2018		View	N/A	Amend Change Status
45	VPK-APP	VPK 10,11A,11B	ELC of Palm Beach	Submitted	08/11/2017	06/21/2017	7/27/2018		View	Download	Change Status
Contract ID	Type of Contract	Contract Name	Coalition	Status	Last Updated	Start Date	End Date	Terminated	Contract	Document	Action

First Previous 1 Next Last

…and change the VPK-APP status to **Certified**.



VPK Provider Application: Change Status

Status: Submitted
Application: OEL-VPK 10

Application Type:
VPK-APP

Application Status: *
Certified

Status Date:
08/11/2017

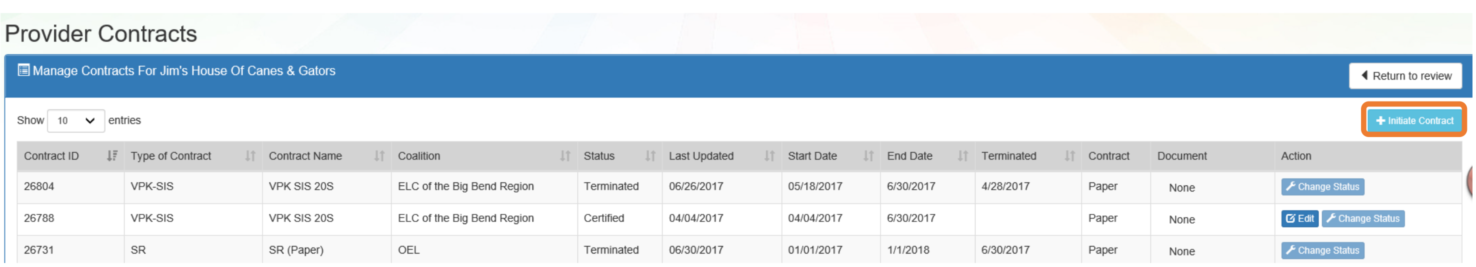
Start Date:
07/01/2017

End Date:
07/27/2018

Comments:

Note: In case of rejection this comment will be included in the Email Notification to the provider

The coalition user can also refresh the VPK-APP by clicking the **<u>Initiate Contract</u>** button.



Provider Contracts

Manage Contracts For Jim's House Of Canes & Gators

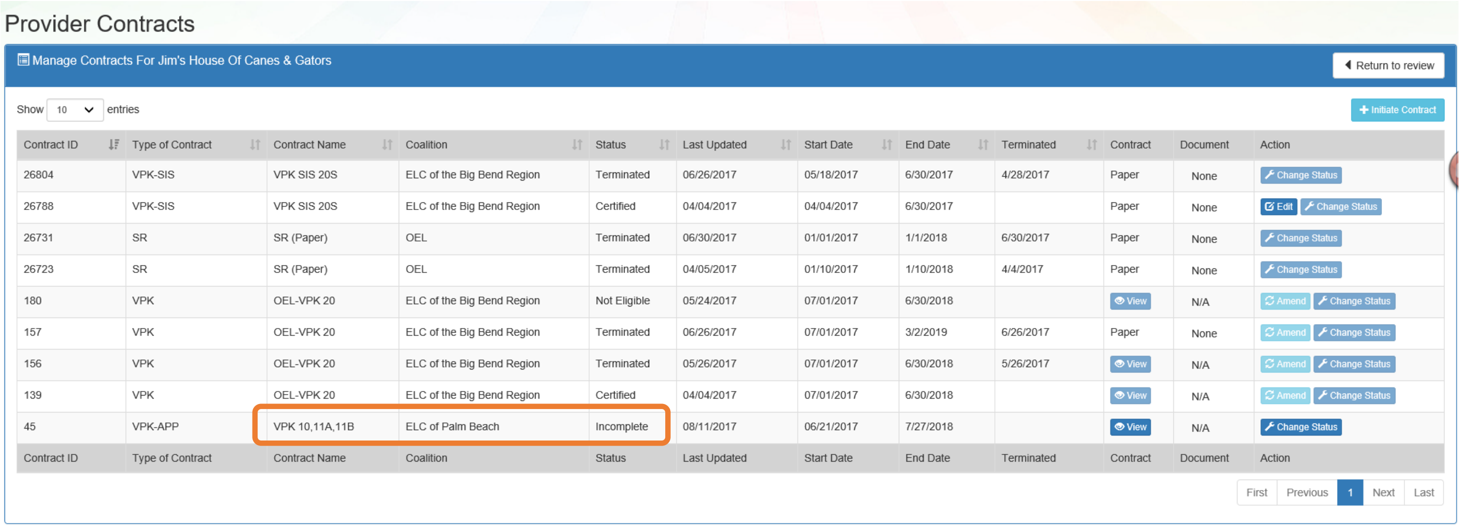
Return to review

Show 10 entries

Initiate Contract

Contract ID	Type of Contract	Contract Name	Coalition	Status	Last Updated	Start Date	End Date	Terminated	Contract	Document	Action
26804	VPK-SIS	VPK SIS 20S	ELC of the Big Bend Region	Terminated	06/26/2017	05/18/2017	6/30/2017	4/28/2017	Paper	None	Change Status
26788	VPK-SIS	VPK SIS 20S	ELC of the Big Bend Region	Certified	04/04/2017	04/04/2017	6/30/2017		Paper	None	Edit Change Status
26731	SR	SR (Paper)	OEL	Terminated	06/30/2017	01/01/2017	1/1/2018	6/30/2017	Paper	None	Change Status

This will change the status of an existing VPK-APP to **Incomplete** from any status.


Provider Contracts

Manage Contracts For Jim's House Of Canes & Gators

Return to review

Show 10 entries

Initiate Contract

Contract ID	Type of Contract	Contract Name	Coalition	Status	Last Updated	Start Date	End Date	Terminated	Contract	Document	Action
26804	VPK-SIS	VPK SIS 20S	ELC of the Big Bend Region	Terminated	06/26/2017	05/18/2017	6/30/2017	4/28/2017	Paper	None	Change Status
26788	VPK-SIS	VPK SIS 20S	ELC of the Big Bend Region	Certified	04/04/2017	04/04/2017	6/30/2017		Paper	None	Edit Change Status
26731	SR	SR (Paper)	OEL	Terminated	06/30/2017	01/01/2017	1/1/2018	6/30/2017	Paper	None	Change Status
26723	SR	SR (Paper)	OEL	Terminated	04/05/2017	01/10/2017	1/10/2018	4/4/2017	Paper	None	Change Status
180	VPK	OEL-VPK 20	ELC of the Big Bend Region	Not Eligible	05/24/2017	07/01/2017	6/30/2018		View	N/A	Amend Change Status
157	VPK	OEL-VPK 20	ELC of the Big Bend Region	Terminated	06/26/2017	07/01/2017	3/2/2019	6/26/2017	Paper	None	Amend Change Status
156	VPK	OEL-VPK 20	ELC of the Big Bend Region	Terminated	05/26/2017	07/01/2017	6/30/2018	5/26/2017	View	N/A	Amend Change Status
139	VPK	OEL-VPK 20	ELC of the Big Bend Region	Certified	04/04/2017	07/01/2017	6/30/2018		View	N/A	Amend Change Status
45	VPK-APP	VPK 10,11A,11B	ELC of Palm Beach	Incomplete	08/11/2017	06/21/2017	7/27/2018		View	N/A	Change Status
Contract ID	Type of Contract	Contract Name	Coalition	Status	Last Updated	Start Date	End Date	Terminated	Contract	Document	Action

First Previous 1 Next Last

A Provider Portal user can also trigger a refresh of a **Certified** VPK-APP by editing the VPK-APP. This will change the status to **Incomplete** from **Certified** and then the user can submit the edited VPK-APP for coalition review.

Vendor Number Entry

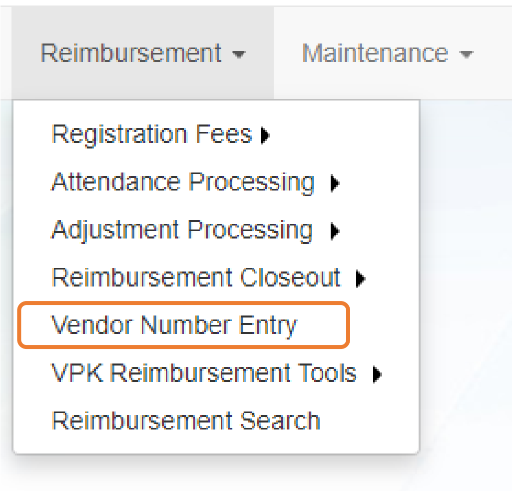
A vendor number is required for contracted providers. Coalitions may review a Tableau report to identify providers with or without vendor numbers, as well as create and manage vendor numbers.

Accessing the Vendor Number Report in Tableau

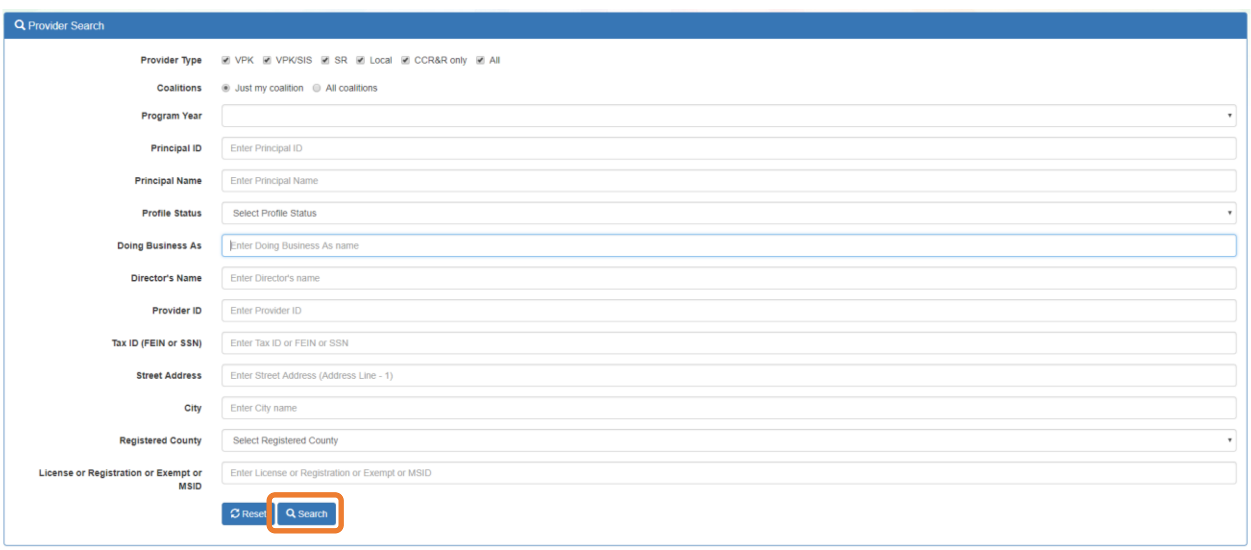
Coalition users with a Tableau account may access the Vendor Number Report by going to https://oel-reports.floridaearlylearning.com. From Projects, select the **~Mod 3.0~** folder. Select the **Vendor Number Report** workbook. Select the **Provider Vendor Dashboard** view (to search specific providers) or the **Vendor Number Report** view (to see all providers).

Adding/Viewing Vendor Numbers

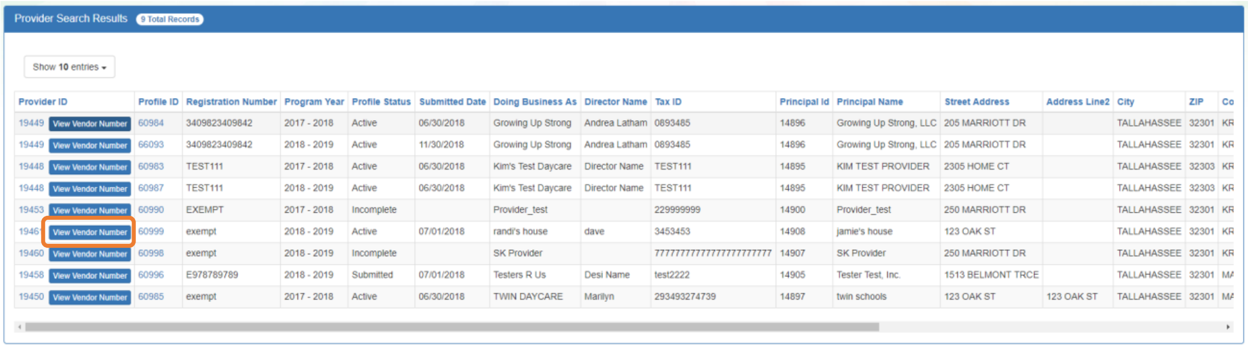
To begin, go to the Reimbursement menu item and select Vendor Number Entry.



A provider search page displays. Enter search criteria for a provider and click **Search**.



Results display. Click the **View Vendor Number** button.

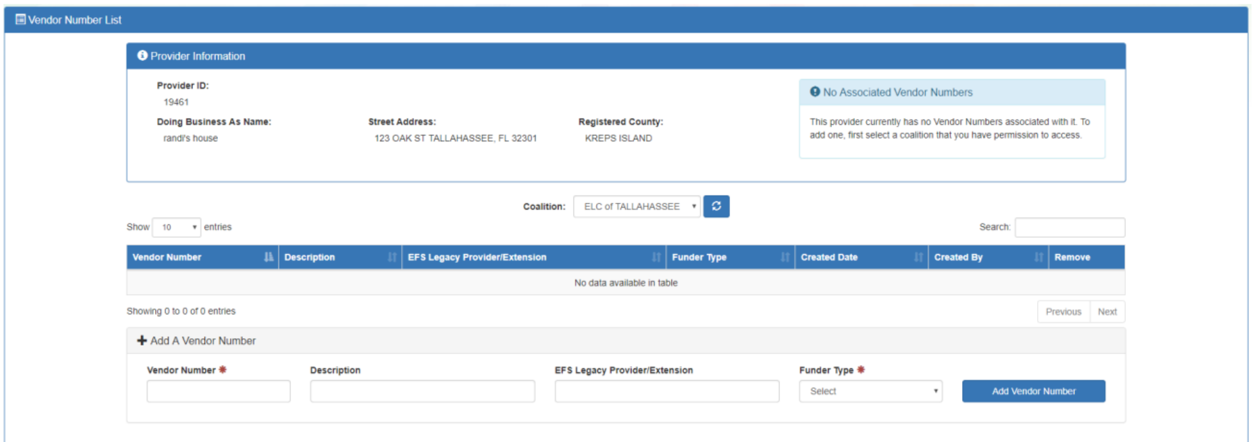


Provider Search Results 9 Total Records

Show 10 entries

Provider ID		Profile ID	Registration Number	Program Year	Profile Status	Submitted Date	Doing Business As	Director Name	Tax ID	Principal Id	Principal Name	Street Address	Address Line2	City	ZIP	Co
19449	View Vendor Number	60984	3409823409842	2017 - 2018	Active	06/30/2018	Growing Up Strong	Andrea Latham	0893485	14896	Growing Up Strong, LLC	205 MARRIOTT DR		TALLAHASSEE	32301	KR
19449	View Vendor Number	66093	3409823409842	2018 - 2019	Active	11/30/2018	Growing Up Strong	Andrea Latham	0893485	14896	Growing Up Strong, LLC	205 MARRIOTT DR		TALLAHASSEE	32301	KR
19448	View Vendor Number	60983	TEST111	2017 - 2018	Active	06/30/2018	Kim's Test Daycare	Director Name	TEST111	14895	KIM TEST PROVIDER	2305 HOME CT		TALLAHASSEE	32303	KR
19448	View Vendor Number	60987	TEST111	2018 - 2019	Active	06/30/2018	Kim's Test Daycare	Director Name	TEST111	14895	KIM TEST PROVIDER	2305 HOME CT		TALLAHASSEE	32303	KR
19453	View Vendor Number	60990	EXEMPT	2017 - 2018	Incomplete		Provider_test		229999999	14900	Provider_test	250 MARRIOTT DR		TALLAHASSEE	32301	KR
1946	View Vendor Number	60999	exempt	2018 - 2019	Active	07/01/2018	randi's house	dave	3453453	14908	jamie's house	123 OAK ST		TALLAHASSEE	32301	KR
19460	View Vendor Number	60998	exempt	2018 - 2019	Incomplete		SK Provider		7777777777777777777777	14907	SK Provider	250 MARRIOTT DR		TALLAHASSEE	32301	KR
19458	View Vendor Number	60996	E978789789	2018 - 2019	Submitted	07/01/2018	Testers R Us	Desi Name	test2222	14905	Tester Test, Inc.	1513 BELMONT TRCE		TALLAHASSEE	32301	MA
19450	View Vendor Number	60985	exempt	2017 - 2018	Active	06/30/2018	TWIN DAYCARE	Marilyn	293493274739	14897	twin schools	123 OAK ST	123 OAK ST	TALLAHASSEE	32301	MA

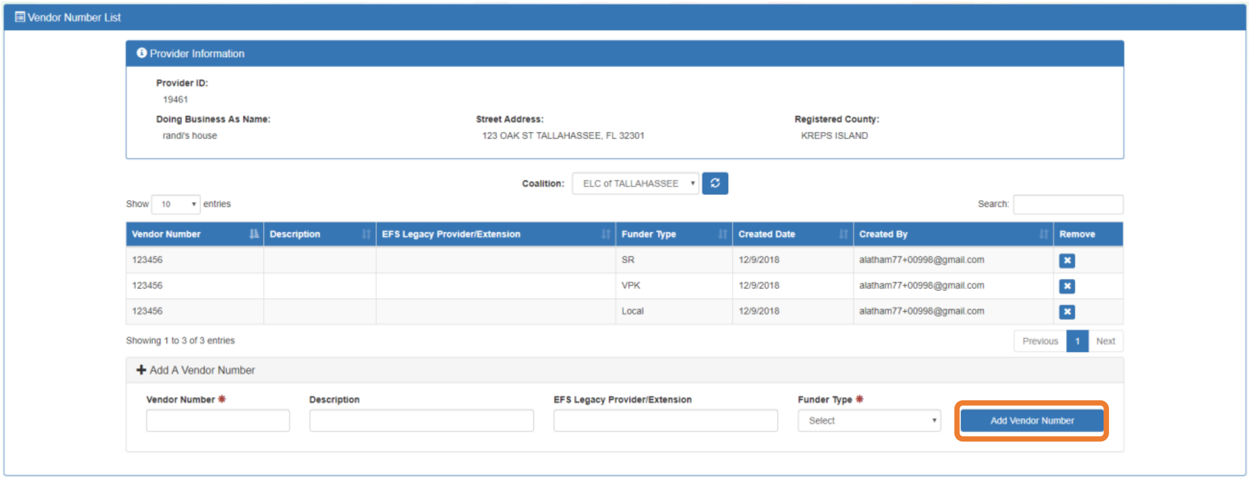
The Vendor Number List for the provider displays with several sections: provider information, coalition drop down, saved vendor number list, and add a vendor number. The coalition drop down is restricted to the user's coalition.



In the Add a Vendor Number section, enter the required fields.

a. Vendor Number – alphanumeric field that holds the local accounting system's vendor number as input by the coalition
b. Description – optional field (useful for labeling when this vendor number should be used)
c. EFS Legacy Provider/Extension – optional field (useful for including EFS Legacy values)
d. Funder Type – drop down; select a funding type (SR, Local, or VPK) or select All to apply the same number to all funding types for the provider.
    a. The vendor numbers created may be assigned to attendance rosters for reimbursement.
    b. It is possible to create multiple vendor numbers for the VPK program that can later be assigned to specific classes (if needed).

When complete, click the **Add Vendor Number** button. The saved vendor number list updates with the new information.



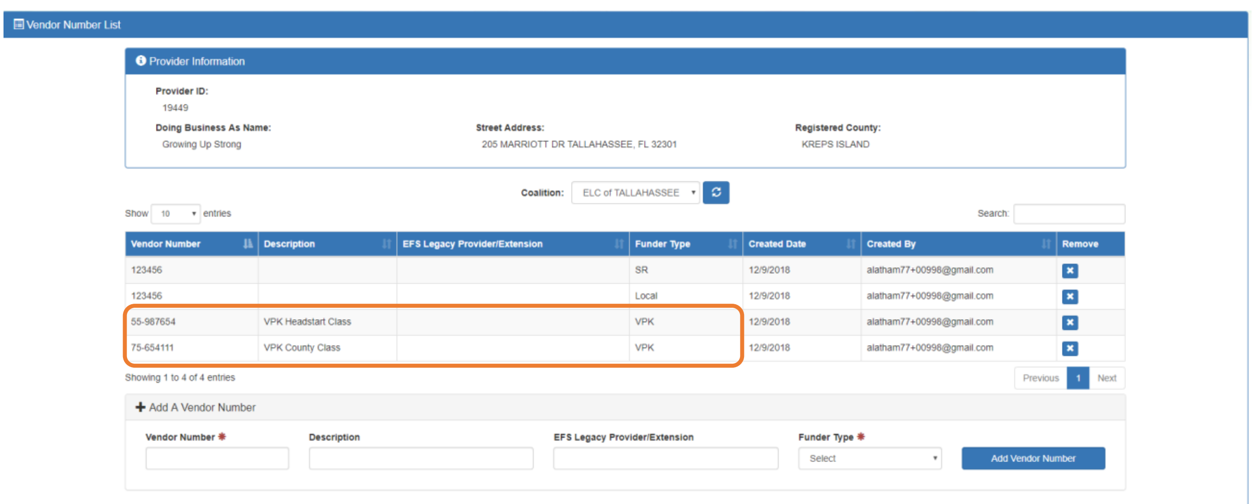
Removing Vendor Numbers

To remove a vendor number, follow the steps above to locate the provider through the Vendor Number Entry provider search and click the **View Vendor Number** button. In the saved vendor number list, click the Remove (X) button. A confirmation window displays. Click Yes to remove the vendor number or click Cancel to abandon the action.

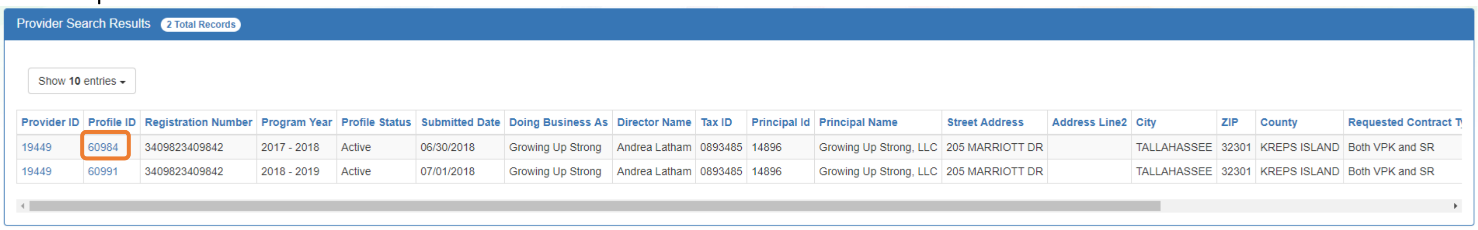
Assigning Vendor Numbers to a VPK Class

Assigning a vendor number to a VPK class is an optional feature and may not be used by all coalitions. During reimbursement, the system will first look to see if a VPK class has a specific vendor number assigned, if not, the system will use the top VPK vendor number created (if more than one VPK vendor number exists).

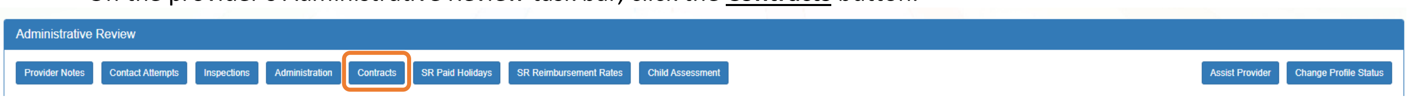
To assign a vendor number to specific VPK class, follow the steps above to locate the provider through the Vendor Number Entry provider search, click the **View Vendor Number** button, and create the vendor numbers to be used by each class at the provider.



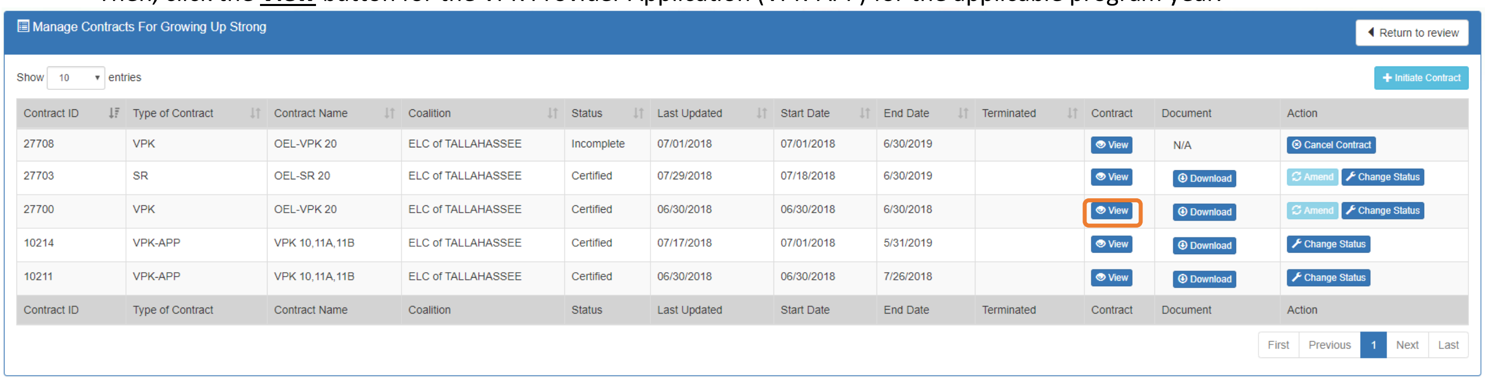
With the VPK vendor numbers created, go to the Provider menu item and select **Search**. Enter criteria to locate the VPK provider and click the **Search** button. Results display. Click the **Profile ID** link to open the provider's profile.



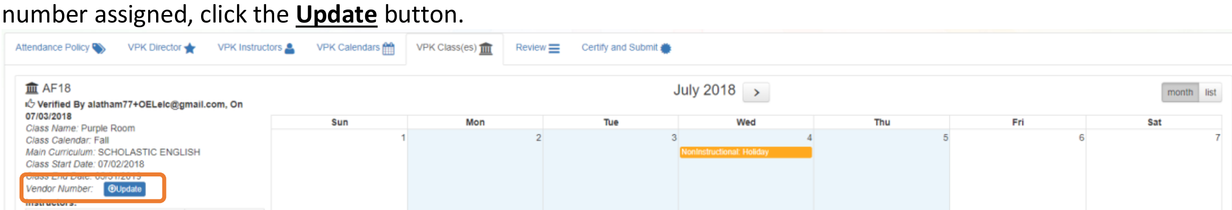
On the provider's Administrative Review task bar, click the **Contracts** button.



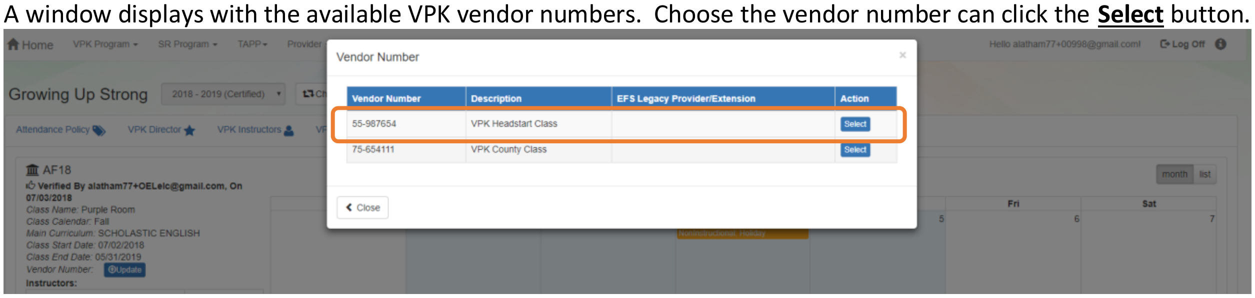
Then, click the **View** button for the VPK Provider Application (VPK-APP) for the applicable program year.



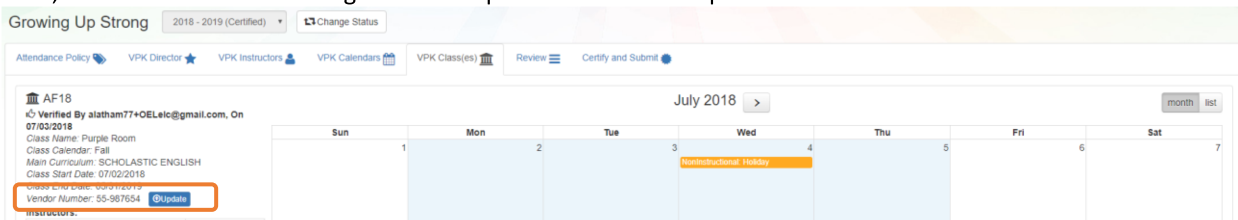
The VPK Provider Application displays. Click the **VPK Class(es)** tab. For each class that needs a specific vendor number assigned, click the **Update** button.



A window displays with the available VPK vendor numbers. Choose the vendor number can click the **Select** button.



Now, the vendor number is assigned to the specific VPK class. Repeat as needed.

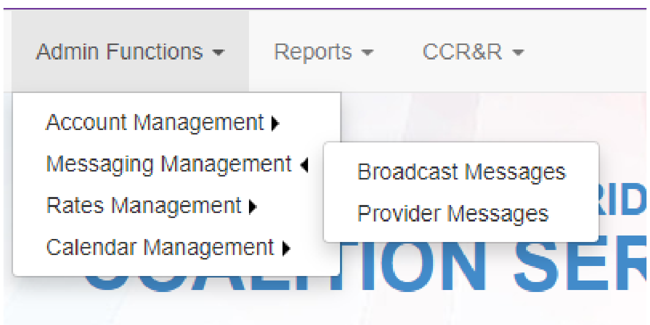


Provider Messaging

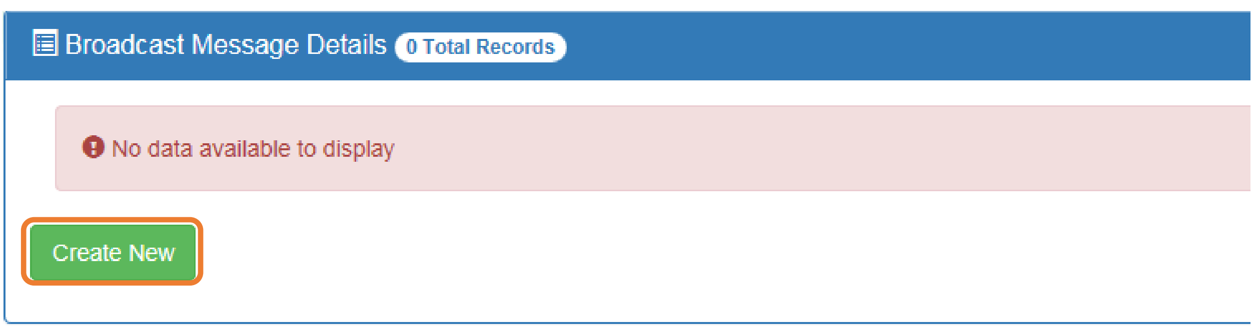
Broadcast Message Management (not yet available)

The Broadcast message management function allows coalitions to send messages to all providers in the coalition service area. This function is only available to coalition admins and DEL admins. Currently, coalitions cannot send to SR, VPK, or CCR&R providers each, but must send a message to all providers, regardless of services provided.

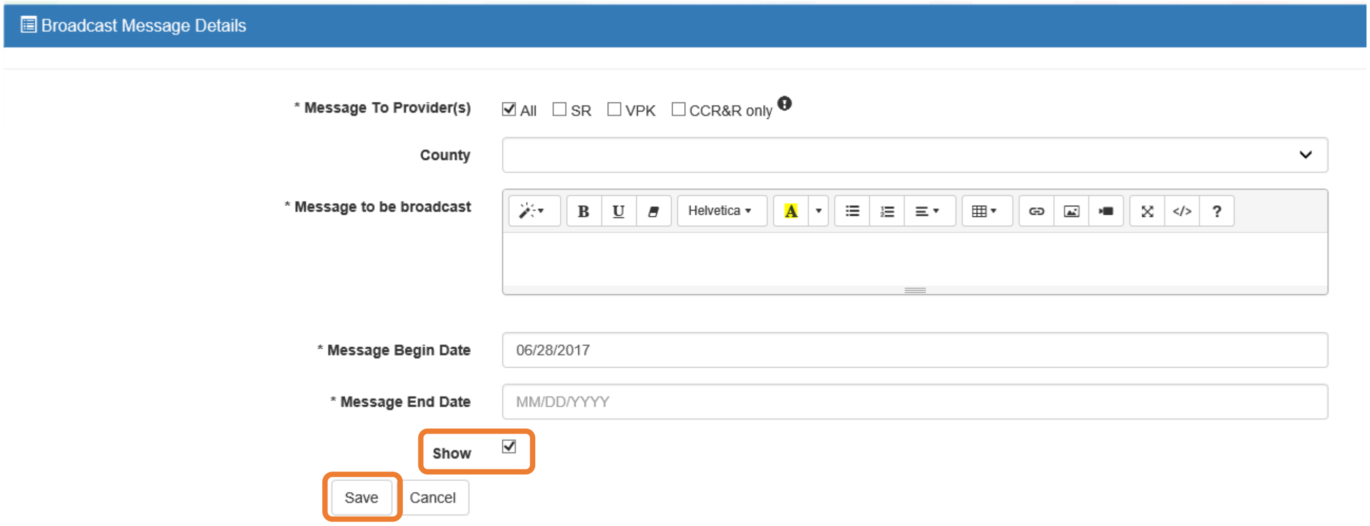
To access the Broadcast message management function, coalition admins will click the **Admin Functions** button, select **Messaging Management** and then **Broadcast messages**.



Then, click the **Create New** button.



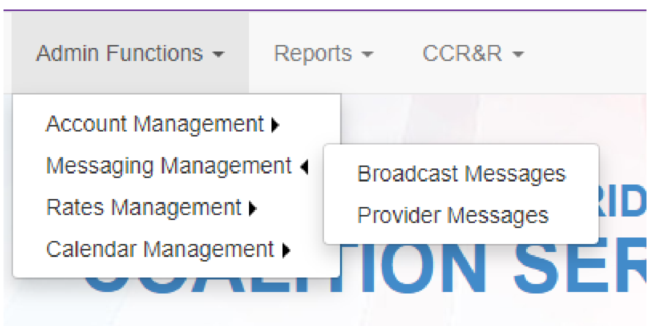
The coalition admin will then select the audience for the message, decide which county(ies) (if a multi-county coalition) for the message, complete the Message field and select the Begin Date and End Date for the message. Unclicking the **Show** check box will hide the message from providers. Click the **Save** button to send the message.



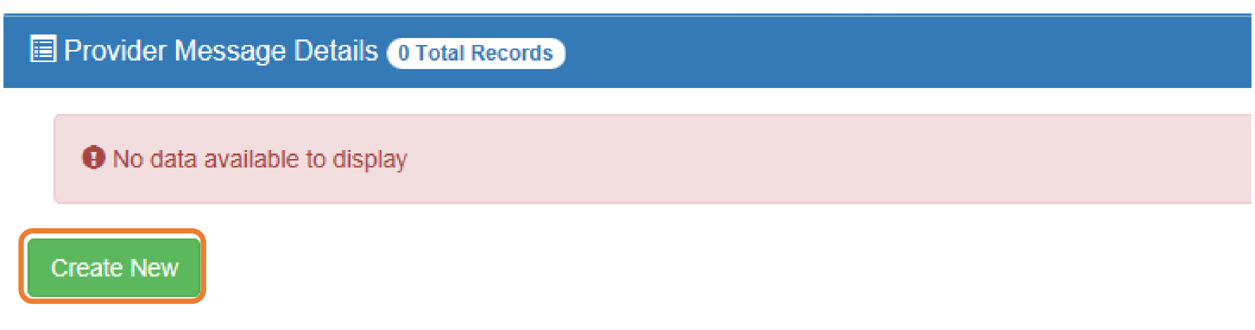
Provider Message Management

The Provider message management function allows coalitions to send messages to a specific provider in the coalition service area. This function is only available to coalition admins and DEL admins.

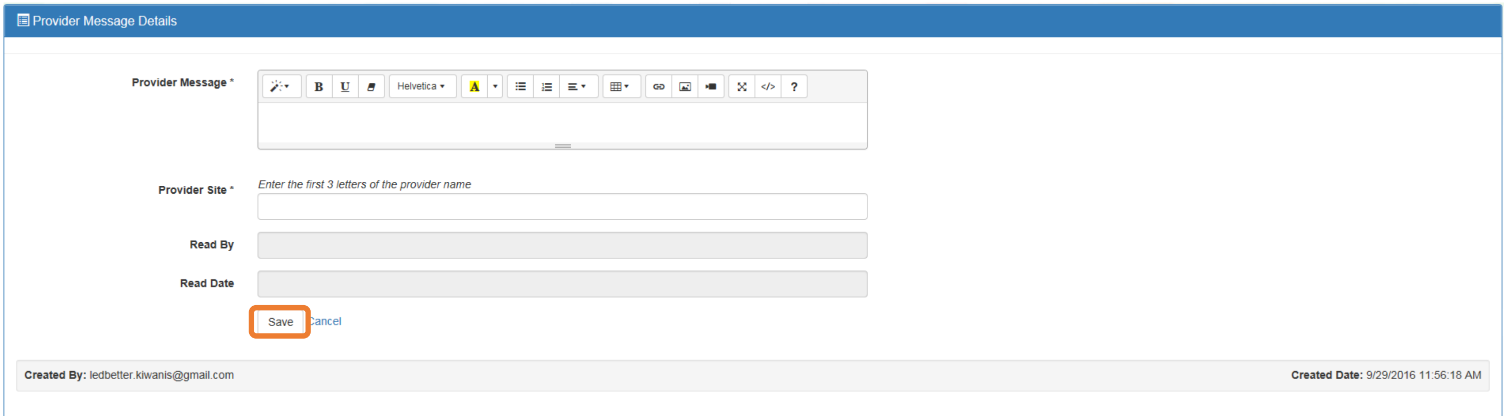
To access the Provider message management function, coalition admins will click the **Admin Functions** button, select **Messaging Management** and then **Provider messages**.



Then, click the **Create New** button.



The coalition admin will then complete the Provider Message and Provider Site fields. When the provider reads the message, the Read By and Read Date fields will be completed. Click the **Save** button to send the message.

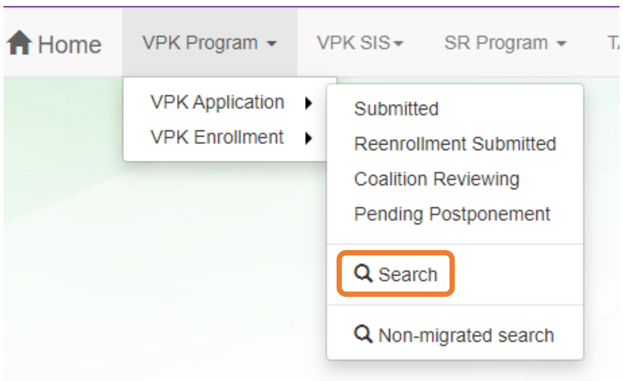


VPK Enrollment

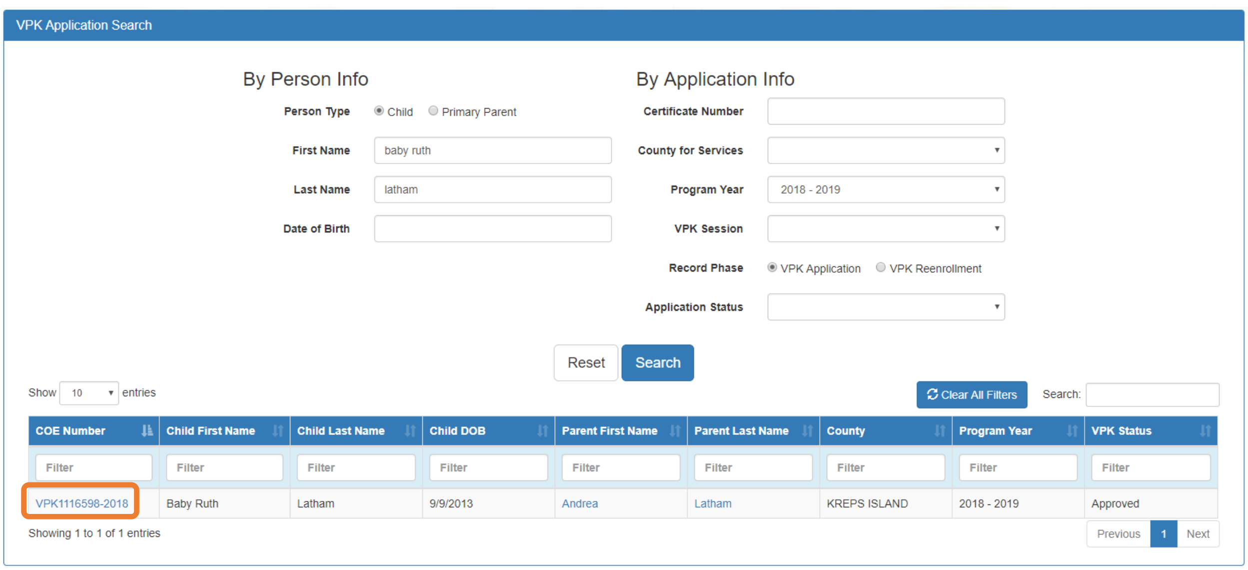
Coalitions may create new enrollments through the system or upload a bulk enrollment file in lieu of a provider submission. Additionally, coalition users manage enrollments by reviewing provider requests or saving changes directly.

Creating New Enrollments

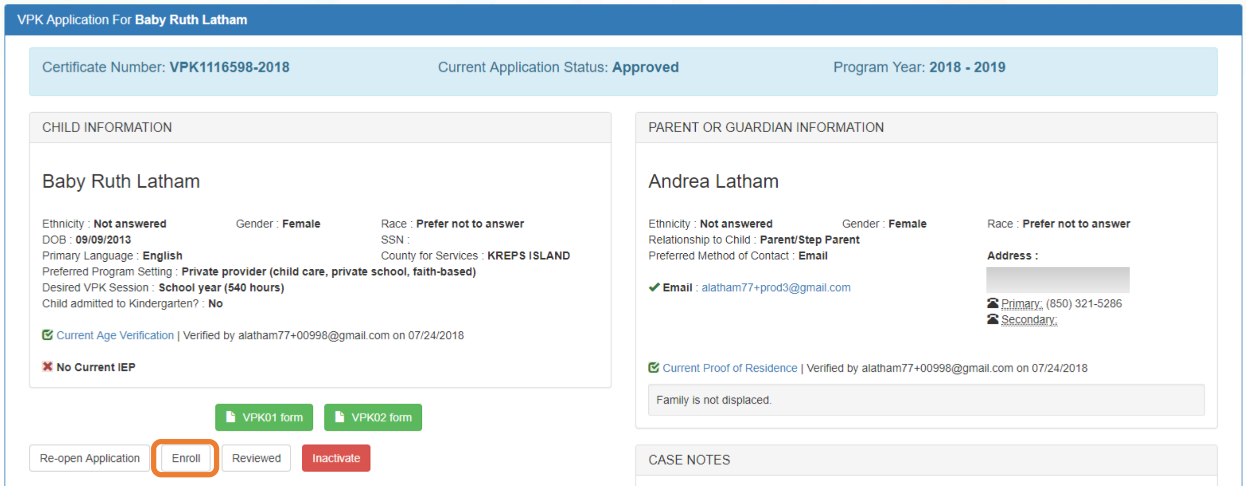
Coalition users will navigate to the VPK Application menu item and select the **Search** option to locate the approved VPK child.



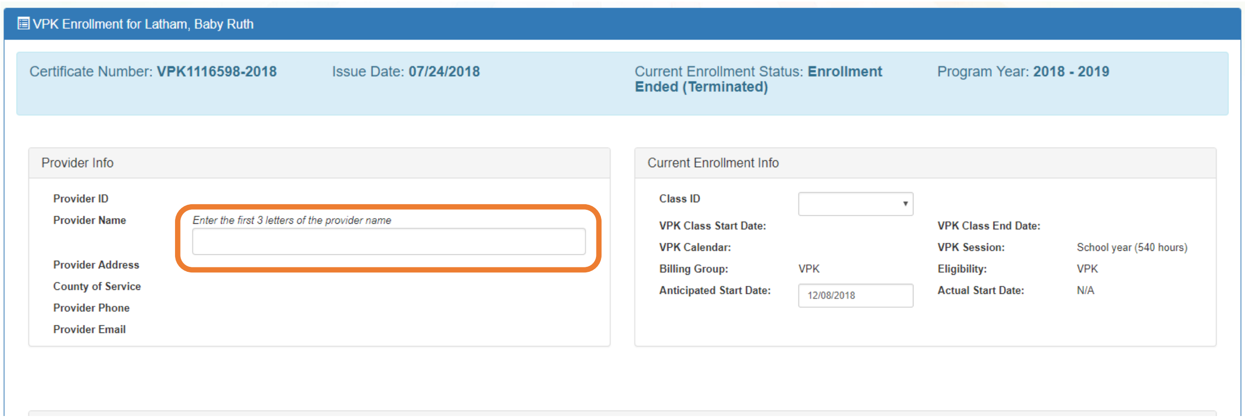
Clicking on the child's COE number opens their application record.



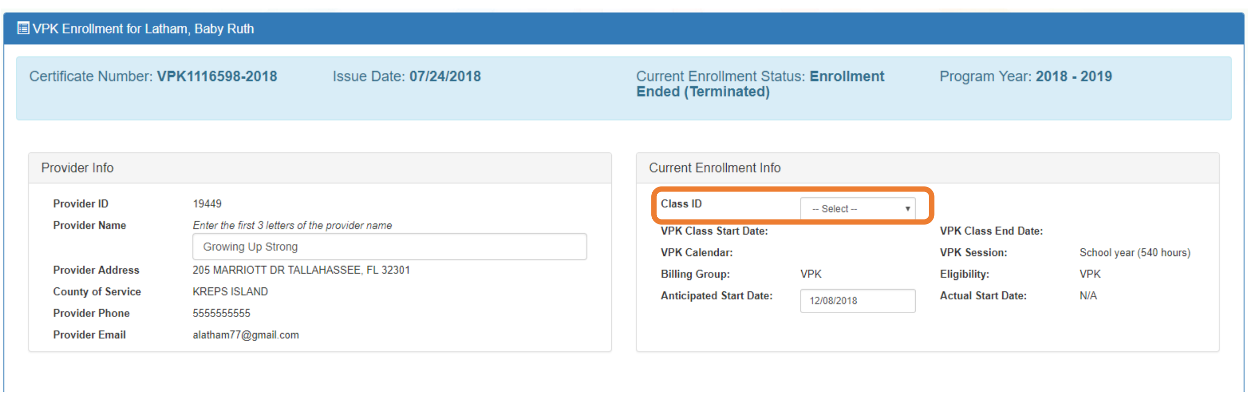
Within the application record, click the **Enroll** button.



Now, the enrollment record opens for the child.

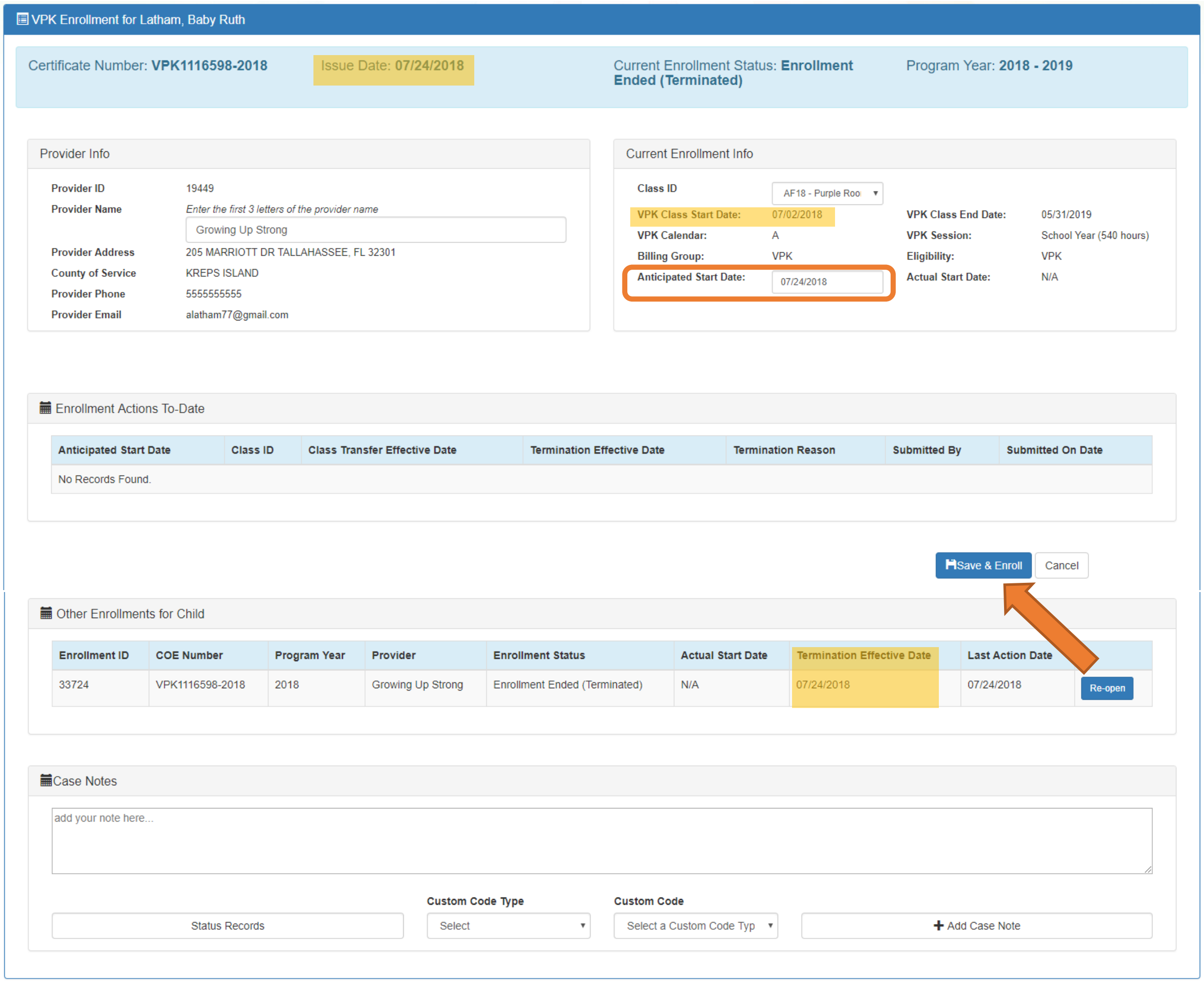


First, enter the provider name. As text is entered, matching providers are identified and display in a drop down. Select the provider and press the **Enter** key. Then, the provider information appears.



Use the Class ID drop down to select the appropriate class for enrollment. Then, the class information appears. Next, enter the anticipated start date for the child.

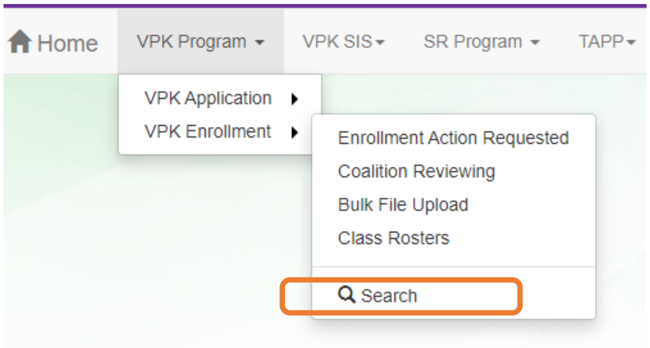
NOTE: The anticipated start date cannot be before the class start date or before the COE issue date (or before a termination date) - see highlighted dates.



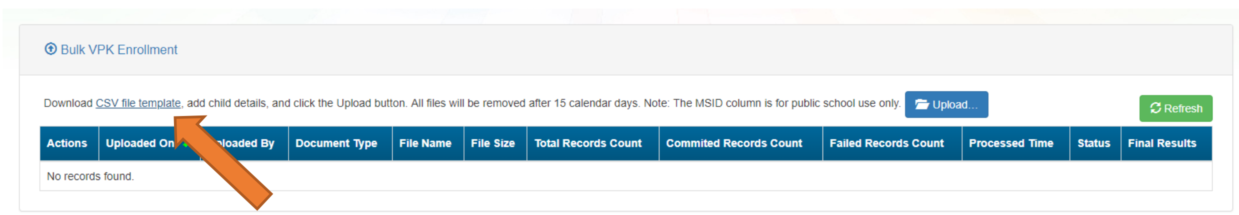
The page refreshes and the application records appears. Now, the button says **View Enrollment**. When clicked, the Enrolled record displays.

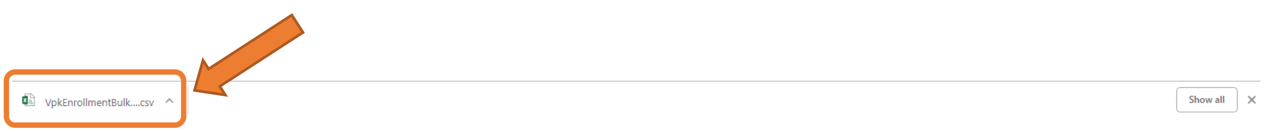
Creating New Enrollments through a Bulk File Upload

In addition to the enrollment method described in "Creating New Enrollments through the Coalition Services Portal" coalition users may submit enrollment requests on behalf of providers via a file process. To begin, click the **VPK Enrollment** menu item, then **Bulk File Upload**. The bulk file processing page displays.

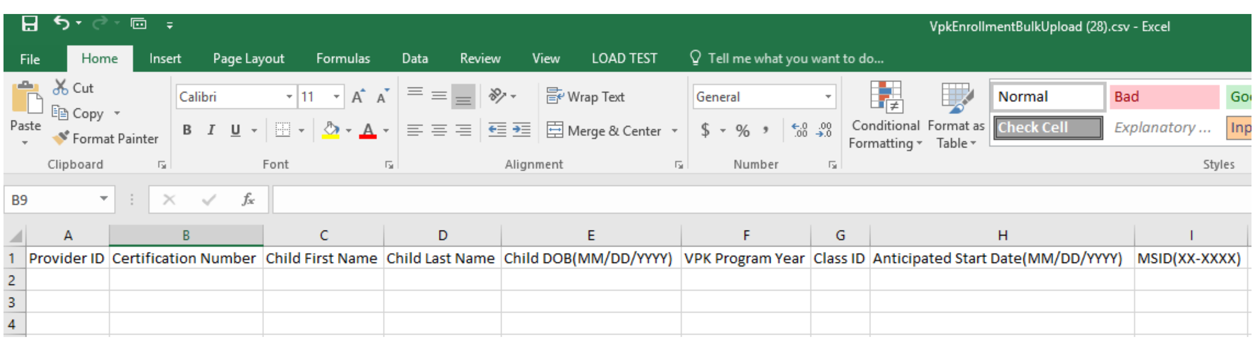


Next, click on the link to download the **CSV file template**. The file may appear at the bottom of the computer screen depending on the user's browser.



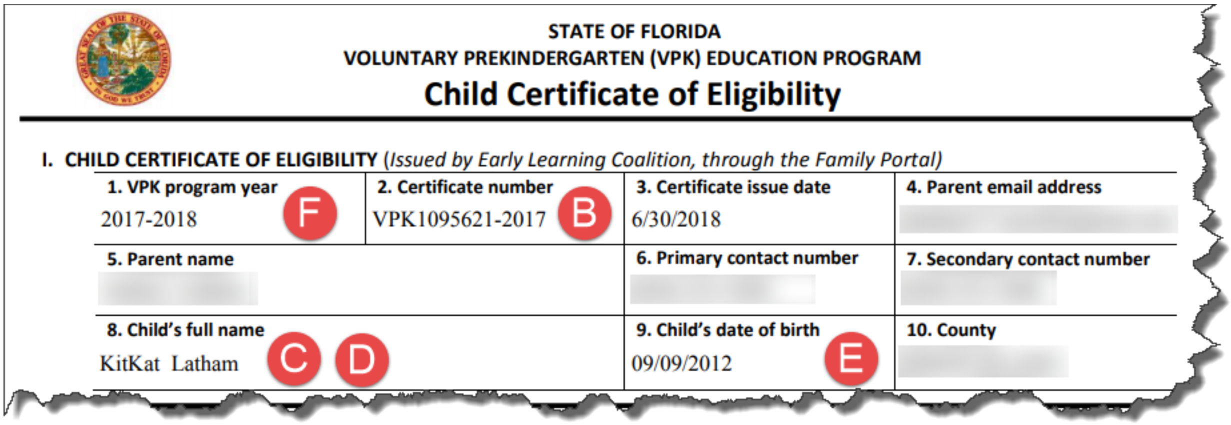


Open the file and expand the columns. Each column is explained below.



A. **Provider ID** = this is the provider ID for the site.

B. **Certification Number** = this is the child's certificate number listed on their COE. The field is not case sensitive, however, the certificate number must be entered exactly as it appears on the COE (i.e. VPK####-YYYY).


STATE OF FLORIDA
VOLUNTARY PREKINDERGARTEN (VPK) EDUCATION PROGRAM
Child Certificate of Eligibility

I. CHILD CERTIFICATE OF ELIGIBILITY *(Issued by Early Learning Coalition, through the Family Portal)*

1. VPK program year 2017-2018 (F)	**2. Certificate number** VPK1095621-2017 (B)	**3. Certificate issue date** 6/30/2018	**4. Parent email address**
5. Parent name		**6. Primary contact number**	**7. Secondary contact number**
8. Child's full name KitKat Latham (C) (D)		**9. Child's date of birth** 09/09/2012 (E)	**10. County**

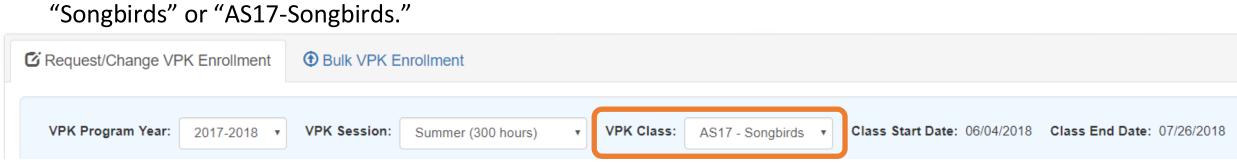
C. **Child First Name** = this is the child's first name listed on their COE. The field is not case sensitive.

D. **Child Last Name** = this is the child's last name listed on their COE. Do not include a suffix (if any). The field is not case sensitive.

E. **Child DOB (MM/DD/YYYY)** = this is the child's date of birth listed on their COE. The field will accept M/D/YYYY as well.

F. **VPK Program Year** = this is the child's approved VPK program year listed on their COE. The field is looking for the first 4-digit year only. For example, if the VPK program year is 2017-2018, the entry would be 2017. Generally, the 4-digit VPK program year matches the year included at the end of the child's COE number.

G. **Class ID** = this is the desired class's 4-digit ID. The class ID must be entered as the 4-digit assigned ID. Do not include the class name (if any). Looking at the example below, the entry would be "AS17" not "Songbirds" or "AS17-Songbirds."

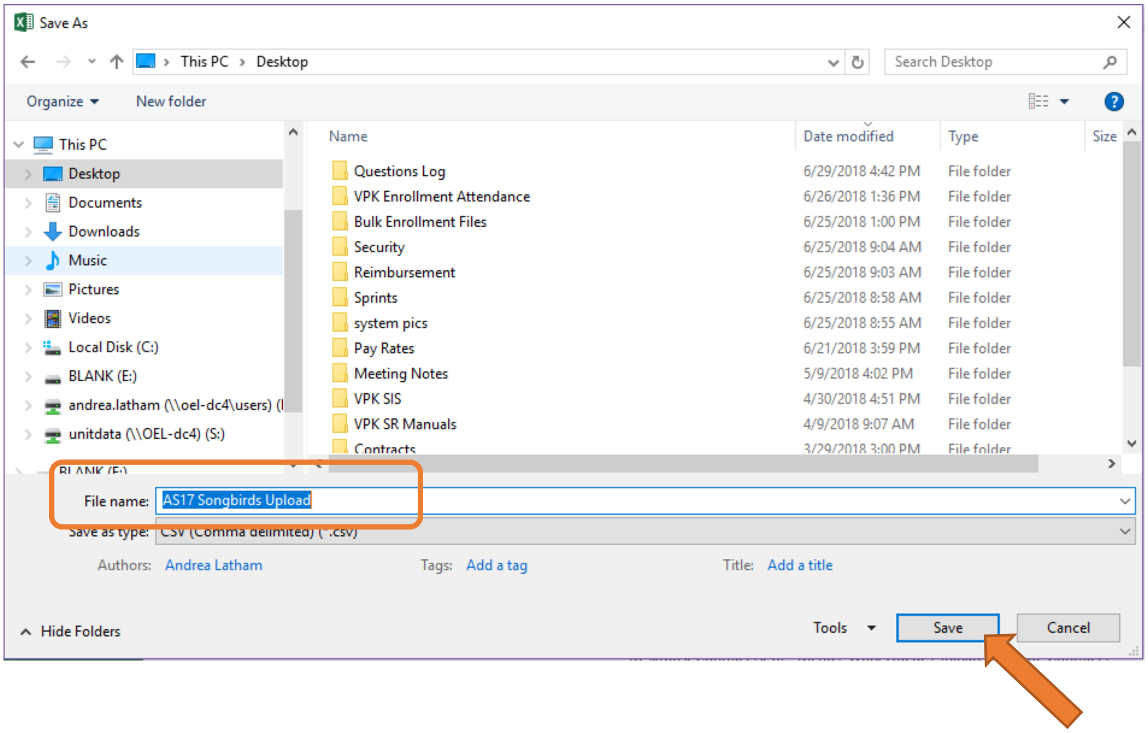


H. **Anticipated Start Date (MM/DD/YYYY)** = this is the date the child will begin attending class. Typically, this is the class start date unless the child is starting after the class begins. **NOTE:** An anticipated start date cannot be before the class start date or after the class end date. And, an anticipated start date cannot be before the child's COE issue date. The field will accept M/D/YYYY as well.

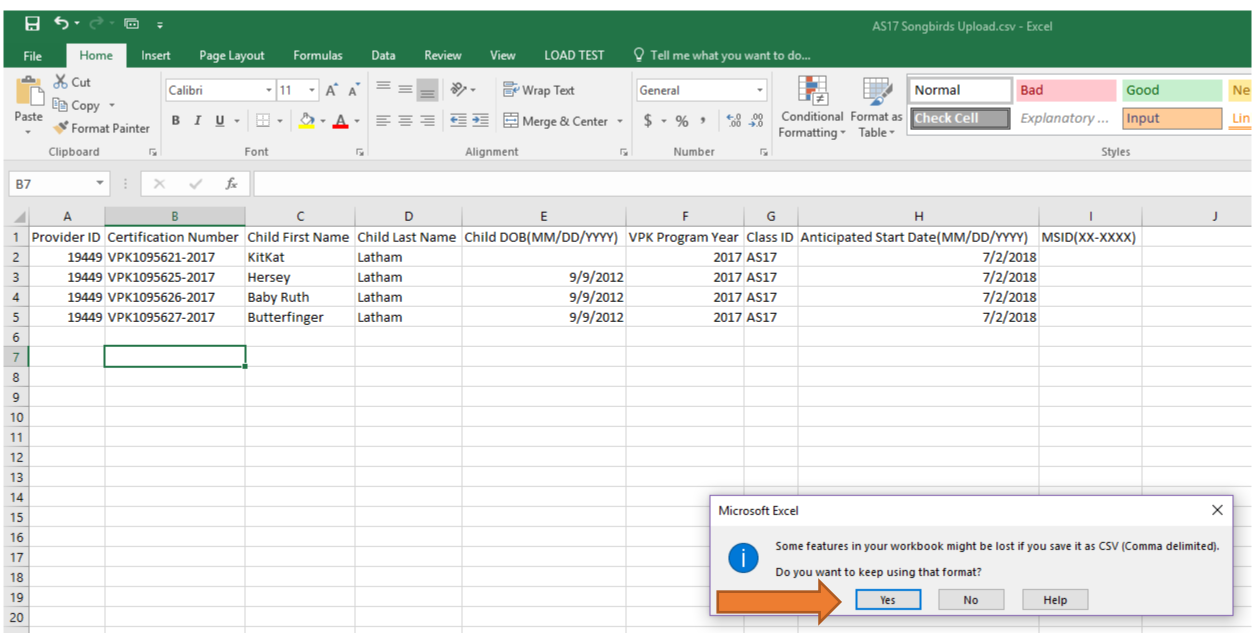
I. **MSID (XX-XXXX)** = this field is for public schools only. Public schools may enter their Master School Identification (MSID) number in a 6-digit format, where the first 2 digits are the district number followed by a hyphen and 4-digit school number. The MSID number can be used in lieu of the Provider ID in column A. Both IDs are accepted.

When the file is complete, name it and save it as a CSV file type.

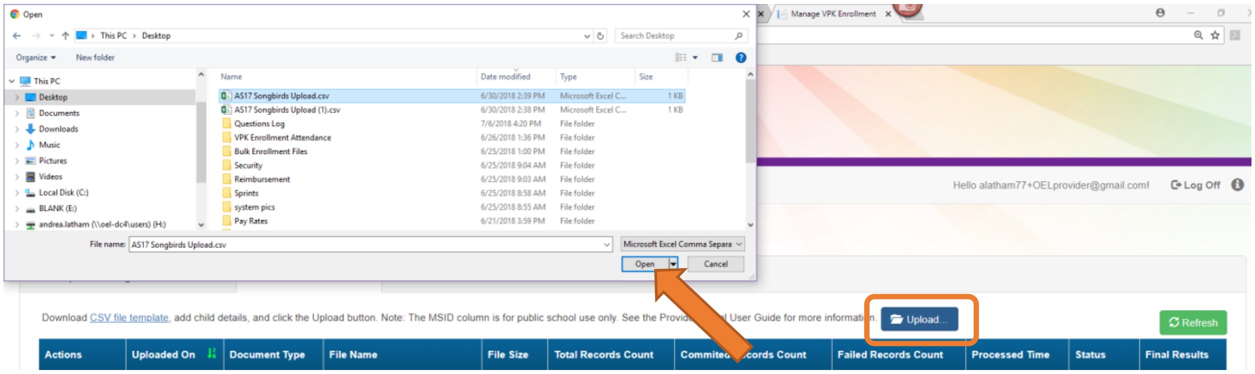
NOTE: It may be helpful to include your provider name and class in the file name if troubleshooting is ever necessary.



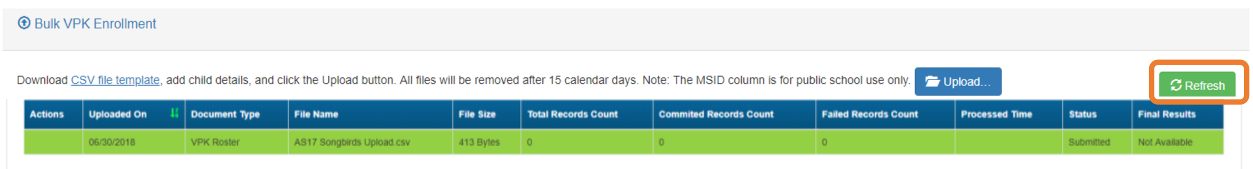
When changing the file format to CSV, Excel often displays a message to ask if you want to keep using that format. If this message appears, click **Yes**.



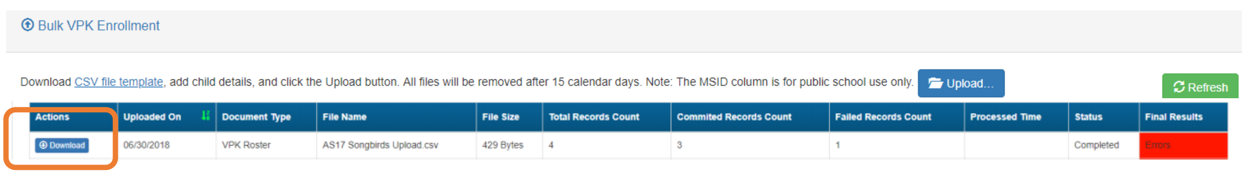
Click the **Upload** button. A window displays. Select your file and click **Open**.



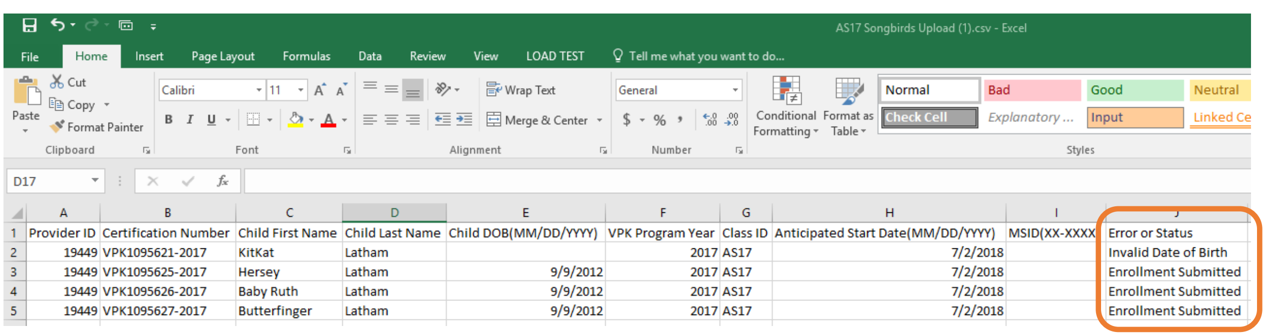
The file upload will begin. The file details will populate on a row and turn green. Click the **Refresh** button to populate the results.



The file details will be updated. The file size, total records count, committed records count, failed records count, processed time, status, and final results are updated. The file results are also returned and can be downloaded by clicking on the **Download** button.

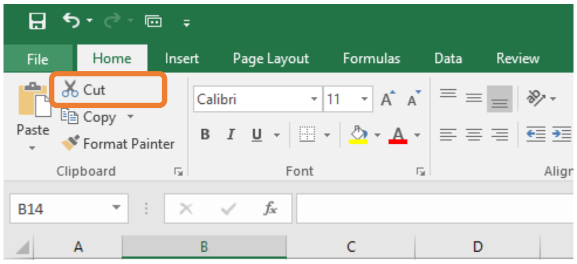


In this example, there is one failed record and three committed records. The file download will include the error message and status for each record submitted. The three committed records are now "Enrollment Submitted" and the failed record was not included because of an invalid date of birth. The same validations that occur with a manual child enrollment occur with the bulk enrollment file process.



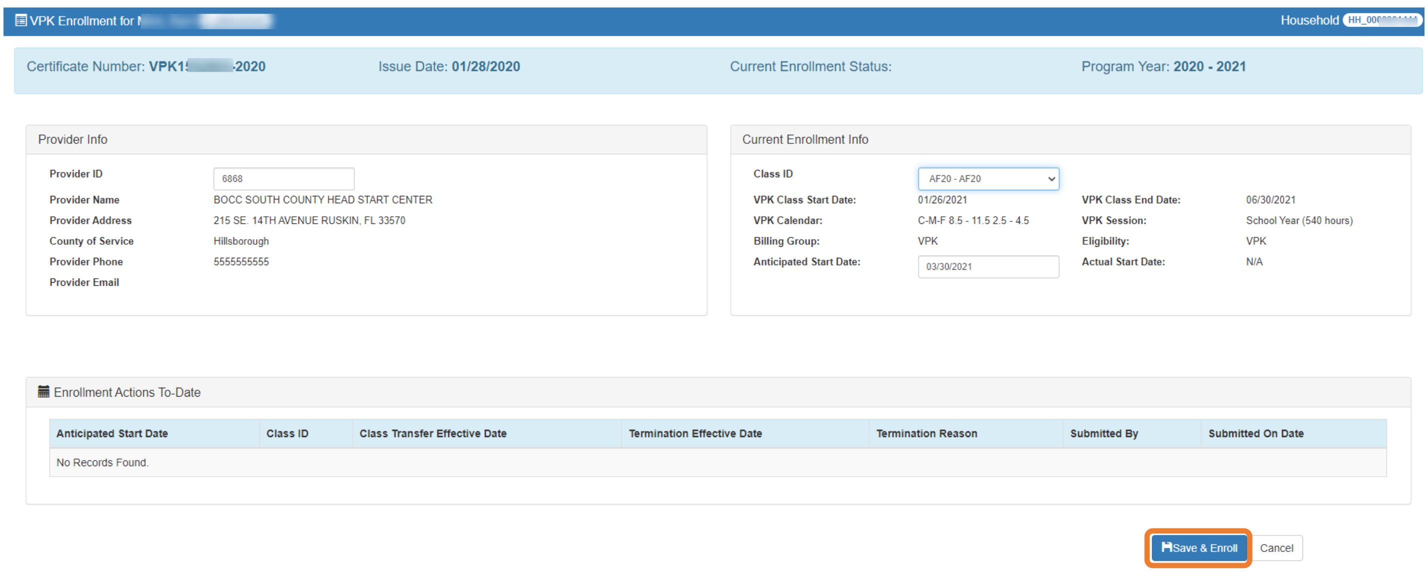
The three committed records are displayed on the class's enrollment roster as "Enrollment Submitted" and appear in the **VPK Enrollment> Enrollment Action Requested** work queue for review/approval/rejection. In addition, the family receives a notification that their child's enrollment is in progress. The same processes that occur with a manual child enrollment occur with the bulk enrollment file process.

NOTE: When correcting records and re-uploading the file, be sure to remove the “Error or Status” column as it is not accepted for the upload. Also, it is best to NOT include records that have already been submitted successfully as they will now error as having been processed. When removing successful records and the Error or Status column, it is best to highlight the row/column and use the cut/delete option instead of just deleting the information. Excel often retains formats even if the cells are now empty.

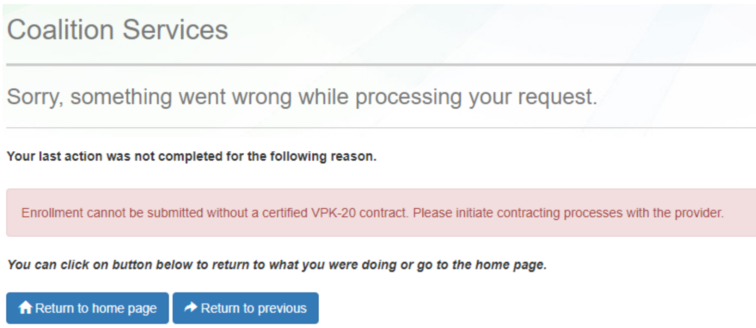


VPK-20 Contract Verification

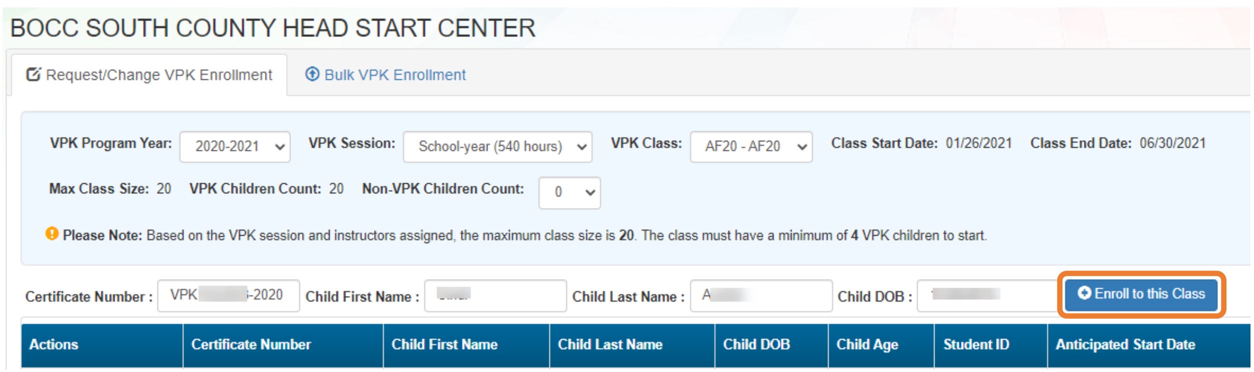
A provider must have a Certified VPK-20 contract on the Anticipated Start Date before an enrollment can be added. In the below example, the VPK application information is entered by the coalition, and the **Save & Enroll** button is clicked.



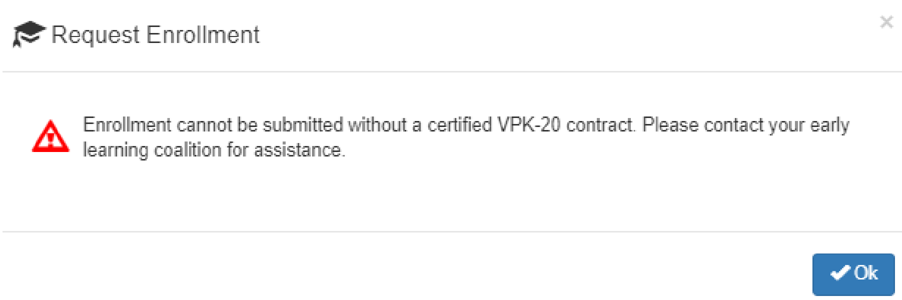
In this example, the provider does not have a Certified VPK-20 contract for the Anticipated Start Date of 03/30/2021, so an error message displays, alerting the coalition that the enrollment cannot be submitted.



In the below example, the VPK application information is entered by the provider, and the **+ Enroll to this Class** button is clicked.

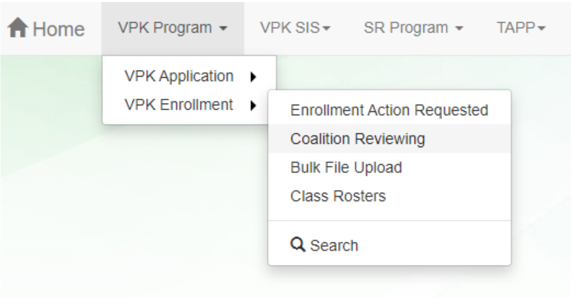


In this example, the provider does not have a Certified VPK-20 contract, so an error message displays, alerting the provider that the enrollment cannot be submitted.

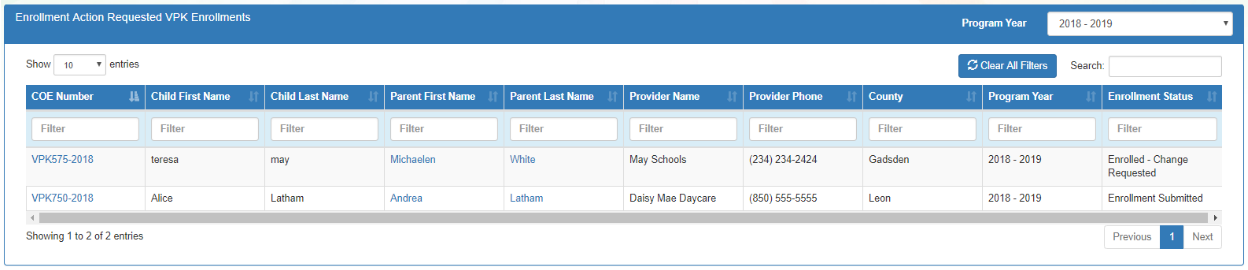


Reviewing VPK Enrollment Requests

Coalition users will navigate to the VPK Enrollment menu item and select the **Enrollment Action Requested** work queue to review/approve/reject enrollment requests made by the provider. Requests include new enrollments, class transfers, and child terminations.

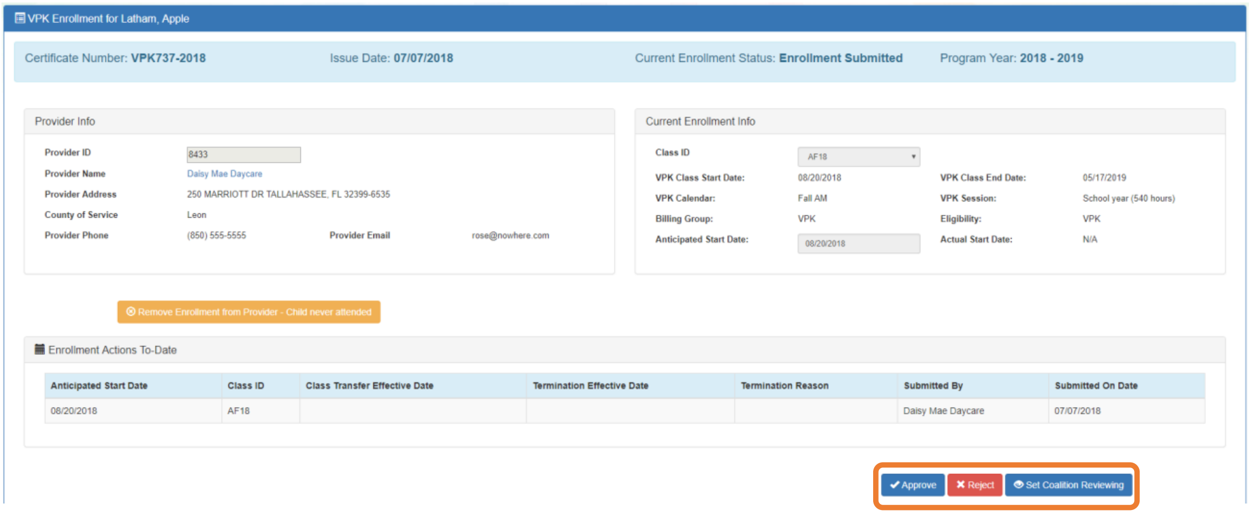


The Enrollment Action Requested work queue displays the certificate of eligibility (COE) number, child name, parent name, provider name, provider phone number, provider county, program year, and enrollment status. The columns may be sorted by clicking on the column header. Each column may be filtered by typing criteria in the column's filter field. Additionally, there is a program year filter and search feature that can filter results.



Clicking on the child's COE number opens the enrollment record. Clicking on the parent's name opens the household view.

The child's enrollment record contains *Provider Information* (on the left) and the *Current Enrollment Information* (on the right). The *Enrollment Actions To-Date* area displays the current request that was made by the provider with action buttons to **Approve**, **Reject**, or **Set Coalition Reviewing**.

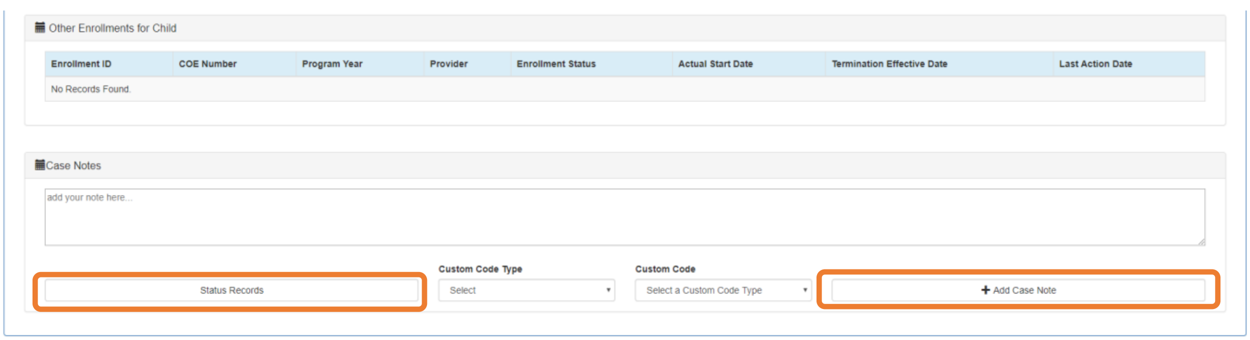


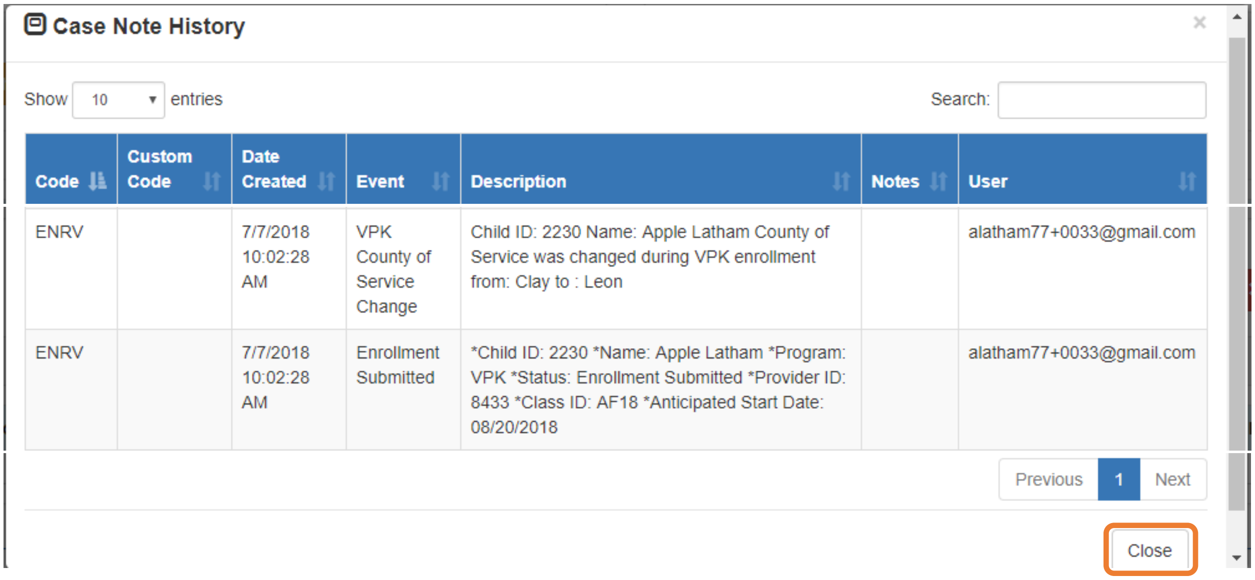
Below, there are two more sections: *Other Enrollments for Child* and *Case Notes*. The *Other Enrollments for Child* area displays the enrollment history attached to this COE (i.e. cancellations, class transfers, rejections, etc.). The *Case Notes* area allows coalition users to create and view case notes related to the enrollment.

To create a case note, type in the text box area and click **Add Case Note**.

NOTE: When assigning a custom code to a case note, select the Custom Code Type and Custom Code prior to clicking **Add Case Note**.

To view case notes, click **Status Records**.





Case Note History

Show 10 entries Search:

Code	Custom Code	Date Created	Event	Description	Notes	User
ENRV		7/7/2018 10:02:28 AM	VPK County of Service Change	Child ID: 2230 Name: Apple Latham County of Service was changed during VPK enrollment from: Clay to : Leon		alatham77+0033@gmail.com
ENRV		7/7/2018 10:02:28 AM	Enrollment Submitted	*Child ID: 2230 *Name: Apple Latham *Program: VPK *Status: Enrollment Submitted *Provider ID: 8433 *Class ID: AF18 *Anticipated Start Date: 08/20/2018		alatham77+0033@gmail.com

Previous 1 Next

Close

In this example, the child had a VPK County of Service Change during the enrollment process. The COE listed Clay as the county of service and it was automatically updated to the provider's county (Leon) during the enrollment process. This enables the coalition of the provider to process the enrollment request without having the original coalition manually update the child's application record.

Case notes have a search feature that can filter results. Click **Close** to close the window.

New Enrollments

New enrollment requests appear in the **Enrollment Action Requested** work queue as *Enrollment Submitted*. Click on the **COE number** to continue. The child's enrollment record opens. The *Enrollment Actions To-Date* area displays the current request that was made by the provider with action buttons to Approve, Reject, or Set to Coalition Reviewing.

Set Coalition Reviewing

Coalition users may place an enrollment request in the Coalition Reviewing status by clicking the **Set Coalition Reviewing** action button. This action changes the record's status from *Enrollment Submitted* to *Coalition Reviewing* and moves the record to the Coalition Reviewing work queue. The family, provider, and coalition will see the status update within the respective portals. The family and provider will not receive an email notification for this action.

Reject

Coalition users may reject an enrollment request by clicking the **Reject** action button. A window will appear to enter comments for the enrollment case note. The user must click **Save** to complete this action; otherwise click **Cancel** to abandon the rejection. Rejecting an enrollment request changes the record's status from *Enrollment Submitted* to *Enrollment Rejected*. In this status, the enrollment request is cancelled and the enrollment process starts over. The provider's VPK Director receives an email notification to inform them the enrollment process could not be completed for the child and the child's record is no longer listed on the class roster in the Provider Portal. The family also receives an email notification to inform them the enrollment process could not be completed for their child; instructions are provided to log into the Family Portal to download the child's COE and select another VPK provider.

Approve

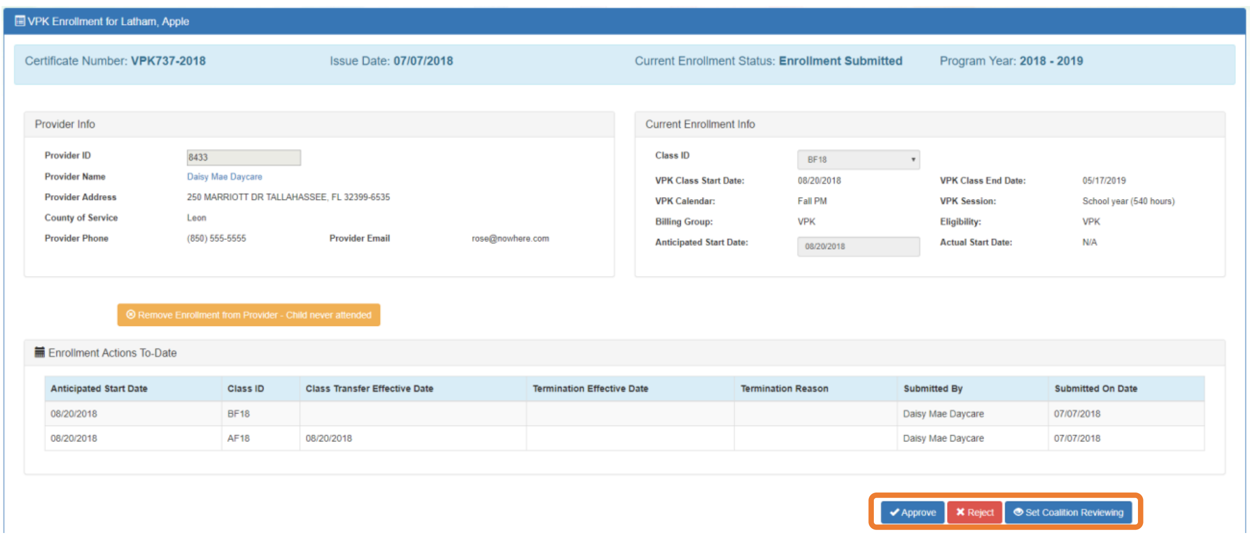
Coalition users may approve an enrollment request by clicking the **Approve** action button. Approving an enrollment request changes the record's status from *Enrollment Submitted* to *Enrolled*. The family, provider, and coalition will see the status update within the respective portals. The family receives an email notification to inform them the enrollment process is complete for their child. The provider will not receive an email notification for this action.

Class Transfers

Class transfer requests appear in the **Enrollment Action Requested** work queue as *Enrolled-Change Requested*. Click on the **COE number** to continue. The child's enrollment record opens. The *Enrollment Actions To-Date* area displays the current request that was made by the provider with action buttons to **Approve**, **Reject**, or **Set Coalition Reviewing**.

NOTE: During a class transfer, a child has two enrollment records; one for their current class *(Enrolled)* and one for the pending class transfer *(Enrolled-Change Requested*).

NOTE: Once a class change request is submitted to the coalition by a provider, a subsequent class change request for the same child is not allowed until the initial class change request is processed by the coalition.



Set Coalition Reviewing

Coalition users may place a class transfer request in the Coalition Reviewing status by clicking the **Set Coalition Reviewing** action button. This action changes the pending class transfer record's status from *Enrolled-Change Requested* to *Coalition Reviewing* and moves the record to the Coalition Reviewing work queue. The family will not see the status change on their dashboard in the Family Portal. However, the provider and coalition will see the status update within the respective portals. The family and provider will not receive an email notification for this action.

Reject

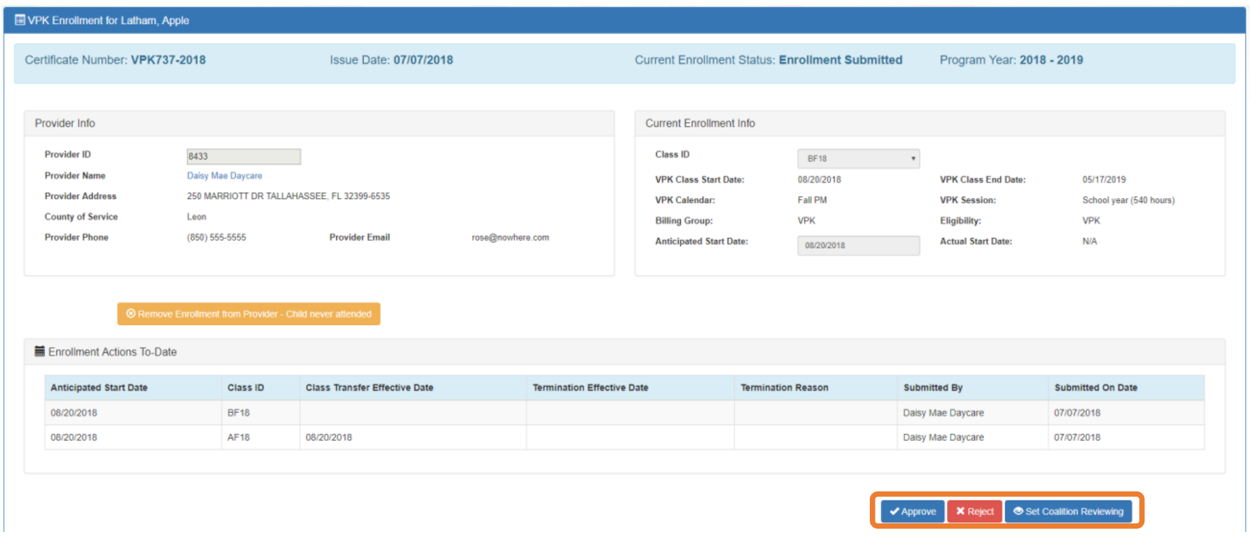
Coalition users may reject a class transfer request by clicking the **Reject** action button. A window will appear to enter comments for the enrollment case note. The user must click **Save** to complete this action; otherwise click **Cancel** to abandon the rejection. Rejecting the pending class transfer record cancels the class transfer. The rejected class transfer request is no longer active or visible to the provider in the second class; only the enrolled record remains active in the first class. The provider's VPK Director receives an email notification to inform them the change request was not approved for the child. The family will not receive an email notification for this action.

Approve

Coalition users may approve a class transfer request by clicking the **Approve** action button. Approving a class transfer request will change the pending class transfer record's status from *Enrolled-Change Requested* to *Enrolled*. The enrolled record in the first class is terminated with the class transfer effective date. The family, provider, and coalition will see the status update within the respective portals. The family and provider will not receive an email notification for this action.

Terminations

Termination requests appear in the **Enrollment Action Requested** work queue as *Enrolled-Change Requested*. Click on the **COE number** to continue. The child's enrollment record opens. The *Enrollment Actions To-Date* area displays the current request that was made by the provider with action buttons to **Approve**, **Reject**, or **Set Coalition Reviewing**.



Set Coalition Reviewing

Coalition users may place a termination request in the Coalition Reviewing status by clicking the **Set Coalition Reviewing** action button. This action changes the pending termination record's status from *Enrolled-Change Requested* to *Coalition Reviewing* and moves the record to the Coalition Reviewing work queue. The family will not see the status change on their dashboard in the Family Portal. However, the provider and coalition will see the status update within the respective portals. The family and provider will not receive an email notification for this action.

Reject

Coalition users may reject a termination request by clicking the **Reject** action button. A window will appear to enter comments for the enrollment case note. The user must click **Save** to complete this action; otherwise click **Cancel** to abandon the rejection. Rejecting the request cancels the termination and changes the record's status from *Enrolled-Change Requested* to *Enrolled*. The provider's VPK Director receives an email notification to inform them the change request was not approved for the child. The family will not receive an email notification for this action.

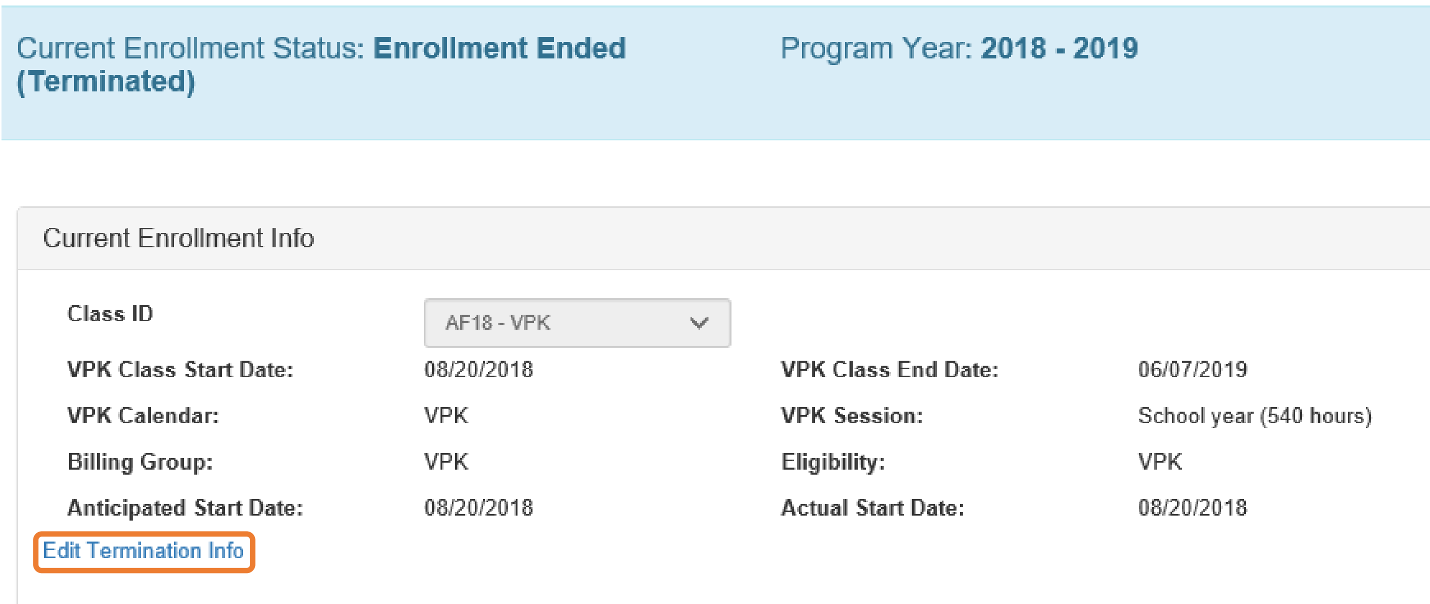
Approve

Coalition users may approve a termination request by clicking the **Approve** action button. Approving a termination request will change the record's status from *Enrolled-Change Requested* to *Enrollment Ended (*once the termination effective date is reached). The family, provider, and coalition will see the status update within the respective portals. The provider's VPK Director receives an email notification to inform them the enrollment has ended and the child's record is no longer listed on the class roster in the Provider Portal (once the termination effective date is reached). The family also receives an email notification to inform them the enrollment has ended; instructions are provided to log into the Family Portal to request reenrollment if hours remain unused.

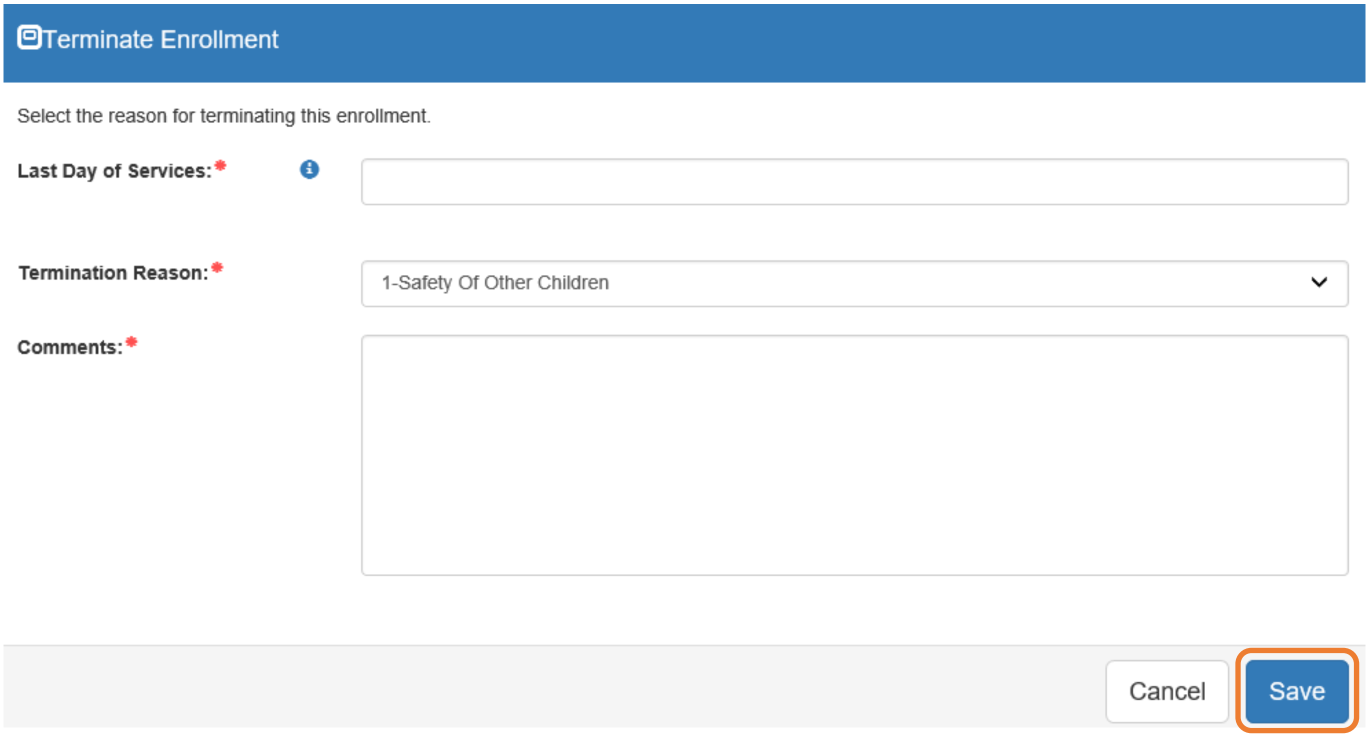
Edit Termination Information

If the VPK enrollment status is Enrollment Ended (Terminated), a coalition admin can change the termination date or termination reason if the date and/or reason was incorrectly entered by the provider.

From the enrollment screen, click the **Edit Termination Info** link.



Fill out the required fields and click **Save**.

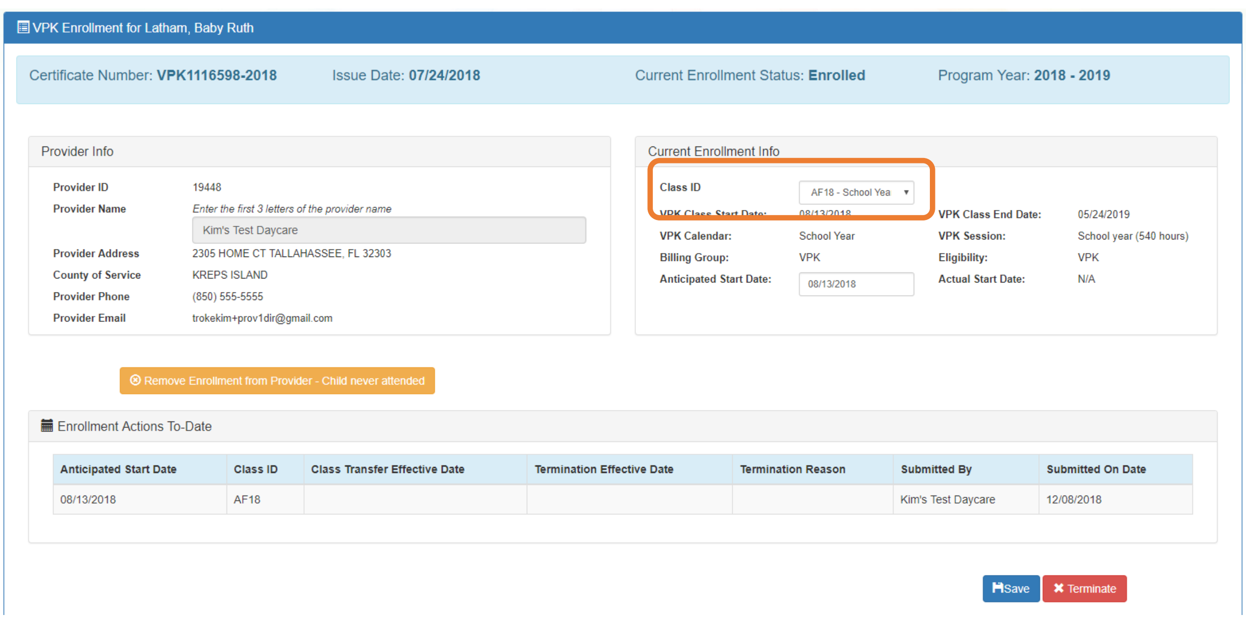


Saving Enrollment Changes Directly

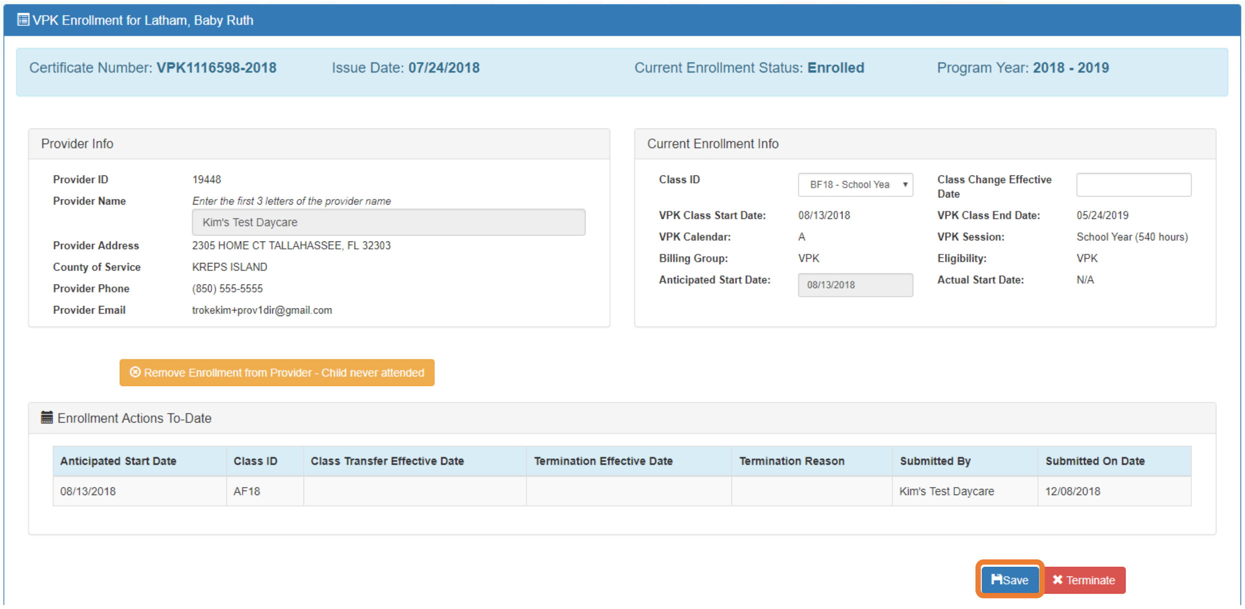
Coalition users may also open an enrollment record and make changes directly, such as changing a class, terminating the enrollment or cancelling the enrollment.

Class Transfers

To save a class transfer change, open the enrollment record. Use the Class ID drop down to select the class to transfer to.



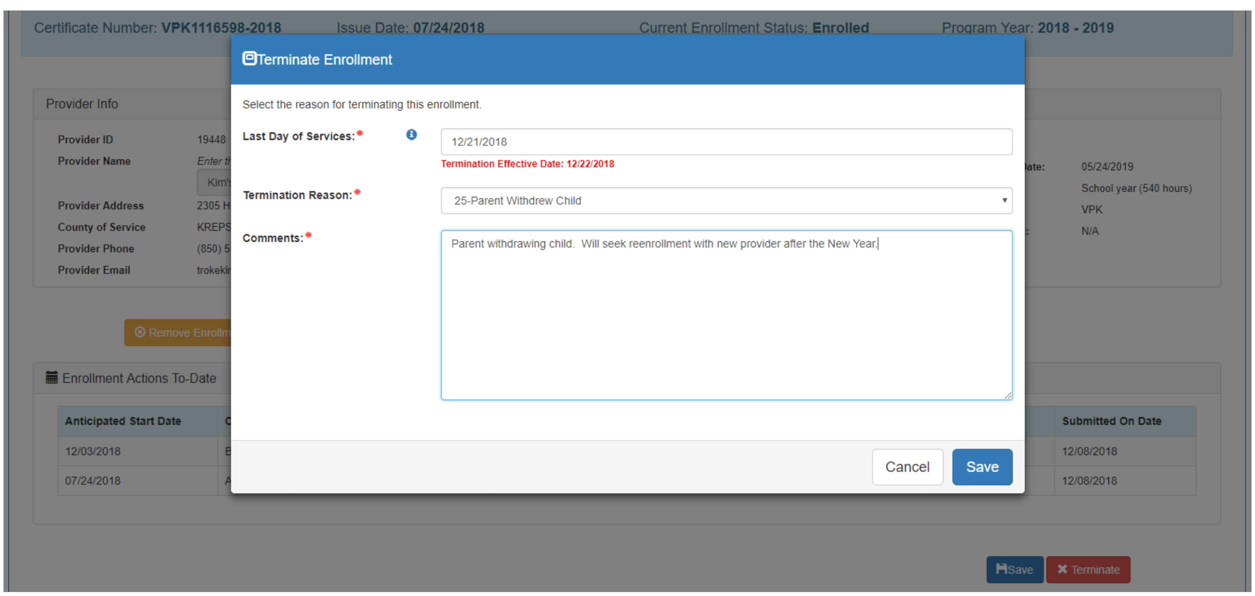
When the class changes, a "Class Change Effective Date" appears. Enter the first day the child will begin in the new class and click **Save**.



The page refreshes and the enrollment record is updated.

Terminations

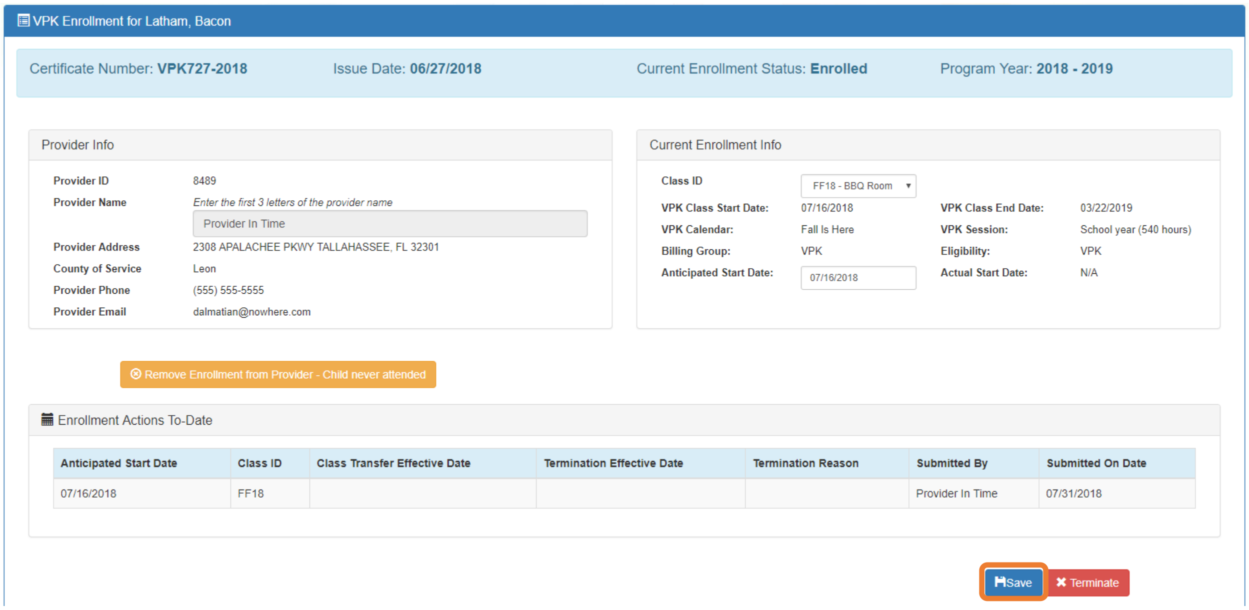
To save a termination change, open the enrollment record and click **Terminate**. A pop-up message displays to collect termination information. Enter the last day that services will be/were rendered and select the reason for termination. The Termination Effective Date is displayed below the Last Day of Services as one day after the last day of services. Therefore, the Termination Effective Date is the first day the child is NOT attending class. Click **Save** to complete the task or click **Close** to abandon the termination and close the window.



The page refreshes and the enrollment record is updated.

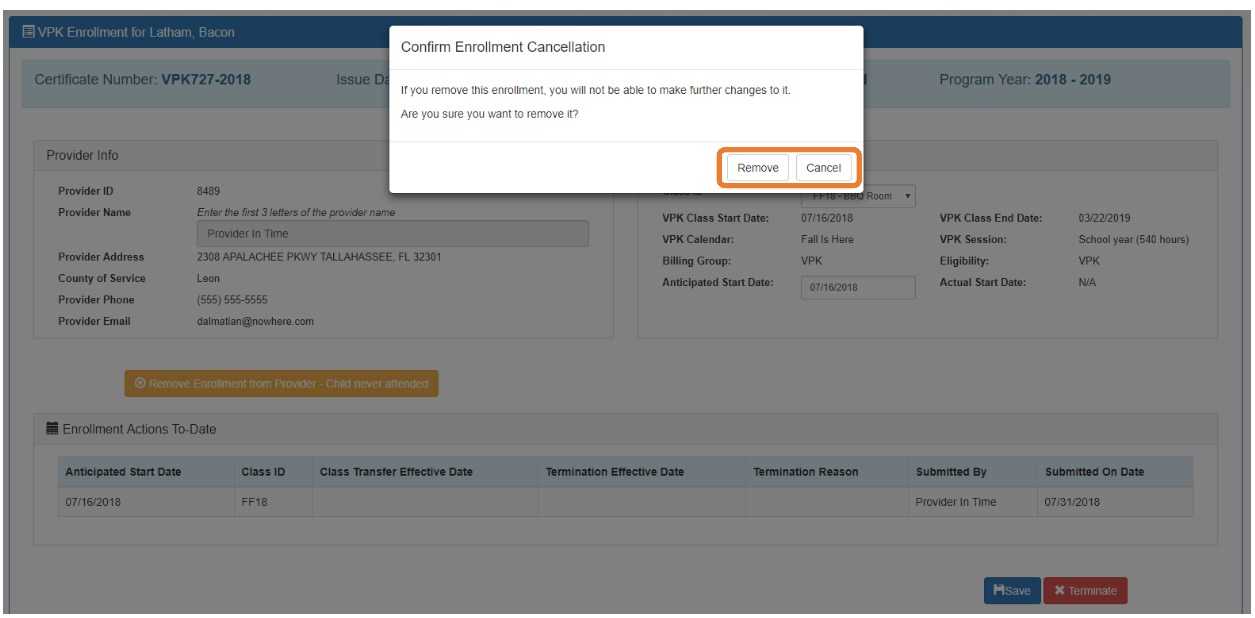
Update Anticipated Start Date

To save an updated anticipated start date, open the enrollment record. Enter a new Anticipated Start Date and click **Save**. **NOTE:** An anticipated start date cannot be changed if an Actual Start Date is recorded. Also, the validations must still be met (i.e. the anticipated start date cannot be before the class start date or after the class end date; and, it cannot be before the child's COE issue date).



Remove Enrollment from Provider - Child Never Attended

Coalition users may remove an enrollment from a provider, in effect cancelling the enrollment. This feature may be used if the child never attended and no reimbursement will be sought for the enrollment. To use this feature, open the enrollment record and click the **Remove Enrollment from Provider - Child Never Attended** button. A window displays to confirm the action. Click **Remove** to continue or click **Cancel** to abandon the action and close the window.

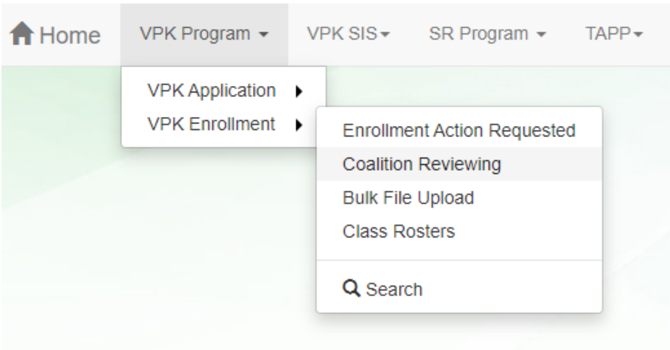


Removing an enrollment changes the record's status to *Enrollment Cancelled* and the enrollment process starts over for the family. The provider's VPK Director will receive an email notification to inform them the enrollment is removed; no attendance or reimbursement may be sought. The child's record is no longer listed on the class enrollment roster or attendance roster in the Provider Portal. The family will receive an email notification to inform them the enrollment for their child was cancelled; instructions are provided to log into the Family Portal to download the child's COE and select another VPK provider.

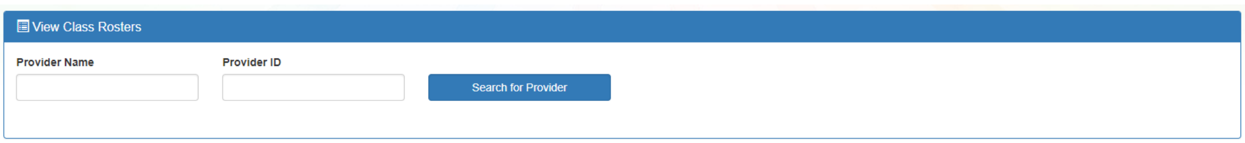
This feature is available until the actual start date is recorded through the attendance process. When the actual start date is populated in the column, the **Never Attended** button is no longer available.

Review Class Rosters

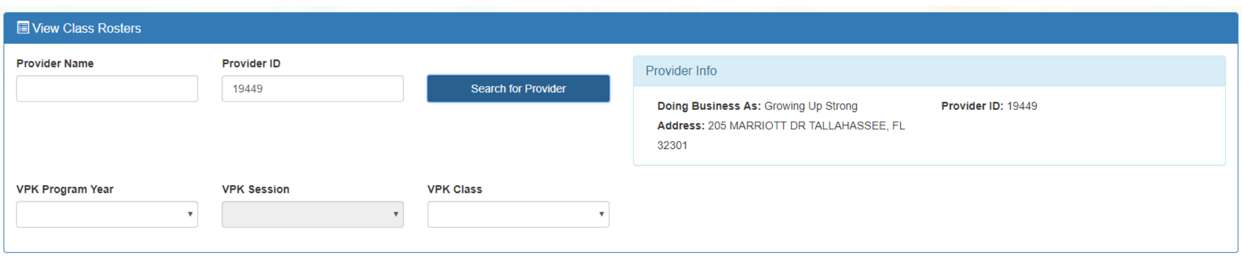
Coalition users can navigate to the VPK Enrollment menu item and select the **Class Rosters** link to view provider rosters by class.



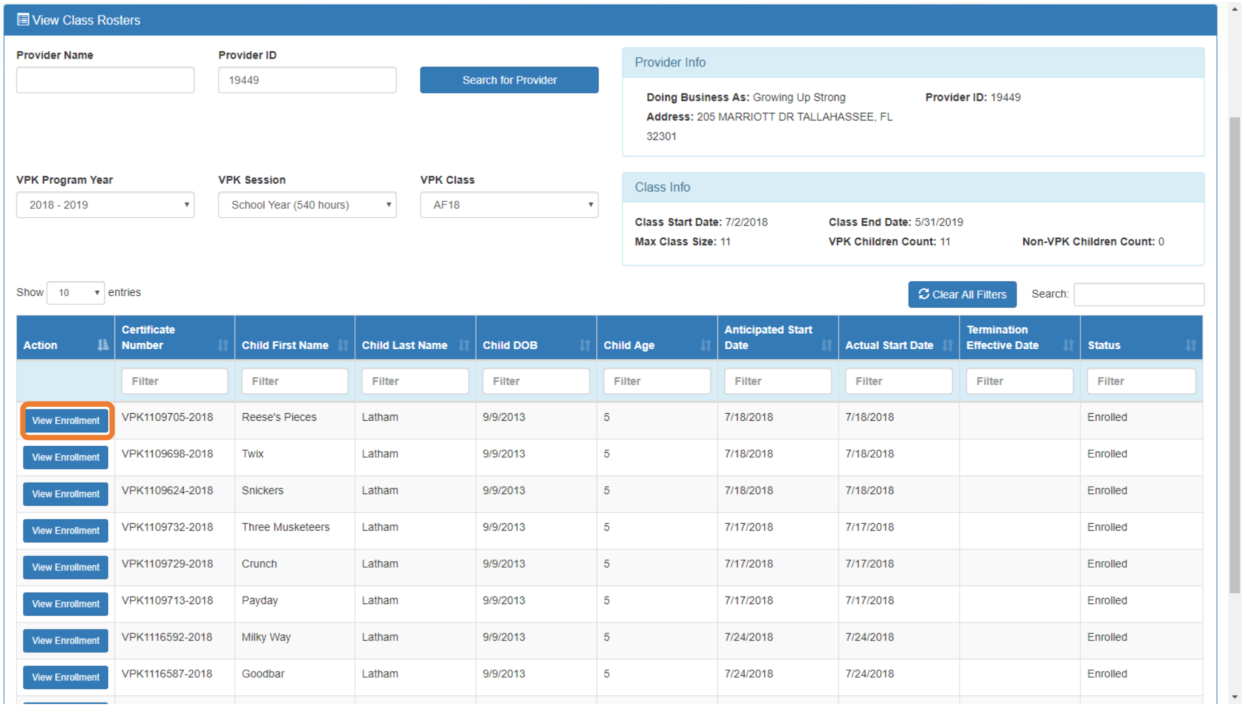
The View Class Rosters page displays.



Enter the provider name or provider ID and click the **Search for Provider** button. Next, the provider information and class selections appear.



Select the VPK program year, session, and class to view the roster. When selected, class information displays.

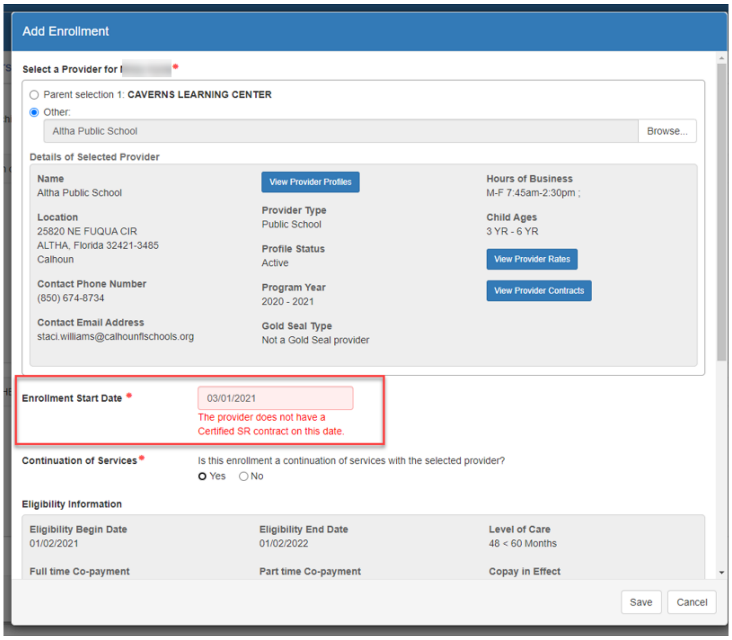


Columns may be sorted, filtered, and searched as needed. Clicking the **View Enrollment** button opens the child's enrollment record. The class rosters duplicate the provider roster view (without provider action buttons).

SR Enrollment

SR-20 Contract Verification

A provider must have a Certified SR-20 contract or an active SR-20 contract extension on the Enrollment Start Date before an enrollment can be added. In the below example, the provider does not have a Certified SR-20 contract for the Enrollment Start Date of 03/01/2021, so a validation message displays, and the enrollment cannot be saved.



Pending Family Acceptance Status

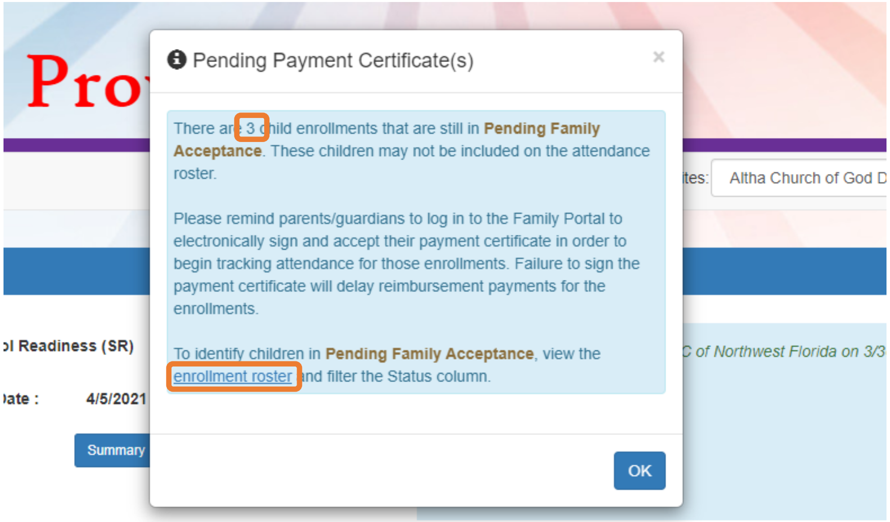
When a new School Readiness enrollment is created for an eligible child, families must accept the terms and conditions, establish their consent for developmental screening and/or child assessment, and sign the payment certificate. Families receive an email notification from DEL every five days until these steps are completed and the enrollment status changes from **Pending Family Acceptance** to **Enrolled**.

New enrollments in **Pending Family Acceptance** will not be visible on provider attendance rosters and will only appear once the family signs the payment certificate; however, there are exceptions.

- New enrollments for at-risk children (BG1) or at-risk children in relative care (BG3R) billing groups in **Pending Family Acceptance** will populate on attendance rosters
- Existing enrollments in **Pending Family Acceptance** that have already been submitted for attendance in previous months will continue to populate on attendance rosters

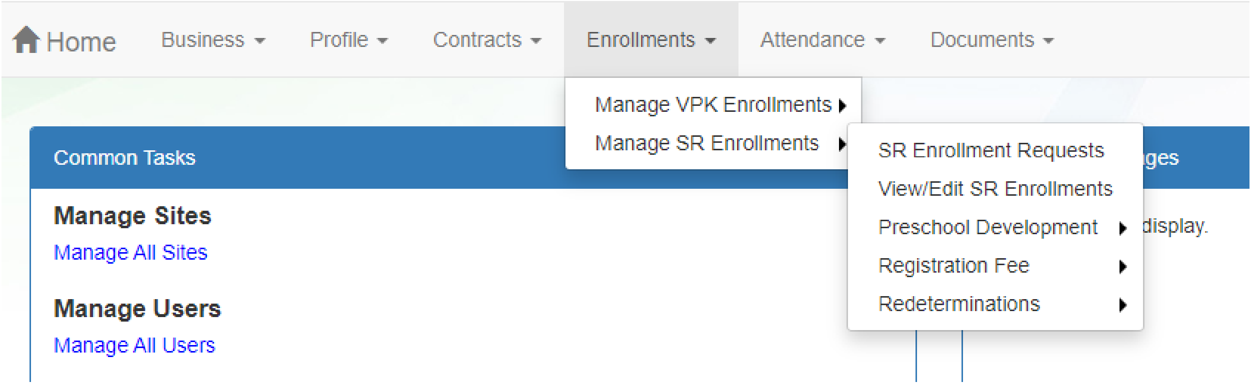
Providers will be able to process attendance and be paid for these enrollments, but not until the payment certificate is signed by the family.

If a provider has new enrollments in **Pending Family Acceptance**, when the provider accesses SR attendance, a pop-up window will display with a count of those new enrollments and a link to the Manage SR Enrollment queue.

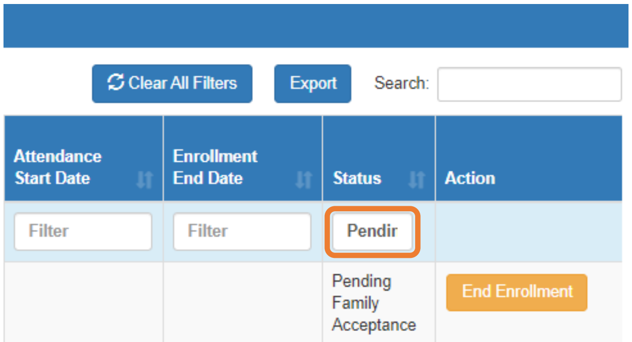


Viewing Enrollments in Pending Family Acceptance

To view enrollments in **Pending Family Acceptance**, navigate to **Enrollments > Manage SR Enrollments > View/Edit SR Enrollments**.

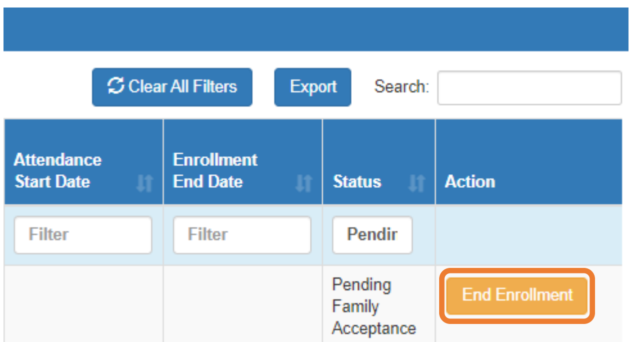


Then, enter “Pending” in the Status column filter.

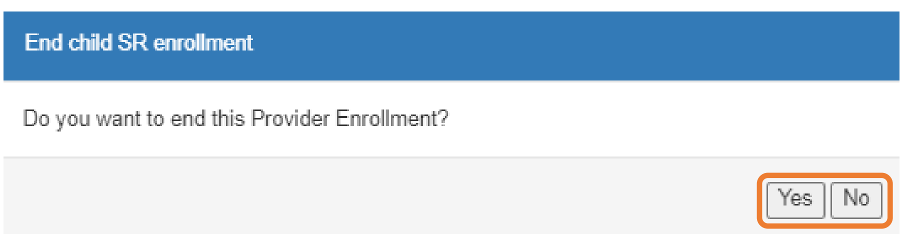


Ending Enrollments in Pending Family Acceptance

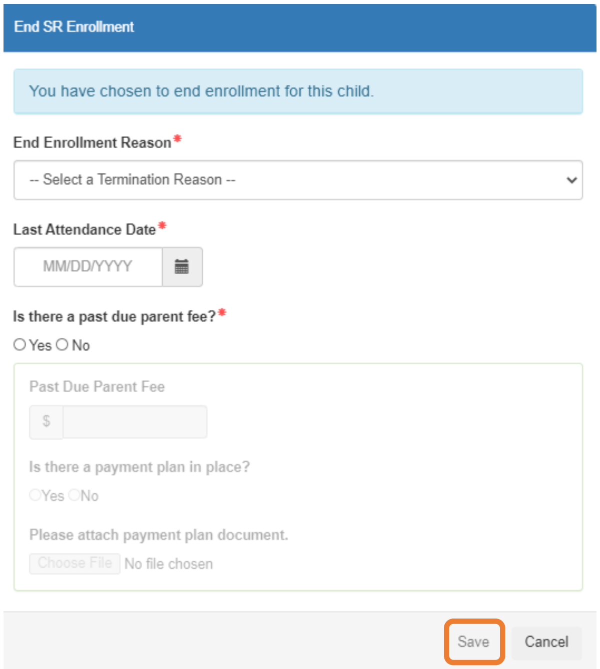
Providers can end enrollments in **Pending Family Acceptance**. Search for enrollments in **Pending Family Acceptance**, as detailed above, then click the **End Enrollment** button.



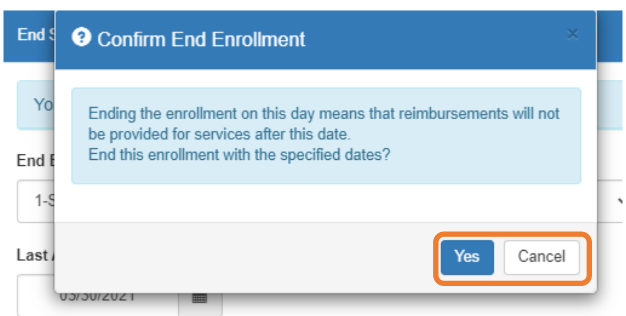
A confirmation pop-up window displays. Click **Yes** to continue or **No** to stop the End Enrollment process.



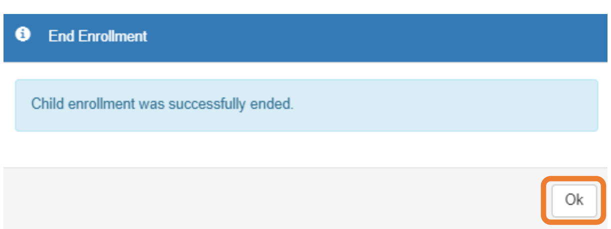
After clicking the **Yes** button, the following pop-up window displays. Complete the required information and click **Save**.



After clicking **Save**, a confirmation pop-up window displays. Click **Yes** to end the enrollment or **Cancel** to cancel the End Enrollment process.



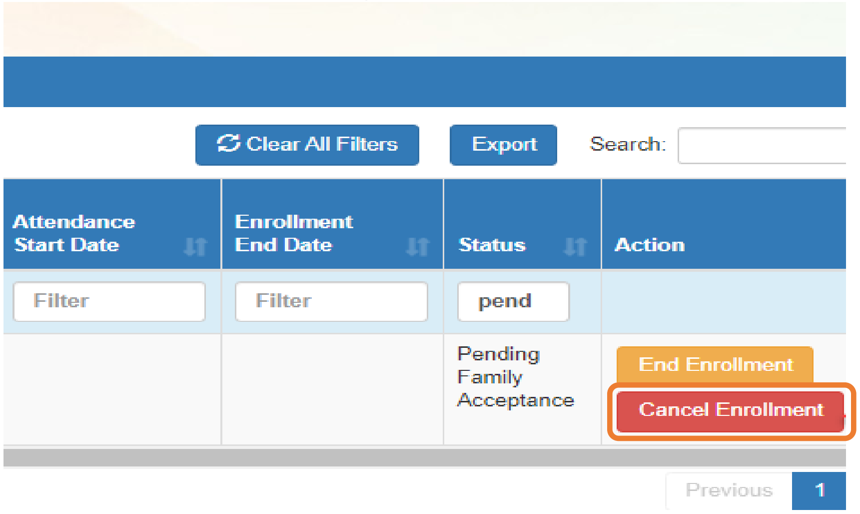
After clicking the **Yes** button, a pop-up window displays a message that the enrollment is ended. Click **Ok** to continue.

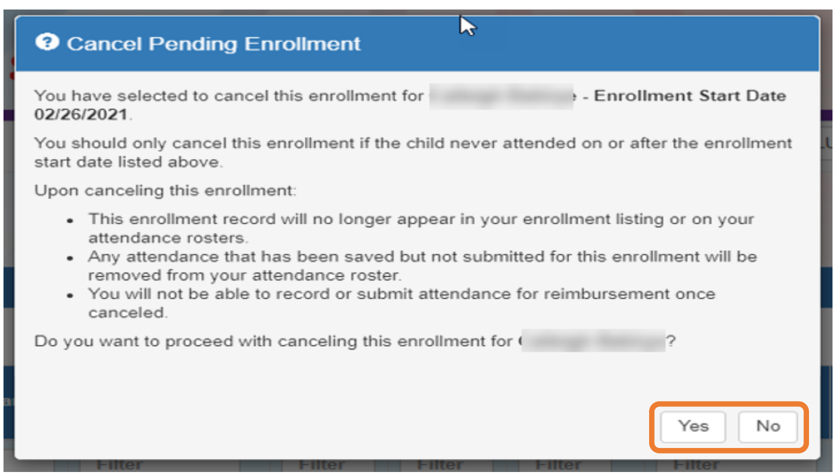


Cancelling Enrollments in Pending Family Acceptance

Providers can cancel enrollments in **Pending Family Acceptance**, but only if the enrollment is not for an at-risk child (BG1) or at-risk child in relative care (BG3R) and attendance has not been submitted for the enrollment.

Search for enrollments in **Pending Family Acceptance**, as detailed above, then click the **Cancel Enrollment** button.





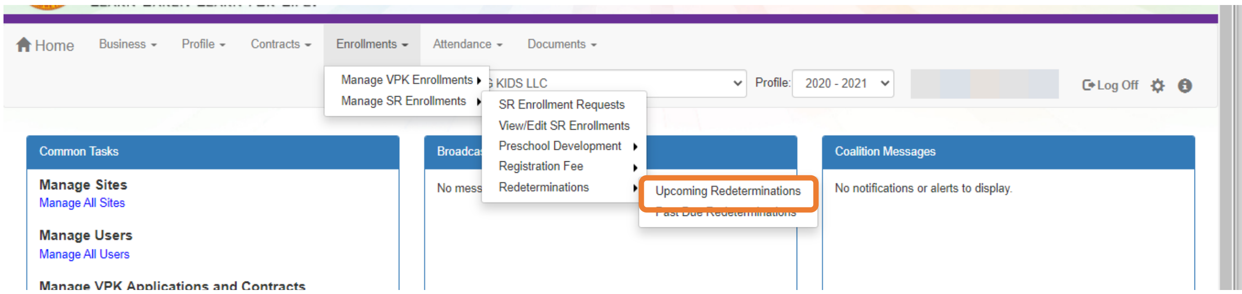
Click **Yes** to cancel the enrollment and remove it from the SR Enrollment queue. Click **No** to stop the Cancel Enrollment process.

SR Eligibility Redeterminations

The SR Eligibility Redetermination menu allows providers to view enrollments with “upcoming” or “past due” redeterminations. These queues are for informational purposes only and aid providers in knowing when an enrolled child is reaching the end of their School Readiness eligibility.

Upcoming Eligibility Redeterminations

To see the enrollments with upcoming eligibility redeterminations, the provider navigates to **Enrollments > Manage SR Enrollments > Redeterminations > Upcoming Redeterminations**.

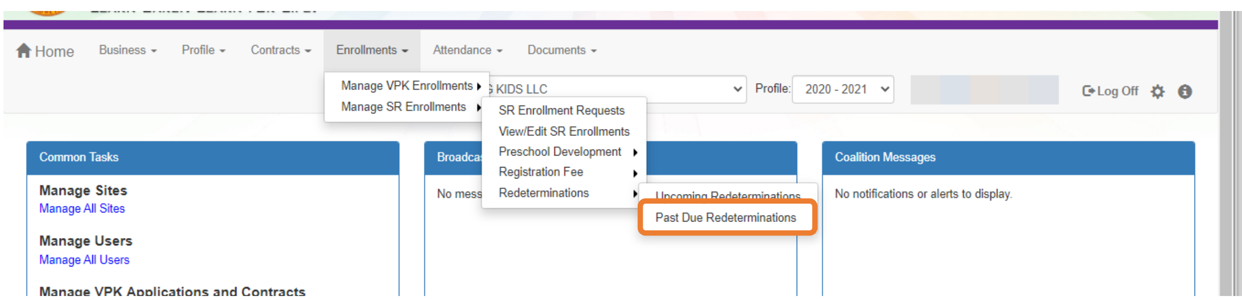


Redetermination records will only appear in the Provider Portal Upcoming Redetermination queue when:

- Child eligibility status is Eligible
- Child enrollment status is Enrolled or Pending Family Acceptance
- The redetermination is within 15 days from the due date

Past Due Eligibility Redeterminations

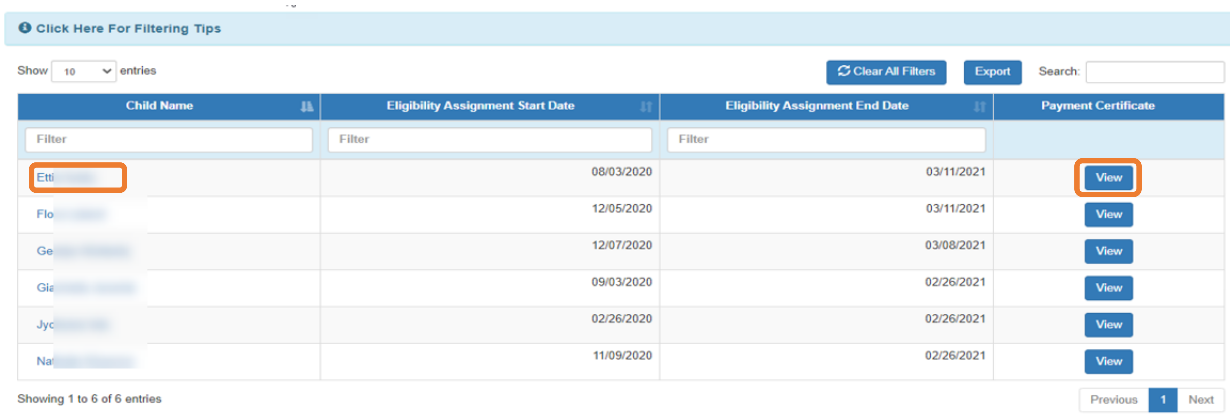
To see the enrollments with past due eligibility redeterminations, the provider navigates to **Enrollments > Manage SR Enrollments > Redeterminations > Past Due Redeterminations**.



Redetermination records will only appear in the Provider Portal Past Due Redetermination queue when:

- Child eligibility status is Eligible
- Child enrollment status is Enrolled or Pending Family Acceptance
- The redetermination is at least one day past the redetermination due date

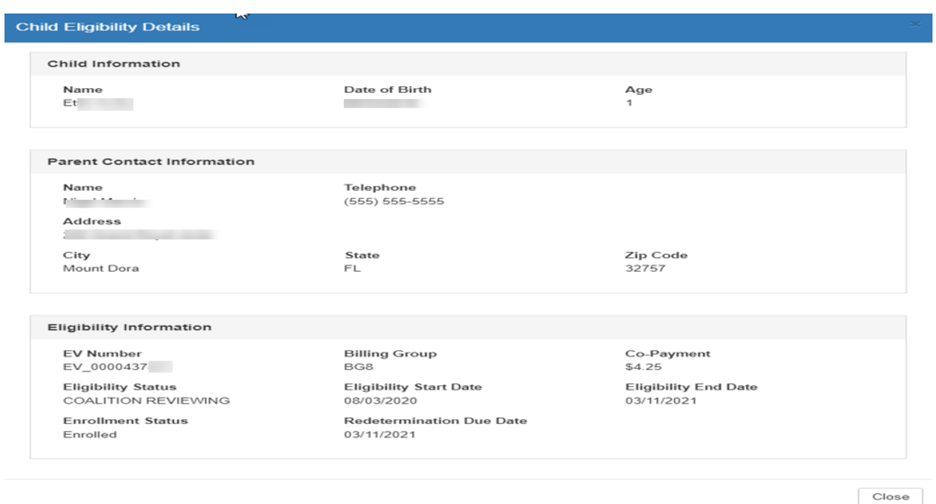
After clicking the **Upcoming Redeterminations** or **Past Due Redeterminations** link, the following appears.



Click the link for a child name in the Child Name column, and a pop-up message displays child eligibility and enrollment details for the child.

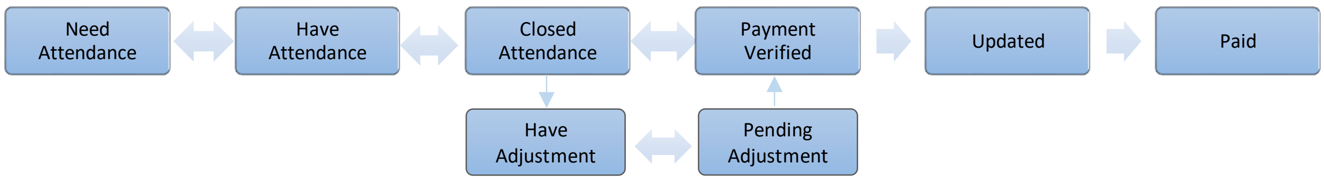
Click **<u>View</u>** in the Payment Certificate column, and a pop-up message displays the payment certificate for the enrollment. If the payment certificate does not exist, the **<u>View</u>** button will not be active, but hovering over the button displays a message: "The payment certificate is not viewable until signed by the parent."

NOTE: If the ELC changes the Household Eligibility Status from **Redetermination** to **Active** or **Inactive,** the child's eligibility will be removed from Redetermination status and the record(s) will be removed from the Provider Portal Redetermination queues.



Attendance and Reimbursement Processing

The EFS Mod financial system operates on a 12-month payment year (July 1 to June 30). Each payment period or month, providers submit attendance rosters for childcare services rendered during a service period. As these child records move through the payment cycle, different statuses are assigned.



1. Need Attendance – Outstanding attendance for a service period not yet submitted.
2. Have Attendance – Submitted attendance.
3. Closed Attendance – Approved attendance.
4. Payment Verified – Verified reimbursement detail.
5. Have Adjustment – Approved attendance in need of reimbursement detail correction.
6. Pending Adjustment – Reimbursement detail corrections pending approval.
7. Updated – Locked reimbursement detail.
8. Paid – Transmitted reimbursement detail.

At any given time, coalitions are see how many individual records are in each status for the current payment period by viewing the *Review & Close Payment Period* page (under the **Reimbursement > Reimbursement Closeout** menu).

Review & Close Payment Period

Payment Period Summary

Use this page to review and close

Funding Type	Payment Period	Have Attendance	Closed Attendance	Pending Adjustment	Payment Verified	Updated	Paid	Enrollments w/ Match Assessed	Assessed Match Amount	Action or Status
VPK	April 2020	5232	610	5	1	0	0	-	-	Open
SR	April 2020	960	6103	1	0	0	0	0	0.00	Open
Local	April 2020	-	8	0	1	0	0	-	-	Open
VPK Advance-VPK	April 2020	-	-	-	0	0	0	-	-	Close
VPK Advance-VPKS	April 2020	-	-	-	0	0	0	-	-	Close
VPK SIS	April 2020	-	-	-	0	0	0	-	-	Close

Payment Periods

Attendance records for service periods move through different statuses within a payment period. The payment period automatically opens on the first of each month and automatically closes on the last day of the month. However, coalitions may choose to manually end a payment period early, such as on the 20th of each month, by using the *Review & Close Payment Period* feature. Closing a payment period, whether automatically or manually, opens the next payment period. Only one payment period is open at a time. Any records that are not in the Paid status when the payment period closes, carryover into the next payment period in the same status so they may continue to be worked until the Paid status is reached.

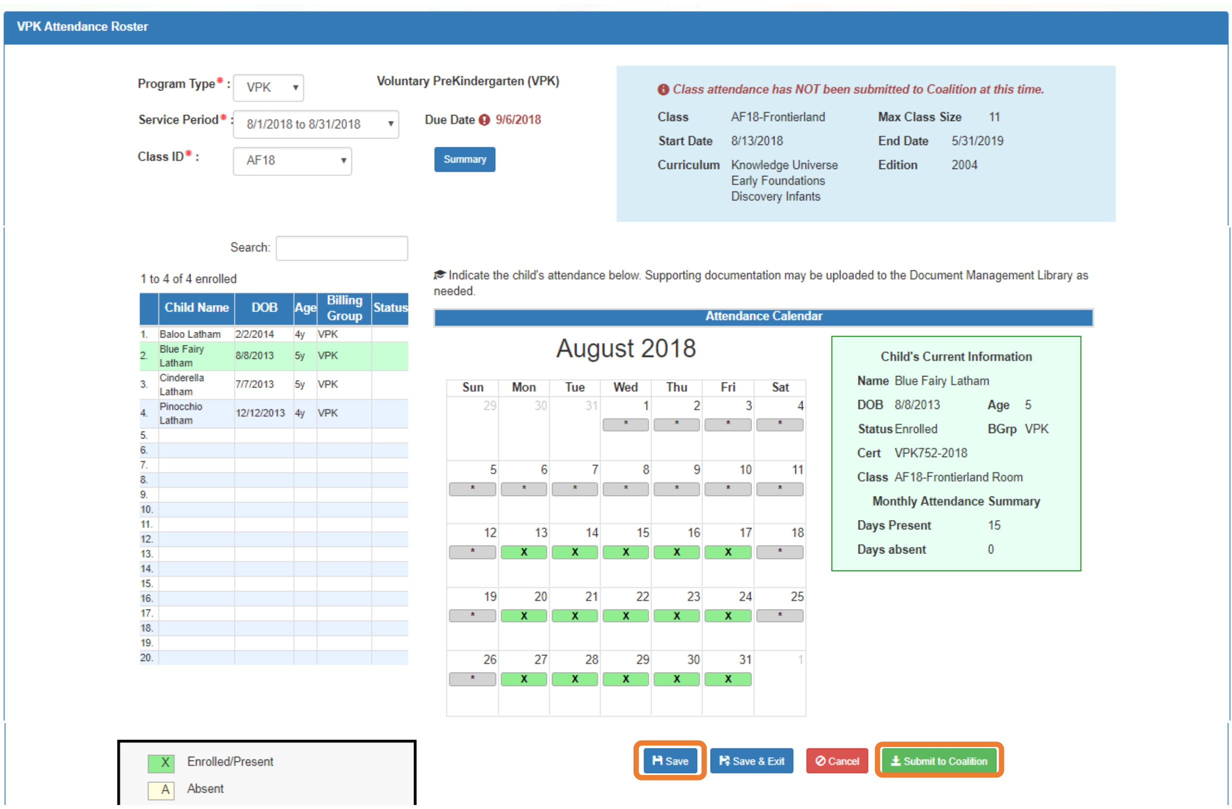
Service Periods

Service periods are one month. Service periods begin on the first day of the month and end on the last day of the month. When a child is enrolled with a provider, an attendance record is created. Providers are able to mark attendance during service periods in which the child is enrolled, beginning on the child's anticipated start date until the child's enrollment has ended. Each service period has a defined due date established by the statewide provider contract process. Providers that submit attendance before the end of the service period or after the service period due date are messaged accordingly. For example, attendance cannot be recorded for a day that has not occurred yet, therefore providers are alerted that future days are not reimbursable upon early submission. When submitting after the service period due date, providers are alerted that reimbursement may be delayed.

Attendance Process - VPK

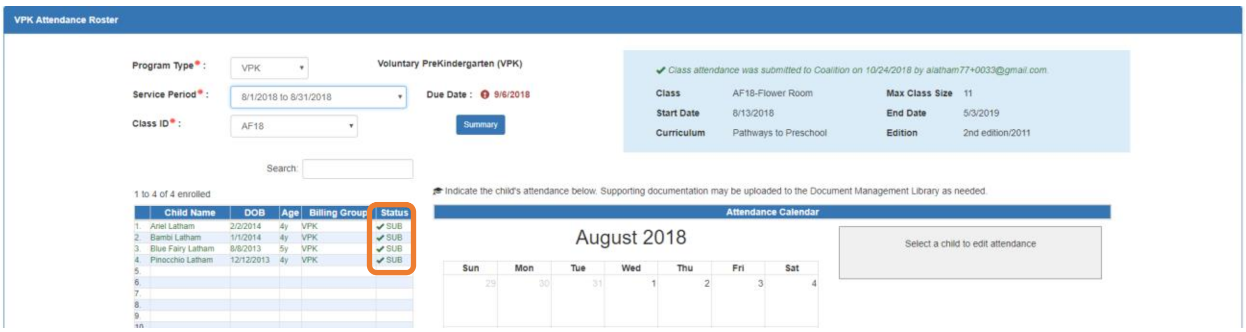
The provider attendance process is based on reporting exceptions. VPK providers must report absences for enrolled children during each service period for each approved class. Information about the class, such as the start/end date and non-instructional days, are from the provider's VPK Provider Application. Information about the child, such as the child's anticipated start date and termination effective date, are from the child's enrollment record. Corrections to the class information or child information must be made in their source areas, not the attendance feature. Class and child information are refreshed each time an un-submitted attendance roster is opened by the provider.

Providers record attendance for each day the class is scheduled to be in session during the child's enrollment. As days occur in the month, they default to present (X). Providers click on a child's name and day to change the present (X) indicator to absent (A). No absent reasons or other information is collected on the provider's screen during the VPK attendance process. Features include a **Search** button (to search for any criteria included in the roster list, such as a name, age, billing group) and a **Summary** button (to display the entire class roster in a single month view and print).



As absences are recorded, they are saved automatically. However, providers may choose to use the **<u>Save</u>** button to save their work periodically or when moving from child to child. When all child absences are recorded for the service period, the provider will click the **<u>Submit to Coalition</u>** button. This brings the provider to a *Sign and Certify* page where the page displays the summary view and collects the user's submission information.

Once submitted, providers see a submitted message in the class summary box and the "SUB" status in the Status column for each child record on the attendance roster. As the individual child records move through the payment period, their status is reflected in the provider's attendance roster Status column. On the Provider Portal, the child record statuses may be "SUB" (Submitted), "REJ" (Rejected), or "APP" (Approved). It is possible that a provider has some children listed as Approved and some children listed as Rejected after their submission. Providers are notified when rejections occur so they may re-visit the attendance roster to edit and re-submit. Only records that do not have a status or are rejected may be edited.

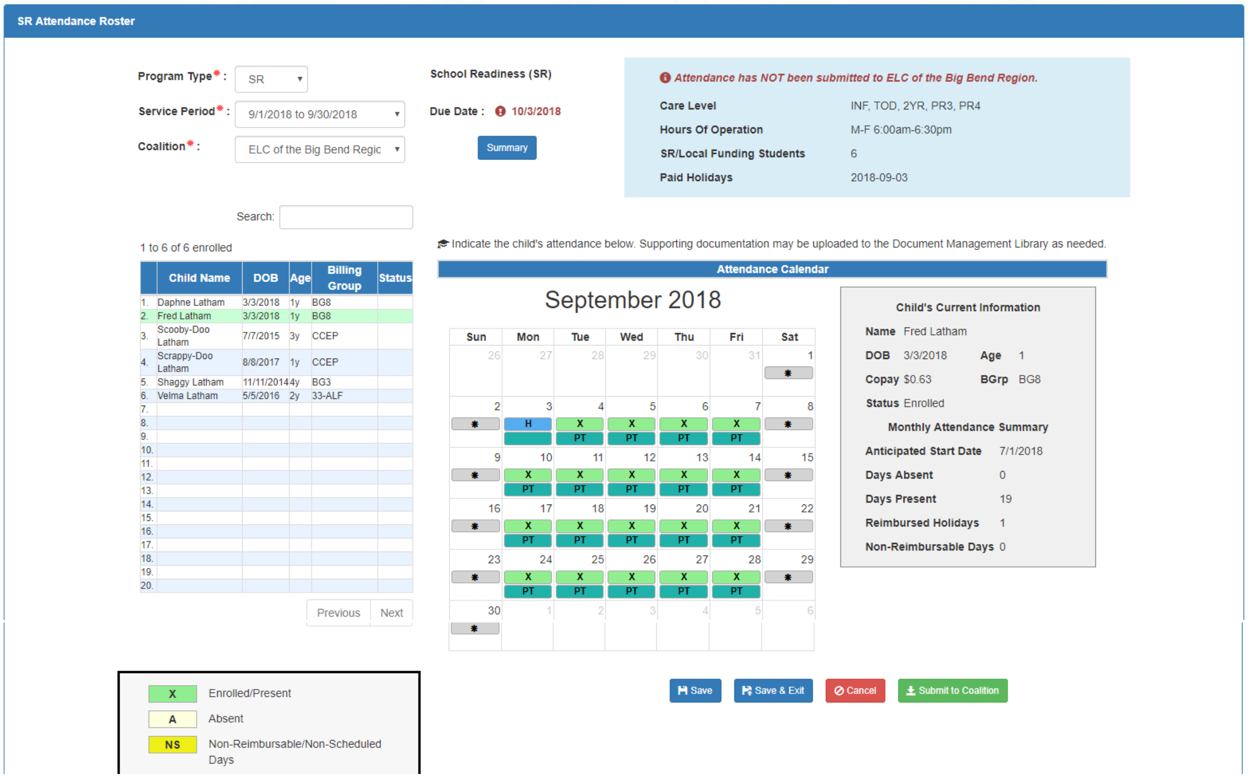


Child record statuses also change on the Coalition Services Portal. Prior to the attendance roster being submitted by the provider, the child records were in the "Need Attendance" status. Once submitted, the child records are moved to the "Have Attendance" status. Approved records move forward to the "Closed Attendance" status while rejected records move back to the "Have Attendance" status. Additional information about the attendance process on the Coalition Services Portal is described in this guide.

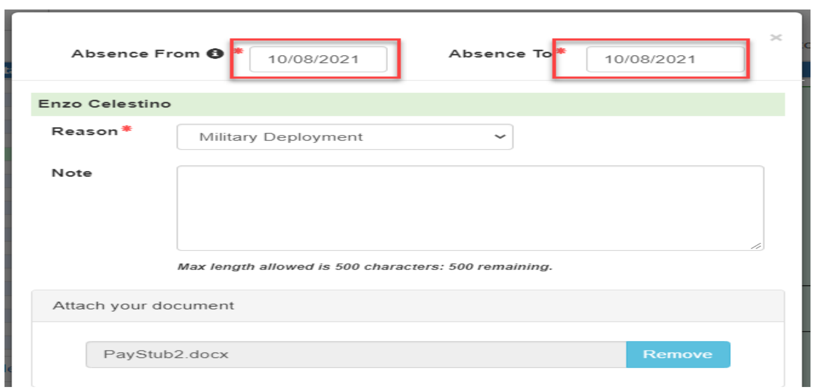
Attendance Process - SR

The provider attendance process is based on reporting exceptions. SR providers must report absences for enrolled children during each service period for each contracted coalition. Information about the provider's operational schedule and site closures are from the provider's profile. Information about paid holidays are from the provider's SR Paid Holidays maintained by the coalition. Information about the child, such as the child's name, enrollment start and end dates, are from the child's enrollment record. Corrections to this information must be made in their source areas, not the attendance feature. Enrollment information is refreshed each time an un-submitted attendance roster is opened by the provider.

Providers record attendance for each day the site is opened and the child is scheduled for service during the child's enrollment. As days occur in the month, they default to present (X). Providers click on a child's name and day to change the present (X) indicator to absent (A). A reason for the absence must be selected. Documentation and a note to the coalition are optional. Non-scheduled days appear as NS on the attendance roster. If needed, providers may change a NS day to present (X) or even absent (A). Features include a **Search** button (to search for any criteria included in the roster list, such as a name, age, billing group) and a **Summary** button (to display the entire roster in a single month view and print).

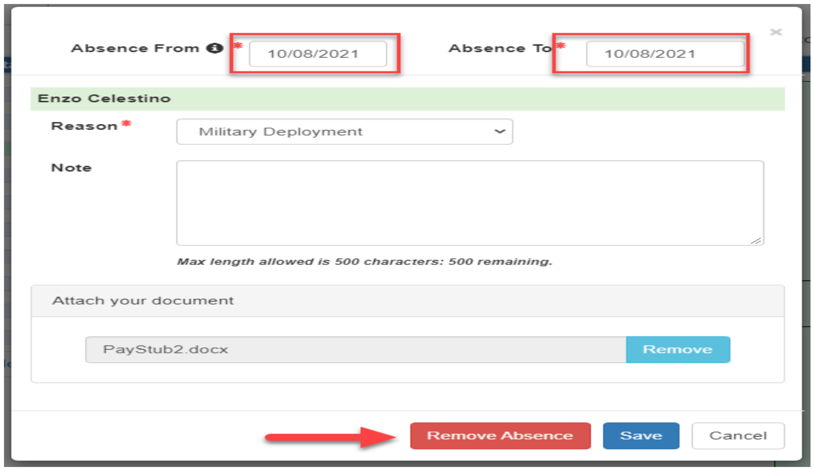


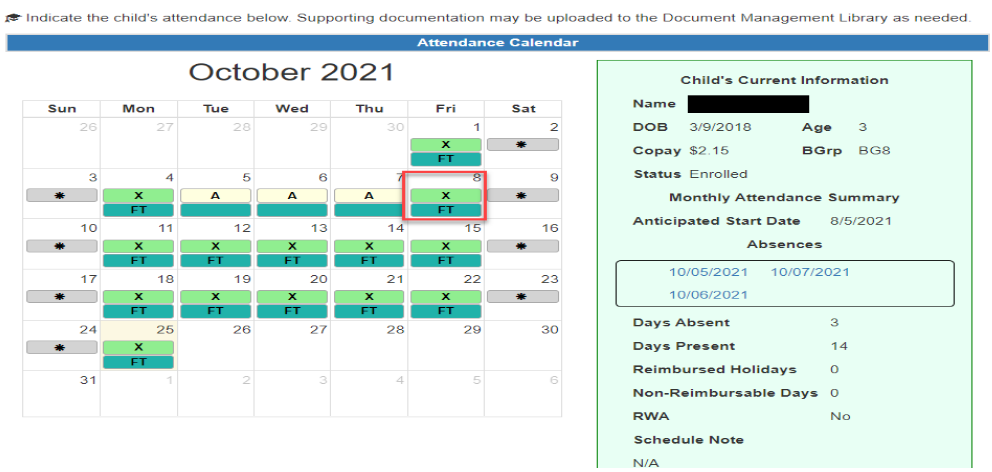
Consecutive absences can be entered by using a date range. A document can be attached to the absence range and the document will be associated to every day entered in the date span.



Removing an Absence

Absences entered by mistake can be changed back to present by clicking on the “A.” The below pop-up message appears. To undo the absence, click the **Remove Absence** button. That day will show an “X”, the absence reason is removed, and the attachment is removed.





Note:

X - Enrolled/Present **– Allows Date Span Absence**

A - Absent **– Allows Date Span Absence**

CR - Reimbursable Temporary Closure Day - Partial **– Allows Date Span Absence**

CN -Non-Reimbursable Temporary Closure Day – Partial **– Allows Date Span Absence**

N - Non-Reimbursable Day **– Does Not Allow Date Span Absence**

NS- Non-Scheduled Day **– Does Not Allow Date Span Absence**

H - Paid Holiday **– Does Not Allow Date Span Absence**

T - Terminated/Enrollment Ended **– Do Not Allow Date Span Absence**

* Closed **– Does Not Allow Date Span Absence**

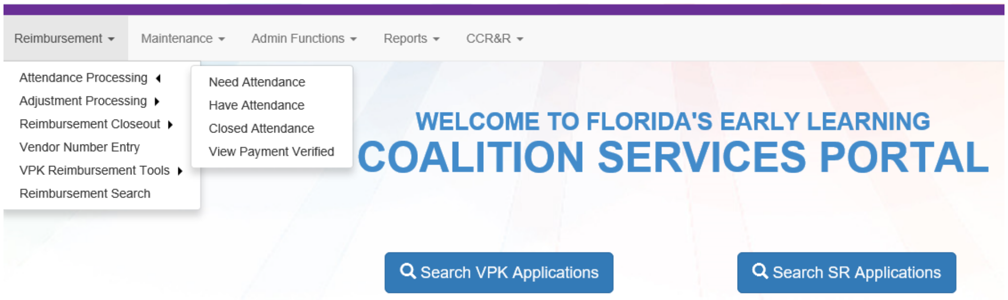
CR - Reimbursable Temporary Closure Day - Whole Site **– Does Not Allow Date Span Absence**

CN - Non-Reimbursable Temporary Closure Day - Whole Site **– Does Not Allow Date Span Absence**

Attendance has not started **– Does Not Allow Date Span Absence**

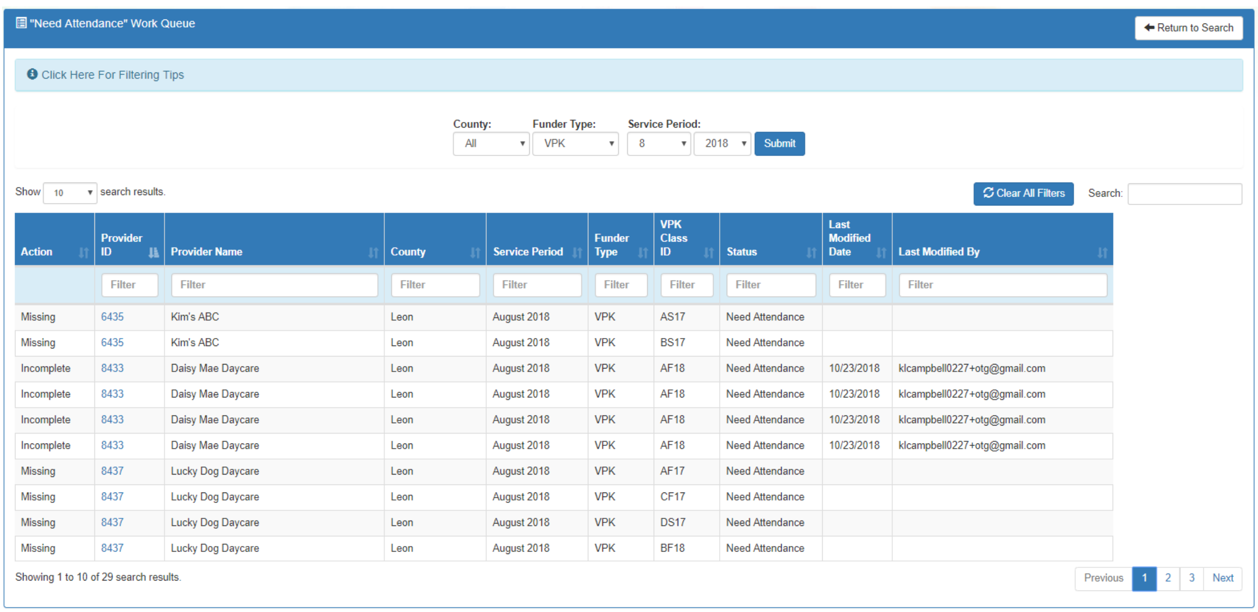
Attendance Processing

The Attendance Processing work queues are available under the Reimbursement menu item. The work queues include Need Attendance, Have Attendance, and Closed Attendance.



Need Attendance

The Need Attendance work queue displays all of the outstanding attendance rosters for providers by service period and funder type. Each provider that has an un-submitted attendance record for a child enrollment are represented here. The column filters and search feature may be used to filter the results by specific criteria such as a county name or provider name.

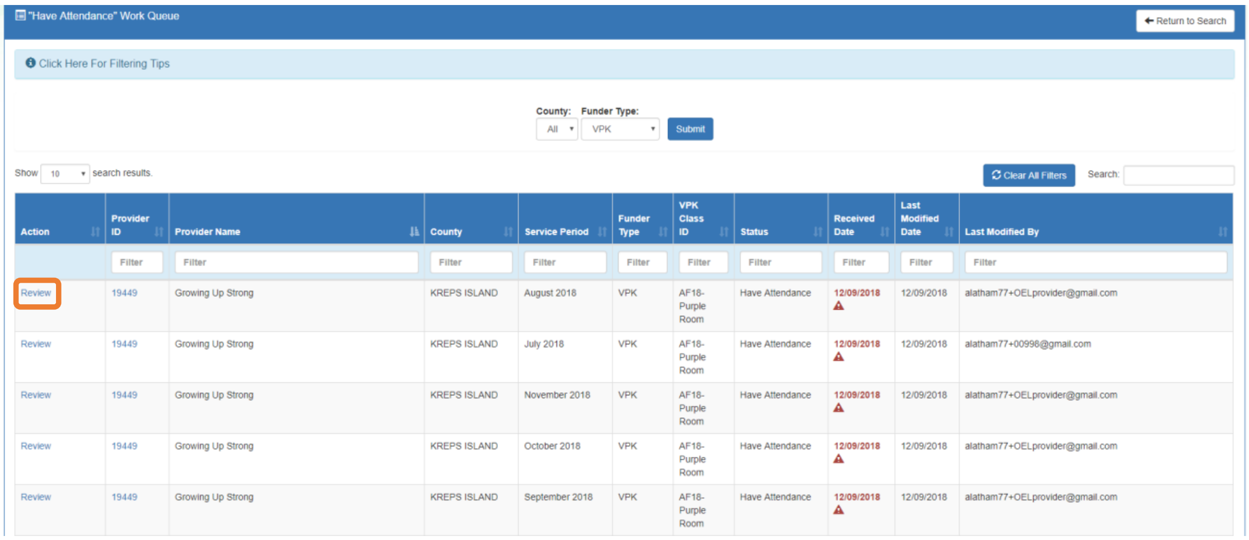


Action	Provider ID	Provider Name	County	Service Period	Funder Type	VPK Class ID	Status	Last Modified Date	Last Modified By
Missing	6435	Kim's ABC	Leon	August 2018	VPK	AS17	Need Attendance		
Missing	6435	Kim's ABC	Leon	August 2018	VPK	BS17	Need Attendance		
Incomplete	8433	Daisy Mae Daycare	Leon	August 2018	VPK	AF18	Need Attendance	10/23/2018	klcampbell0227+otg@gmail.com
Incomplete	8433	Daisy Mae Daycare	Leon	August 2018	VPK	AF18	Need Attendance	10/23/2018	klcampbell0227+otg@gmail.com
Incomplete	8433	Daisy Mae Daycare	Leon	August 2018	VPK	AF18	Need Attendance	10/23/2018	klcampbell0227+otg@gmail.com
Incomplete	8433	Daisy Mae Daycare	Leon	August 2018	VPK	AF18	Need Attendance	10/23/2018	klcampbell0227+otg@gmail.com
Missing	8437	Lucky Dog Daycare	Leon	August 2018	VPK	AF17	Need Attendance		
Missing	8437	Lucky Dog Daycare	Leon	August 2018	VPK	CF17	Need Attendance		
Missing	8437	Lucky Dog Daycare	Leon	August 2018	VPK	DS17	Need Attendance		
Missing	8437	Lucky Dog Daycare	Leon	August 2018	VPK	BF18	Need Attendance		

Coalition users cannot open or view the attendance rosters from this work queue. However, whether or not the provider has opened or worked on the attendance roster is known by looking at the Action column. The Action column has two indicators: Missing or Incomplete. Missing means the provider has not opened the roster. Incomplete means the provider has been working on the roster. In addition, the Last Modified Date and Last Modified By information will be populated. As attendance rosters are submitted, their status changes to Have Attendance. Therefore, they will not be listed in this work queue anymore. However, if the provider has one or more rejected attendance records (from Have Attendance), the service period roster will be listed in the Need Attendance work queue again because the provider has outstanding child attendance records that are not yet submitted for a service period. An additional report is available in Tableau with additional information about the outstanding child attendance records.

Have Attendance

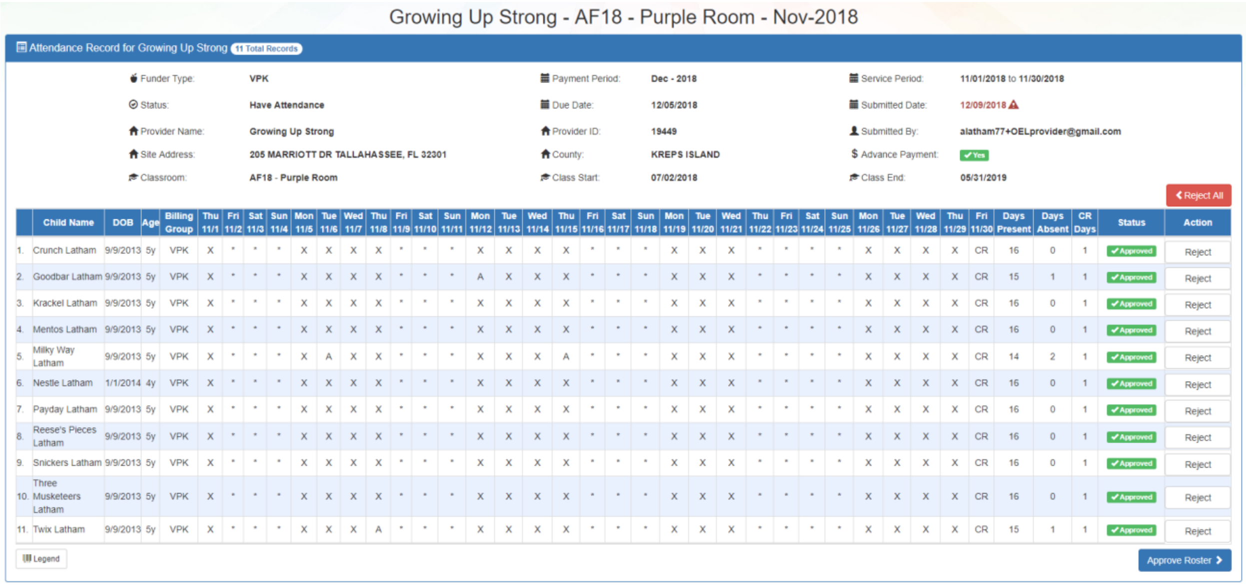
The Have Attendance work queue displays all of the submitted attendance rosters for providers by county and funder type. Each provider that has submitted attendance records for a child enrollment are represented here. The column filters and search feature may be used to filter the results by specific criteria such as a county name, service period, or provider name. Attendance rosters submitted after their service period due date are bolded in red and have a warning symbol ( ) to indicate their late submission. Coalitions may choose to work the late rosters or skip over them. Any rosters that do not reach the Paid status when the payment period closes, remain in their current status in the new payment period to continue being worked.



To begin reviewing submitted attendance records, click on the **Review** link. The attendance roster opens. The top portion of the roster contains information about the provider and attendance roster. The service period, due date, and submitted date are displayed. Again, attendance rosters submitted after their service period due date are bolded in red and have a warning symbol ( ) to indicate late submission.

Each record must have a status of Approved or Rejected in order to continue with the roster processing. Children with 3 or fewer absences default to the Approved status. Children with 4 or more absences must have the status selected.

Approved records will move forward in the reimbursement process to Closed Attendance. Rejected records will move backward in the reimbursement process to Need Attendance. Rejecting records is necessary when corrections are needed to the child enrollment information, attendance, or schedule (i.e. closures). Once rejected, edits to the enrollment, attendance, and schedule may be updated. Then, the provider may review and re-submit. **Rejecting one or more records will not prevent the other approved records from moving forward in the reimbursement process.**



Growing Up Strong - AF18 - Purple Room - Nov-2018

Attendance Record for Growing Up Strong 11 Total Records

Funder Type:	VPK	Payment Period:	Dec - 2018	Service Period:	11/01/2018 to 11/30/2018
Status:	Have Attendance	Due Date:	12/05/2018	Submitted Date:	12/09/2018
Provider Name:	Growing Up Strong	Provider ID:	19449	Submitted By:	alatham77+OELprovider@gmail.com
Site Address:	205 MARRIOTT DR TALLAHASSEE, FL 32301	County:	KREPS ISLAND	Advance Payment:	Yes
Classroom:	AF18 - Purple Room	Class Start:	07/02/2018	Class End:	05/31/2019

Reject All

	Child Name	DOB	Age	Billing Group	Thu 11/1	Fri 11/2	Sat 11/3	Sun 11/4	Mon 11/5	Tue 11/6	Wed 11/7	Thu 11/8	Fri 11/9	Sat 11/10	Sun 11/11	Mon 11/12	Tue 11/13	Wed 11/14	Thu 11/15
1.	Crunch Latham	9/9/2013	5y	VPK	X	*	*	*	X	X	X	X	*	*	*	X	X	X	X
2.	Goodbar Latham	9/9/2013	5y	VPK	X	*	*	*	X	X	X	X	*	*	*	A	X	X	X
3.	Krackel Latham	9/9/2013	5y	VPK	X	*	*	*	X	X	X	X	*	*	*	X	X	X	X
4.	Mentos Latham	9/9/2013	5y	VPK	X	*	*	*	X	X	X	X	*	*	*	X	X	X	X
5.	Milky Way Latham	9/9/2013	5y	VPK	X	*	*	*	X	A	X	X	*	*	*	X	X	X	A
6.	Nestle Latham	1/1/2014	4y	VPK	X	*	*	*	X	X	X	X	*	*	*	X	X	X	X
7.	Payday Latham	9/9/2013	5y	VPK	X	*	*	*	X	X	X	X	*	*	*	X	X	X	X
8.	Reese's Pieces Latham	9/9/2013	5y	VPK	X	*	*	*	X	X	X	X	*	*	*	X	X	X	X
9.	Snickers Latham	9/9/2013	5y	VPK	X	*	*	*	X	X	X	X	*	*	*	X	X	X	X
10.	Three Musketeers Latham	9/9/2013	5y	VPK	X	*	*	*	X	X	X	X	*	*	*	X	X	X	X
11.	Twix Latham	9/9/2013	5y	VPK	X	*	*	*	X	X	X	A	*	*	*	X	X	X	X

Child Name	Fri 11/16	Sat 11/17	Sun 11/18	Mon 11/19	Tue 11/20	Wed 11/21	Thu 11/22	Fri 11/23	Sat 11/24	Sun 11/25	Mon 11/26	Tue 11/27	Wed 11/28	Thu 11/29	Fri 11/30	Days Present	Days Absent	CR Days	Status	Action
Crunch Latham	*	*	*	X	X	X	*	*	*	*	X	X	X	X	CR	16	0	1	Approved	Reject
Goodbar Latham	*	*	*	X	X	X	*	*	*	*	X	X	X	X	CR	15	1	1	Approved	Reject
Krackel Latham	*	*	*	X	X	X	*	*	*	*	X	X	X	X	CR	16	0	1	Approved	Reject
Mentos Latham	*	*	*	X	X	X	*	*	*	*	X	X	X	X	CR	16	0	1	Approved	Reject
Milky Way Latham	*	*	*	X	X	X	*	*	*	*	X	X	X	X	CR	14	2	1	Approved	Reject
Nestle Latham	*	*	*	X	X	X	*	*	*	*	X	X	X	X	CR	16	0	1	Approved	Reject
Payday Latham	*	*	*	X	X	X	*	*	*	*	X	X	X	X	CR	16	0	1	Approved	Reject
Reese's Pieces Latham	*	*	*	X	X	X	*	*	*	*	X	X	X	X	CR	16	0	1	Approved	Reject
Snickers Latham	*	*	*	X	X	X	*	*	*	*	X	X	X	X	CR	16	0	1	Approved	Reject
Three Musketeers Latham	*	*	*	X	X	X	*	*	*	*	X	X	X	X	CR	16	0	1	Approved	Reject
Twix Latham	*	*	*	X	X	X	*	*	*	*	X	X	X	X	CR	15	1	1	Approved	Reject

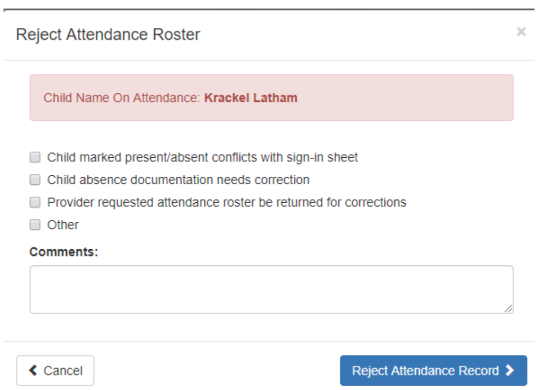
Legend

Approve Roster

NOTE: For VPK rosters, 1) absences between the anticipated start date and first present day are not reimbursable, and 2) absences between the last present day and termination effective date are not reimbursable. While actual absences are recorded in Have Attendance, the system excludes these absences from payment calculations in Closed Attendance.

To reject a single record, click the **Reject** action button for that row. A pop-up message appears to collect the rejection reason and comment.

NOTE: The rejection reasons are the same for both SR and VPK programs so they may not be applicable in all cases. Selecting "Other" requires a comment.



Reject Attendance Roster

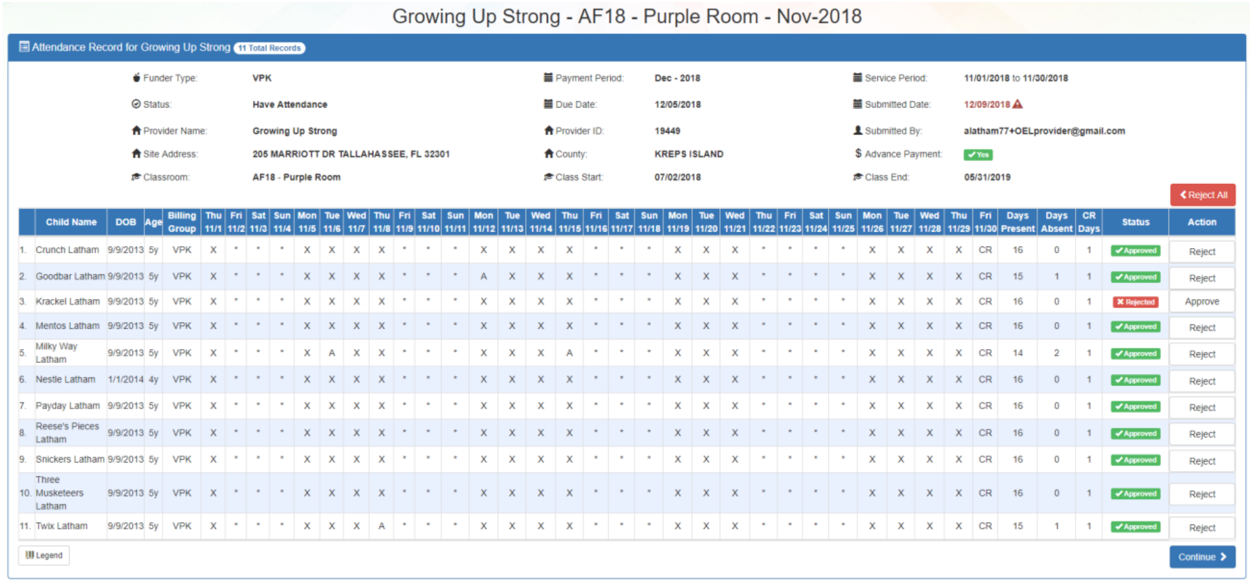
Child Name On Attendance: **Krackel Latham**

- [ ] Child marked present/absent conflicts with sign-in sheet
- [ ] Child absence documentation needs correction
- [ ] Provider requested attendance roster be returned for corrections
- [ ] Other

Comments:

Cancel   Reject Attendance Record

Once rejected, the child record status and action button change on the roster. The child record status may be changed back to approved by clicking the **Approve** action button. Statuses are not committed until the **Continue/Approve Roster** button is selected. In other words, it will not notify the provider of a rejected record as soon as the status is changed on the screen. There is another step to complete the process before the status is committed and notification of rejected records is sent.



Growing Up Strong - AF18 - Purple Room - Nov-2018

Attendance Record for Growing Up Strong 11 Total Records

Funder Type:	VPK	Payment Period:	Dec - 2018	Service Period:	11/01/2018 to 11/30/2018
Status:	Have Attendance	Due Date:	12/05/2018	Submitted Date:	12/09/2018
Provider Name:	Growing Up Strong	Provider ID:	19449	Submitted By:	alatham77+OELprovider@gmail.com
Site Address:	205 MARRIOTT DR TALLAHASSEE, FL 32301	County:	KREPS ISLAND	Advance Payment:	Yes
Classroom:	AF18 - Purple Room	Class Start:	07/02/2018	Class End:	05/31/2019

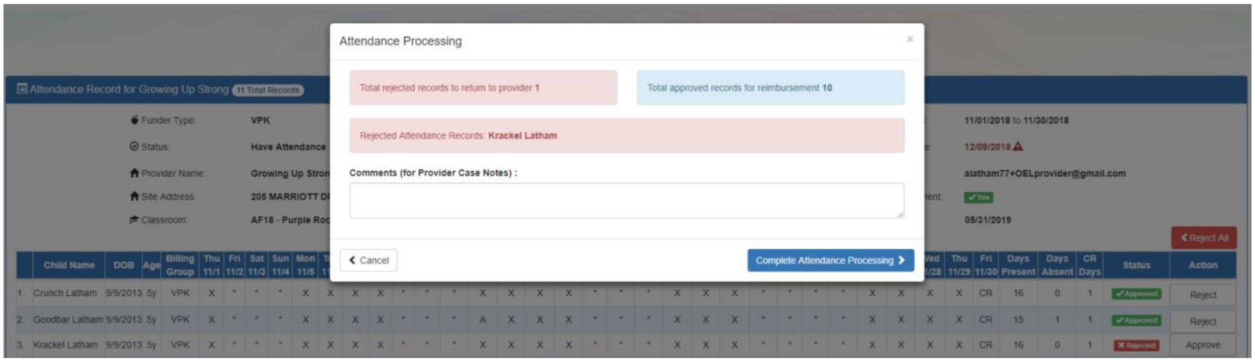
Reject All

	Child Name	DOB	Age	Billing Group	Thu 11/1	Fri 11/2	Sat 11/3	Sun 11/4	Mon 11/5	Tue 11/6	Wed 11/7	Thu 11/8	Fri 11/9	Sat 11/10	Sun 11/11	Mon 11/12	Tue 11/13	Wed 11/14	Thu 11/15	Fri 11/16	Sat 11/17	Sun 11/18	Mon 11/19	Tue 11/20	Wed 11/21	Thu 11/22	Fri 11/23	Sat 11/24	Sun 11/25	Mon 11/26	Tue 11/27	Wed 11/28	Thu 11/29	Fri 11/30	Days Present	Days Absent	CR Days	Status	Action
1.	Crunch Latham	9/9/2013	5y	VPK	X	*	*	*	X	X	X	X	*	*	*	X	X	X	X	*	*	*	X	X	X	*	*	*	*	X	X	X	X	CR	16	0	1	Approved	Reject
2.	Goodbar Latham	9/9/2013	5y	VPK	X	*	*	*	X	X	X	X	*	*	*	A	X	X	X	*	*	*	X	X	X	*	*	*	*	X	X	X	X	CR	15	1	1	Approved	Reject
3.	Krackel Latham	9/9/2013	5y	VPK	X	*	*	*	X	X	X	X	*	*	*	X	X	X	X	*	*	*	X	X	X	*	*	*	*	X	X	X	X	CR	16	0	1	Rejected	Approve
4.	Mentos Latham	9/9/2013	5y	VPK	X	*	*	*	X	X	X	X	*	*	*	X	X	X	X	*	*	*	X	X	X	*	*	*	*	X	X	X	X	CR	16	0	1	Approved	Reject
5.	Milky Way Latham	9/9/2013	5y	VPK	X	*	*	*	X	A	X	X	*	*	*	X	X	X	A	*	*	*	X	X	X	*	*	*	*	X	X	X	X	CR	14	2	1	Approved	Reject
6.	Nestle Latham	1/1/2014	4y	VPK	X	*	*	*	X	X	X	X	*	*	*	X	X	X	X	*	*	*	X	X	X	*	*	*	*	X	X	X	X	CR	16	0	1	Approved	Reject
7.	Payday Latham	9/9/2013	5y	VPK	X	*	*	*	X	X	X	X	*	*	*	X	X	X	X	*	*	*	X	X	X	*	*	*	*	X	X	X	X	CR	16	0	1	Approved	Reject
8.	Reese's Pieces Latham	9/9/2013	5y	VPK	X	*	*	*	X	X	X	X	*	*	*	X	X	X	X	*	*	*	X	X	X	*	*	*	*	X	X	X	X	CR	16	0	1	Approved	Reject
9.	Snickers Latham	9/9/2013	5y	VPK	X	*	*	*	X	X	X	X	*	*	*	X	X	X	X	*	*	*	X	X	X	*	*	*	*	X	X	X	X	CR	16	0	1	Approved	Reject
10.	Three Musketeers Latham	9/9/2013	5y	VPK	X	*	*	*	X	X	X	X	*	*	*	X	X	X	X	*	*	*	X	X	X	*	*	*	*	X	X	X	X	CR	16	0	1	Approved	Reject
11.	Twix Latham	9/9/2013	5y	VPK	X	*	*	*	X	X	X	A	*	*	*	X	X	X	X	*	*	*	X	X	X	*	*	*	*	X	X	X	X	CR	15	1	1	Approved	Reject

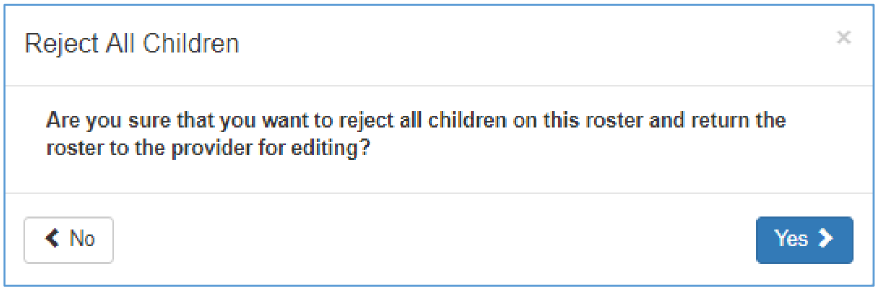
Legend

Continue

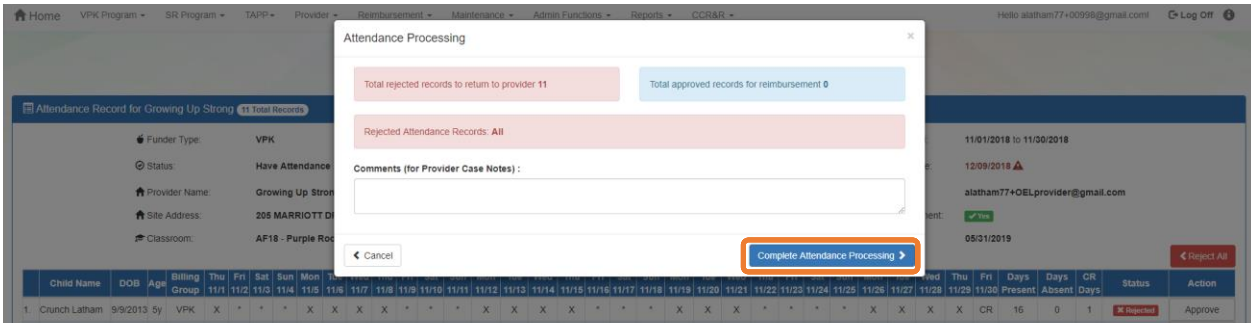
When all records have a status, click **Continue/Approve Roster**. When rejected records appear, the **Continue** button brings the coalition user to the *Complete Roster Processing* pop-up message, where the summary is displayed and comments are captured for the provider case notes. When the **Complete Roster Processing** button is clicked, the statuses are committed. Rejected records are returned to Need Attendance so corrections may be made. The provider will receive a dashboard notification and the user that submitted the attendance roster will receive an email instructing them to log in to the Provider Portal to review and edit the rejected records (indicated with "REJ"). The rejected records for the service period move back to Need Attendance. The approved records for the service period move forward to Closed Attendance.



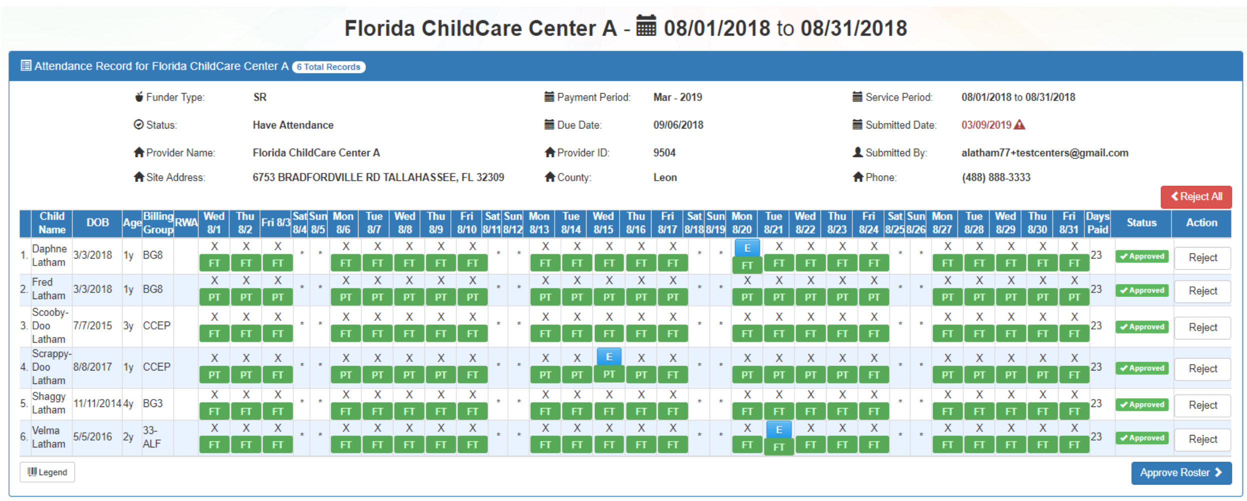
NOTE: It is possible to reject all children on the roster at once by using the **Reject All** button. A message appears to confirm that the coalition user would like to reject all of the children on the roster and return the roster to the provider for editing.



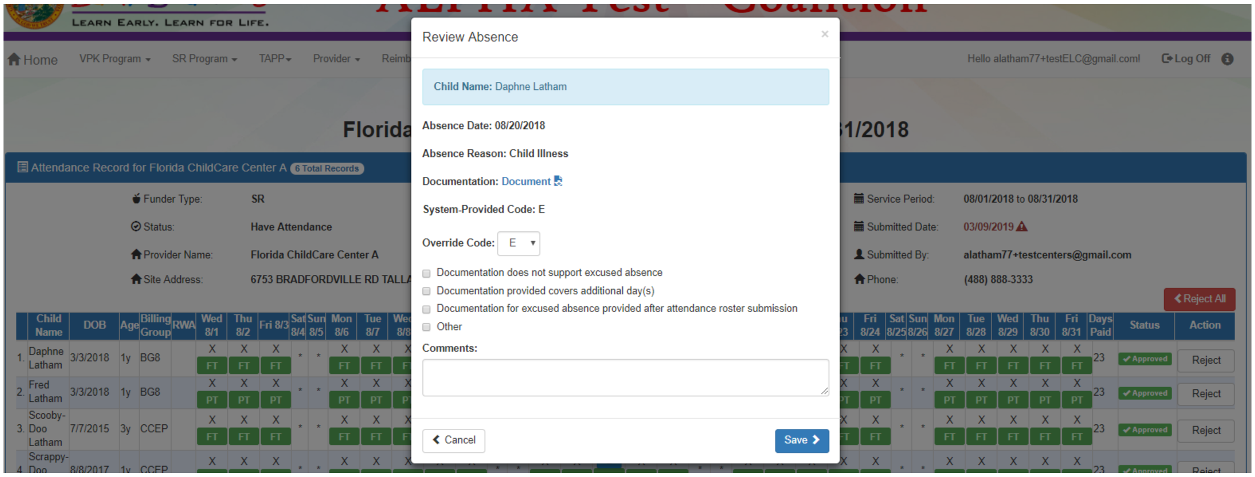
Clicking **Yes** continues the process. This gives all records the rejected status. Next, click the **Continue** button. This brings the coalition user to the *Complete Roster Processing* pop-up message, where the summary is displayed and comments are captured for the provider case notes. When the **Complete Attendance Processing** button is clicked, the statuses are committed. The provider receives notifications and records as moved as described above.



SR & Local rosters in Have Attendance function similarly to VPK in regards to rejecting records, giving each record a status, and completing roster processing. However, there are some differences. SR & Local rosters include a reimbursement code for each absence and display the unit of care per day.

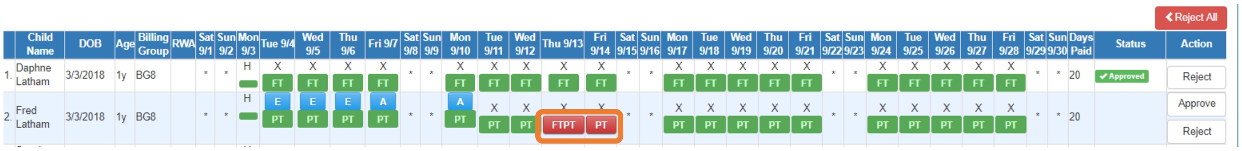


As providers record absences on the Provider Portal, the user will select a reason and optionally leave a note or upload a document. The absence information can be viewed in Have Attendance by clicking on the coded absence.

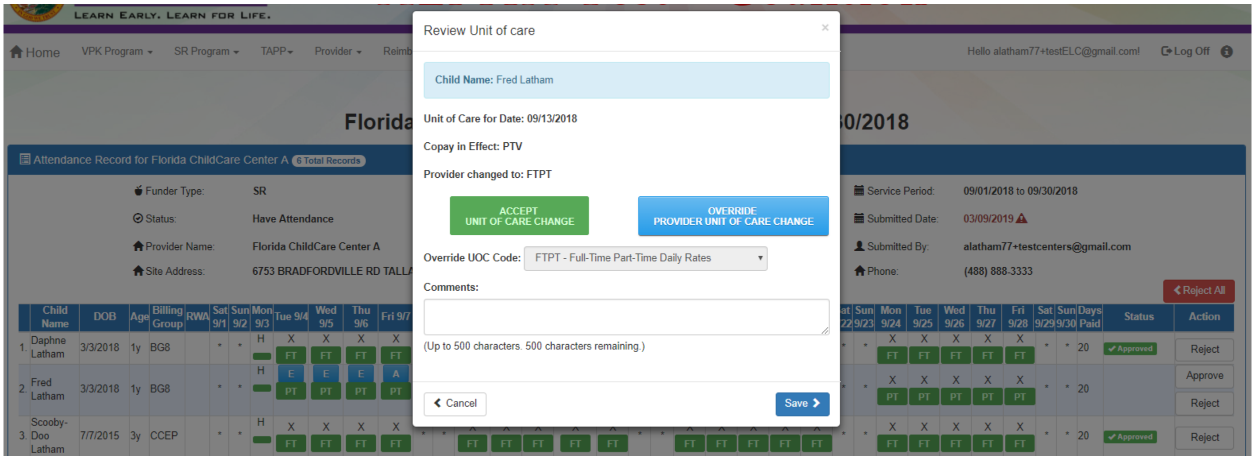


The system will code absences one to three as “E” for excused. The system will code absences four to seven as “A” for authorized. Absences 11 or more are coded as “N” for non-reimbursable. Coalition users may override the absence code by choosing another reimbursement code (within the system limitations of three E’s and seven A’s) and clicking **Save**. Absences due to disaster declarations are coded “D”, are not included in the 10-absence limit, and are considered paid absences.

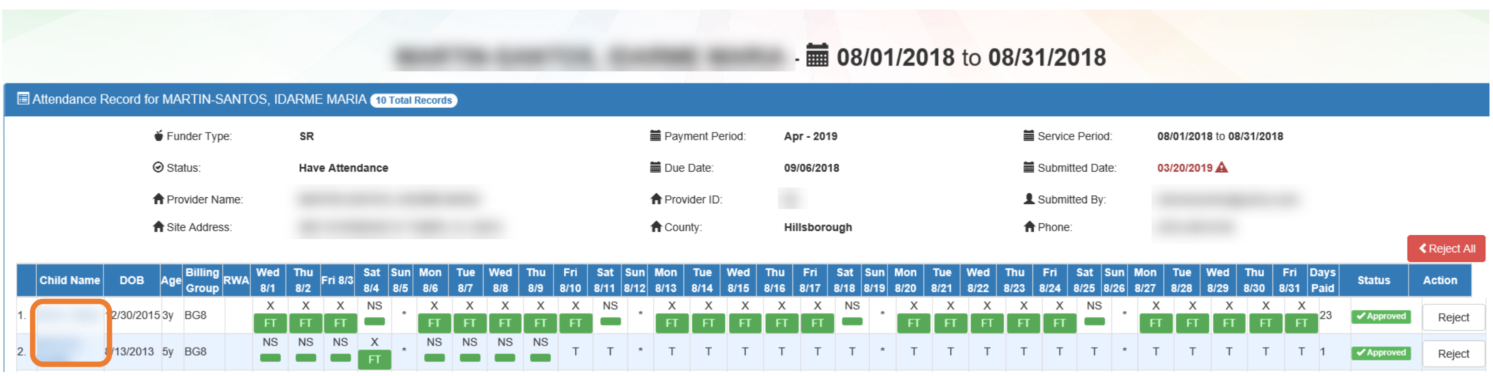
Another feature of SR & Local attendance is the ability for providers to change the unit of care on the roster. This feature may be removed at a later time, but in the meantime, if a provider uses the feature the attendance roster in Have Attendance highlights the change in red.



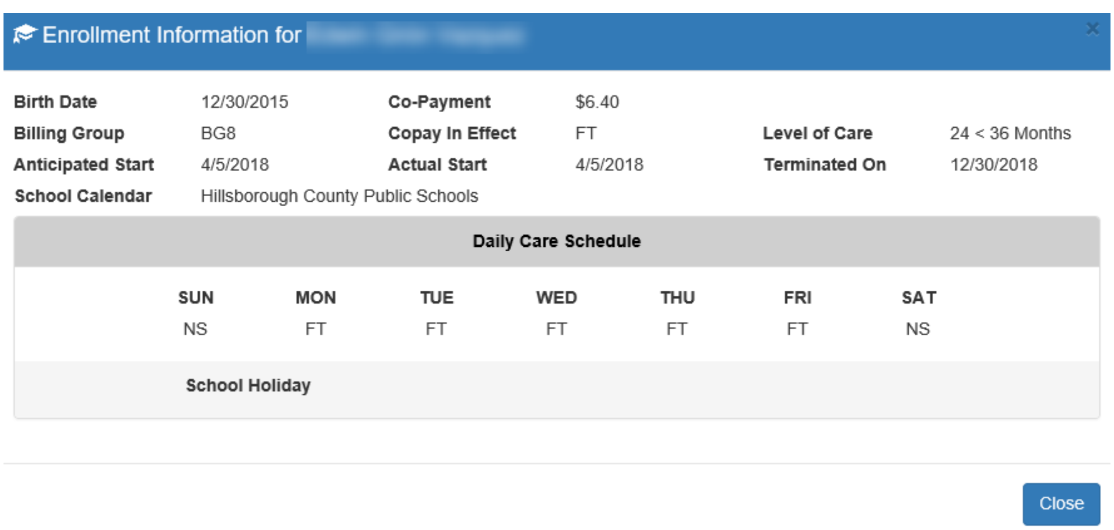
The unit of care change can be viewed in Have Attendance by clicking on the highlighted value. A pop-up message displays to accept or override the change.



Coalition staff can see a quick summary of SR enrollment details in Have Attendance. Click a **Child Name** link.

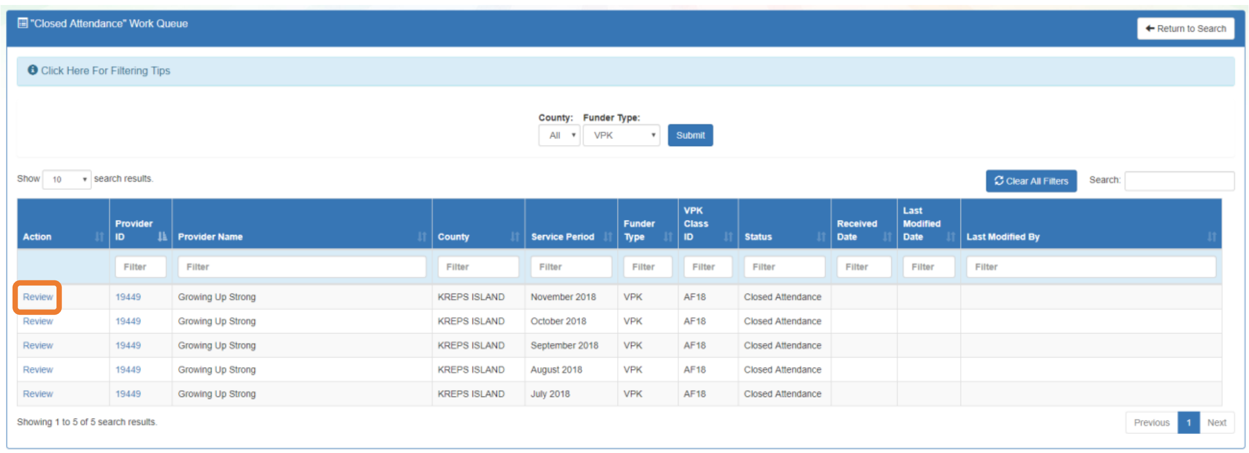


After the **Child Name** link is clicked, the following will display.



Closed Attendance

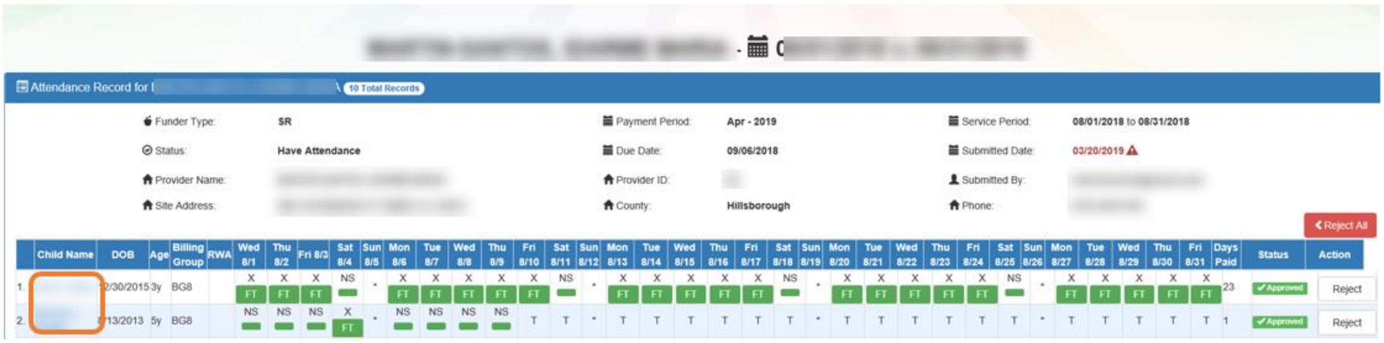
The Closed Attendance work queue displays all of the approved attendance records for providers by county and funder type. At this point, reimbursement calculations are run. The School Readiness funder type and Local funder type are separated. The column filters and search feature may be used to filter the results by specific criteria such as a county name, service period, or provider name.



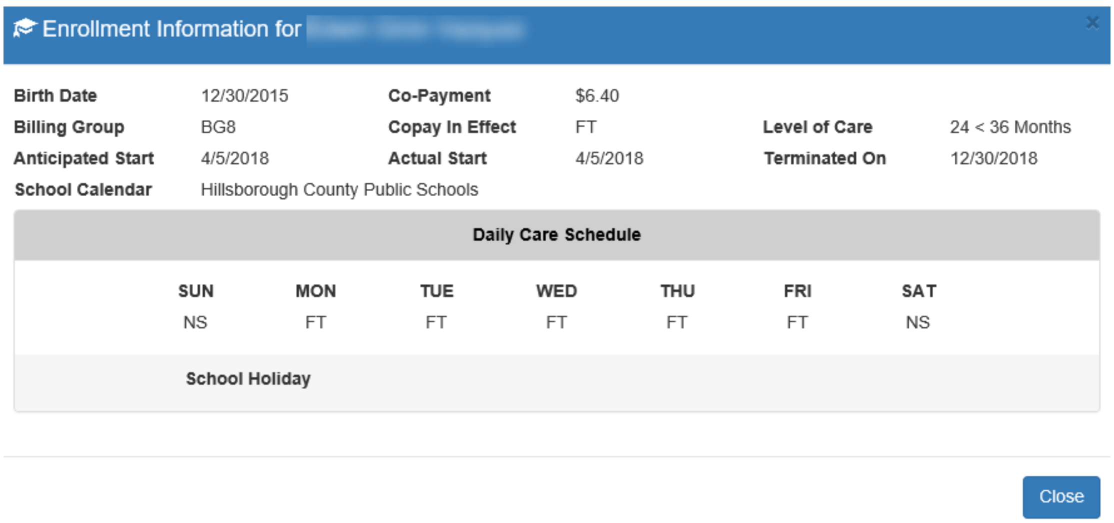
To begin reviewing approved attendance records with reimbursement detail, click on the **Review** link. The approved attendance records display with calculations. The top portion of the roster contains information about the provider and attendance roster, including whether closures are included and the vendor number for payment.

Similar to Have Attendance, each record in Closed Attendance must have a status of Verified or Adjusted in order to continue with the roster processing.

Similar to Have Attendance, coalition staff can see a quick summary of SR enrollment details in Closed Attendance. Click a **Child Name** link.

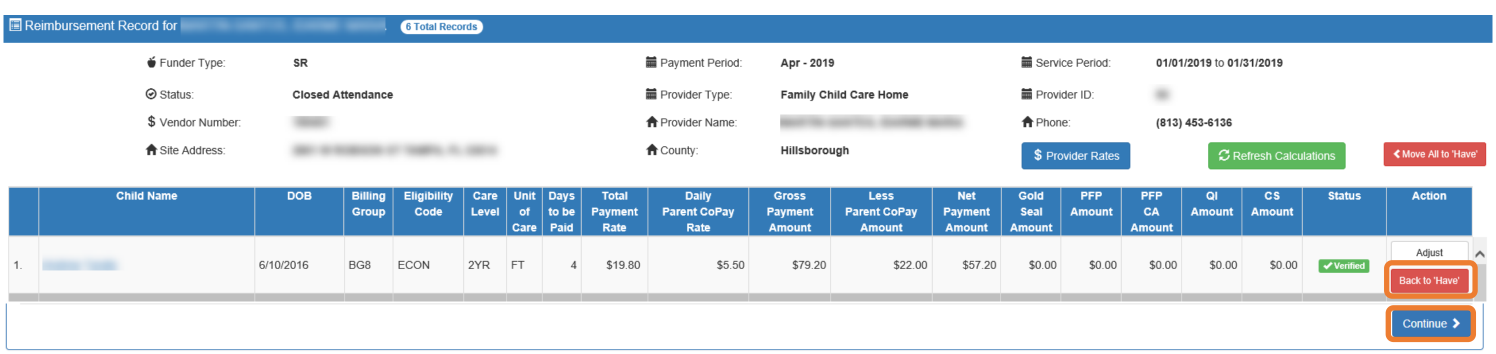


After the **Child Name** link is clicked, the following will display.



Verified records will move forward in the reimbursement process to Payment Verified. Adjusted records will move to the Need Adjustment work queue for editing. **Marking one or more records for adjustment will not prevent the other verified records from moving forward in the reimbursement process.**

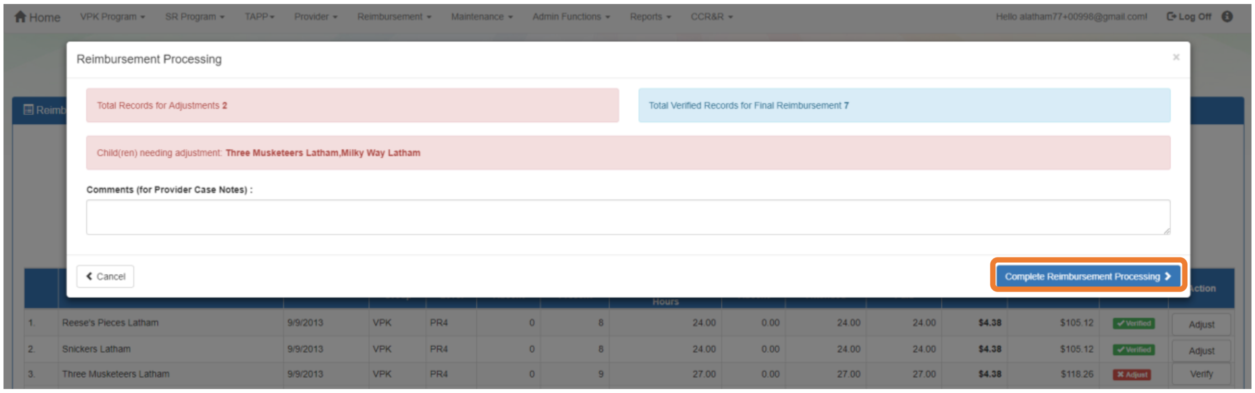
An individual record or an entire roster can be sent back to Have Attendance by clicking the **<u>Back to "Have"</u>** button. If the provider needs to make additional changes to the individual record or entire roster, the records can be rejected, moving the status back to Need Attendance.



NOTE: If any records have CCEP in the Billing Group column, those must be changed to SR Match through the Bulk Billing Group Transfer process. See the *Bulk Billing Group Transfer* section for more details.

When all records have a status, click **<u>Continue</u>**. This brings the coalition user to the *Complete Reimbursement Processing* pop-up message, where the summary is displayed and comments are captured for the provider case notes.

When the **<u>Complete Reimbursement Processing</u>** button is clicked, the statuses are committed.



Records marked for Adjustment move to the Have Adjustment work queue. Records marked as Verified move forward in the reimbursement process and may be Updated.

*****Printing Tip –** An enhancement has been logged to include a print feature as well as a method to recall previously worked rosters. In the meantime, when all records have a status, prior to clicking **Continue**, follow the steps below to select all, copy, and paste the information into an Excel document that can be saved locally.*

1. *Click on the webpage (anywhere)*
2. *Hold the CTRL key and press A (CTRL + A)*
3. *Then, hold the CTRL key and press C (CTRL + C)*
4. *Open Excel*
5. *Then, in the Excel document, hold the CTRL key and press V (CTRL + V)*
6. *Save file locally (remove header/menu information that was included in copy/paste if needed)*

VPK Calculations in Closed Attendance

VPK calculations in Closed Attendance are specific to the class calendar and individual enrollment record with 80/20 included in Hours Paid.

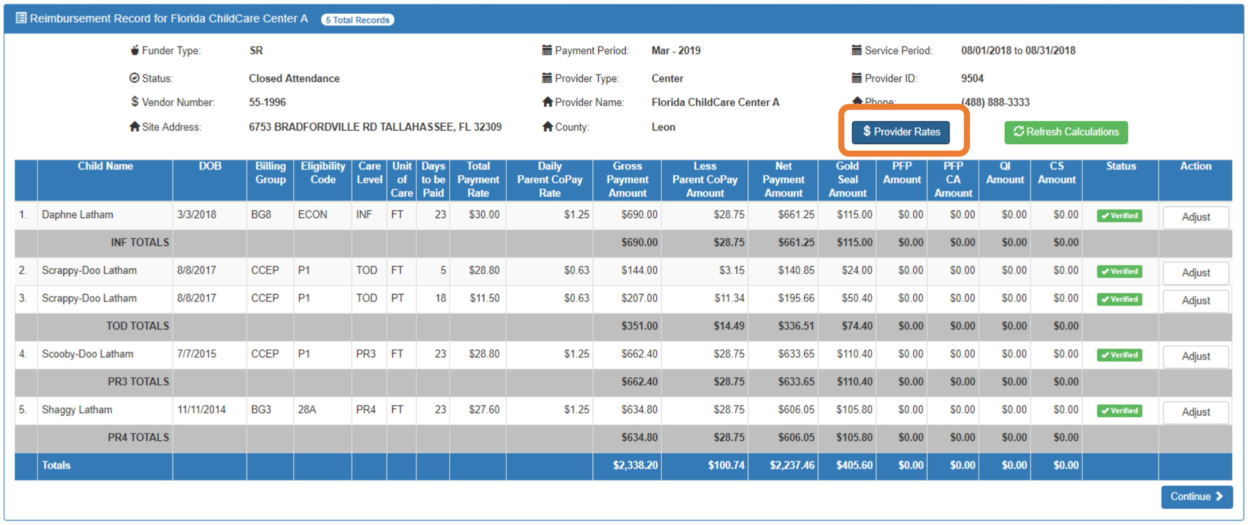
- Total Instructional Hours are the sum of instructional hours scheduled for the child's enrollment during the service period.
- Hours Absent and Hours Attended are the sum of instructional hours on the individual days the child attended or missed. Remember, VPK calendars can have variances per day such that most weekdays are three hours and one day is four hours (for example). Therefore, it makes a difference which day the child attended or missed.
- Hours Paid and Amount is the result of the 80/20 calculation as follows:

	Total VPK Instructional Hours (54) x Rate ($4.36) = Maximum Provider Reimbursement ($235.44)
Bulk1 Attend	Total Hours Attended (54) / 0.8 = Hours Paid (84.38) Hours Paid ≥ Total Instructional Hours, then use Maximum Provider Reimbursement Hours Paid (54) x Rate ($4.36) = Amount ($235.44)
Bulk2 Attend	Total Hours Attended (39) / 0.8 = Hours Paid (48.75) Total VPK Instructional Hours (54) – Hours Paid (48.75) = Non-Reimbursable Hours (5.25) Non-Reimbursable Hours (5.25) x Rate ($4.36) = 80/20 Adjustment ($22.89) Max Provider Reimbursement ($235.44) - 80/20 Adjustment ($22.89) = Amount ($212.55) Hours Paid (48.75) x Rate ($4.36) = Amount ($212.55)
Bulk3 Attend	Total Hours Attended (33) / 0.8 = Hours Paid (41.25) Total VPK Instructional Hours (54) – Hours Paid (41.25) = Non-Reimbursable Hours (12.75) Non-Reimbursable Hours (12.75) x Rate ($4.36) = 80/20 Adjustment ($55.59) Max Provider Reimbursement ($235.44) - 80/20 Adjustment ($55.59) = Amount ($179.85) Hours Paid (41.25) x Rate ($4.36) = Amount ($179.85)

	Child Name	DOB	Billing Group	Care Level	Days Absent	Days Present	Total Instructional Hours	Hours Absent	Hours Attended	Hours Paid	Rate	Amount	Status	Action
1.	Bulk1 Attend	5/5/2013	VPK	PR5	0	18	54.00	0.00	54.00	54.00	**$4.36**	$235.44		Verify Adjust
2.	Bulk2 Attend	5/6/2014	VPK	PR4	5	13	54.00	15.00	39.00	48.75	**$4.36**	$212.55		Verify Adjust
3.	Bulk3 Attend	5/7/2014	VPK	PR4	7	11	54.00	21.00	33.00	41.25	**$4.36**	$179.85		Verify Adjust

SR Calculations in Closed Attendance

SR calculations in Closed Attendance are specific to the provider reimbursement rate plan in effect during the service period. To view the provider's rate plans, click the **Provider Rates** button.


Reimbursement Record for Florida ChildCare Center A 5 Total Records

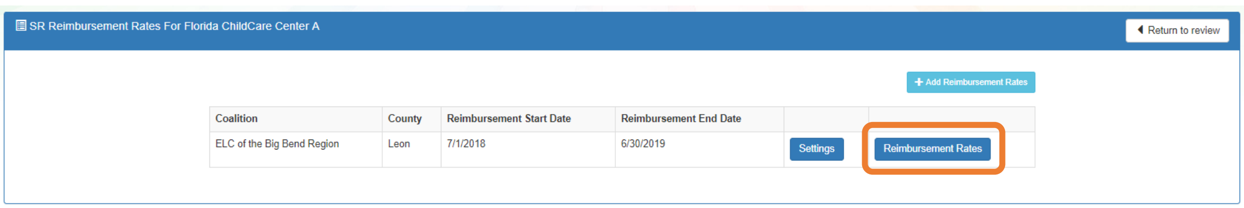
Funder Type: SR | Payment Period: Mar - 2019 | Service Period: 08/01/2018 to 08/31/2018
Status: Closed Attendance | Provider Type: Center | Provider ID: 9504
Vendor Number: 55-1996 | Provider Name: Florida ChildCare Center A | Phone: (488) 888-3333
Site Address: 6753 BRADFORDVILLE RD TALLAHASSEE, FL 32309 | County: Leon

Provider Rates | Refresh Calculations

	Child Name	DOB	Billing Group	Eligibility Code	Care Level	Unit of Care	Days to be Paid	Total Payment Rate	Daily Parent CoPay Rate	Gross Payment Amount	Less Parent CoPay Amount	Net Payment Amount	Gold Seal Amount	PFP Amount	PFP CA Amount	QI Amount	CS Amount	Status	Action
1.	Daphne Latham	3/3/2018	BG8	ECON	INF	FT	23	$30.00	$1.25	$690.00	$28.75	$661.25	$115.00	$0.00	$0.00	$0.00	$0.00	Verified	Adjust
	INF TOTALS									$690.00	$28.75	$661.25	$115.00	$0.00	$0.00	$0.00	$0.00		
2.	Scrappy-Doo Latham	8/8/2017	CCEP	P1	TOD	FT	5	$28.80	$0.63	$144.00	$3.15	$140.85	$24.00	$0.00	$0.00	$0.00	$0.00	Verified	Adjust
3.	Scrappy-Doo Latham	8/8/2017	CCEP	P1	TOD	PT	18	$11.50	$0.63	$207.00	$11.34	$195.66	$50.40	$0.00	$0.00	$0.00	$0.00	Verified	Adjust
	TOD TOTALS									$351.00	$14.49	$336.51	$74.40	$0.00	$0.00	$0.00	$0.00		
4.	Scooby-Doo Latham	7/7/2015	CCEP	P1	PR3	FT	23	$28.80	$1.25	$662.40	$28.75	$633.65	$110.40	$0.00	$0.00	$0.00	$0.00	Verified	Adjust
	PR3 TOTALS									$662.40	$28.75	$633.65	$110.40	$0.00	$0.00	$0.00	$0.00		
5.	Shaggy Latham	11/11/2014	BG3	28A	PR4	FT	23	$27.60	$1.25	$634.80	$28.75	$606.05	$105.80	$0.00	$0.00	$0.00	$0.00	Verified	Adjust
	PR4 TOTALS									$634.80	$28.75	$606.05	$105.80	$0.00	$0.00	$0.00	$0.00		
	Totals									$2,338.20	$100.74	$2,237.46	$405.60	$0.00	$0.00	$0.00	$0.00		

Continue

This opens a new browser tab with the provider's reimbursement rate plans. Click on the **Reimbursement Rates** button.

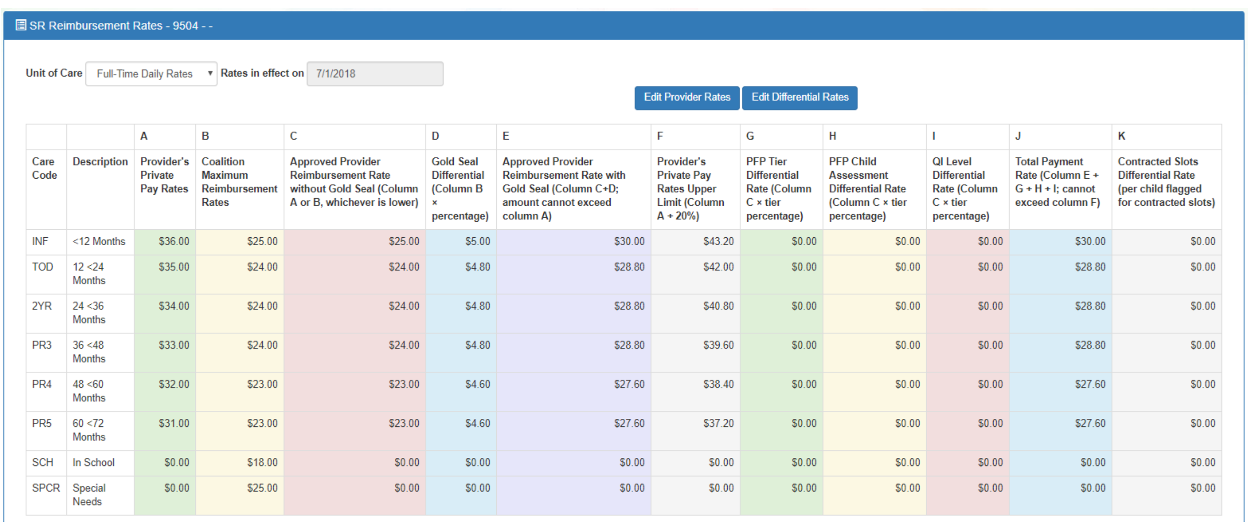

SR Reimbursement Rates For Florida ChildCare Center A

Return to review

Add Reimbursement Rates

Coalition	County	Reimbursement Start Date	Reimbursement End Date		
ELC of the Big Bend Region	Leon	7/1/2018	6/30/2019	Settings	Reimbursement Rates

Now, the rates appear.


SR Reimbursement Rates - 9504 - -

Unit of Care: Full-Time Daily Rates | Rates in effect on: 7/1/2018

Edit Provider Rates | Edit Differential Rates

		A	B	C	D	E	F	G	H	I	J	K
Care Code	Description	Provider's Private Pay Rates	Coalition Maximum Reimbursement Rates	Approved Provider Reimbursement Rate without Gold Seal (Column A or B, whichever is lower)	Gold Seal Differential (Column B × percentage)	Approved Provider Reimbursement Rate with Gold Seal (Column C+D; amount cannot exceed column A)	Provider's Private Pay Rates Upper Limit (Column A + 20%)	PFP Tier Differential Rate (Column C × tier percentage)	PFP Child Assessment Differential Rate (Column C × tier percentage)	QI Level Differential Rate (Column C × tier percentage)	Total Payment Rate (Column E + G + H + I; cannot exceed column F)	Contracted Slots Differential Rate (per child flagged for contracted slots)
INF	<12 Months	$36.00	$25.00	$25.00	$5.00	$30.00	$43.20	$0.00	$0.00	$0.00	$30.00	$0.00
TOD	12 <24 Months	$35.00	$24.00	$24.00	$4.80	$28.80	$42.00	$0.00	$0.00	$0.00	$28.80	$0.00
2YR	24 <36 Months	$34.00	$24.00	$24.00	$4.80	$28.80	$40.80	$0.00	$0.00	$0.00	$28.80	$0.00
PR3	36 <48 Months	$33.00	$24.00	$24.00	$4.80	$28.80	$39.60	$0.00	$0.00	$0.00	$28.80	$0.00
PR4	48 <60 Months	$32.00	$23.00	$23.00	$4.60	$27.60	$38.40	$0.00	$0.00	$0.00	$27.60	$0.00
PR5	60 <72 Months	$31.00	$23.00	$23.00	$4.60	$27.60	$37.20	$0.00	$0.00	$0.00	$27.60	$0.00
SCH	In School	$0.00	$18.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
SPCR	Special Needs	$0.00	$25.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00

- Column A represents the provider's private pay rates *(source = Edit Provider Rates).*
- Column B represents the coalition's maximum reimbursement rates for the provider type and county *(source = **Admin Functions > Rates Management > SR Rate Plans**).*

- Column C represents the approved reimbursement rate (lower of columns A or B) without Gold Seal (or other differentials).
- Column J represents the total payment rate (approved reimbursement rate with Gold Seal and other differentials).

Looking back at the Closed Attendance calculations, coalition users may confirm the rates in use.

- The *Total Payment Rate* for each child's care level and unit of care in Closed Attendance match Column J of the provider reimbursement rate plan.
- The *Total Payment Rate* multiplied by *Days to be Paid* equals the *Gross Payment Amount*.
- The *Daily Parent CoPay Rate* multiplied by *Days to be Paid* equals the *Less Parent CoPay Amount*.
- The differential amounts (i.e. *Gold Seal Amount, PFP Amount, PFP CA Amount, QI Amount,* and *CS Amount*) are already included in the *Gross Payment Amount* as they are part of the *Total Payment Rate*, however, they can be confirmed by multiplying *Days to be Paid* and the differential rate on the Reimbursement Rate Plan.

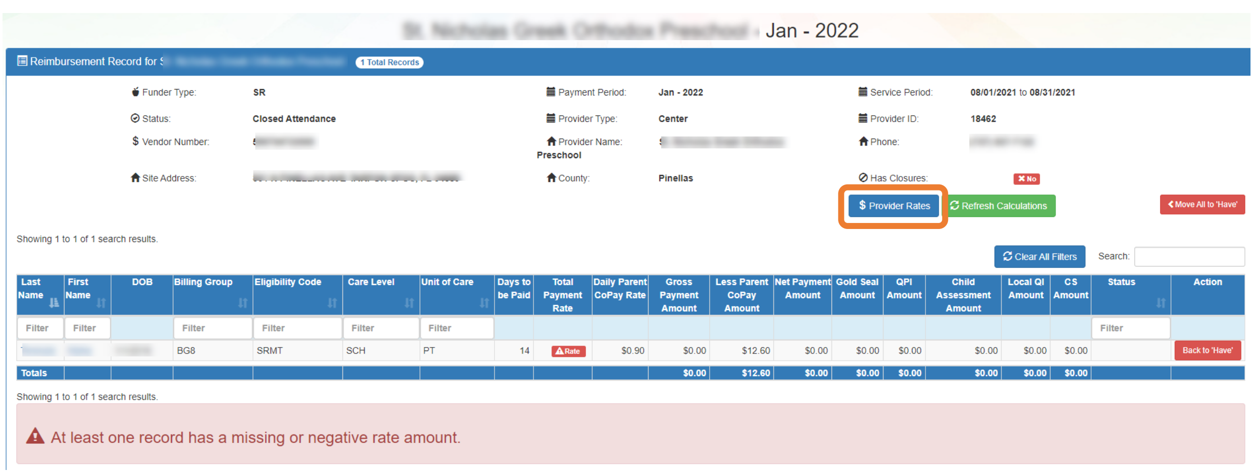
NOTE: If changes to a rate plan are needed there are several options:

1. Remove a rate plan. Use the **Provider Rates** button in Closed Attendance to go to the provider's reimbursement rate plan page. Then, click the **Settings** button and **Remove** button if reimbursement has never been processed against the rate plan. A new reimbursement rate plan can be created.
2. Edit a rate plan. Use the **Provider Rates** button in Closed Attendance to go to the provider's reimbursement rate plan page. Then, click the **Reimbursement Rates** button. Next, click the **Edit Provider Rates** or **Edit Differential Rates** buttons to make edits if reimbursement has never been processed against the rate plan.
3. End a rate plan and make a new one. Use the **Provider Rates** button in Closed Attendance to go to the provider's reimbursement rate plan page. Then, click the **Add Reimbursement Rates** button. Enter the start and end date for the new plan and click **Save**. Next, click the **Reimbursement Rates** button to set up the plan (by clicking the **Edit Provider Rates** or **Edit Differential Rates** buttons).

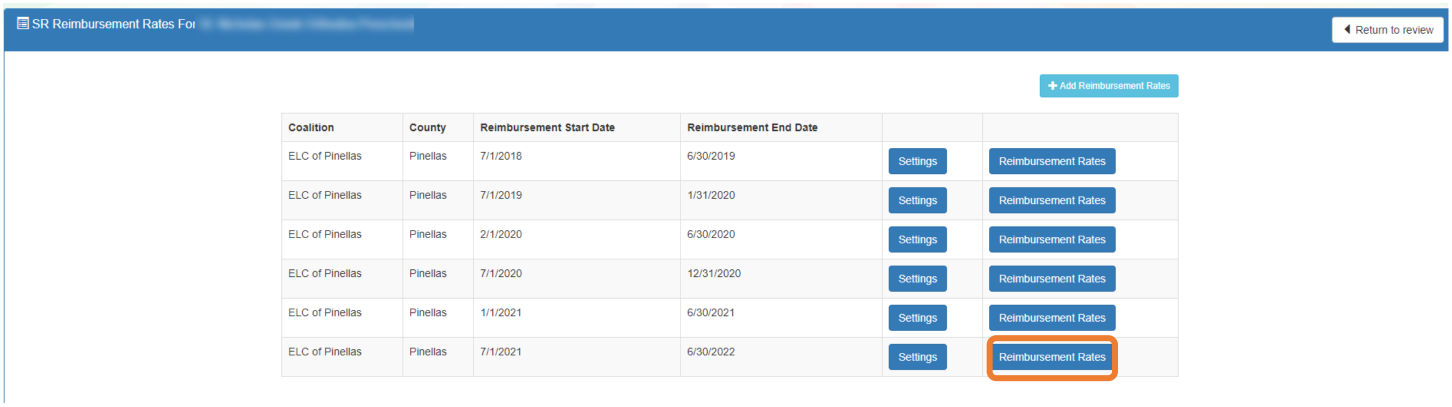
Once back in Closed Attendance, click the **Refresh Calculations** button to update with the new rate plan information.

Missing Rates

If a provider rate is missing for a care level in Closed Attendance, a red error message will display in the Total Payment Rate column and at the bottom of the page. A coalition user can enter the rate on the provider's behalf. Click the **$ Provider Rates** button.



This opens a new browser tab with the provider's reimbursement rate plans. Click the **Reimbursement Rates** button for the appropriate reimbursement rate plan.

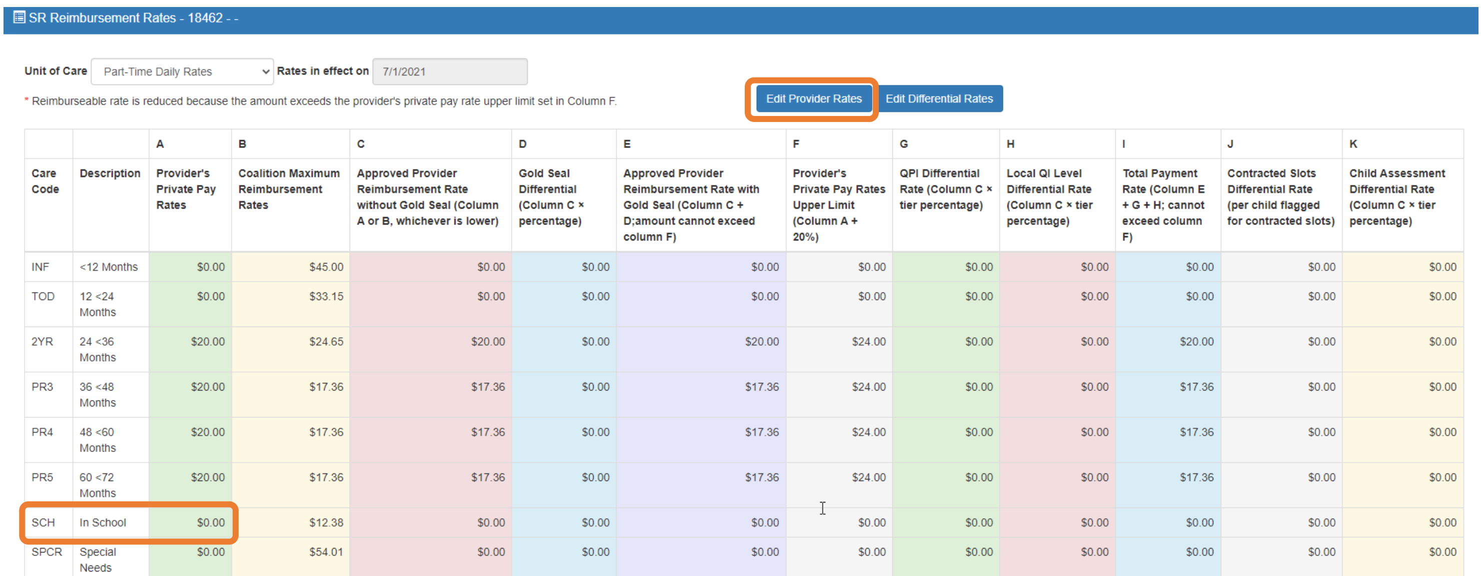

SR Reimbursement Rates For

Return to review

Add Reimbursement Rates

Coalition	County	Reimbursement Start Date	Reimbursement End Date		
ELC of Pinellas	Pinellas	7/1/2018	6/30/2019	Settings	Reimbursement Rates
ELC of Pinellas	Pinellas	7/1/2019	1/31/2020	Settings	Reimbursement Rates
ELC of Pinellas	Pinellas	2/1/2020	6/30/2020	Settings	Reimbursement Rates
ELC of Pinellas	Pinellas	7/1/2020	12/31/2020	Settings	Reimbursement Rates
ELC of Pinellas	Pinellas	1/1/2021	6/30/2021	Settings	Reimbursement Rates
ELC of Pinellas	Pinellas	7/1/2021	6/30/2022	Settings	Reimbursement Rates

In this example, the Part-Time Daily Rate for SCH is $0.00. Click **Edit Provider Rates**.


SR Reimbursement Rates - 18462 - -

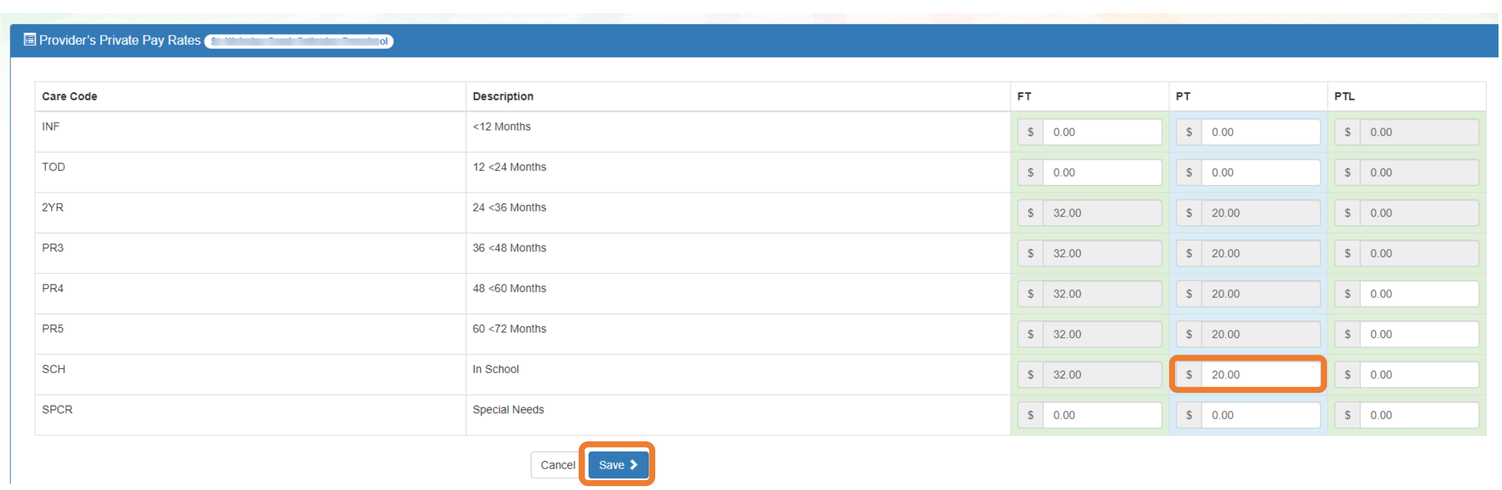
Unit of Care: Part-Time Daily Rates Rates in effect on: 7/1/2021

* Reimburseable rate is reduced because the amount exceeds the provider's private pay rate upper limit set in Column F.

Edit Provider Rates Edit Differential Rates

		A	B	C	D	E	F	G	H	I	J	K
Care Code	Description	Provider's Private Pay Rates	Coalition Maximum Reimbursement Rates	Approved Provider Reimbursement Rate without Gold Seal (Column A or B, whichever is lower)	Gold Seal Differential (Column C × percentage)	Approved Provider Reimbursement Rate with Gold Seal (Column C + D;amount cannot exceed column F)	Provider's Private Pay Rates Upper Limit (Column A + 20%)	QPI Differential Rate (Column C × tier percentage)	Local QI Level Differential Rate (Column C × tier percentage)	Total Payment Rate (Column E + G + H; cannot exceed column F)	Contracted Slots Differential Rate (per child flagged for contracted slots)	Child Assessment Differential Rate (Column C × tier percentage)
INF	<12 Months	$0.00	$45.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
TOD	12 <24 Months	$0.00	$33.15	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
2YR	24 <36 Months	$20.00	$24.65	$20.00	$0.00	$20.00	$24.00	$0.00	$0.00	$20.00	$0.00	$0.00
PR3	36 <48 Months	$20.00	$17.36	$17.36	$0.00	$17.36	$24.00	$0.00	$0.00	$17.36	$0.00	$0.00
PR4	48 <60 Months	$20.00	$17.36	$17.36	$0.00	$17.36	$24.00	$0.00	$0.00	$17.36	$0.00	$0.00
PR5	60 <72 Months	$20.00	$17.36	$17.36	$0.00	$17.36	$24.00	$0.00	$0.00	$17.36	$0.00	$0.00
SCH	In School	$0.00	$12.38	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
SPCR	Special Needs	$0.00	$54.01	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00

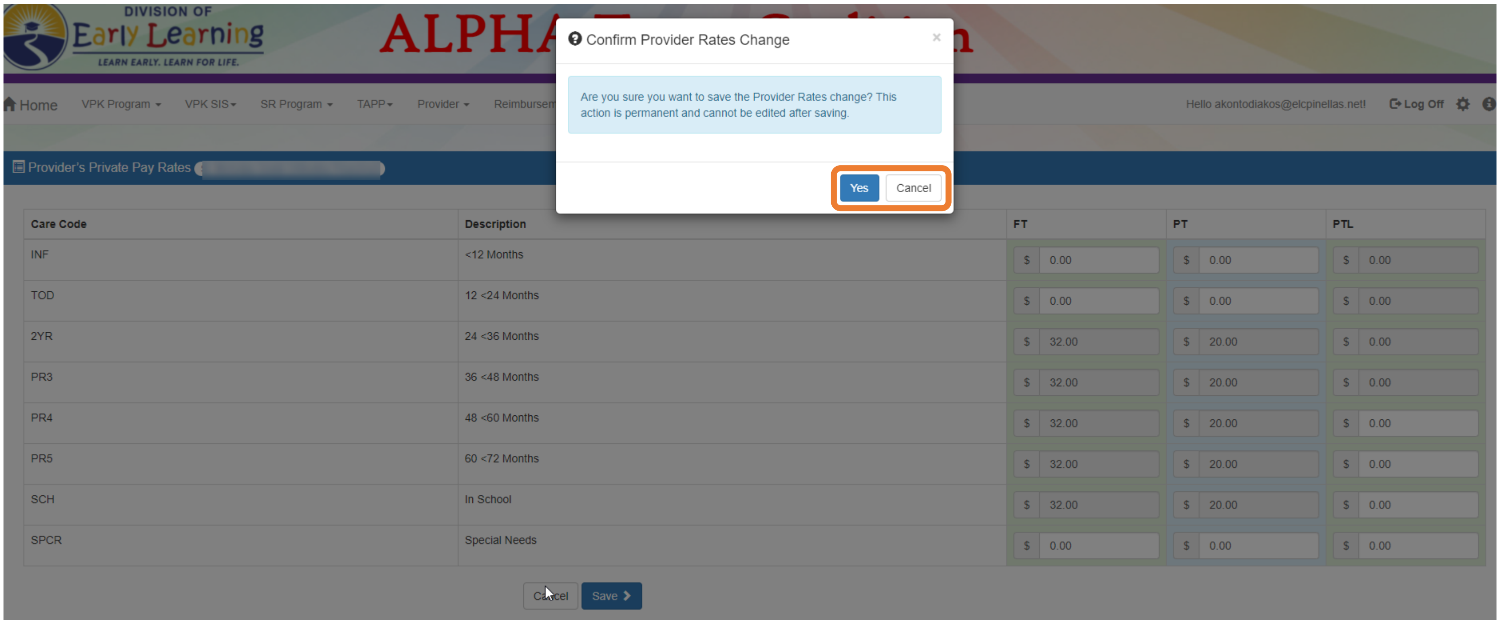
Enter the correct rate. For this example, the rate is $20.00. Only $0.00 rates are editable. Click **Save**.


Provider's Private Pay Rates

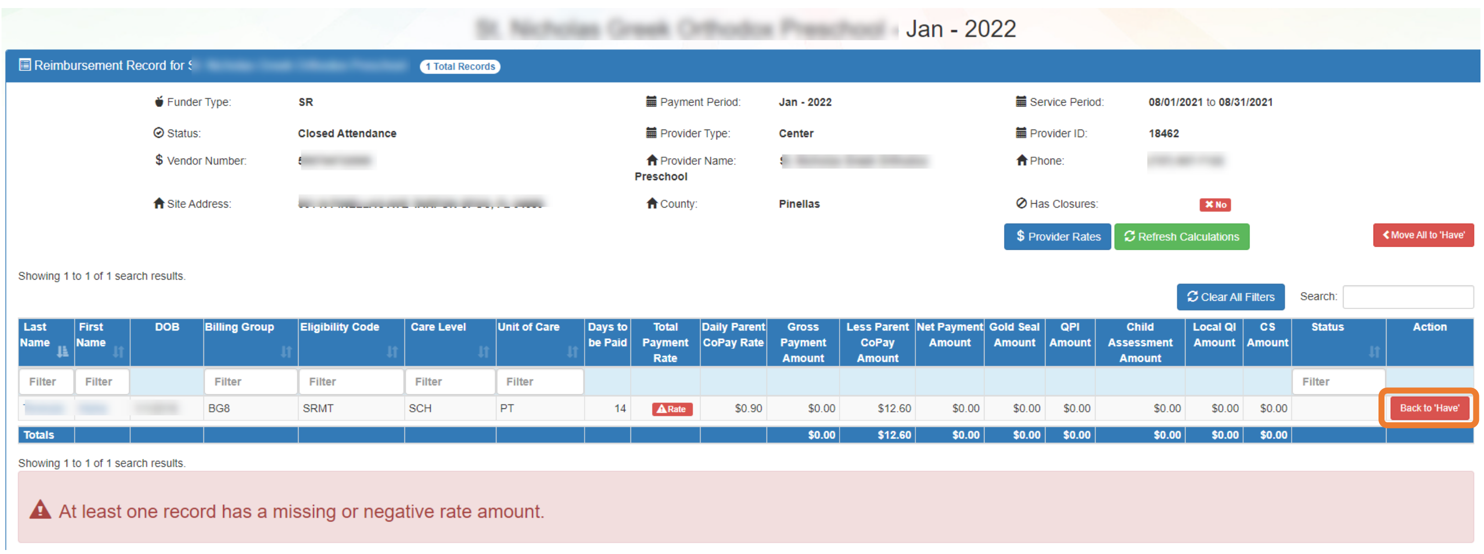
Care Code	Description	FT	PT	PTL
INF	<12 Months	$ 0.00	$ 0.00	$ 0.00
TOD	12 <24 Months	$ 0.00	$ 0.00	$ 0.00
2YR	24 <36 Months	$ 32.00	$ 20.00	$ 0.00
PR3	36 <48 Months	$ 32.00	$ 20.00	$ 0.00
PR4	48 <60 Months	$ 32.00	$ 20.00	$ 0.00
PR5	60 <72 Months	$ 32.00	$ 20.00	$ 0.00
SCH	In School	$ 32.00	$ 20.00	$ 0.00
SPCR	Special Needs	$ 0.00	$ 0.00	$ 0.00

Cancel Save

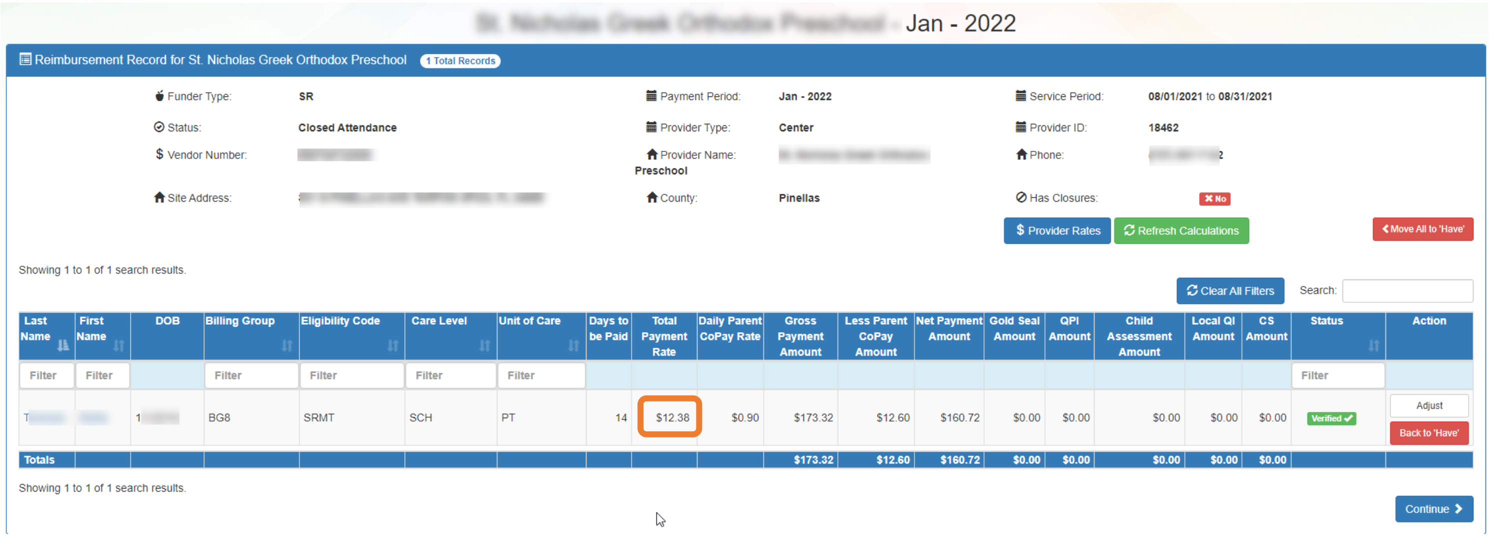
A confirmation window will display. Click **Yes** or **Cancel**.



For each affected record, click the **Back to Have** button.



In Have Attendance, move the provider records to Closed Attendance. In Closed Attendance, the missing rate error is resolved, and the amount in the Total Payment Rate is based on the lower amount of the Provider Private Pay Rate and the Coalition Maximum Reimbursement Rate for that Care Level.



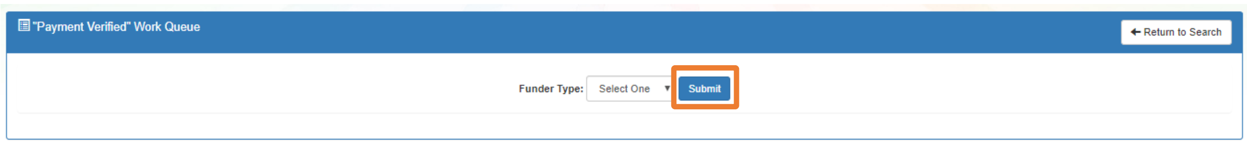
Payment Verified Work Queue

When a record, month (MTH), current period adjustment (MTH), prior period adjustment (PPA), or line item adjustment (LIA) is in Payment Verified status for the current payment period, it will display on the Payment Verified Work Queue. The Payment Verified Work Queue is only available for the following:

- For MTH records, selecting the record will move the record back to Closed Attendance
- For MTH records (current period adjustments), selecting the record will move the record back to Closed Attendance and delete the adjustment information
- For PPA and LIA records, selecting the record will delete the adjustment

From the Coalition Portal, navigate to **Reimbursement > Attendance Processing > View Payment Verified.**

On the Payment Verified Work Queue, select the Funder Type. Clicking the **Submit** button will display the selected funder type's work queue.



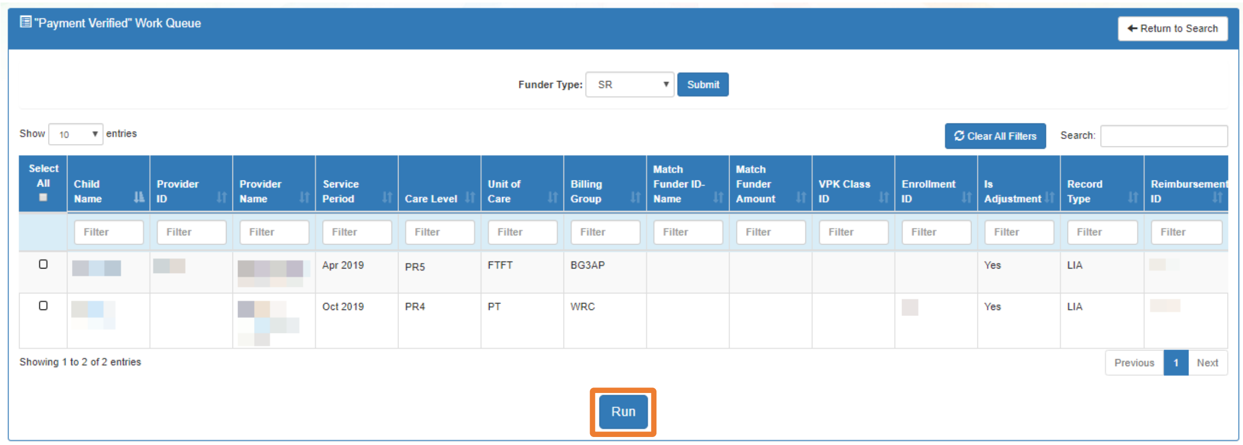
SR

The search field displays at the top and will filter the work queue based on the information entered. The work queue displays 10 records per page by default. The work queue can be changed to display 10, 25, 50, or 100 records per page. If more than 10 records are available, then pagination is available. The number of entries display at the bottom of the work queue.

Only SR records in Payment Verified status will display in the queue. Clicking on the **Select All** checkbox will select all records on the screen. The following columns display in the work queue:

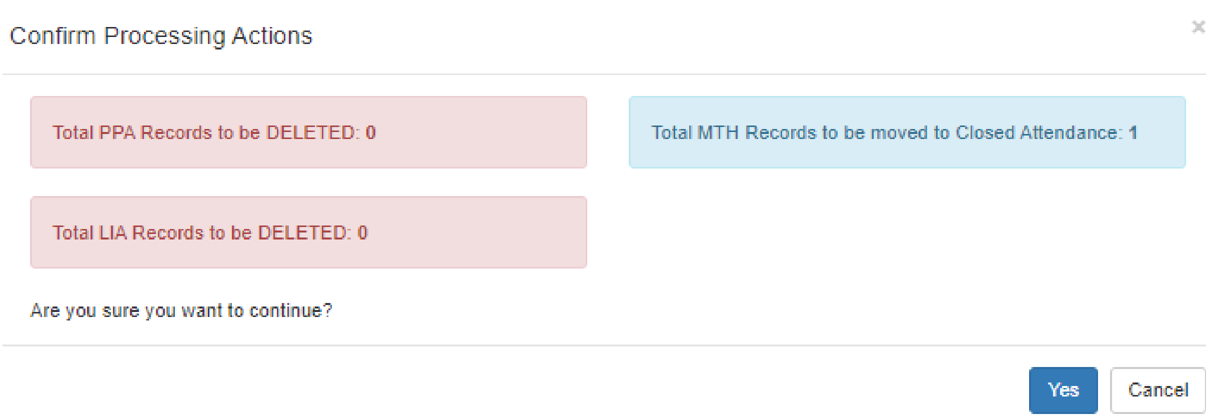
- Child Name
- Provider ID
- Provider Name
- Service Period
- Care Level
- Unit of Care
- Billing Group
- Match Funder ID-Name
- Match Funder Amount
- VPK Class ID
- Enrollment ID
- Is Adjustment
- Record Type
- Reimbursement ID

The work queue is sorted alphabetically by Child Name, by default. Each of the columns have a search filter to narrow the results. Clicking on a column header will sort the work queue by that criterion. Clicking the **Return to Search** button will navigate to the Payment Verified Work Queue Search screen.



After selecting one or more records to remove from the Payment Verified work queue, clicking the **Run** button opens the confirmation pop-up window. The confirmation pop-up shows the number of records that are impacted and the action that will be taken:

- PPA records will be deleted
- LIA records will be deleted
- MTH records will be moved to closed attendance



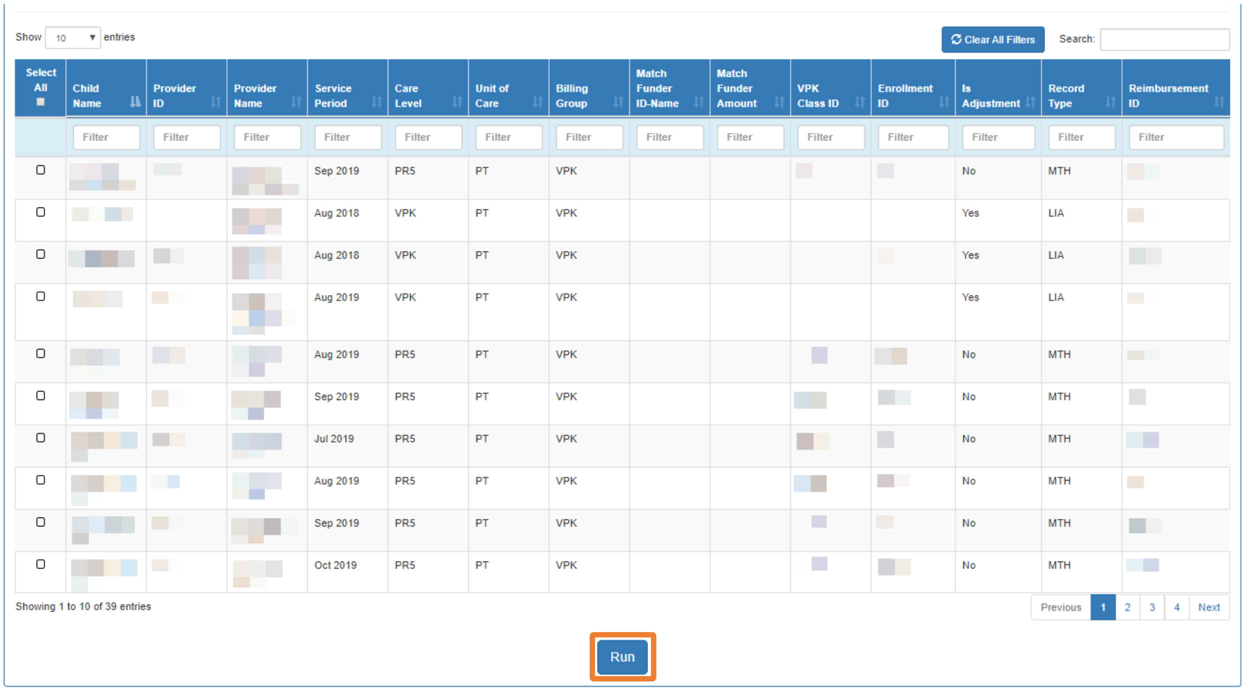
VPK

The search field displays at the top and will filter the work queue based on the information entered. The work queue displays 10 records per page by default. The work queue can be changed to display 10, 25, 50, or 100 records per page. If more than 10 records are available, then pagination is available. The number of entries display at the bottom of the work queue.

Only VPK records in Payment Verified status will display in the queue. Clicking on the **Select All** checkbox will select all records on the screen. The following columns display in the work queue:

- Child Name
- Provider ID
- Provider Name
- Service Period
- Care Level
- Unit of Care
- Billing Group
- Match Funder ID-Name
- Match Funder Amount
- VPK Class ID
- Enrollment ID
- Is Adjustment
- Record Type
- Reimbursement ID

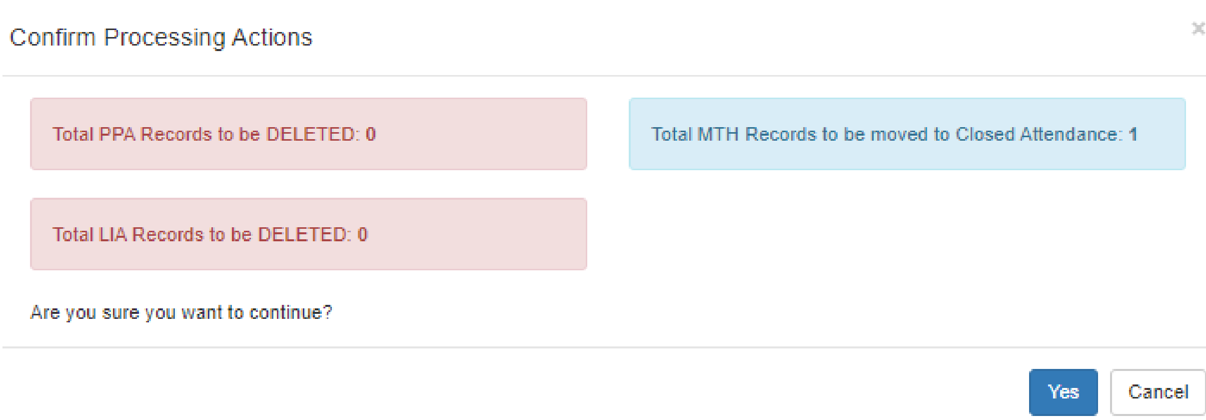
The work queue is sorted alphabetically by Child Name, by default. Each of the columns have a search filter to narrow the results. Clicking on a column header will sort the work queue by that criterion. Clicking the **Return to Search** button will navigate to the Payment Verified Work Queue Search screen.



Select All	Child Name	Provider ID	Provider Name	Service Period	Care Level	Unit of Care	Billing Group	Match Funder ID-Name	Match Funder Amount	VPK Class ID	Enrollment ID	Is Adjustment	Record Type	Reimbursement ID
	Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter
☐				Sep 2019	PR5	PT	VPK					No	MTH	
☐				Aug 2018	VPK	PT	VPK					Yes	LIA	
☐				Aug 2018	VPK	PT	VPK					Yes	LIA	
☐				Aug 2019	VPK	PT	VPK					Yes	LIA	
☐				Aug 2019	PR5	PT	VPK					No	MTH	
☐				Sep 2019	PR5	PT	VPK					No	MTH	
☐				Jul 2019	PR5	PT	VPK					No	MTH	
☐				Aug 2019	PR5	PT	VPK					No	MTH	
☐				Sep 2019	PR5	PT	VPK					No	MTH	
☐				Oct 2019	PR5	PT	VPK					No	MTH	

After selecting one or more records to remove from the Payment Verified work queue, clicking the **Run** button opens the confirmation pop-up window. The confirmation pop-up shows the number of records that are impacted and the action that will be taken:

- PPA records will be deleted
- LIA records will be deleted
- MTH records will be moved to closed attendance



Local

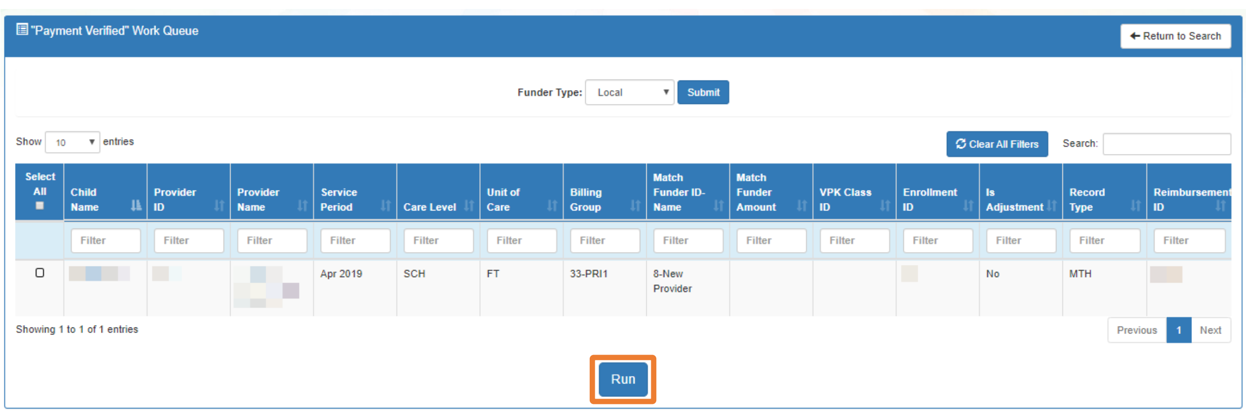
The search field displays at the top and will filter the work queue based on the information entered. The work queue displays 10 records per page by default. The work queue can be changed to display 10, 25, 50, or 100 records per page. If more than 10 records are available, then pagination is available. The number of entries display at the bottom of the work queue.

Only Local records in Payment Verified status will display in the queue. Clicking on the **Select All** checkbox will select all records on the screen. The following columns display in the work queue:

- Child Name
- Provider ID
- Provider Name
- Service Period
- Care Level
- Unit of Care
- Billing Group
- Match Funder ID-Name
- Match Funder Amount
- VPK Class ID
- Enrollment ID
- Is Adjustment
- Record Type
- Reimbursement ID

The work queue is sorted alphabetically by Child Name, by default. Each of the columns have a search filter to narrow the results. Clicking on a column header will sort the work queue by that criterion. Clicking the **Return to Search** button will navigate to the Payment Verified Work Queue Search screen. Selecting one or more entries and clicking on the **Run** button will do the following:

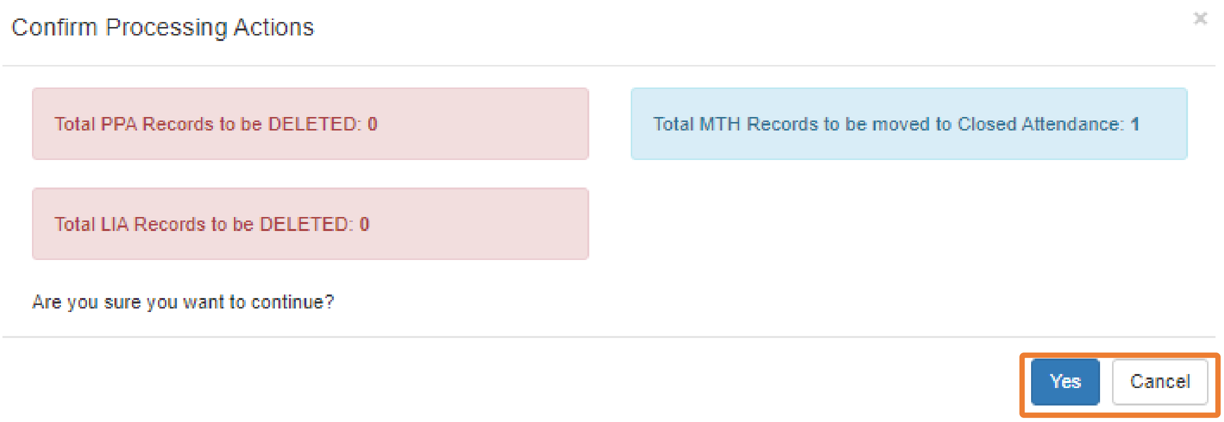
- Open the Confirm Submit for Reimbursement modal
- For MTH records, selecting the record will move the record back to Closed Attendance
- For MTH records (current period adjustments), selecting the record will move the record back to Closed Attendance and delete the adjustment information
- For PPA and LIA records, selecting the record will delete the adjustment



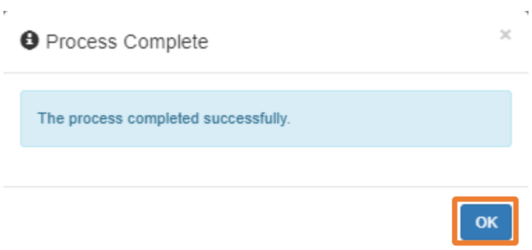
Confirmation Modal

Clicking the **Run** button opens the confirmation pop-up window. The confirmation pop-up shows the number of records that are impacted and the action that will be taken:

- PPA records will be deleted
- LIA records will be deleted
- MTH records will be moved to closed attendance



Clicking the **Cancel** button will close the modal and the entries will remain in the Payment Verified Work Queue.

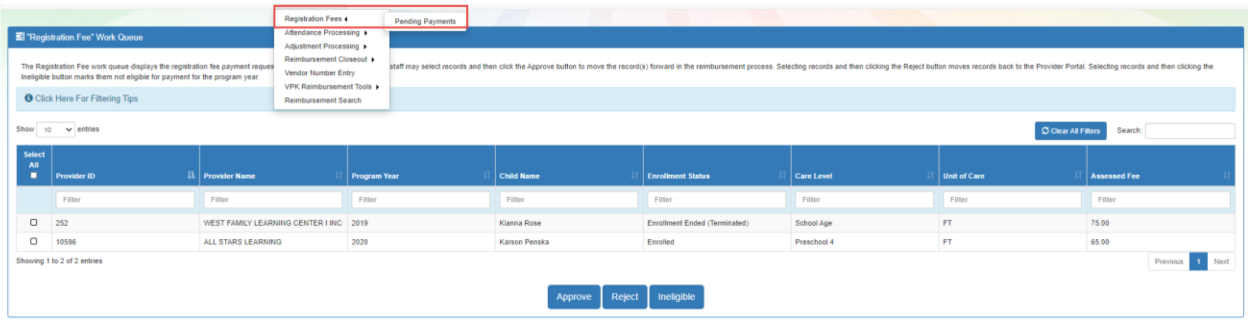


Registration Fees

Providers will request registration fee payments through the Provider Portal. Once those requests are submitted, they will display in the Coalition's Registration Fee work queue.

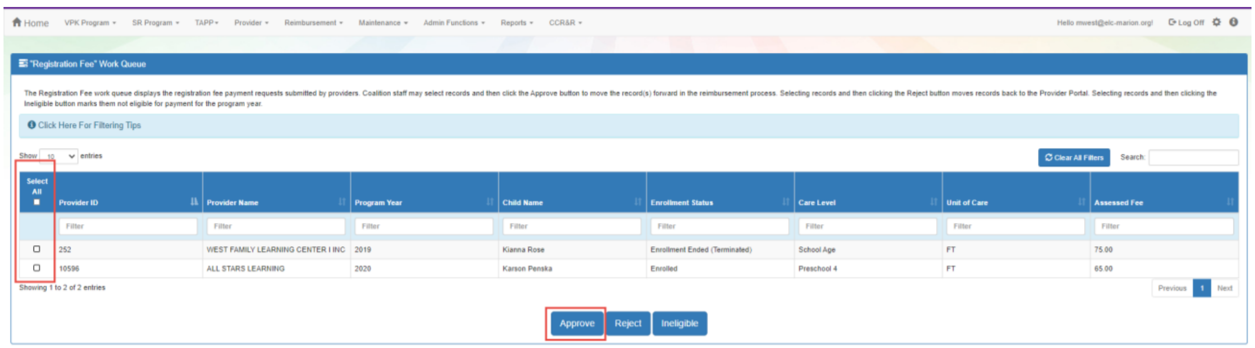
To view/process Registration Fees navigate to **Reimbursement > Registration Fees > Pending Payments**

Coalitions can **Approve, Reject,** or mark the record **Ineligible** for payment.

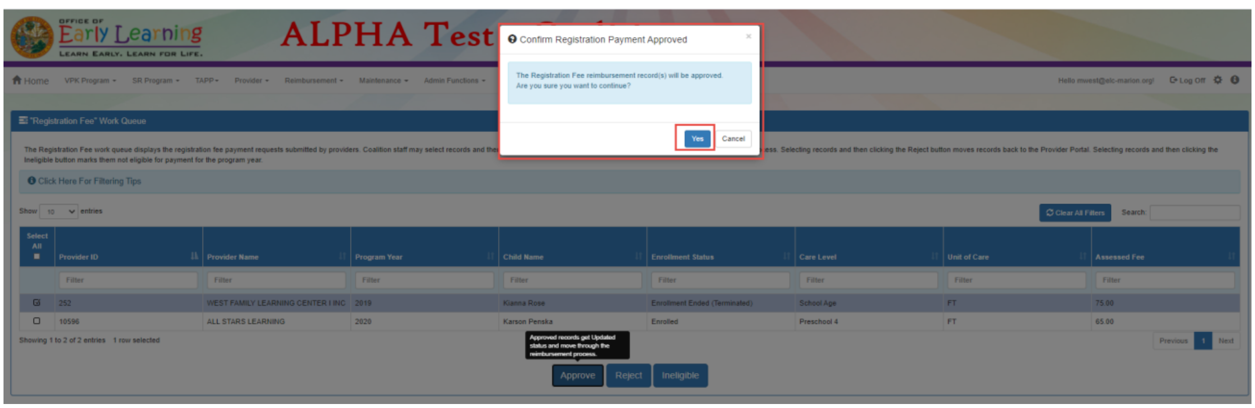


Approve the Registration Fee Request

The list displays the children submitted by the provider. To approve the registration fee payment, select the checkbox for the child(ren) and click the **Approve** button.



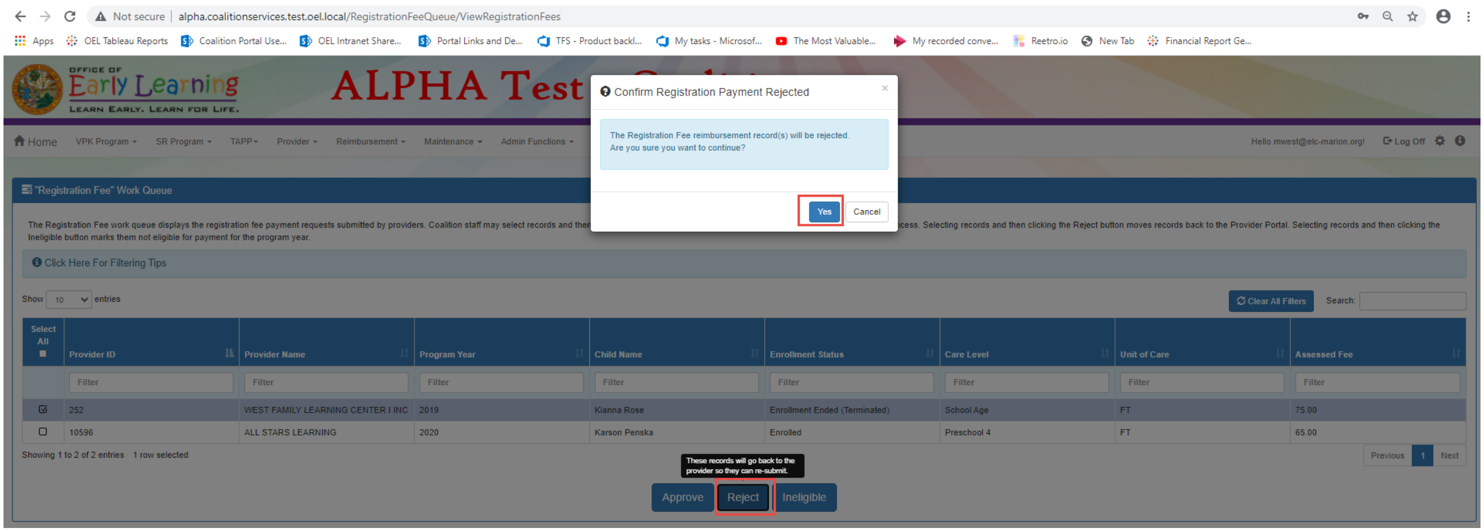
On the Confirm Registration Payment Approved pop-up window, click **Yes**. The Registration Fee record's status is now **Updated**.



Reject the Registration Fee Request

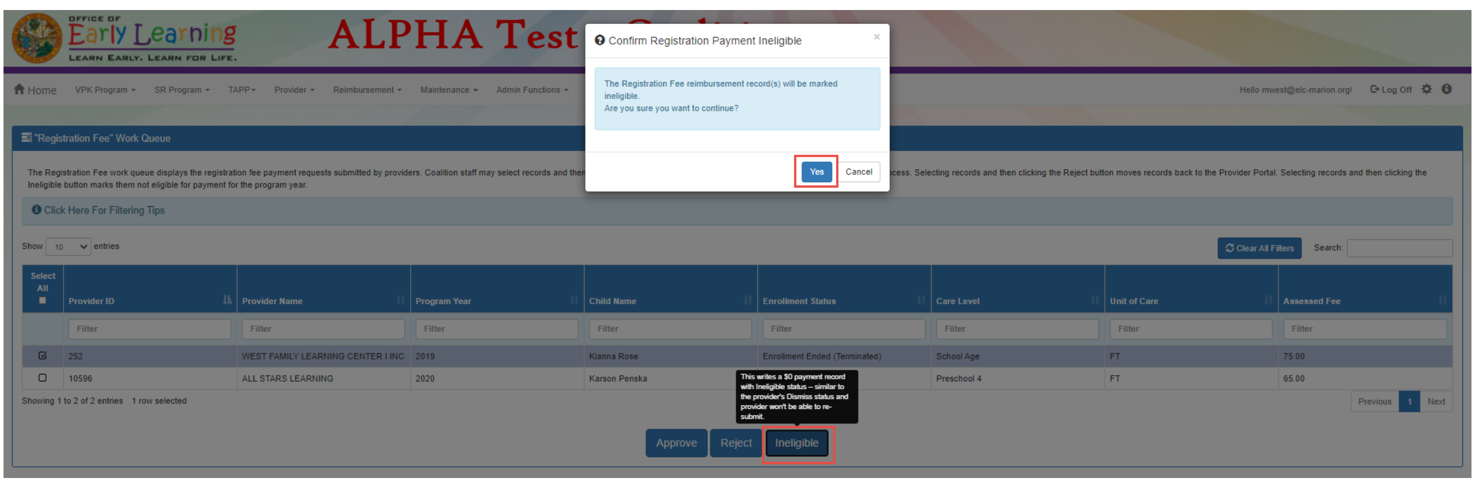
If the coalition determines that the record is incorrect, it can be rejected back to the provider for correction. Rejected records can be re-submitted to the coalition for payment. To reject a record, check the checkbox and click

Reject to reject the records. The Registration Fee record gets the status of **Reject**. Provider would be able to re-submit the record for payment. On the Confirm Registration Payment Rejected pop-up window, click the **Yes** button. Hovering over the Reject button will display the following message: "These records will go back to the provider so they can re-submit."



Mark the Registration Fee Requests 'Ineligible'

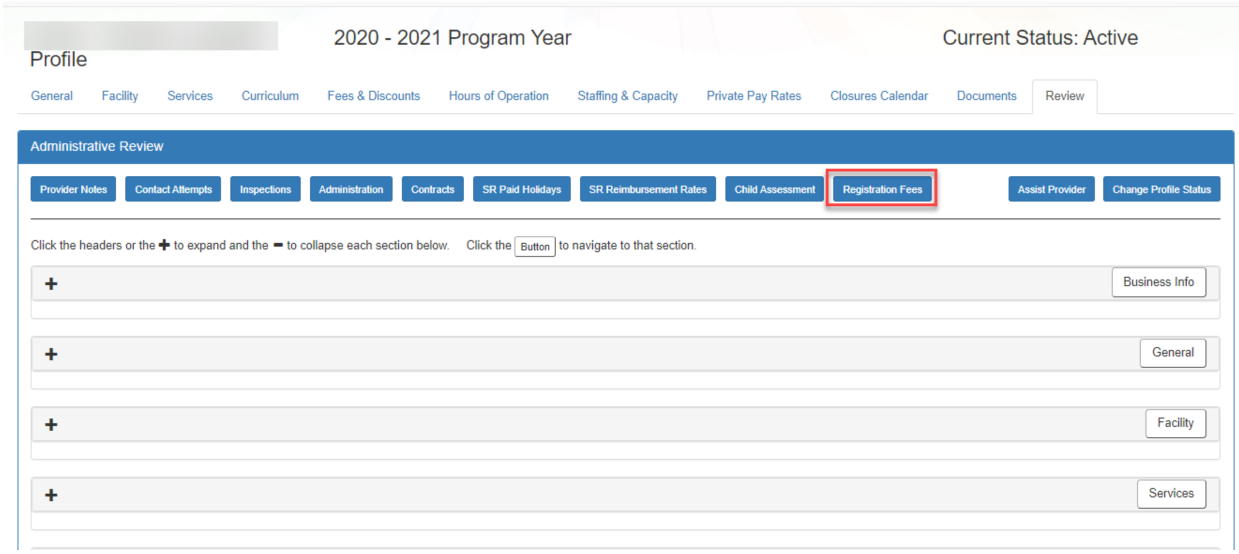
If the coalition determines that a record is ineligible for registration fee payment, then the coalition will check the checkbox for the record and click the **Ineligible** button. **NOTE:** The Registration Fee record gets the status of **Ineligible** with $0 payment. Provider will NOT be able to re-submit these records for payment. Hovering over the Ineligible button will display the following message: "This writes a $0 payment record with Ineligible status – similar to the provider's Dismiss status and provider won't be able to re-submit."



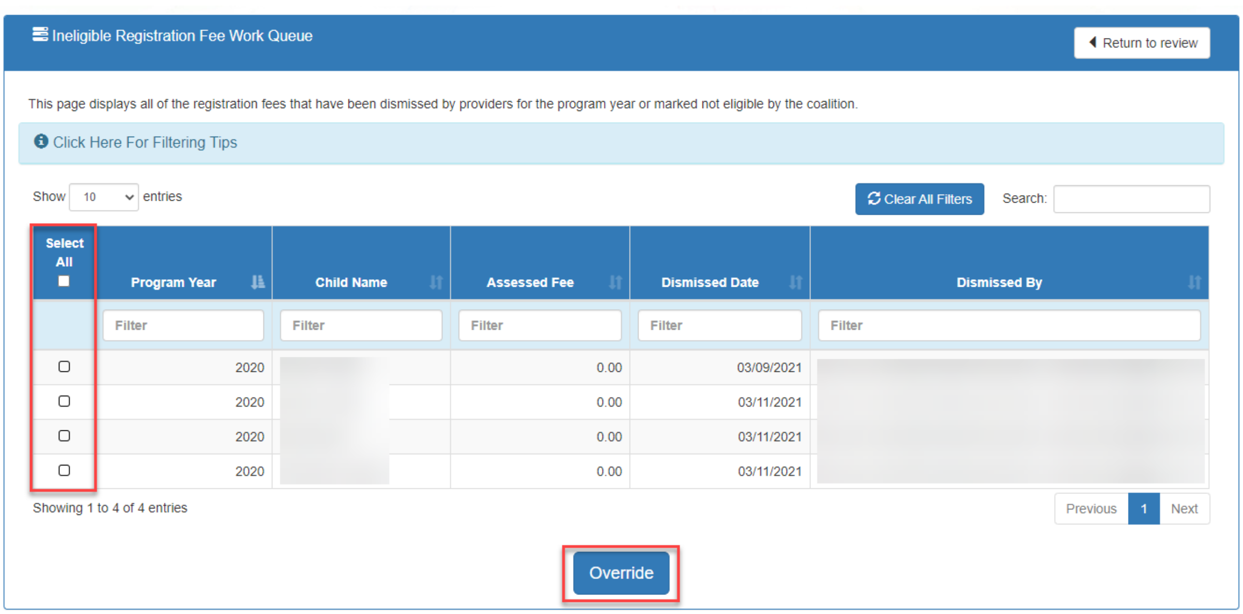
Ineligible Registration Fee Work Queue (Override)

When a provider dismisses a child for registration fee payments on the Provider Portal, the child will show in the Ineligible Registration Fee Work Queue on the Coalition Portal. If the child was dismissed for the registration fee payment in error, coalition users can override and allow the registration fee payment to be processed.

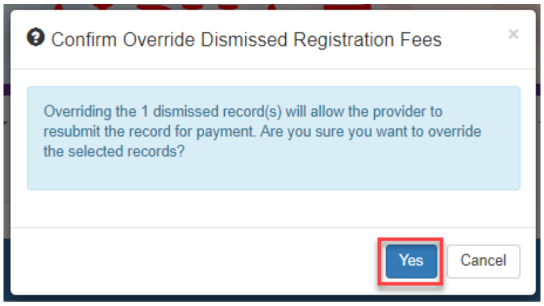
In the Coalition Portal, navigate to the provider's Administrative Review screen and click the **Registration Fees** button.



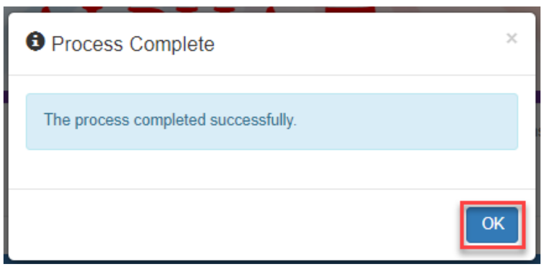
The Ineligible Registration Fee Work Queue displays. This lists all children at the provider that have been dismissed for registration fees for the current program year. Select the check box for the child and click the **Override** button. There is an option to select all children in the queue to override.



After clicking the **Override** button, the Confirm Override Dismissed Registration Fees pop-up window displays. Click the **Yes** button to override the records.



After clicking the **Yes** button on the Confirm Override Dismissed Registration Fees pop-up window, the Process Complete pop-up message opens. Click the **OK** button to close the window.

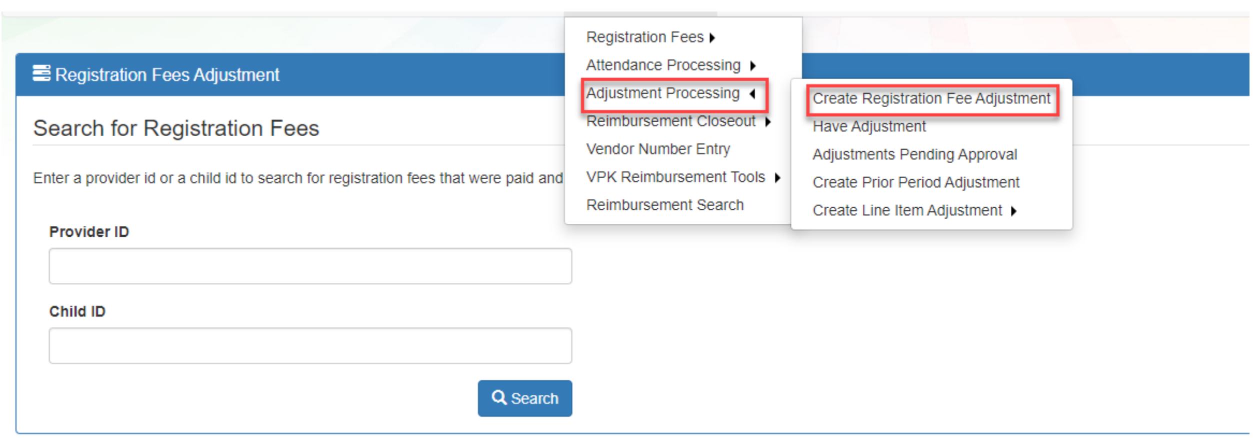


After the coalition has overridden the registration fee for payment, the child will show in the list of children eligible for registration fee payment on the Provider Portal. The provider can process the request for registration fee payments as usual.

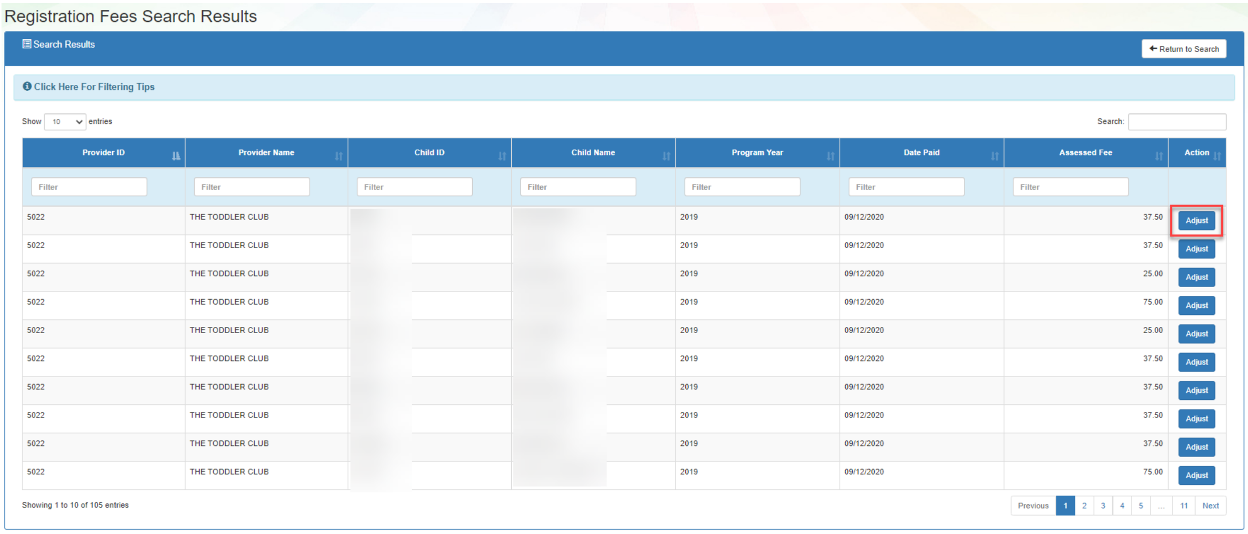
Registration Fee Reversals (Adjustments)

Coalitions can create a reversal (adjustment) for a registration fee that has been paid. Navigate to **Reimbursement > Adjustment Processing > Create Registration Fee Adjustment**

On the Registration Fee Adjustment screen, search by the Provider ID and/or the Child ID, then click the **Search** button.



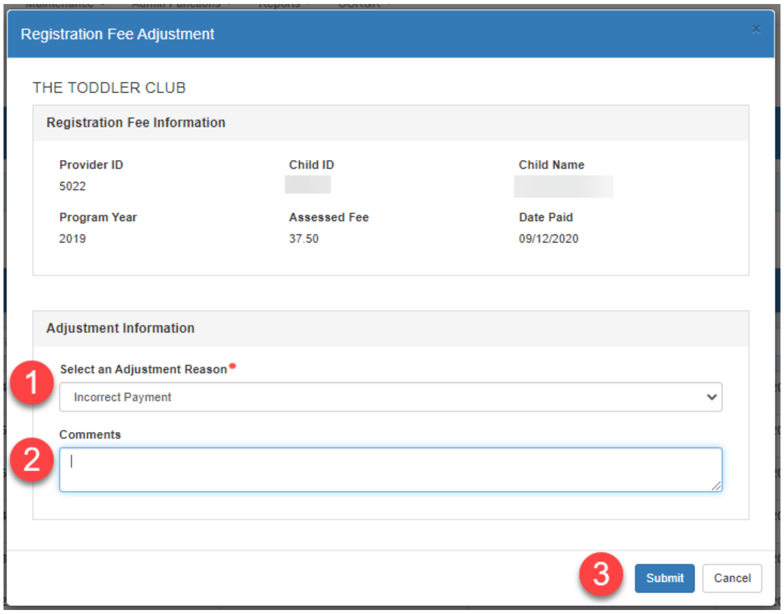
The Registration Fees Search Results screen displays the search results based on the criteria entered. To adjust a record, click the **<u>Adjust</u>** button.



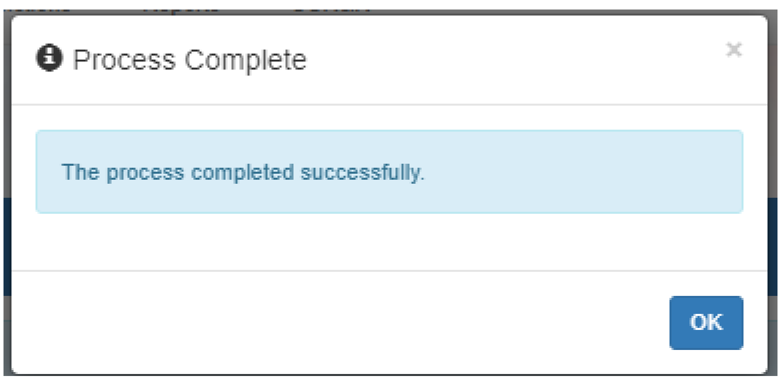
Provider ID	Provider Name	Child ID	Child Name	Program Year	Date Paid	Assessed Fee	Action
5022	THE TODDLER CLUB	[illegible]	[illegible]	2019	09/12/2020	37.50	Adjust
5022	THE TODDLER CLUB	[illegible]	[illegible]	2019	09/12/2020	37.50	Adjust
5022	THE TODDLER CLUB	[illegible]	[illegible]	2019	09/12/2020	25.00	Adjust
5022	THE TODDLER CLUB	[illegible]	[illegible]	2019	09/12/2020	75.00	Adjust
5022	THE TODDLER CLUB	[illegible]	[illegible]	2019	09/12/2020	25.00	Adjust
5022	THE TODDLER CLUB	[illegible]	[illegible]	2019	09/12/2020	37.50	Adjust
5022	THE TODDLER CLUB	[illegible]	[illegible]	2019	09/12/2020	37.50	Adjust
5022	THE TODDLER CLUB	[illegible]	[illegible]	2019	09/12/2020	37.50	Adjust
5022	THE TODDLER CLUB	[illegible]	[illegible]	2019	09/12/2020	37.50	Adjust
5022	THE TODDLER CLUB	[illegible]	[illegible]	2019	09/12/2020	75.00	Adjust

The Registration Fee Adjustment pop-up window displays the details of the record. The adjustment will fully reverse the registration fee assessed.

1. Select the reason for the adjustment
2. Enter a comment
3. Click the **Submit** button



The Process Complete pop-up window opens. Click the **OK** button.



After the registration fee reversal is completed, it will display on the 5045 as a RFR negative amount.

Complete the Payment Transmittal Process

Navigate to **Reimbursement > Reimbursement Closeout > Run Payment Transmittal File**
Click **Run Transmittal File** button. Records that were in **Updated** status are now in **Paid** status.

Verify Data in 5045 report

Navigate to **Reimbursement > Reimbursement Closeout > Run 5045 Report.** Click the **Run Report** button for SR. The Run SR Report modal displays. Click the **Run Trial 5045 Report** button. The Reimbursement Detail Type drop down includes RFR when registration fee reversal records are present.

Child Assessment

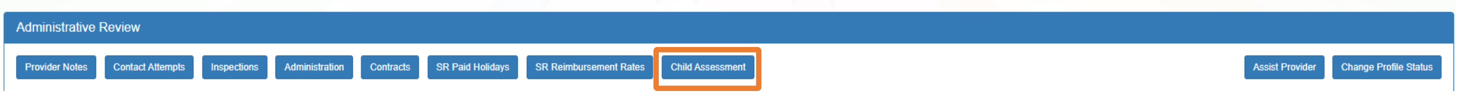
Eligibility Criteria

In the Coalition Portal, Providers meet the following criteria:

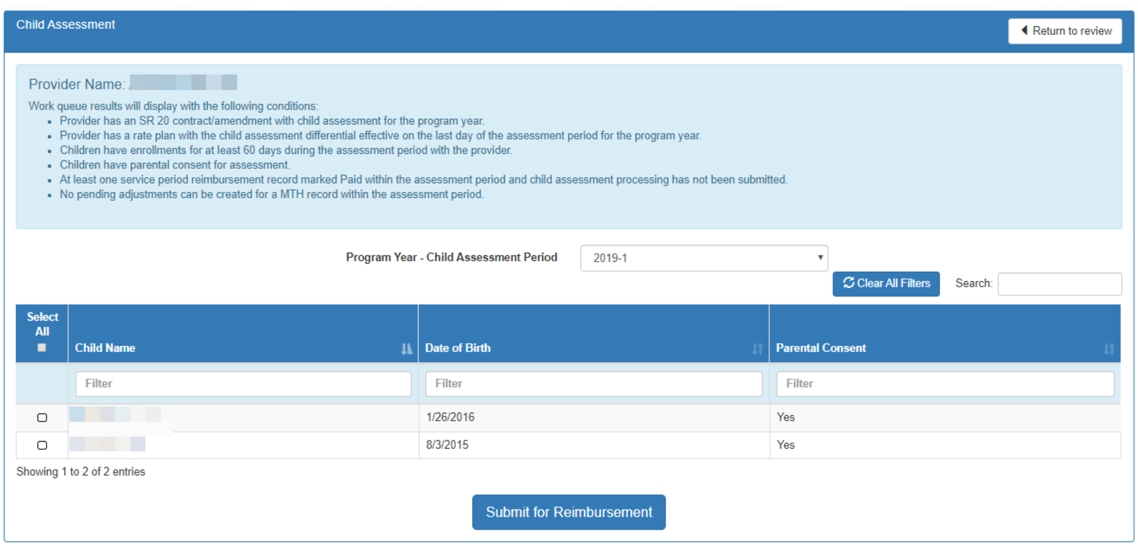
- Provider has an SR 20 contract/amendment with child assessment for the program year
- Provider has a rate plan with the child assessment differential effective on the last day of the assessment period for the program year
- Children have enrollments for at least 60 days during the assessment period with the provider
- Children have parental consent for assessment
- At least one service period reimbursement record marked Paid within the assessment period and child assessment processing has not been submitted
- No pending adjustments can be created for a MTH record within the assessment period (status of the adjustment must be Updated or Paid)
- Has not already been processed for the assessment period

Child Assessment Differentials

On the Provider Profile Administrative Review screen, click **Child Assessment**.



The children that meet the eligibility criteria will display on the Child Assessment screen.

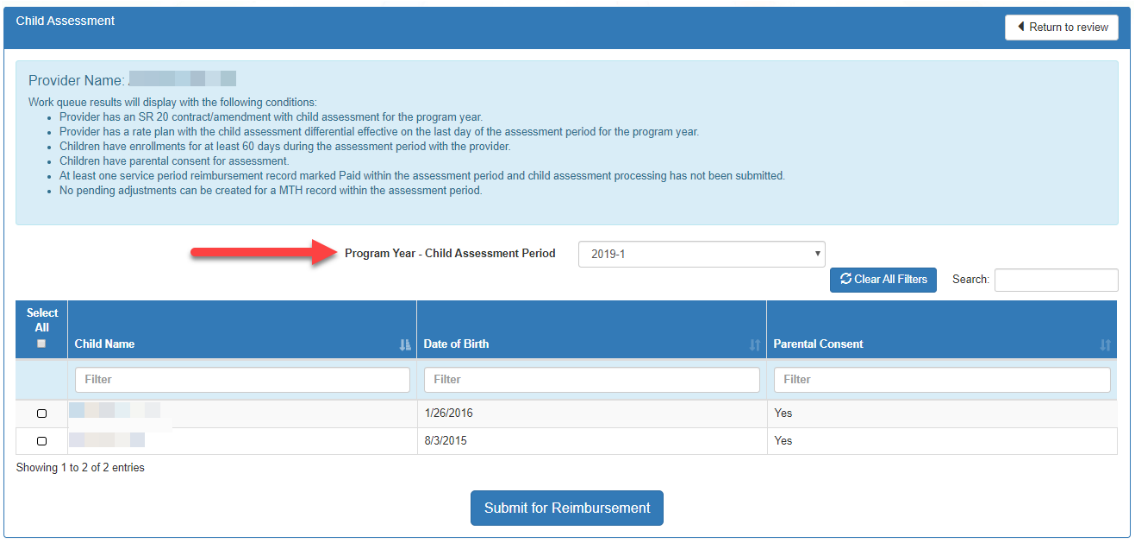


There are three assessment periods:

Assessment Period	Service Period	Payment Period
1 (2019-01)	August, September, October	July, August, September, October
2 (2019-02)	November, December, January	November, December, January
3 (2019-03)	February, March, April	February, March, April, May, June

- The Service Period are the months in which assessments may occur
- The Payment Period are the months in which the child assessment differential can be paid, once the child assessment for the respective assessment period has been approved by the Coalition
  NOTE: The reimbursement will occur during the open Payment Period

Select an assessment period from the dropdown menu.



If the Service Period is in the past, then all months will be included in selecting the children.

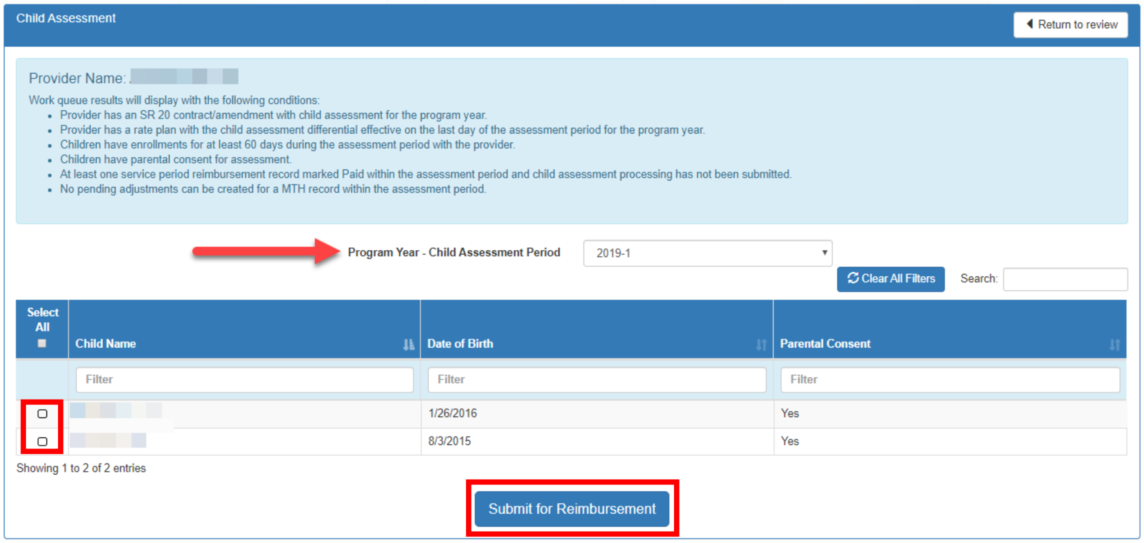
- Example: Selecting one child for Assessment Period 1 (July – October) will create a child assessment reimbursement record for each month in the assessment period

If the Service Period is not yet complete, then only the completed months will be included for reimbursement.

- Example: Selecting one child for Assessment Period 3 (February – June) in the month of May will not pay for May or June. The child assessment reimbursement will only be for the completed months (February – April)

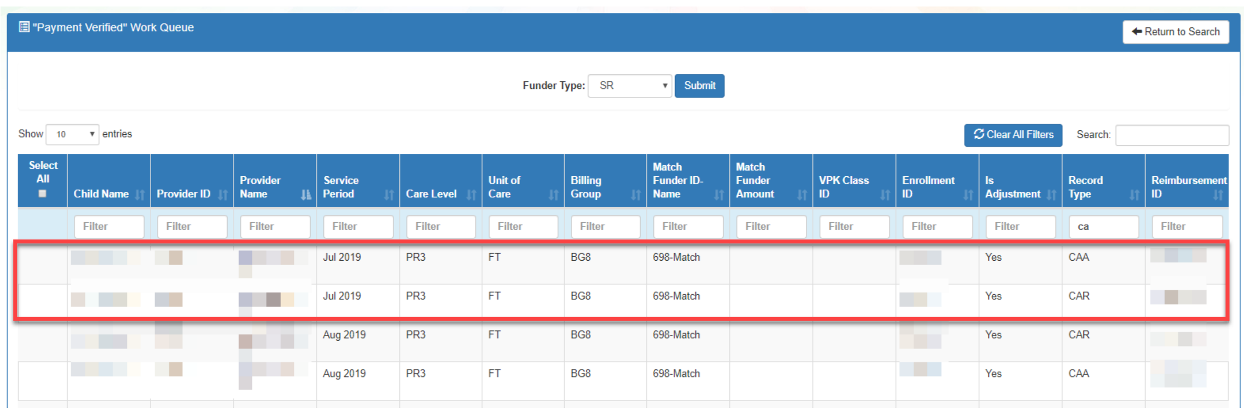
Coalition users will need to create the child assessment reimbursement records for May and June after the end of the month.

Select one or more children from the list and click **Submit for Reimbursement**.



Payment Verified Work Queue

The child assessment records can be seen in the Payment Verified Work Queue.



Each child will have two rows for each month in the assessment period:

- Record Type: CAA (Child Assessment Adjustment) – This record creates a new reimbursement record to include the child assessment differential
- Record Type: CAR (Child Assessment Reversal) – This record reverses out the original reimbursement record, where child assessment differential was not included

No action can be taken on these records from the Payment Verified Work Queue.

Reports

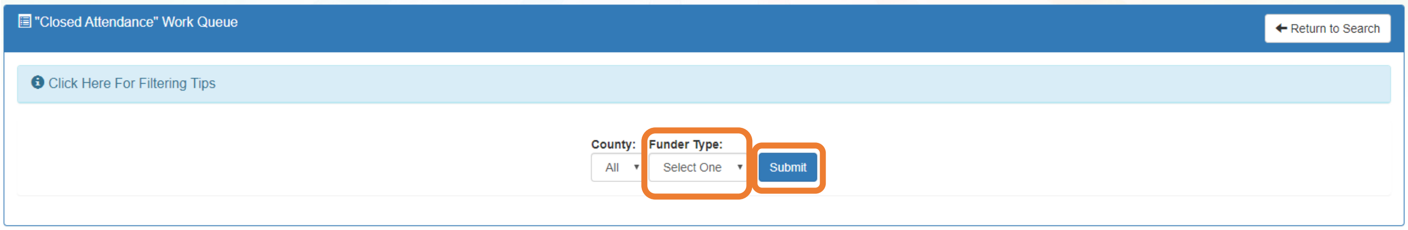
The child assessment reimbursements will be available on the 5045 with record types of CAA and CAR.

Adjustment Processing

Current Period Adjustments

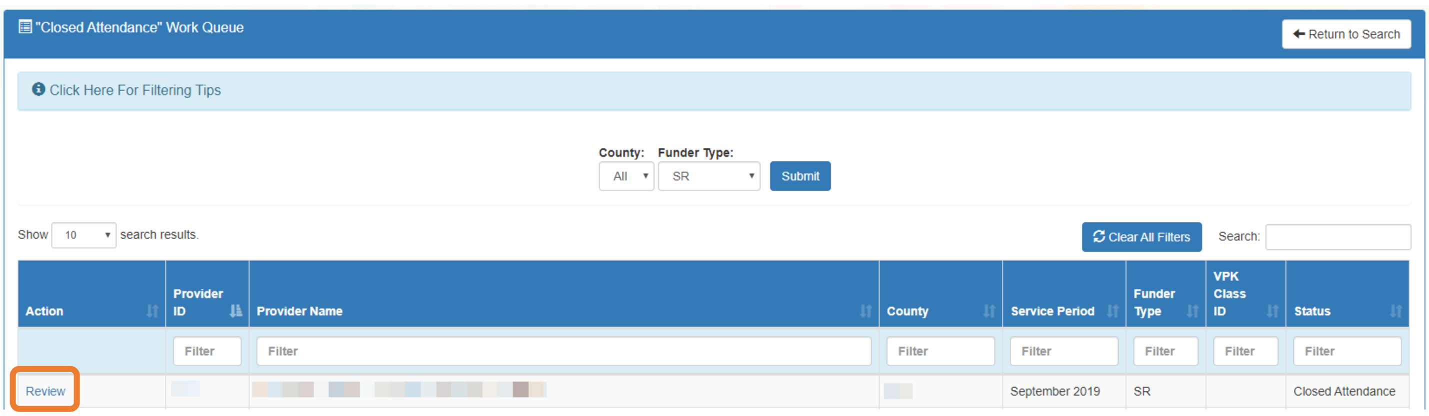
Coalitions can create a Current Period Adjustment for any attendance records that have been submitted by a provider and approved by the coalition.

Go to **Reimbursement > Attendance Processing > Closed Attendance**. Select the Funder Type. Click **<u>Submit</u>**.

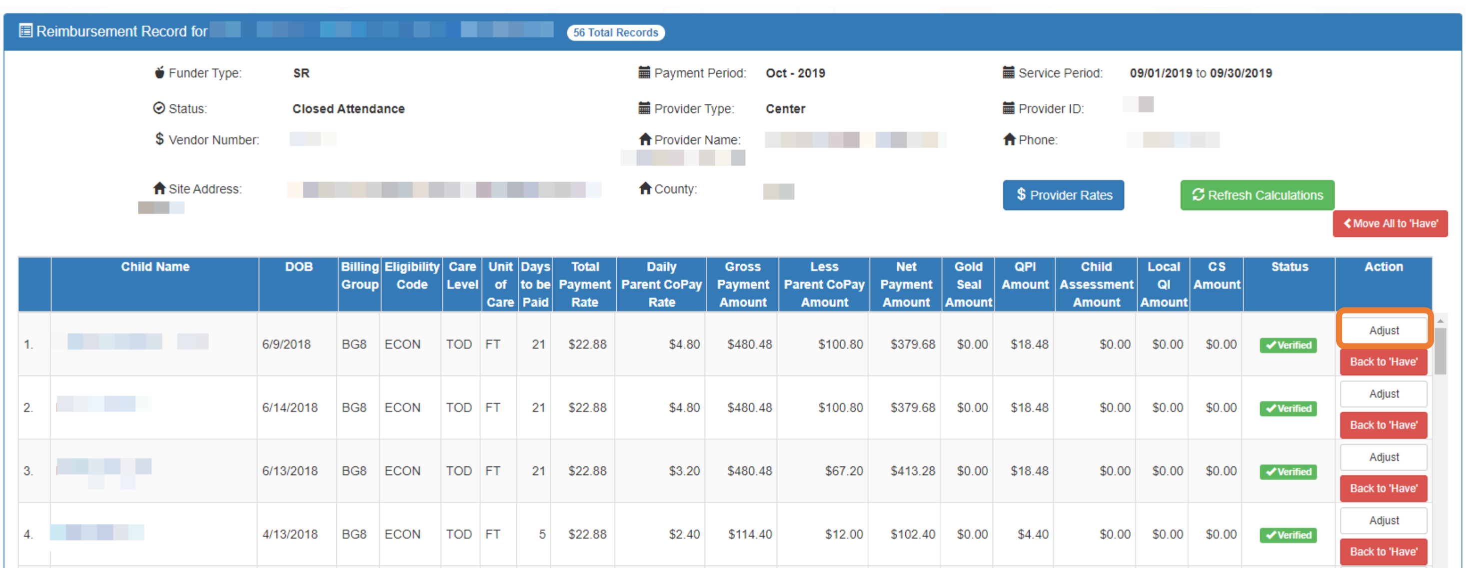


Current Period Adjustments for SR

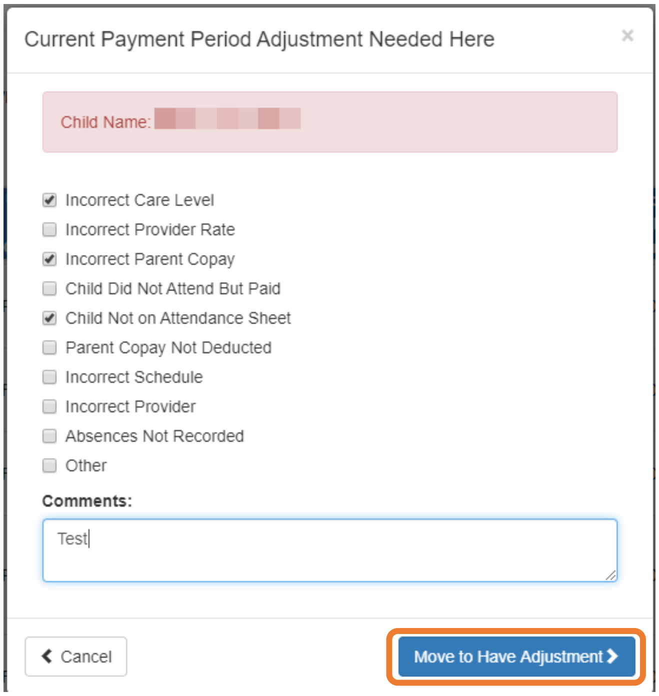
The search results will display all the providers with a status of Closed Attendance. Click the **<u>Review</u>** link for the Service Period.



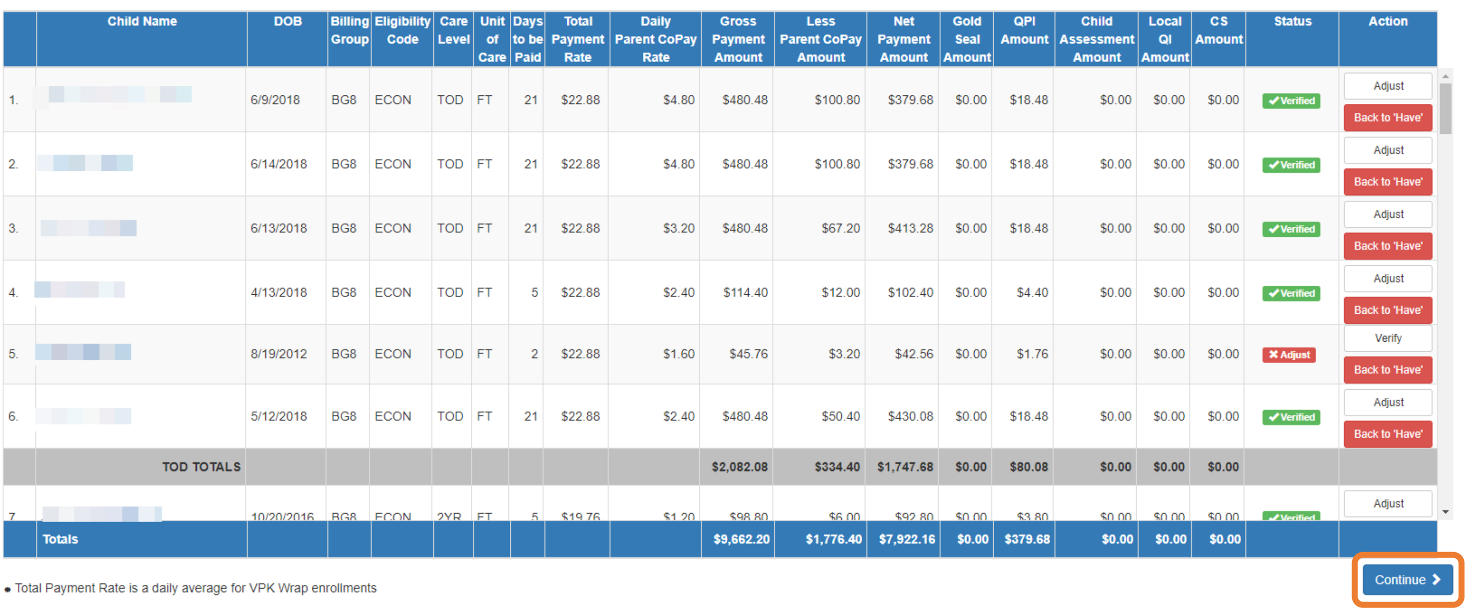
After clicking the Review link, the Reimbursement Record for the provider and service period display. Confirm that all children on the roster have a status. Click **<u>Adjust</u>** for the selected record.



After clicking **Adjust** from the Reimbursement Record, the Current Payment Period Adjustment Needed Here pop-up displays. Review the Child Name, to ensure this is the correct record to adjust. Select one or more reasons for the adjustment. Enter in a comment. Click **Move to Have Adjustment**.



The adjusted record now has a status of Adjust on the Reimbursement Record screen. When all of the records have a status, the **Continue** button will display. Click **Continue**.



	Child Name	DOB	Billing Group	Eligibility Code	Care Level	Unit of Care	Days to be Paid	Total Payment Rate	Daily Parent CoPay Rate	Gross Payment Amount	Less Parent CoPay Amount	Net Payment Amount	Gold Seal Amount	QPI Amount	Child Assessment Amount	Local QI Amount	CS Amount	Status	Action
1.		6/9/2018	BG8	ECON	TOD	FT	21	$22.88	$4.80	$480.48	$100.80	$379.68	$0.00	$18.48	$0.00	$0.00	$0.00	Verified	Adjust Back to 'Have'
2.		6/14/2018	BG8	ECON	TOD	FT	21	$22.88	$4.80	$480.48	$100.80	$379.68	$0.00	$18.48	$0.00	$0.00	$0.00	Verified	Adjust Back to 'Have'
3.		6/13/2018	BG8	ECON	TOD	FT	21	$22.88	$3.20	$480.48	$67.20	$413.28	$0.00	$18.48	$0.00	$0.00	$0.00	Verified	Adjust Back to 'Have'
4.		4/13/2018	BG8	ECON	TOD	FT	5	$22.88	$2.40	$114.40	$12.00	$102.40	$0.00	$4.40	$0.00	$0.00	$0.00	Verified	Adjust Back to 'Have'
5.		8/19/2012	BG8	ECON	TOD	FT	2	$22.88	$1.60	$45.76	$3.20	$42.56	$0.00	$1.76	$0.00	$0.00	$0.00	Adjust	Verify Back to 'Have'
6.		5/12/2018	BG8	ECON	TOD	FT	21	$22.88	$2.40	$480.48	$50.40	$430.08	$0.00	$18.48	$0.00	$0.00	$0.00	Verified	Adjust Back to 'Have'
	TOD TOTALS									$2,082.08	$334.40	$1,747.68	$0.00	$80.08	$0.00	$0.00	$0.00		
7.		10/20/2016	BG8	ECON	2YR	FT	5	$19.76	$1.20	$98.80	$6.00	$92.80	$0.00	$3.80	$0.00	$0.00	$0.00	Verified	Adjust
	Totals									$9,662.20	$1,776.40	$7,922.16	$0.00	$379.68	$0.00	$0.00	$0.00		

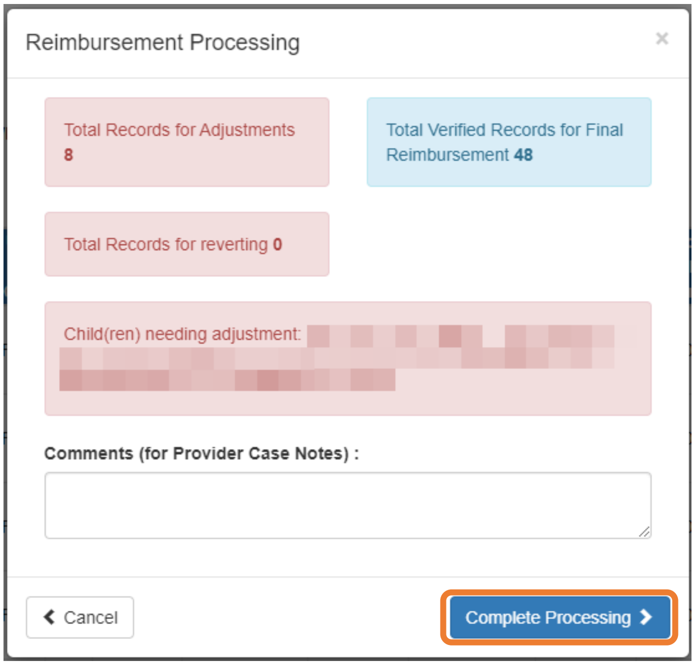
• Total Payment Rate is a daily average for VPK Wrap enrollments

Continue

After clicking **Continue**, a Reimbursement Processing pop-up will display a summary:

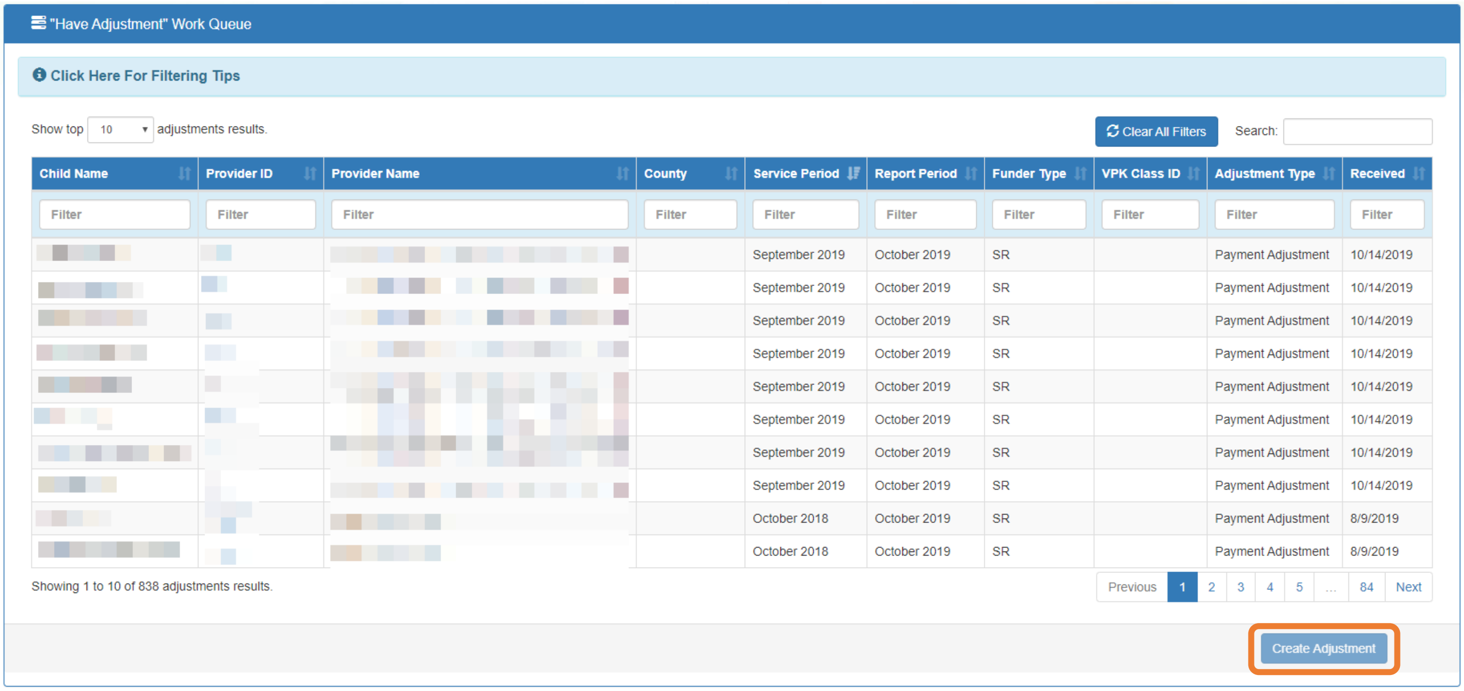
- Records for Adjustments
- Records for Reverting
- Total Verified Record for Final Reimbursement
- Children needing adjustment

Review the Child(ren) needing adjustment listed for accuracy. Enter a comment for the provider case note. Click **Complete Processing**.



After clicking **Complete Processing**, the user returns to the Closed Attendance work queue.

Go to **Reimbursement > Adjustment Processing > Have Adjustment** to see records marked as needing an adjustment. To create a Current Period Adjustment, select a record from the Have Adjustment work queue. Click the **Create Adjustment** button.


"Have Adjustment" Work Queue

Click Here For Filtering Tips

Show top 10 adjustments results.

Clear All Filters Search:

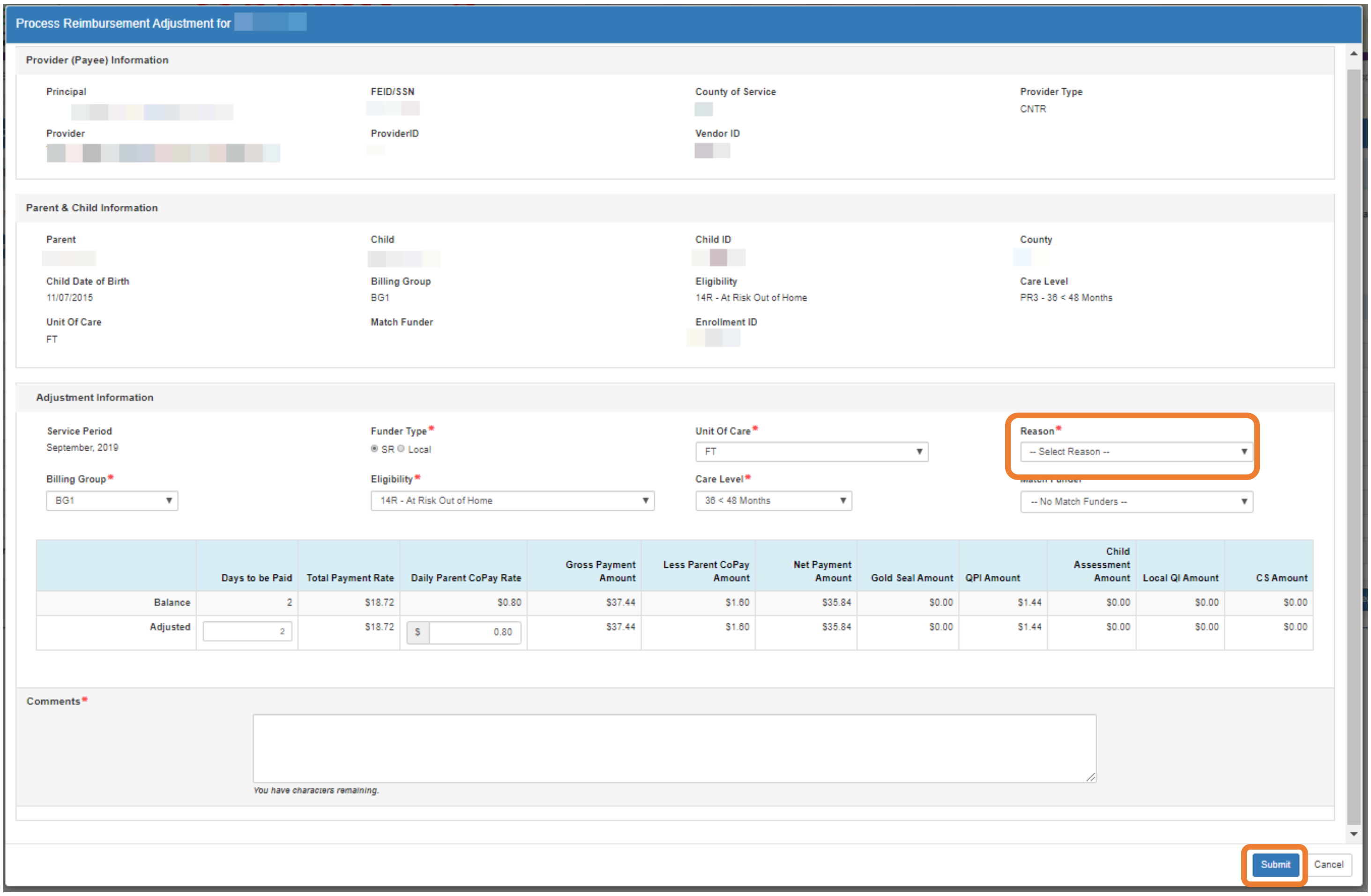
Child Name	Provider ID	Provider Name	County	Service Period	Report Period	Funder Type	VPK Class ID	Adjustment Type	Received
Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter
				September 2019	October 2019	SR		Payment Adjustment	10/14/2019
				September 2019	October 2019	SR		Payment Adjustment	10/14/2019
				September 2019	October 2019	SR		Payment Adjustment	10/14/2019
				September 2019	October 2019	SR		Payment Adjustment	10/14/2019
				September 2019	October 2019	SR		Payment Adjustment	10/14/2019
				September 2019	October 2019	SR		Payment Adjustment	10/14/2019
				September 2019	October 2019	SR		Payment Adjustment	10/14/2019
				September 2019	October 2019	SR		Payment Adjustment	10/14/2019
				October 2018	October 2019	SR		Payment Adjustment	8/9/2019
				October 2018	October 2019	SR		Payment Adjustment	8/9/2019

Showing 1 to 10 of 838 adjustments results.

Previous 1 2 3 4 5 … 84 Next

Create Adjustment

After clicking **Create Adjustment**, the Process Reimbursement Adjustment for [ELC Name] pop-up displays. The required fields are marked with an asterisk (*). On the *Adjustment Information* section, it is pre-populated with the most recent information on the record. The user will need to select the Reason from the dropdown menu, and enter a comment. User will click **Submit** to confirm the adjustment. After the adjustment is submitted, it will no longer display in the "Have Adjustment" Work Queue.



The Adjustments Grid has a Balance row with the current balance for the record and an Adjusted row with any adjustments made during this edit. In the Adjustments Grid, only the Days to be Paid and Daily Parent CoPay Rate are editable. Any changes made that will impact rate (Unit of Care, Care Level, or Daily Parent CoPay Rate) will display in the Adjusted row.

The column headers in the grid for years 2018-2019 and prior are:

- Days to be Paid
- Total Payment Rate
- Daily Parent CoPay Rate
- Gross Payment Amount = [Days to be Paid * Total Payment Rate]
- Less Parent CoPay Amount = [Days to be Paid * Daily Parent CoPay Rate]
- Net Payment Amount = [Gross Payment Amount – Less Parent CoPay Amount]
- Gold Seal Amount = [Days to be Paid * Gold Seal Amount (*from SR Rate Plan*)]
- PFP Amount = [Days to be Paid * PFP Amount (*from SR Rate Plan*)]
- PFP CA Amount = [Days to be Paid * PFP CA Amount (*from SR Rate Plan*)]
- Local QI Amount = [Days to be Paid * Local QI Amount (*from SR Rate Plan*)]
- CS Amount = [Days to be Paid * CS Amount (*from SR Rate Plan*)]

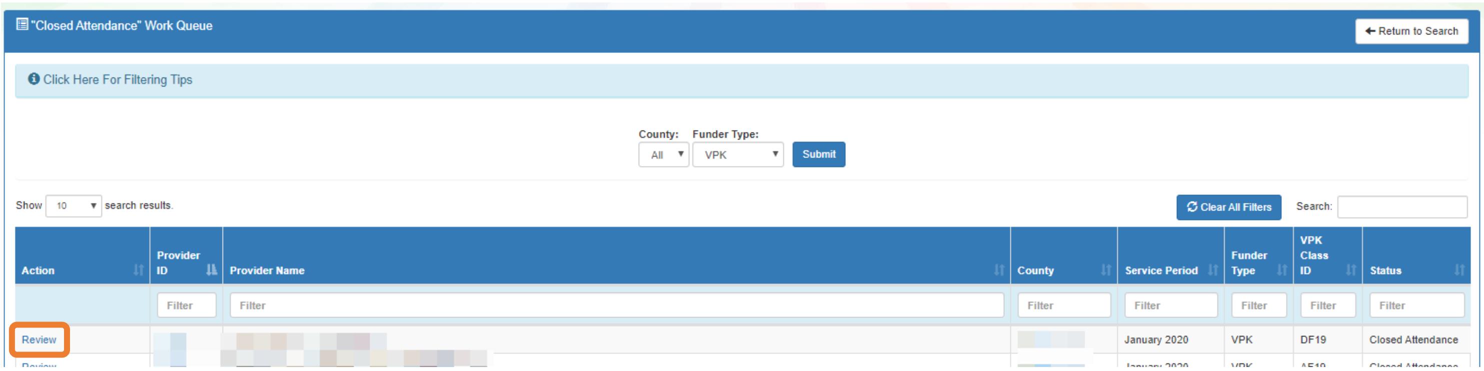
The column headers in the grid for years 2019-2020 and forward are:

- Days to be Paid
- Total Payment Rate
- Daily Parent CoPay Rate
- Gross Payment Amount = [Days to be Paid * Total Payment Rate]
- Less Parent CoPay Amount = [Days to be Paid * Daily Parent CoPay Rate]
- Net Payment Amount = [Gross Payment Amount – Less Parent CoPay Amount]
- Gold Seal Amount = [Days to be Paid * Gold Seal Amount (*from SR Rate Plan*)]
- QPI Amount = [Days to be Paid * QPI Amount (*from SR Rate Plan*)]
- Child Assessment Amount = [Days to be Paid * Child Assessment Amount (*from SR Rate Plan*)]
- Local QI Amount = [Days to be Paid * Local QI Amount (*from SR Rate Plan*)]
- CS Amount = [Days to be Paid * CS Amount (*from SR Rate Plan*)]

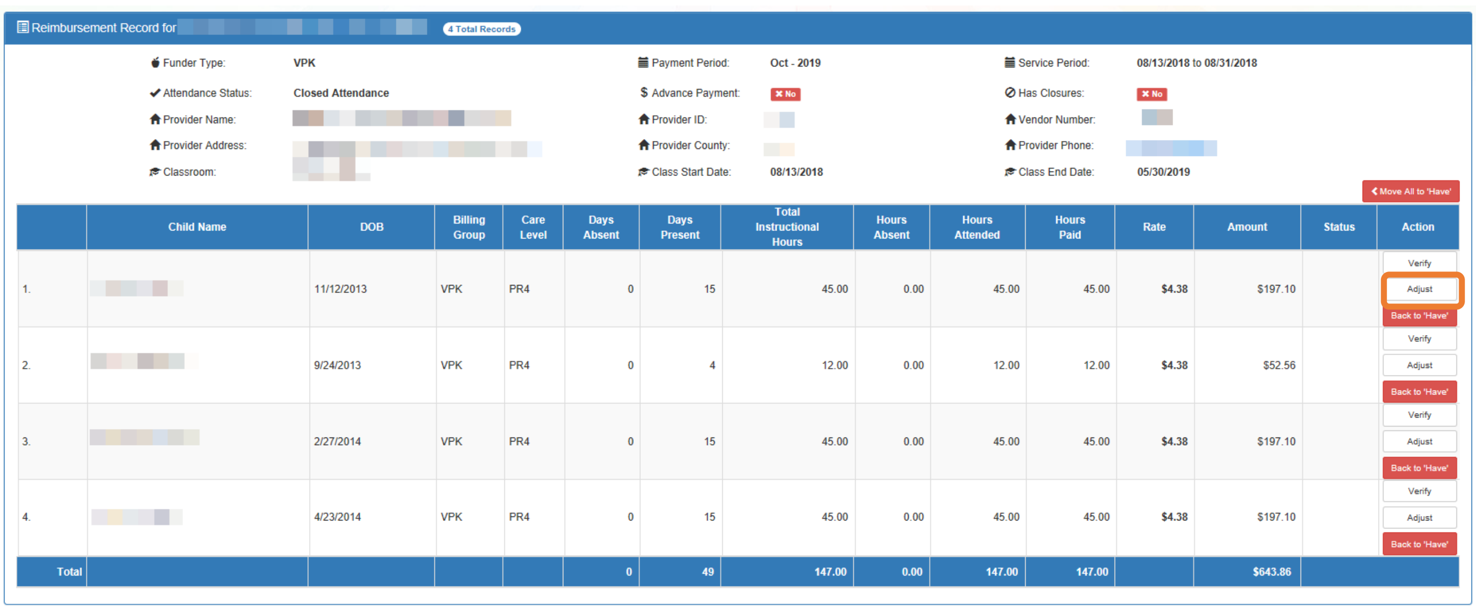
	Days to be Paid	Total Payment Rate	Daily Parent CoPay Rate	Gross Payment Amount	Less Parent CoPay Amount	Net Payment Amount	Gold Seal Amount	QPI Amount	Child Assessment Amount	Local QI Amount	CS Amount
Balance	2	$18.72	$0.80	$37.44	$1.60	$35.84	$0.00	$1.44	$0.00	$0.00	$0.00
Adjusted	2	$18.72	$ 0.80	$37.44	$1.60	$35.84	$0.00	$1.44	$0.00	$0.00	$0.00

Current Period Adjustments for VPK

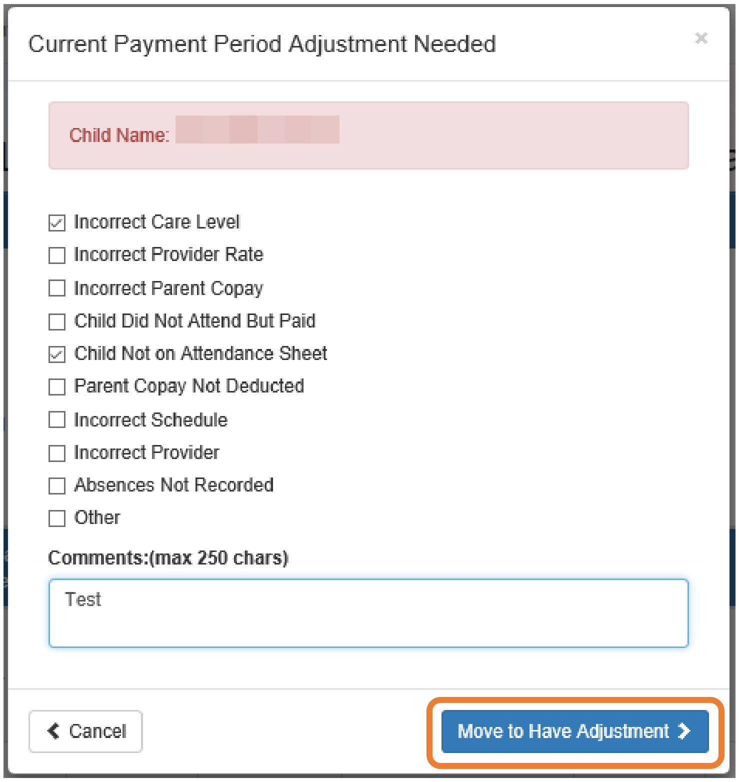
The search results will display all the providers with a status of Closed Attendance. Click the **Review** link for the Service Period.



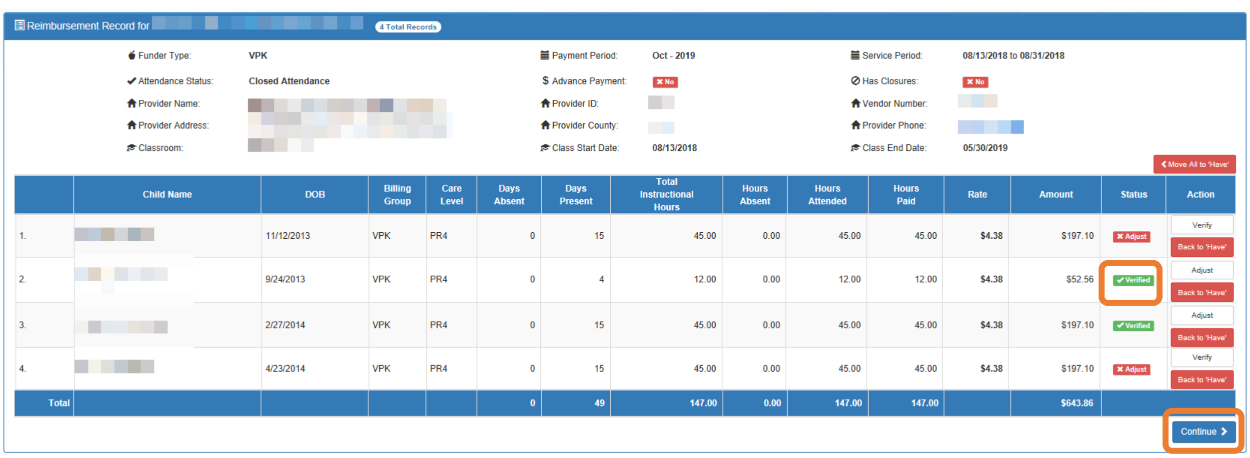
After clicking the **Review** link, the Reimbursement Record for the provider and service period displays. Confirm that all children on the roster have a status. Click **Adjust** for the selected record.



After clicking **Adjust** from the Reimbursement Record, the Current Payment Period Adjustment Needed pop-up displays. Review the Child Name, to ensure this is the correct record to adjust. Select one or more reasons for the adjustment. Enter a comment. Click **Move to Have Adjustment**.



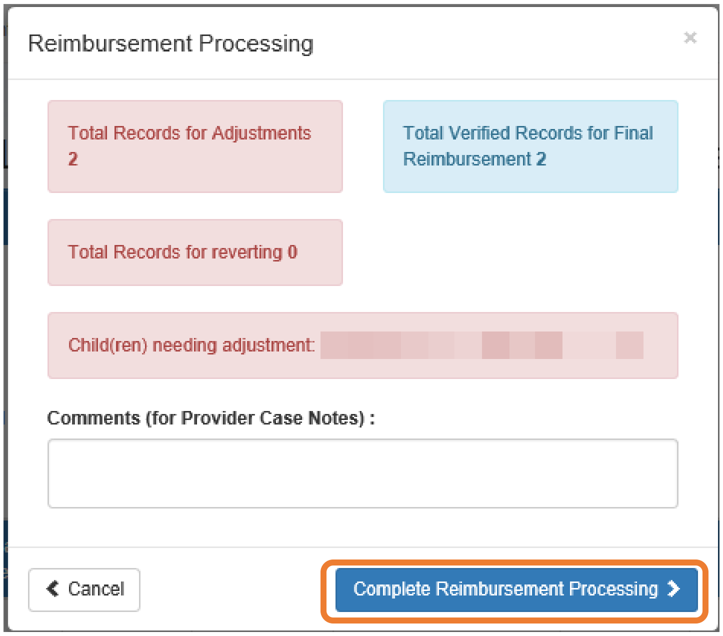
The adjusted record now has a status of **Adjust**, on the Reimbursement Record screen. When all of the records have a status, the **Continue** button will display. Click **Continue**.



After clicking **Continue**, the Reimbursement Processing pop-up displays a summary:

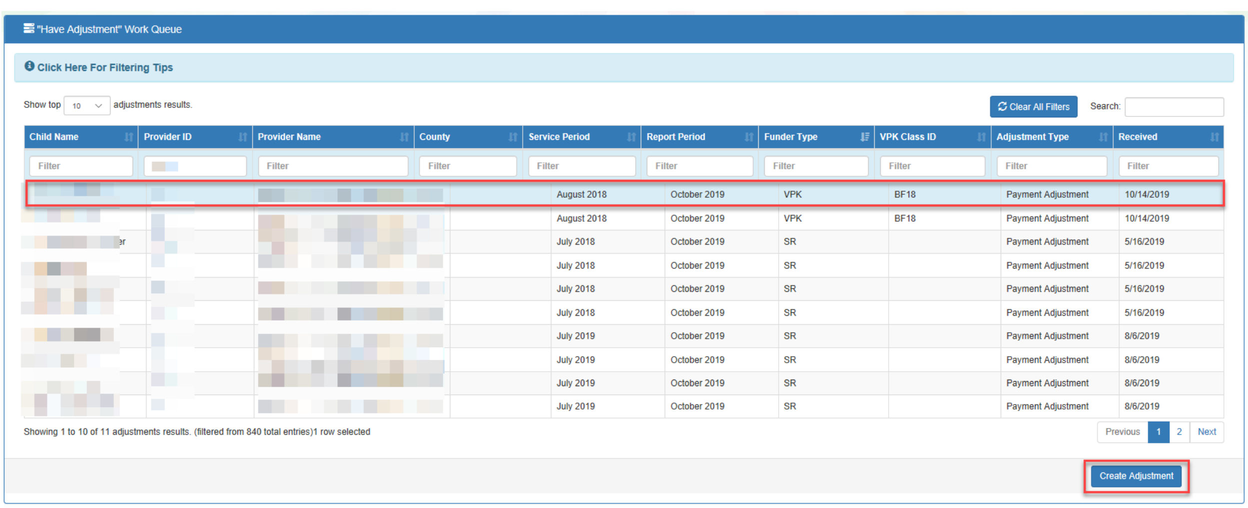
- Records for Adjustments
- Records for Reverting
- Total Verified Record for Final Reimbursement
- Children needing adjustment

Review the Child(ren) needing adjustment listed for accuracy. Enter a comment for the provider case note. Click **Complete Reimbursement Processing**.

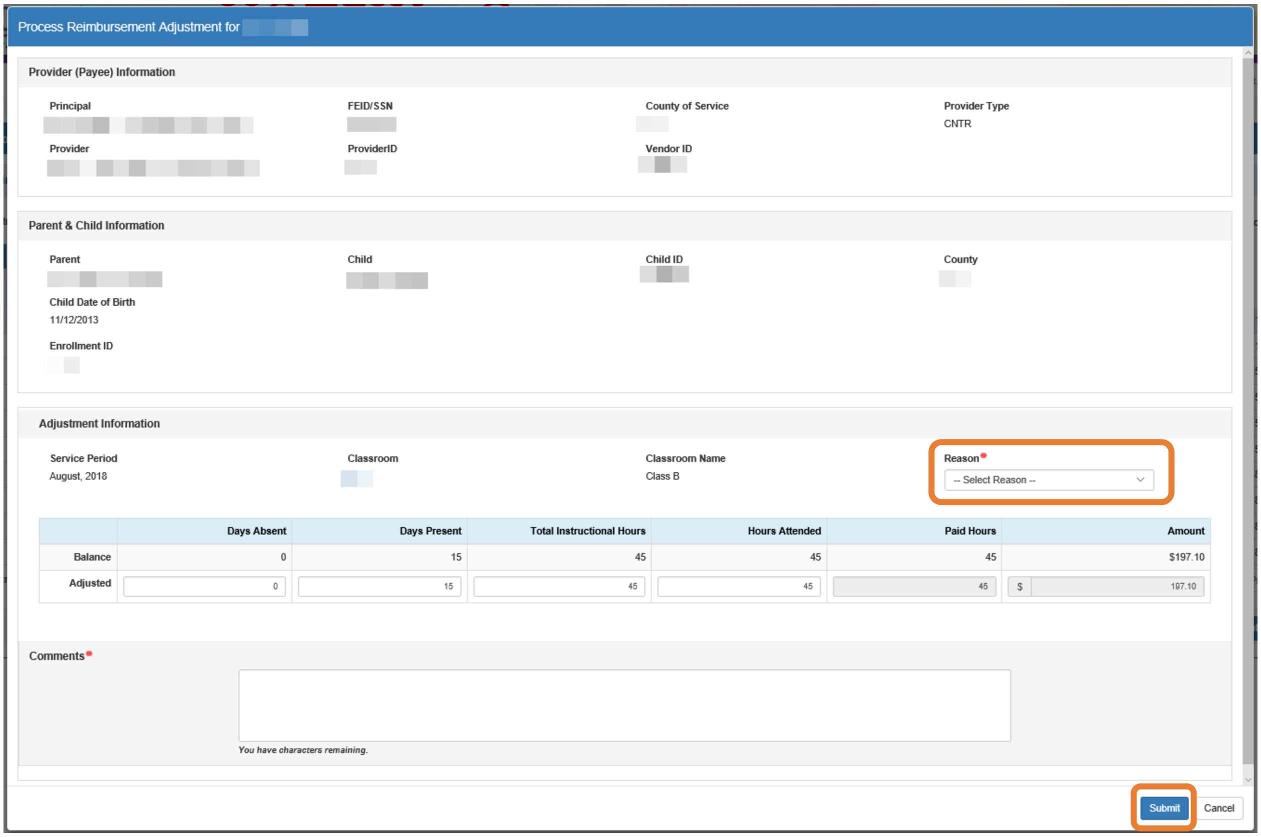


After clicking **Complete Reimbursement Processing**, the user returns to the Closed Attendance work queue.

After marking reimbursement records as needing an adjustment, they will display in the “Have Adjustment” Work Queue. To create a Current Period Adjustment, go to **Reimbursement > Adjustment Processing > Have Adjustment**. Select a record from the Have Adjustment Work Queue. Click **Create Adjustment**.



After clicking **Create Adjustment**, the Process Reimbursement Adjustment for [ELC Name] pop-up displays. The required fields are marked with an asterisk (*). On the *Adjustment Information* section, it is pre-populated with the most recent information on the record. The user will need to select the Reason from the dropdown menu, and enter a comment. User will click **Submit** to confirm the adjustment. After the adjustment is submitted, it will no longer display in the "Have Adjustment" Work Queue.



In the Adjustments Grid, the Balance row displays the summary of all adjustments for the record. The Adjusted row displays any adjustments made during this edit. In the Adjustments grid, the Days Absent, Days Present, Total Instructional Hours, Hours Attended fields are editable. The column headers in the grid are:

- Days Absent
- Days Present
- Total Instructional Hours
- Hours Attended
- Paid Hours = [(Hours Attended/.8) or Total Instructional Hours]
- Amount = [(Hours Attended/.8) or Total Instructional Hours] * VPK Rate

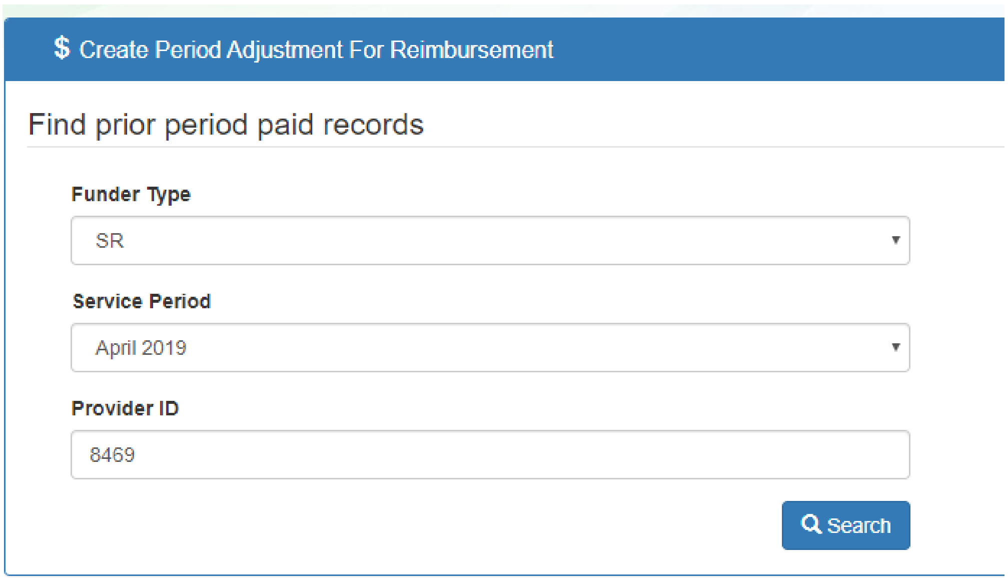
	Days Absent	Days Present	Total Instructional Hours	Hours Attended	Paid Hours	Amount
Balance	0	15	45	45	45	$197.10
Adjusted	0	15	45	45	45	$ 197.10

Prior Period Adjustments (PPA)

Coalitions can create a Prior Period Adjustment (PPA) for any attendance records that have a PAID status. To create a PPA, go to **Reimbursement > Adjustment Processing > Create Prior Period Adjustment > Create MOD Adjustment**.

Create Prior Period Adjustment for SR/Local

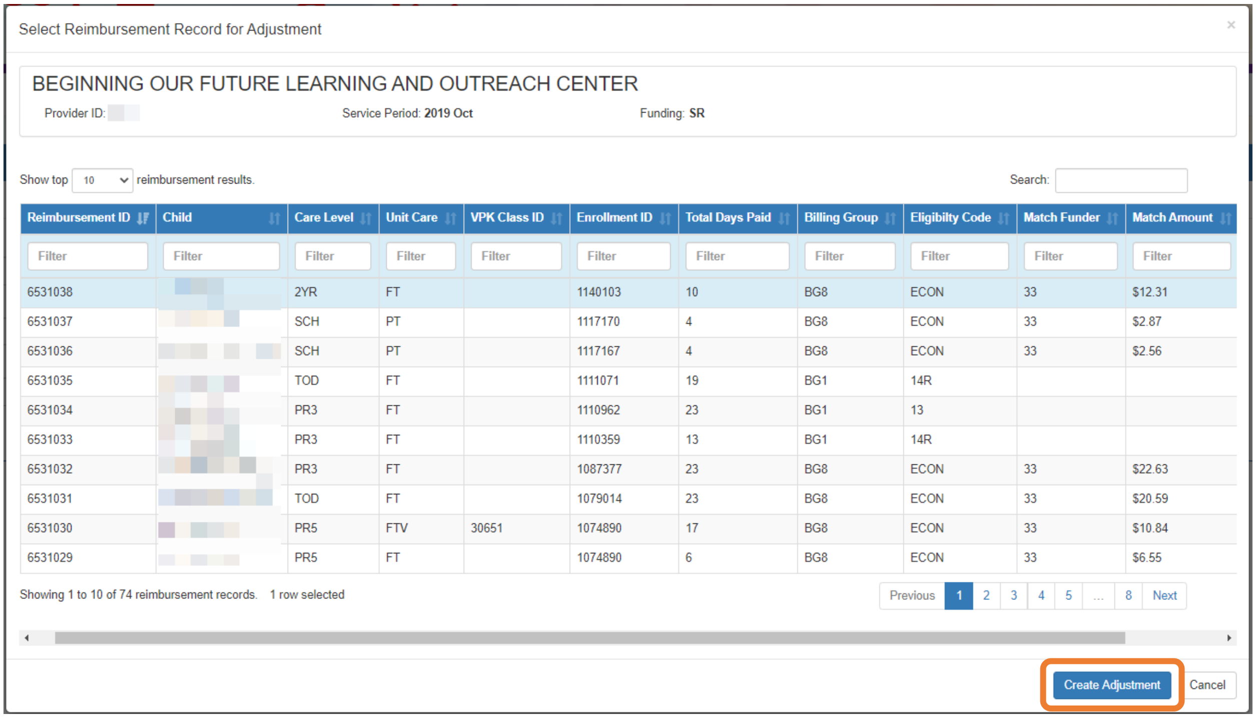
On the *Create Period Adjustment for Reimbursement* screen, users will enter in criteria to search for paid records eligible for a PPA.



Only children that have a status of PAID will display in the search results. Click on a record then click **Create Adjustment**.

The columns can be filtered and sorted.

NOTE: Prior period adjustments cannot be created for wrap (PTV, FTV) reimbursement records.


Select Reimbursement Record for Adjustment

BEGINNING OUR FUTURE LEARNING AND OUTREACH CENTER

Provider ID: Service Period: **2019 Oct** Funding: **SR**

Show top 10 reimbursement results. Search:

Reimbursement ID	Child	Care Level	Unit Care	VPK Class ID	Enrollment ID	Total Days Paid	Billing Group	Eligibilty Code	Match Funder	Match Amount
Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter
6531038		2YR	FT		1140103	10	BG8	ECON	33	$12.31
6531037		SCH	PT		1117170	4	BG8	ECON	33	$2.87
6531036		SCH	PT		1117167	4	BG8	ECON	33	$2.56
6531035		TOD	FT		1111071	19	BG1	14R		
6531034		PR3	FT		1110962	23	BG1	13		
6531033		PR3	FT		1110359	13	BG1	14R		
6531032		PR3	FT		1087377	23	BG8	ECON	33	$22.63
6531031		TOD	FT		1079014	23	BG8	ECON	33	$20.59
6531030		PR5	FTV	30651	1074890	17	BG8	ECON	33	$10.84
6531029		PR5	FT		1074890	6	BG8	ECON	33	$6.55

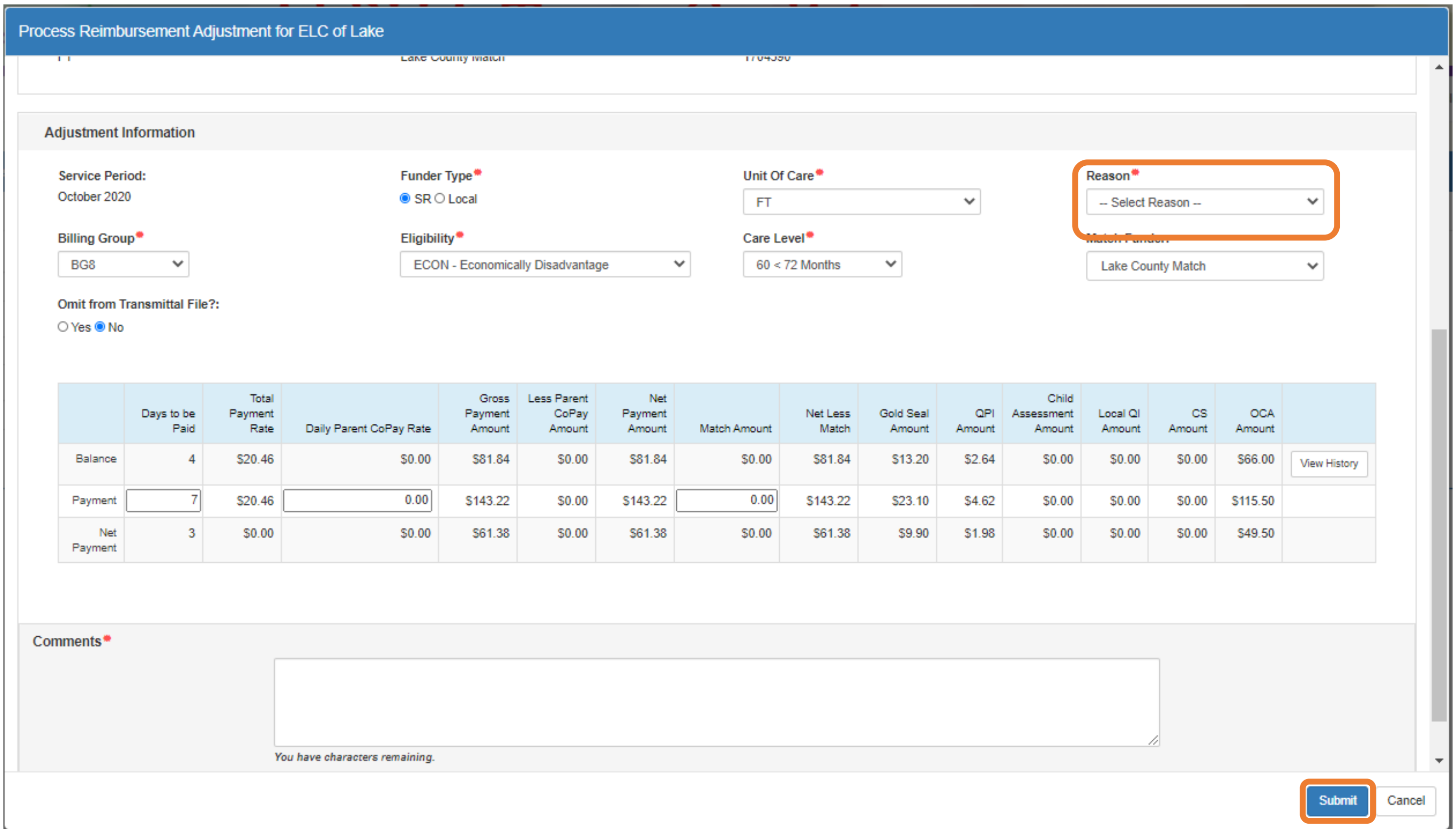
Showing 1 to 10 of 74 reimbursement records. 1 row selected

Previous 1 2 3 4 5 ... 8 Next

Create Adjustment Cancel

After clicking **Create Adjustment**, the Process Reimbursement Adjustment for [ELC Name] pop-up displays. Required fields are marked with an asterisk *. On the *Adjustment Information* section, it is pre-populated with the most recent information on the record. The user will need to select the Reason from the dropdown menu, make the adjustment changes, and enter a comment. User will click **Submit** to confirm the adjustment.

If only the Adjustment Reason and Comment are entered, a PPA will not be saved because no changes were made.



In the Adjustments Grid, the Balance row displays the summary of all adjustments/changes for the record. The Payment row displays any adjustments made during this edit. In the Adjustments grid, only the Days to be Paid, Daily Parent CoPay Rate, and Match Amount (for BG8 and CCEP only) are editable. For any changes made, the difference will show on the Net Payment row.

Any changes that will change the Total Payment Rate or OCA Code will create two rows:

- PPA (Prior Period Adjustment) – the newly adjusted amount.
- PPR (Prior Period Reversal) – the reversed amounts.

Click **View History** to see the full history of adjustments for the record.

	Days to be Paid	Total Payment Rate	Daily Parent CoPay Rate	Gross Payment Amount	Less Parent CoPay Amount	Net Payment Amount	Match Amount	Net Less Match	Gold Seal Amount	QPI Amount	Child Assessment Amount	Local QI Amount	CS Amount	OCA Amount	
Balance	4	$20.46	$0.00	$81.84	$0.00	$81.84	$0.00	$81.84	$13.20	$2.64	$0.00	$0.00	$0.00	$66.00	View History
Payment	7	$20.46	0.00	$143.22	$0.00	$143.22	0.00	$143.22	$23.10	$4.62	$0.00	$0.00	$0.00	$115.50	
Net Payment	3	$0.00	$0.00	$61.38	$0.00	$61.38	$0.00	$61.38	$9.90	$1.98	$0.00	$0.00	$0.00	$49.50	

The column headers in the grid for years 2018-2019 and prior are:

- Days to be Paid
- Total Payment Rate
- Daily Parent CoPay Rate
- Gross Payment Amount = [Days to be Paid * Total Payment Rate]
- Less Parent CoPay Amount = [Days to be Paid * Daily Parent CoPay Rate]
- Net Payment Amount = [Gross Payment Amount – Less Parent CoPay Amount]
- Match Amount (only editable if the Billing Group is BG8 or CCEP)
- Net Less Match = [Net Payment Amount – Match Amount]
- Gold Seal Amount = [Days to be Paid * Gold Seal Amount (*from SR Rate Plan*)]
- PFP Amount = [Days to be Paid * PFP Amount (*from SR Rate Plan*)]
- PFP CA Amount = [Days to be Paid * PFP CA Amount (*from SR Rate Plan*)]
- Local QI Amount = [Days to be Paid * Local QI Amount (*from SR Rate Plan*)]
- CS Amount = [Days to be Paid * CS Amount (*from SR Rate Plan*)]
- OCA Amount
  - CCEP Billing Group = [Net Less Match – (PFP Amount + PFP CA Amount + Local QI Amount + CS Amount)]
  - All other Billing Groups = [Net Less Match – (Gold Seal + PFP Amount + PFP CA Amount + Local QI Amount + CS Amount)]

The column headers in the grid for years 2019-2020 and forward are:

- Days to be Paid
- Total Payment Rate
- Daily Parent CoPay Rate
- Gross Payment Amount = [Days to be Paid * Total Payment Rate]
- Less Parent CoPay Amount = [Days to be Paid * Daily Parent CoPay Rate]
- Net Payment Amount = [Gross Payment Amount – Less Parent CoPay Amount]
- Match Amount (only editable if the Billing Group is BG8 or CCEP)
- Net Less Match = [Net Payment Amount – Match Amount]
- Gold Seal Amount = [Days to be Paid * Gold Seal Amount (*from SR Rate Plan*)]

- QPI Amount = [Days to be Paid * QPI Amount (*from SR Rate Plan*)]
- Child Assessment Amount = [Days to be Paid * Child Assessment Amount (*from SR Rate Plan*)]
- Local QI Amount = [Days to be Paid * Local QI Amount (*from SR Rate Plan*)]
- CS Amount = [Days to be Paid * CS Amount (*from SR Rate Plan*)]
- OCA Amount
    - CCEP Billing Group = [Net Less Match – (QPI Amount + Child Assessment Amount + Local QI Amount + CS Amount)]
    - All other Billing Groups = [Net Less Match – (Gold Seal + QPI Amount + Child Assessment Amount + Local QI Amount + CS Amount)]

After clicking **View History**, in the below example, the Adjustments History grid shows that this record has had one adjustment saved. The PPA will display. If there was a change in OCA Code or Daily Payment Rate, the PPR row will show. The amounts deducted display in red text. The Adjustments History is sorted by Reimbursement Detail ID (oldest to newest). The Total row displays the calculated amounts based on all adjustments. The Total row information is also what displays in the Balance row on the Adjustments grid.

Adjustments History

	Days to be Paid	Total Payment Rate	Daily Parent CoPay Rate	Gross Payment Amount	Less Parent CoPay Amount	Net Payment Amount	Match Amount	Net Less Match	Gold Seal Amount	QPI Amount	Child Assessment Amount	Local QI Amount	CS Amount	OCA Amount	Status	Type	Billing Group Code	Eligibility Code	Care Level Type Code	Unit Of Care	Match Funder ID
	4	$20.46	$0.00	$81.84	$0.00	$81.84	$0.00	$81.84	$13.20	$2.64	$0.00	$0.00	$0.00	$66.00	PAID	MTH	BG8	ECON	PR5	FT	371
	-4	$20.46	$0.00	-$81.84	$0.00	-$81.84	$0.00	-$81.84	-$13.20	-$2.64	$0.00	$0.00	$0.00	-$66.00	PENDING	PPR	BG8	ECON	PR5	FT	371
	7	$20.46	$0.00	$143.22	$0.00	$143.22	$0.00	$143.22	$23.10	$4.62	$0.00	$0.00	$0.00	$115.50	PENDING	PPA	BG8	SRMT	PR5	FT	371
Final	7	$20.46	$0.00	$143.22	$0.00	$143.22	$0.00	$143.22	$23.10	$4.62	$0.00	$0.00	$0.00	$115.50							

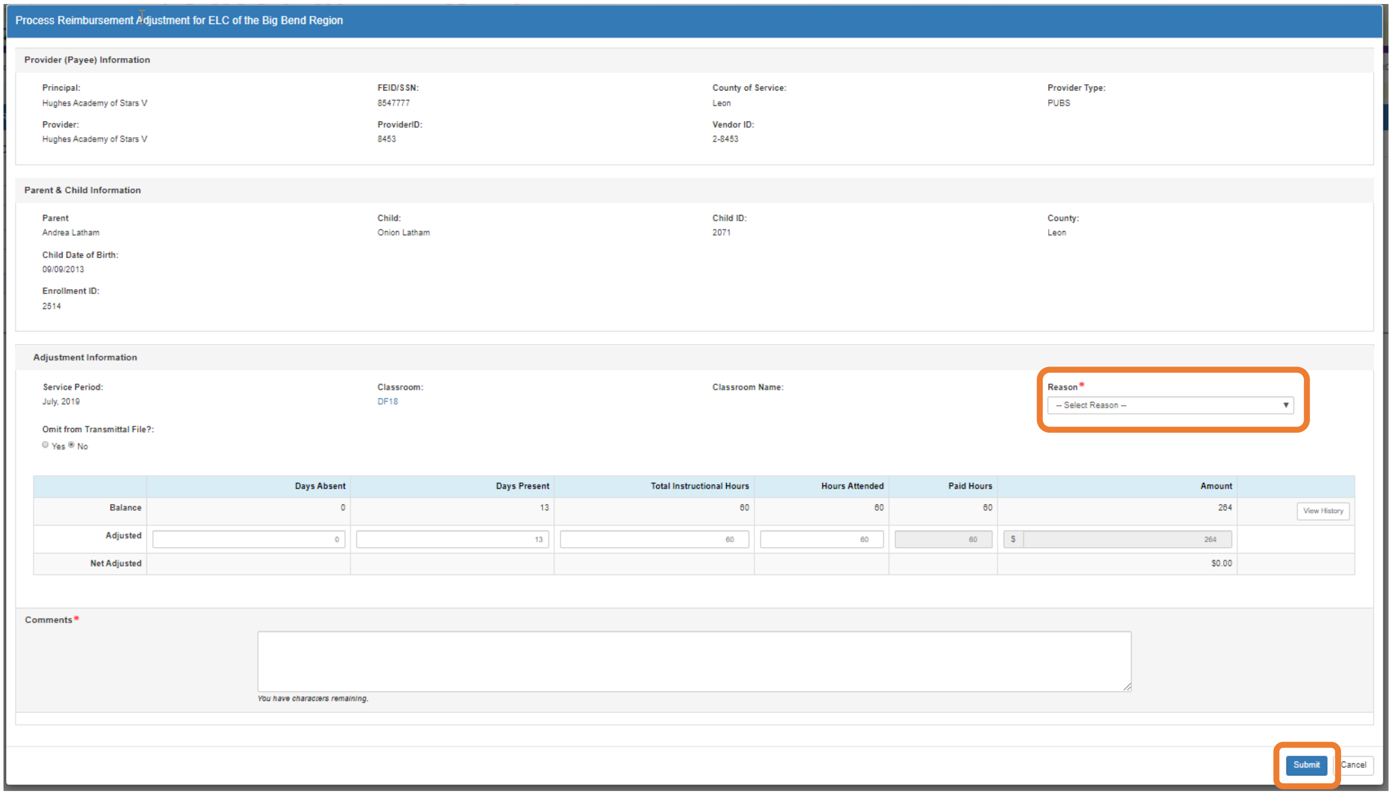
Ok

	Days to be Paid	Total Payment Rate	Daily Parent CoPay Rate	Gross Payment Amount	Less Parent CoPay Amount	Net Payment Amount	Match Amount	Net Less Match	Gold Seal Amount	QPI Amount	Child Assessment Amount	Local QI Amount	CS Amount	OCA Amount	
Balance	7	$20.46	$0.00	$143.22	$0.00	$143.22	$0.00	$143.22	$23.10	$4.62	$0.00	$0.00	$0.00	$115.50	View History
Payment	7	$20.46	0.00	$143.22	$0.00	$143.22	0.00	$143.22	$23.10	$4.62	$0.00	$0.00	$0.00	$115.50	
Net Payment															

After clicking **Create Adjustment**, in the above example, the confirmation modal displays. After the adjustment is saved, it is saved in a PENDING status and is available in the Pending Adjustment Work Queue.

Create Prior Period Adjustment for VPK

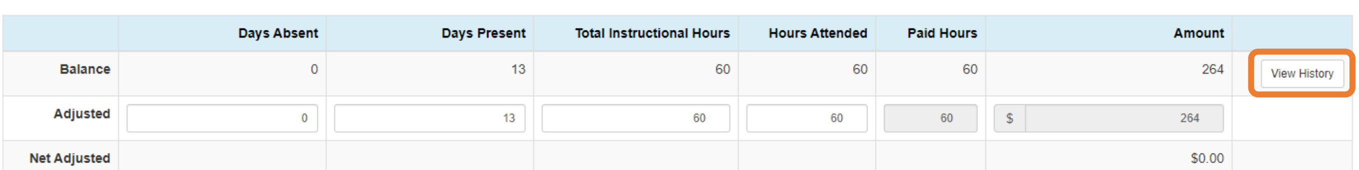
After clicking the **Create Adjustment** button, the Process Reimbursement Adjustment for [ELC Name] pop-up displays. Required fields are marked with an asterisk *. On the *Adjustment Information* section, it is pre-populated with the most recent information on the record. The user will need to select the Reason from the dropdown menu, and enter a comment. User will click the **Submit** button to confirm the adjustment.



In the Adjustments Grid, the Balance row displays the summary of all adjustments for the record. The Adjusted row displays any adjustments made during this edit. In the Adjustments grid, the Days Absent, Days Present, Total Instructional Hours, Hours Attended fields are editable. Click **View History** to see the full history of adjustments for the record.

The column headers in the grid are:

- Days Absent
- Days Present
- Total Instructional Hours
- Hours Attended
- Paid Hours = [(Hours Attended/.8) or Total Instructional Hours]
- Amount = [(Hours Attended/.8) or Total Instructional Hours] * VPK Rate

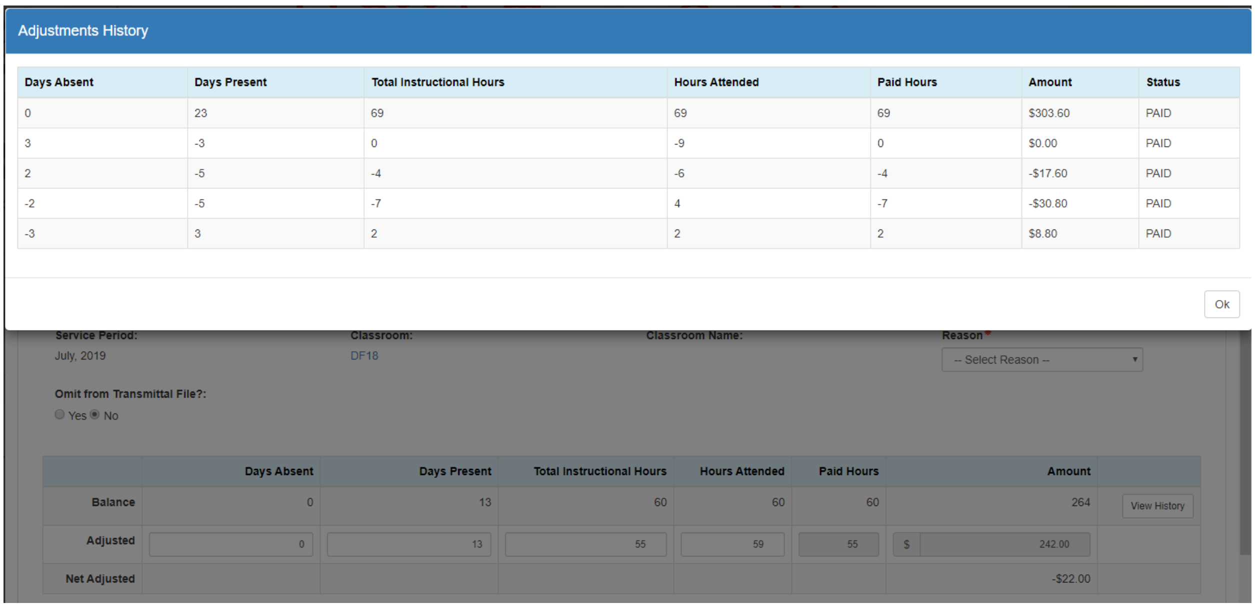


	Days Absent	Days Present	Total Instructional Hours	Hours Attended	Paid Hours	Amount	
Balance	0	13	60	60	60	264	View History
Adjusted	0	13	60	60	60	$ 264	
Net Adjusted						$0.00	

After clicking **View History**, in the below example, the Adjustments History grid shows that this record has had multiple adjustments saved. The Adjustments History is sorted by Reimbursement Detail ID (oldest to newest). The Total row displays the calculated amounts based on all adjustments. The Total row information is also what displays in the Balance row on the Adjustments grid.

The column headers in the Adjustments History grid are:

- Days Absent
- Days Present
- Total Instructional Hours
- Hours Attended
- Paid Hours = [(Hours Attended/.8) or Total Instructional Hours]
- Amount = [(Hours Attended/.8) or Total Instructional Hours] * VPK Rate


Adjustments History

Days Absent	Days Present	Total Instructional Hours	Hours Attended	Paid Hours	Amount	Status
0	23	69	69	69	$303.60	PAID
3	-3	0	-9	0	$0.00	PAID
2	-5	-4	-6	-4	-$17.60	PAID
-2	-5	-7	4	-7	-$30.80	PAID
-3	3	2	2	2	$8.80	PAID

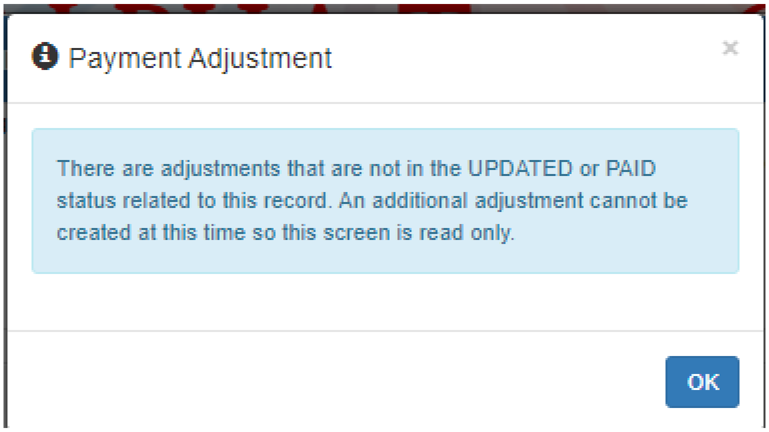
Ok

Service Period: July, 2019
Classroom: DF18
Classroom Name:
Reason * -- Select Reason --
Omit from Transmittal File?: Yes No

	Days Absent	Days Present	Total Instructional Hours	Hours Attended	Paid Hours	Amount	
Balance	0	13	60	60	60	264	View History
Adjusted	0	13	55	59	55	$ 242.00	
Net Adjusted						-$22.00	

Pending Adjustments

If there are Adjustments pending approval and not in PAID status, then an additional adjustment cannot be created for the record. If a record with a Pending Adjustment is selected, then a pop-up opens notifying the user that there is a Pending Adjustment. A record is related by the Reimbursement Detail ID. For example: if the January attendance for a child is PAID, then a Prior Period Adjustment is created and saved; another Prior Period Adjustment for this record cannot be created until the first PPA is in PAID status.



Pending Adjustment Work Queue

Any adjustments that are created will be in the Pending Adjustment Work Queue: **Reimbursement > Adjustment Processing > Adjustments Pending Approval**. The Pending Adjustment Work Queue allows the Coalition to review and approve any adjustments.

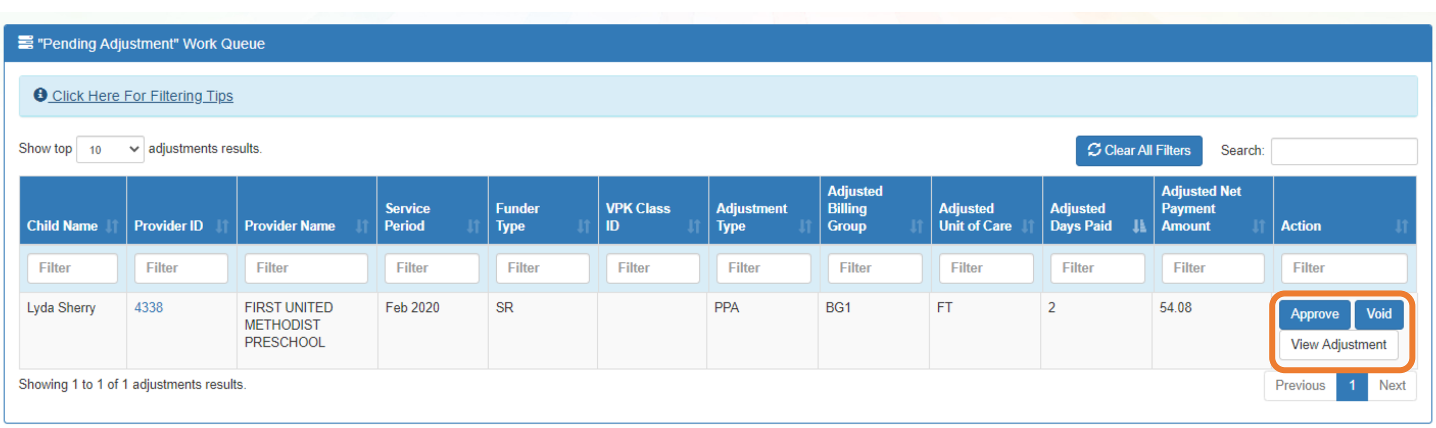
The different type of adjustments (MTH, PPA, LIA) all show in the Pending Adjustment Work Queue after they are created. The PPRs will not show on the Pending Adjustment Work Queue. The columns can be sorted and filtered using the column headers.

Click the **Approve** button to change the status from Pending to Payment Verified.

- After the adjustment is approved it will show in the Payment Verified Work Queue.

Click the **Void** button to delete the adjustment.

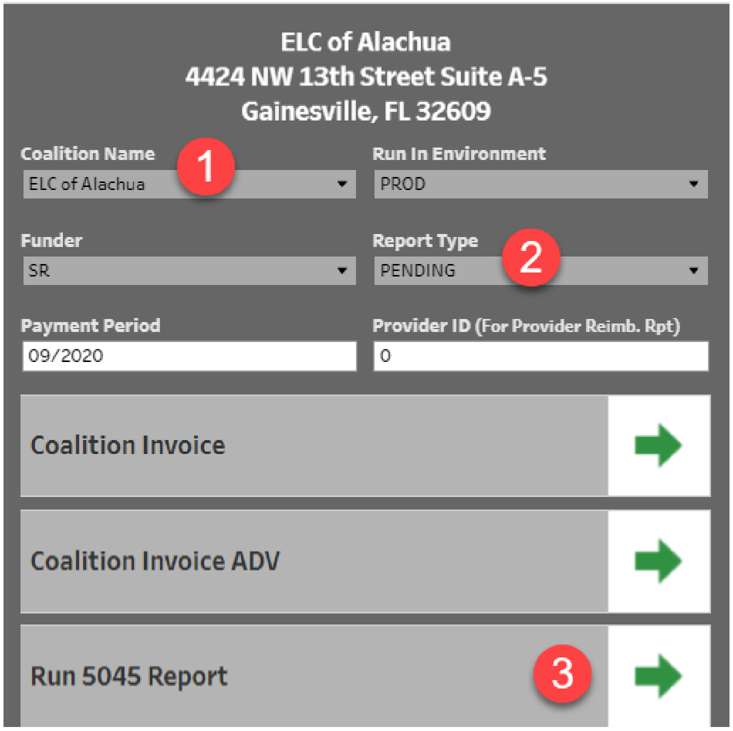
Click the **View Adjustment** button to see the details of the adjustment.



Pending Adjustments – 5045 Review

Before approving the pending adjustments, the 5045 can be reviewed to confirm the changes.

Open Tableau: https://oel-reports.floridaearlylearning.com/#/home and search for the Financial Report Generator.



1. Select your Coalition
    a. Select Funder
2. Set the Report Type to Pending to view the Pending Adjustments
3. Click the Run 5045 Report

View the Detail report to see adjustments and confirm the changes are as expected.

- The new detail type of PPR (Prior Period Reversal) will display if applicable with a related PPA.
- If the results are correct, then approve the adjustment in the Pending Adjustment Work Queue.
- If the adjustment is incorrect, then the adjustment can be voided and recreated correctly.

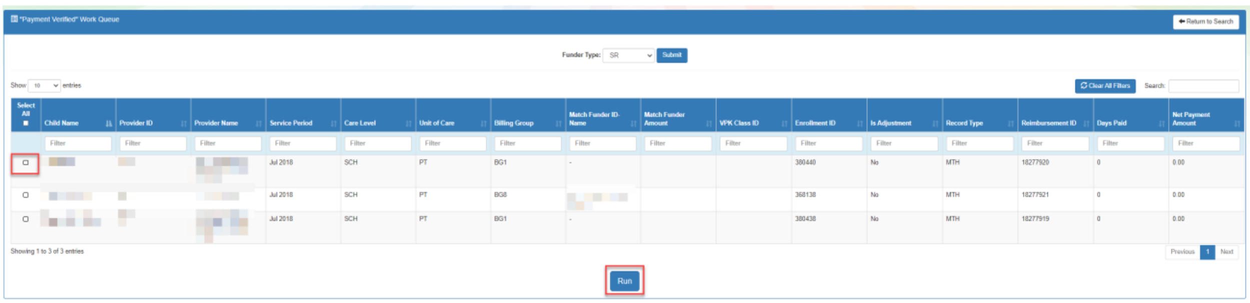
The approved adjustments will now display on the Payment Verified Work Queue. This can include attendance that is approved.

Payment Verified Work Queue

The Payment Verified Work Queue shows all records with a status of Payment Verified: **Reimbursement > Attendance Processing > View Payment Verified**.

The Payment Verified Work Queue shows the following record types:

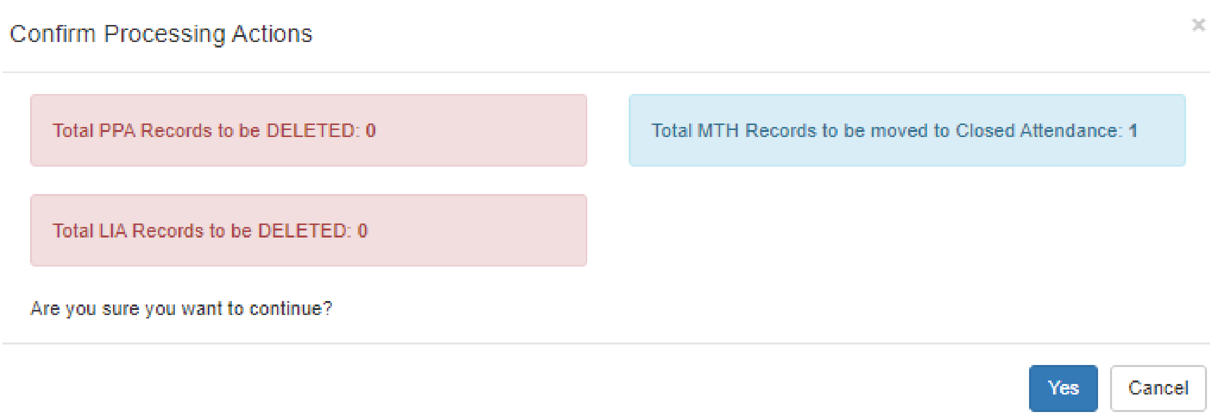
- MTH (approved from Closed Attendance)
- PPA
- LIA
- EOC/EOCR – VPK End of Class Records
- CAA/CAR – Child Assessment



Records will only display in the Payment Verified Work Queue during the open payment period. The records can be Updated or when the payment period is closed.

After selecting one or more records to remove from the Payment Verified work queue, clicking the **<u>Run</u>** button opens the confirmation pop-up window. The confirmation pop-up shows the number of records that are impacted and the action that will be taken:

- PPA records will be deleted
- LIA records will be deleted
- MTH records will be moved to closed attendance



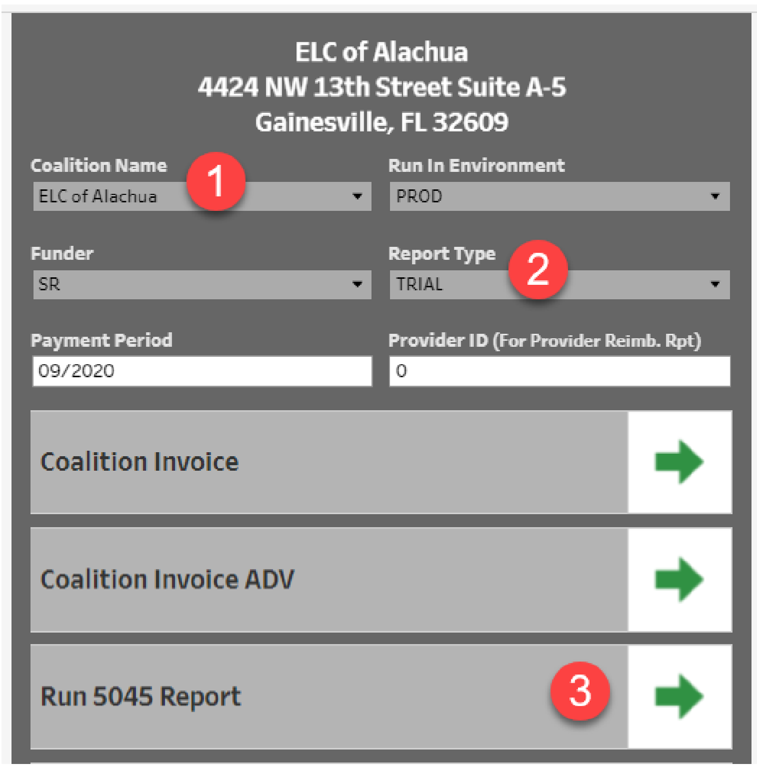
5045 Review

The 5045 can be reviewed to confirm the changes.

Open Tableau: https://oel-reports.floridaearlylearning.com/#/home and search for the Financial Report Generator.

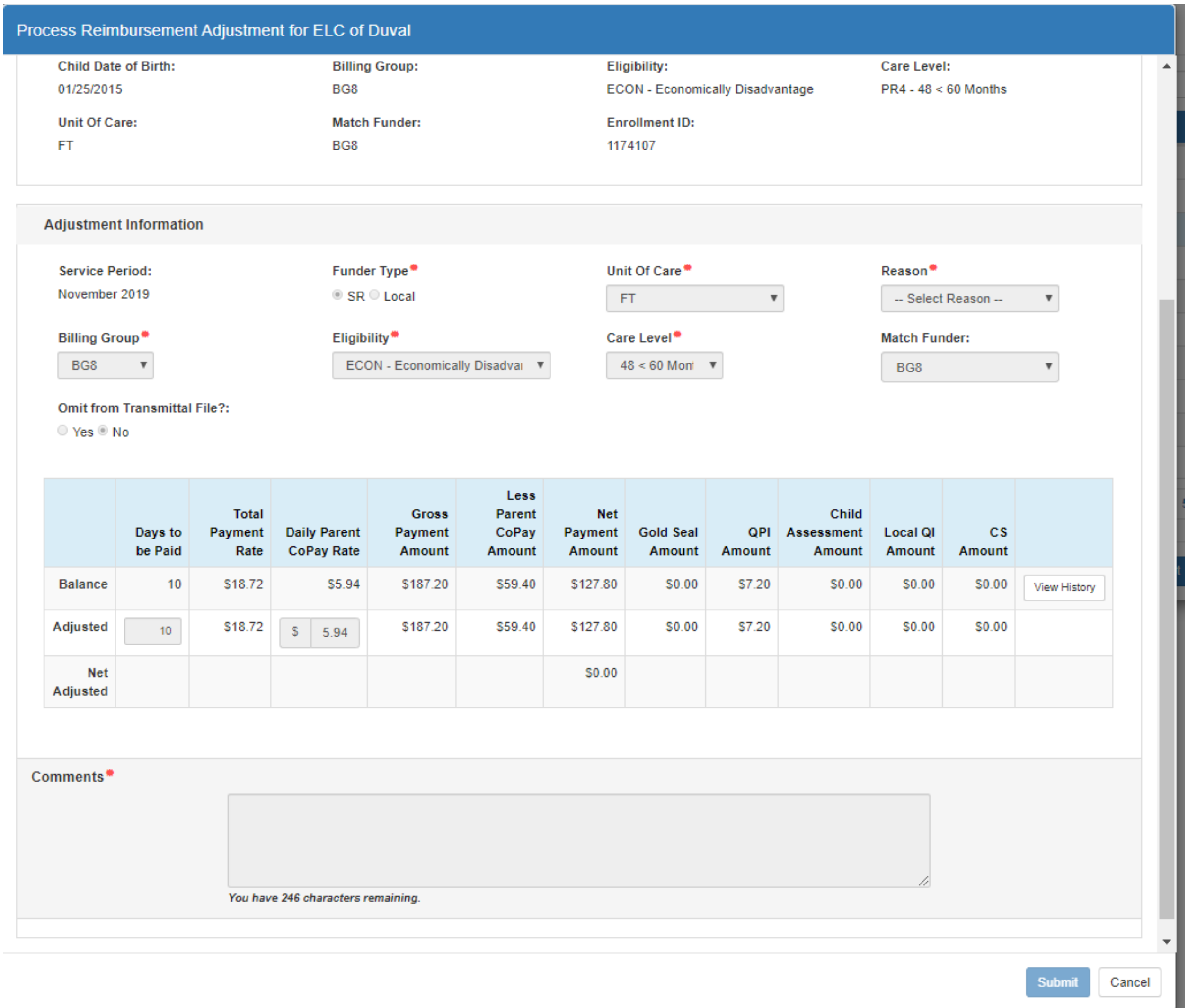
1. Select your Coalition
    a. Select Funder
2. Set the Report Type to Trial to view the records in Payment Verified status
3. Click the Run 5045 Report

Review the Detail report to see records.



The screen will be read-only until the Adjustment is in the Updated or Paid status.

The PPA screen will display as read-only, and the **Submit** button is deactivated if there is a Pending Adjustment.


Process Reimbursement Adjustment for ELC of Duval

Child Date of Birth: 01/25/2015
Billing Group: BG8
Eligibility: ECON - Economically Disadvantage
Care Level: PR4 - 48 < 60 Months
Unit Of Care: FT
Match Funder: BG8
Enrollment ID: 1174107

Adjustment Information

Service Period: November 2019
Funder Type: SR Local
Unit Of Care: FT
Reason: -- Select Reason --
Billing Group: BG8
Eligibility: ECON - Economically Disadvai
Care Level: 48 < 60 Mon
Match Funder: BG8
Omit from Transmittal File?: Yes No

	Days to be Paid	Total Payment Rate	Daily Parent CoPay Rate	Gross Payment Amount	Less Parent CoPay Amount	Net Payment Amount	Gold Seal Amount	QPI Amount	Child Assessment Amount	Local QI Amount	CS Amount	
Balance	10	$18.72	$5.94	$187.20	$59.40	$127.80	$0.00	$7.20	$0.00	$0.00	$0.00	View History
Adjusted	10	$18.72	$ 5.94	$187.20	$59.40	$127.80	$0.00	$7.20	$0.00	$0.00	$0.00	
Net Adjusted						$0.00						

Comments

You have 246 characters remaining.

Submit Cancel

Line Item Adjustments (LIA)

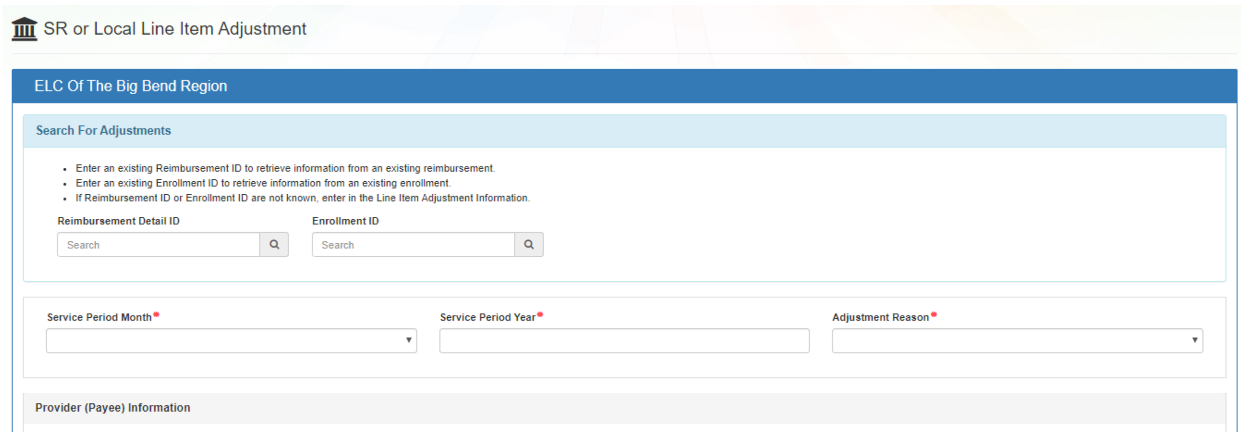
Coalitions can create Line Item Adjustments (LIA) for a reimbursement record. The LIA can add or create a new record, which may or may not be EFS Mod-generated records. Adjustments can add a new entry or reverse out an entry.

SR or Local Line Item Adjustments

To create a Line Item Adjustment, navigate to **Reimbursement > Adjustment Processing > Create Line Item Adjustment > SR/Local**

Any saved line item adjustments will be processed in the currently open payment period.

Required fields are marked with an asterisk *. A record does not have to be in EFS Mod to create a line item adjustment. Clicking the **Submit** button opens the SR Line Item Adjustment modal.



Search

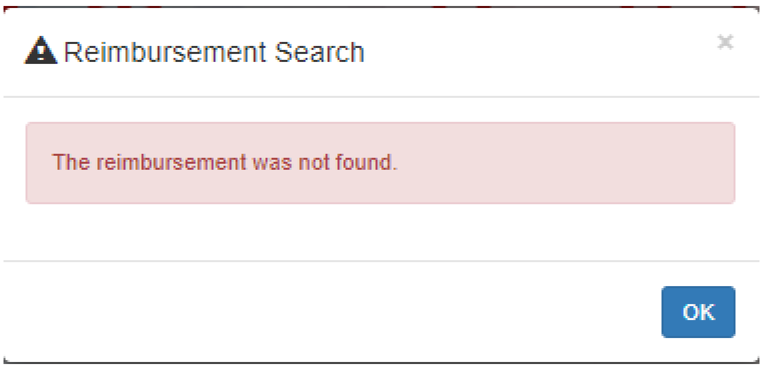
Before creating a Line Item Adjustment, search using the Reimbursement Detail ID or the Enrollment ID. Reimbursement Detail ID is available on the 5045 detail download.

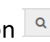
Enter the Reimbursement Detail ID and click on the search icon to populate the record with the available information:

- Service Period Month
- Service Period Year
- Provider ID
- Name of Provider
- Principal ID
- Name of Principal
- Vendor ID
- Provider Type
- Provider County
- Child ID
- Name of Child
- Name of Parent
- County of Parent
- Enrollment ID (dropdown selection of available enrollment dates)
- Purpose of Care
- Funding Type

- Unit of Care
- Billing Group
- Eligibility
- Care Level
- Days to be Paid
- Total Payment Rate
- Match Amount

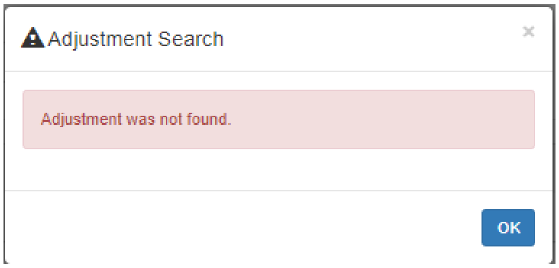
NOTE: If Reimbursement ID is used to search, and there is a Pending Adjustment, then a pop-up will display. Click the OK button and search again. A Line Item Adjustment cannot be created with through the Reimbursement ID search until the Pending Adjustment for the Reimbursement ID is in PAID status.



The Enrollment ID can be found on the Eligibility screen. Enter the Enrollment ID and click on the search icon  to populate the record with the available information:

- Service Period Month
- Service Period Year
- Provider ID
- Name of Provider
- Principal ID
- Name of Principal
- Vendor ID
- Provider Type
- Provider County
- Child ID
- Name of Child
- Name of Parent
- County of Parent
- Enrollment ID
- Purpose of Care

If a search result is not found, then the Adjustment Search pop up message opens. Clicking **OK** will close the Adjustment Search message.

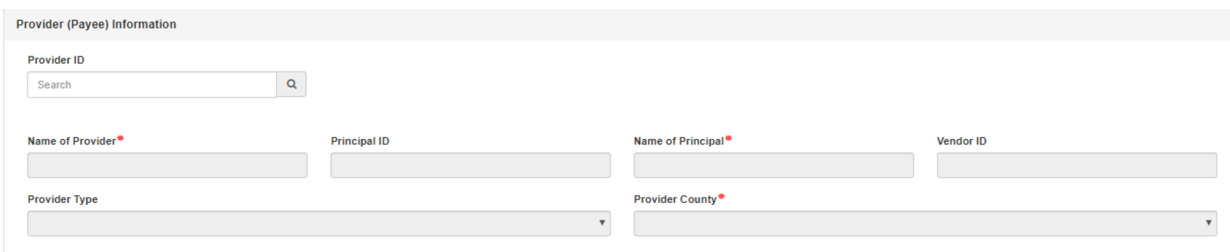


If the Reimbursement Detail ID or Enrollment ID are not known, then enter the Service Period Month and Service Period Year. The Service Period Year must be between 1990 and the current year. Select the Adjustment Reason from the dropdown menu. Select Restitution if the LIA will have a Service Period prior to 7/1/2018.

Provider (Payee) Information

Service Period After 7/1/2018

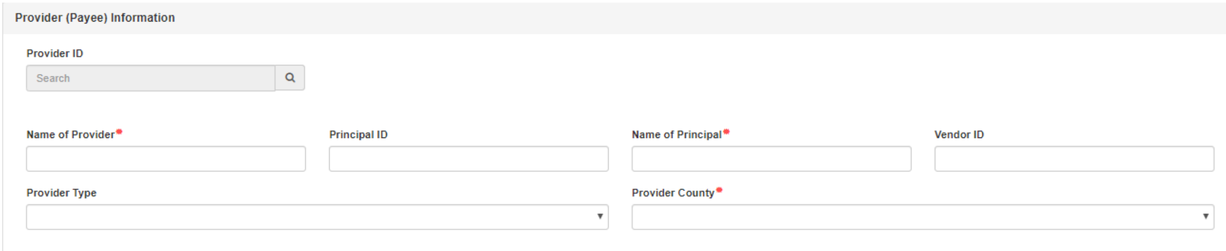
Required fields are marked with an asterisk *. If the Service Period is 7/1/2018 or after, then the Provider ID search will be available, see the screen below. If the Service Period is prior to 7/1/2018, then the Provider ID will not be required. If the Reimbursement Detail ID or Enrollment ID are entered in the search at the top of the screen, then Provider Information will pre-populate.



Service Period Prior to 7/1/2018

Required fields are marked with an asterisk *. If the Service Period is prior to 7/1/2018, then the Provider ID search will not be available, see the screen below. If the Service Period is prior to 7/1/2018 and the Adjustment Reason is Restitution, then the Provider ID will not be required.

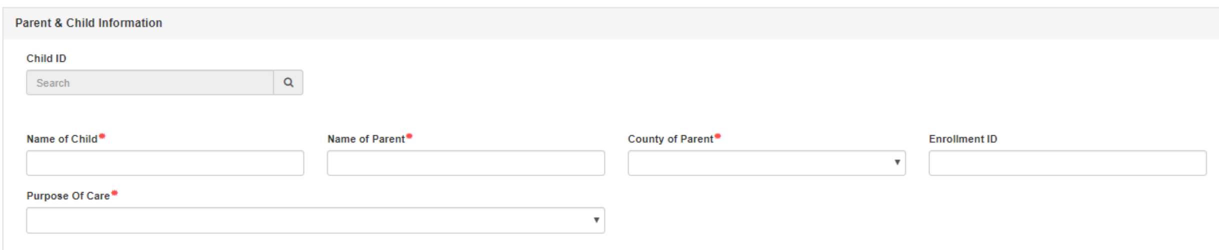
- The Name of Provider is a text field. If a Provider ID is entered, it must match a current Provider ID in EFS Mod. If the Provider ID does not match a current Provider ID in EFS Mod, then the LIA will not save.
- The Name of Principal is a text field. If a Principal ID is entered, it must match a current Principal ID in EFS Mod. If the Principal ID does not match a current Principal ID in EFS Mod, then the LIA will not save.
- The Vendor ID is an alphanumeric field. The Vendor ID is the Taxpayer ID Number, which can be found on the Provider's Business Info screen.
- The Provider Type dropdown field displays the available Provider Types.
- The Provider County dropdown displays all Florida counties.



Parent & Child Information

Service Period After 7/1/2018

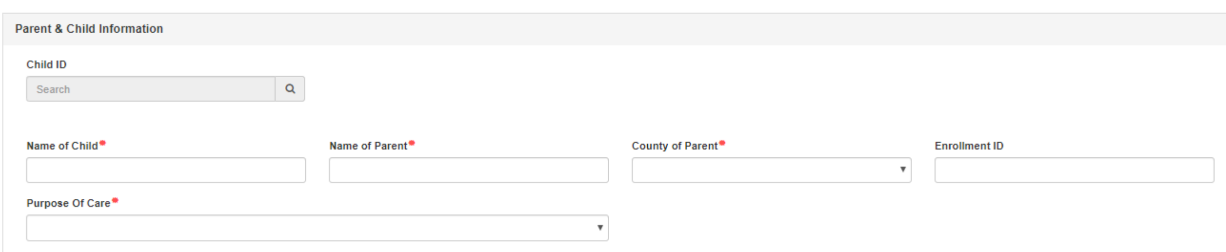
Required fields are marked with an asterisk *. If the Service Period is 7/1/2018 or after, then the Child ID search will be available, see the screen below. If the Service Period is prior to 7/1/2018, then the Child ID will not be required. If the Reimbursement Detail ID or Enrollment ID are entered in the search at the top of the screen, then Parent & Child Information will pre-populate. The Enrollment ID will be a dropdown menu and display any enrollment dates the child was enrolled.



Service Period Prior to 7/1/2018

Required fields are marked with an asterisk *. If the Service Period is prior to 7/1/2018, then the Child ID search will not be available, see the screen below. If the Service Period is prior to 7/1/2018 and the Adjustment Reason is Restitution, then the Child ID will not be required.

- The Name of Child is a text field.
- The Name of Parent is a text field.
- The County of Parent dropdown displays all Florida counties.
- If an Enrollment ID is entered, it must match a current Enrollment ID in EFS Mod. If the Enrollment ID does not match a current Enrollment ID in EFS Mod, then the LIA will not save.
- The Purpose of Care dropdown field displays the available Purposes of Care.



Adjustment Information

Service Period After 7/1/2018

Required fields are marked with an asterisk *. If the Reimbursement Detail ID or Enrollment ID are entered in the search at the top of the screen, then Adjustment Information will pre-populate.

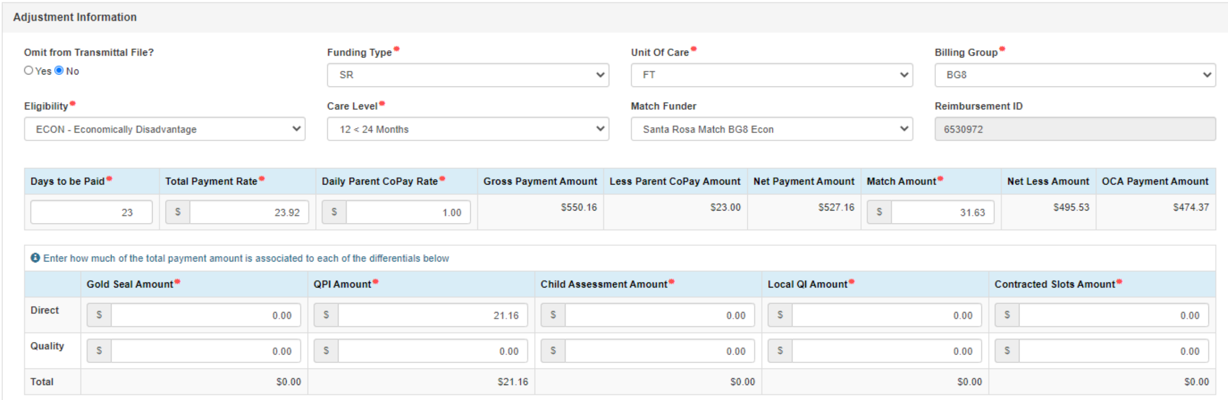
- The Funding Type dropdown field displays the available Funding Types (SR or Local).
- The Service Period Month dropdown field displays the available Months.
- The Service Period Year is a numeric field. Users can save entries between 1990 and the current year.
- The Unit of Care dropdown field displays the available Units of Care.
- The Billing Group dropdown field displays the available Billing Groups.
- The Eligibility dropdown field displays the available Eligibility.
- The Care Level dropdown field displays the available Care Levels.
- The Match Funder dropdown field displays available Match Funders.
- The Days to be Paid can be a positive or negative number. The Days to be Paid cannot be 0.
- The Total Payment Rate is the daily payment rate. The Total Payment Rate must be between $0.00 and $100.00.
- The Daily Parent CoPay Rate must be greater than or equal to $0.00.
- The Gross Payment Amount is a calculated field. [Total Payment Rate * Days to be Paid]
- The Less Parent CoPay Amount is a calculated field. [Daily Parent CoPay Rate * Days to be Paid]
- The Net Payment Amount is a calculated field. [Gross Payment Amount – Less Parent CoPay Amount}
- The Match Amount is the amount paid by a Match.
- The Net Less Match is a calculated field. [Net Payment Amount – Match Amount]
- OCA Amount is a calculated field.
    - CCEP Billing Group = [Net Less Match – (QPI Amount + Child Assessment Amount + Local QI Amount + CS Amount)]
    - All other Billing Groups = [Net Less Match – (Gold Seal + QPI Amount + Child Assessment Amount + Local QI Amount + CS Amount)]

The differentials grid will allow the entry of any adjustments for the following:

a. 2018-2019 and Prior Years
    i. Gold Seal Amount
    ii. PFP Amount
    iii. PFP CA Amount
    iv. QI Amount
    v. CS Amount
b. 2019-2020 and Future Years
    i. Gold Seal Amount
    ii. QPI Amount
    iii. Child Assessment Amount
    iv. Local QI Amount
    v. CS Amount

For 2019-2020 and future years, the differentials have under and over fields.

The Comments field is a text field.



Service Period prior to 7/1/2018

Required fields are marked with an asterisk *.

- The Omit from Transmittal File will default to Yes for legacy LIA records.
- The Funding Type dropdown field displays the available Funding Types (SR or Local).
- The Service Period Month dropdown field displays the available Months.
- The Service Period Year is a numeric field. Users can save entries between 1990 and the current year.
- The Unit of Care dropdown field displays the available Units of Care.
- The Billing Group dropdown field displays the available Billing Groups.
- The Eligibility dropdown field displays the available Eligibility.
- The Care Level dropdown field displays the available Care Levels.
- The Match Funder dropdown field displays available Match Funders.
- The Days to be Paid can be a positive or negative number. The Days to be Paid cannot be 0.
- The Total Payment Rate is the daily payment rate. The Total Payment Rate must be between $0.00 and $100.00.
- The Daily Parent CoPay Rate must be greater than or equal to $0.00.
- The Gross Payment Amount is a calculated field. [Total Payment Rate * Days to be Paid]
- The Less Parent CoPay Amount is a calculated field. [Daily Parent CoPay Rate * Days to be Paid]
- The Net Payment Amount is a calculated field. [Gross Payment Amount – Less Parent CoPay Amount}
- The Match Amount is the amount paid by a Match.
  - The Match Amount is only editable if the Billing Group is BG8 or CCEP
- The Net Less Match is a calculated field. [Net Payment Amount – Match Amount]
- OCA Amount is a calculated field.
  - CCEP Billing Group = [Net Less Match – (QPI Amount + Child Assessment Amount + Local QI Amount + CS Amount)]
  - All other Billing Groups = [Net Less Match – (Gold Seal + QPI Amount + Child Assessment Amount + Local QI Amount + CS Amount)]

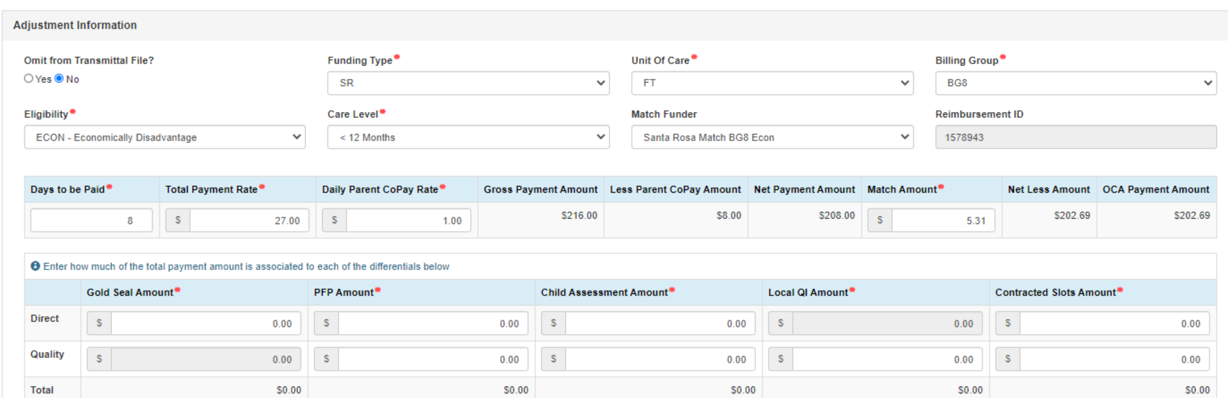
The differentials grid will allow the entry of any adjustments for

a. 2018-2019 and Prior Years
   i. Gold Seal Amount
      1. Direct (Under)
   ii. PFP Amount
      1. Direct (Under)
      2. Quality (Over)
   iii. Child Assessment Amount

            1. Direct (Under)
            2. Quality (Over)
        iv. Local QI Amount
            1. Quality (Over)
        v. Contracted Slots Amount
            1. Direct (Under)
            2. Quality (Over)
    b. 2019-2020 and Future Years
        i. Gold Seal Amount
            1. Direct (Under)
            2. Quality (Over)
        ii. QPI Amount
            1. Direct (Under)
            2. Quality (Over)
        iii. Child Assessment Amount
            1. Direct (Under)
            2. Quality (Over)
        iv. Local QI Amount
            1. Direct (Under)
            2. Quality (Over)
        v. Contracted Slots Amount
            1. Direct (Under)
            2. Quality (Over)

For 2019-2020 and future years, the differentials have under and over fields.

The Comments field is a text field.


Adjustment Information

Omit from Transmittal File? Yes No

Funding Type* SR

Unit Of Care* FT

Billing Group* BG8

Eligibility* ECON - Economically Disadvantage

Care Level* < 12 Months

Match Funder Santa Rosa Match BG8 Econ

Reimbursement ID 1578943

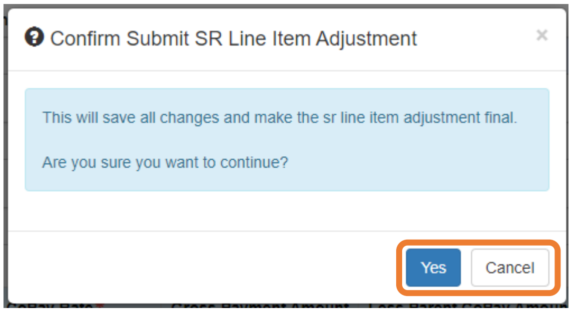
Days to be Paid*	Total Payment Rate*	Daily Parent CoPay Rate*	Gross Payment Amount	Less Parent CoPay Amount	Net Payment Amount	Match Amount*	Net Less Amount	OCA Payment Amount
8	$ 27.00	$ 1.00	$216.00	$8.00	$208.00	$ 5.31	$202.69	$202.69

Enter how much of the total payment amount is associated to each of the differentials below

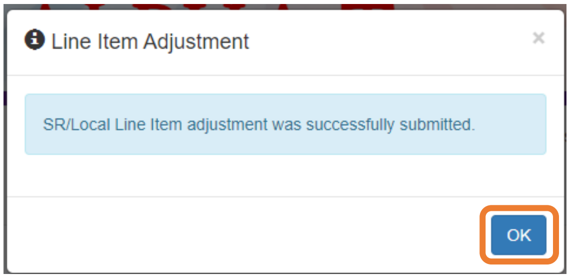
	Gold Seal Amount*	PFP Amount*	Child Assessment Amount*	Local QI Amount*	Contracted Slots Amount*
Direct	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00
Quality	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00
Total	$0.00	$0.00	$0.00	$0.00	$0.00

Confirmation Modal

Clicking the **Yes** button will save the adjustment and open the Line Item Adjustment modal. Clicking the **Cancel** button will discard any changes and close the modal.



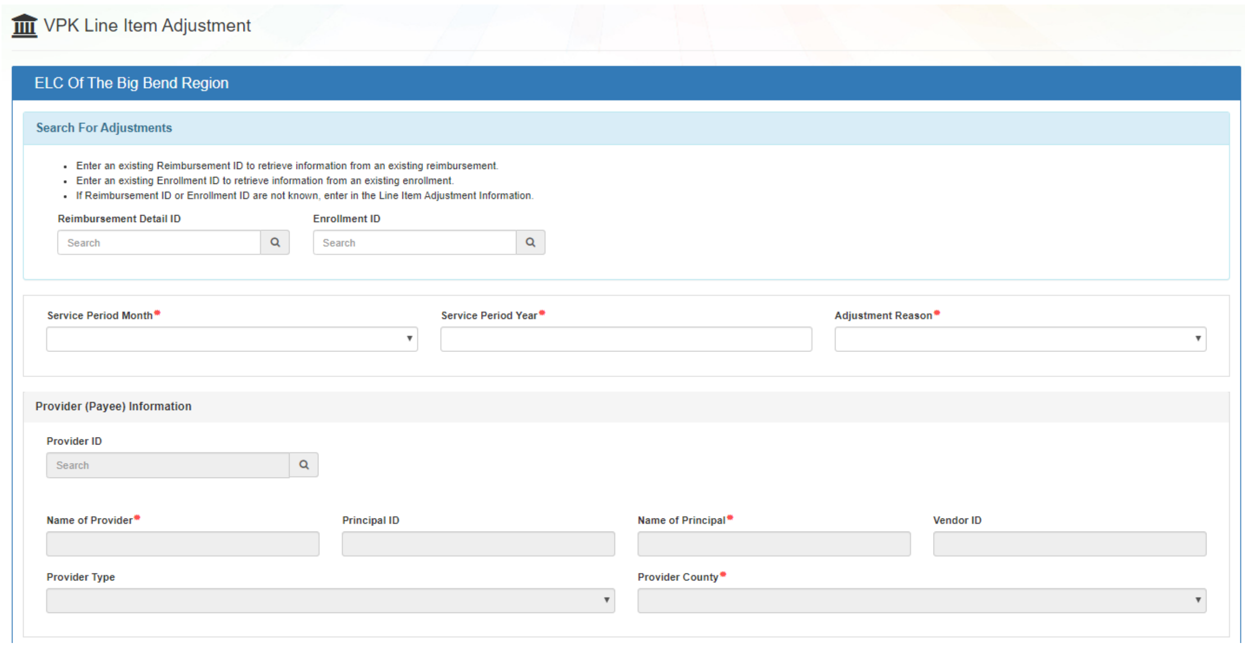
Clicking the **OK** button will close the Line Item Adjustment modal.



VPK Line Item Adjustments

To create a Line Item Adjustment, navigate to **Reimbursement > Adjustment Processing > Create Line Item Adjustment > VPK**

Any saved line item adjustments will be processed in the currently open payment period. Required fields are marked with an asterisk *. A record does not have to be in EFS Mod to create a line item adjustment. Clicking **Submit** opens the Confirm Submit VPK Line Item Adjustment modal.



Search

Before creating a Line Item Adjustment, search using the Reimbursement Detail ID or the Enrollment ID. Reimbursement Detail ID is available on the 5045 detail download.

Enter the Reimbursement Detail ID and click on the search icon to populate the record with the available information:

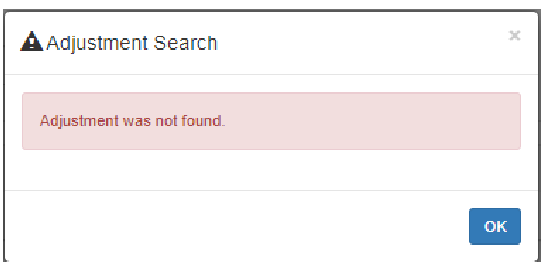
- Service Period Month
- Service Period Year
- Provider ID
- Name of Provider
- Principal ID
- Name of Principal
- Vendor ID
- Provider Type
- Provider County
- Child ID
- Name of Child
- Name of Parent
- County of Parent
- Class Name
- Billing Group
- Hourly Payment Rate

- Total Instructional Hours
- Hours Attended

The Enrollment ID can be found on the Eligibility screen. Enter the Enrollment ID and click on the search icon to populate the record with the available information:

- Service Period Month
- Service Period Year
- Provider ID
- Name of Provider
- Principal ID
- Name of Principal
- Vendor ID
- Provider Type
- Provider County
- Child ID
- Name of Child
- Name of Parent
- County of Parent
- Class Name

If a search result is not found, then the Adjustment Search modal opens. Clicking on the **OK** button will close the Adjustment Search modal.



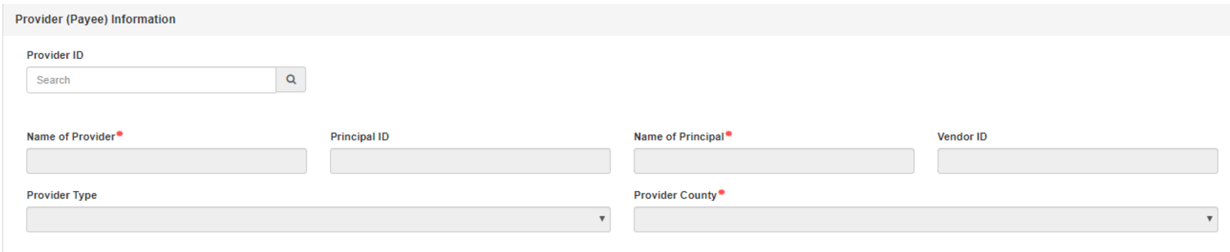
If the Reimbursement Detail ID or Enrollment ID are not known, then enter the Service Period Month and Service Period Year. The Service Period Year must be between 1990 and the current year.

Select the Adjustment Reason from the dropdown menu. Select Restitution if the LIA will have a Service Period prior to 7/1/2018.

Provider (Payee) Information

Service Period After 7/1/2018

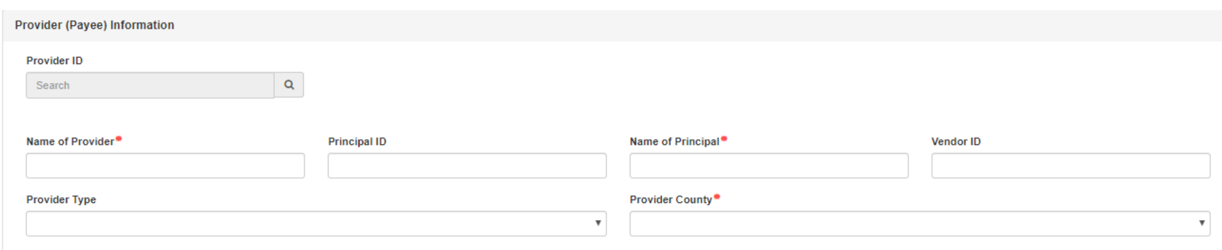
Required fields are marked with an asterisk *. If the Service Period is 7/1/2018 or later, then the Provider ID search will be available, see the screen below. If the Service Period is prior to 7/1/2018, then the Provider ID will not be required. If the Reimbursement Detail ID or Enrollment ID are entered in the search at the top of the screen, then Provider Information will pre-populate.



Service Period Prior to 7/1/2018

Required fields are marked with an asterisk *.

- The Name of Provider is a text field.
- The Name of Principal is a text field. If a Principal ID is entered, it must match a current Principal ID in EFS Mod. If the Principal ID does not match a current Principal ID in EFS Mod, then the LIA will not save.
- The Vendor ID is an alphanumeric field. The Vendor ID is the Taxpayer ID Number, which can be found on the Provider's Business Info screen.
- The Provider Type dropdown field displays the available Provider Types.
- The Provider County dropdown displays all Florida counties.



Parent & Child Information

Service Period After 7/1/2018

Required fields are marked with an asterisk *. If the Service Period is 7/1/2018 or after, then the Child ID search will be available, see the screen below. If the Service Period is prior to 7/1/2018, then the Child ID will not be required.

- If the Reimbursement Detail ID or Enrollment ID are entered in the search at the top of the screen, then Parent & Child Information will pre-populate.
- If a Child ID is entered, it must match a current Child ID in EFS Mod. If the Child ID does not match a current Child ID in EFS Mod, then the LIA will not save.
- The Class Name is limited to 4 characters (e.g. AF17).

Service Period Prior to 7/1/2018

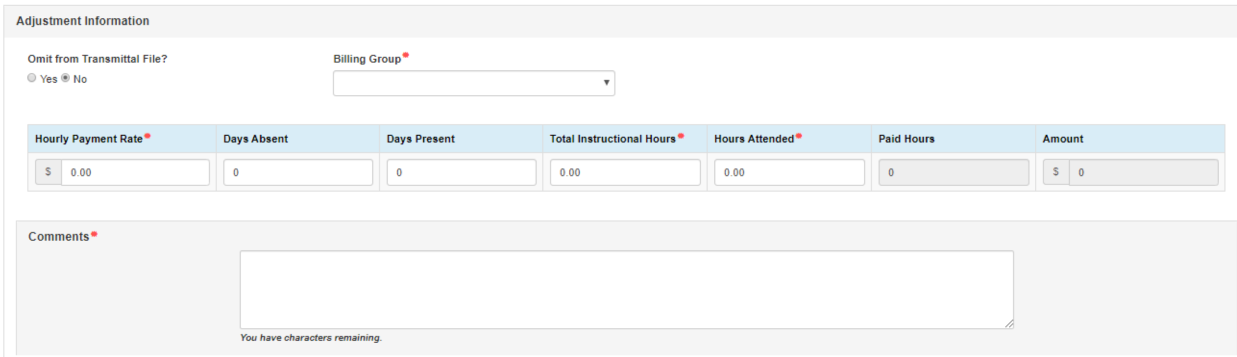
Required fields are marked with an asterisk *.

- The Name of Child is a text field.
- The Name of Parent is a text field.
- The Class Name is limited to 4 characters (e.g. AF17).

Adjustment Information

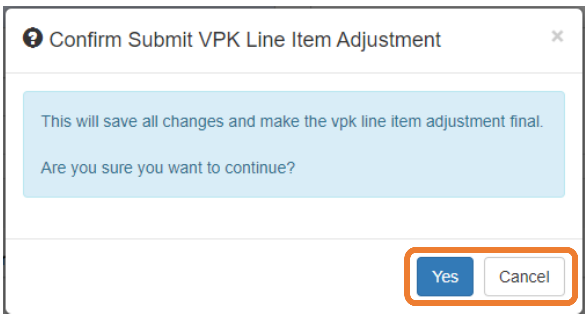
Required fields are marked with an asterisk *.

- The Adjustment Reason dropdown field displays the available Adjustment Reasons.
- The Billing Group dropdown field displays the available Billing Groups.
- The Hourly Payment Rate is the reimbursement hourly rate.
- The Days Absent is an optional field.
- The Days Present is an optional field.
- The Total Instructional Hours is the total hours available for the month.
- The Hours Attended is the amount of hours the child attended class. If there are closure days, then include those hours to the Hours Attended. The Hours Attended cannot be 0. The Hours Attended can be a positive or negative number.
- The Paid Hours is a calculated field, which includes 80/20.
- The Amount is a calculated field, which includes 80/20.
- The Comments field is a text field.

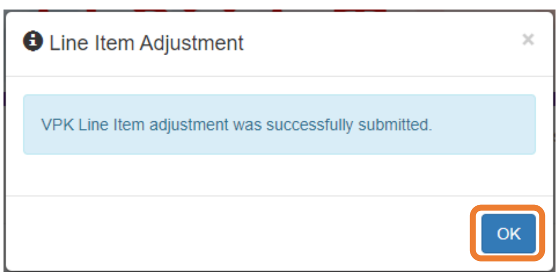


Confirmation Modal

Clicking **Yes** will save the adjustment and open the Line Item Adjustment modal. Clicking the **Cancel** button will discard any changes and close the modal.



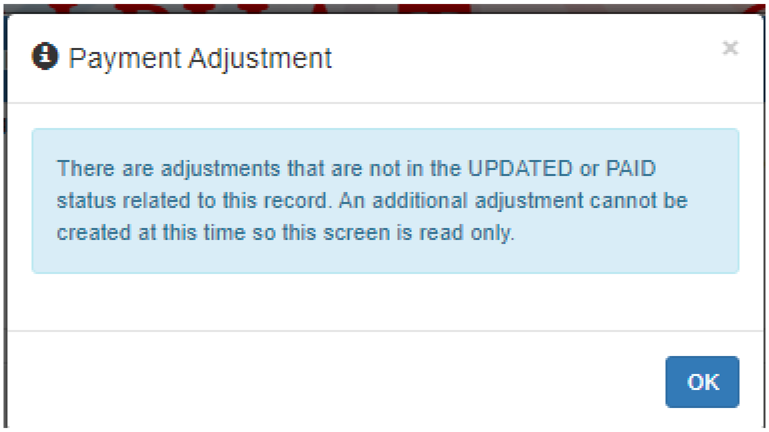
Clicking **OK** will close the Line Item Adjustment modal.



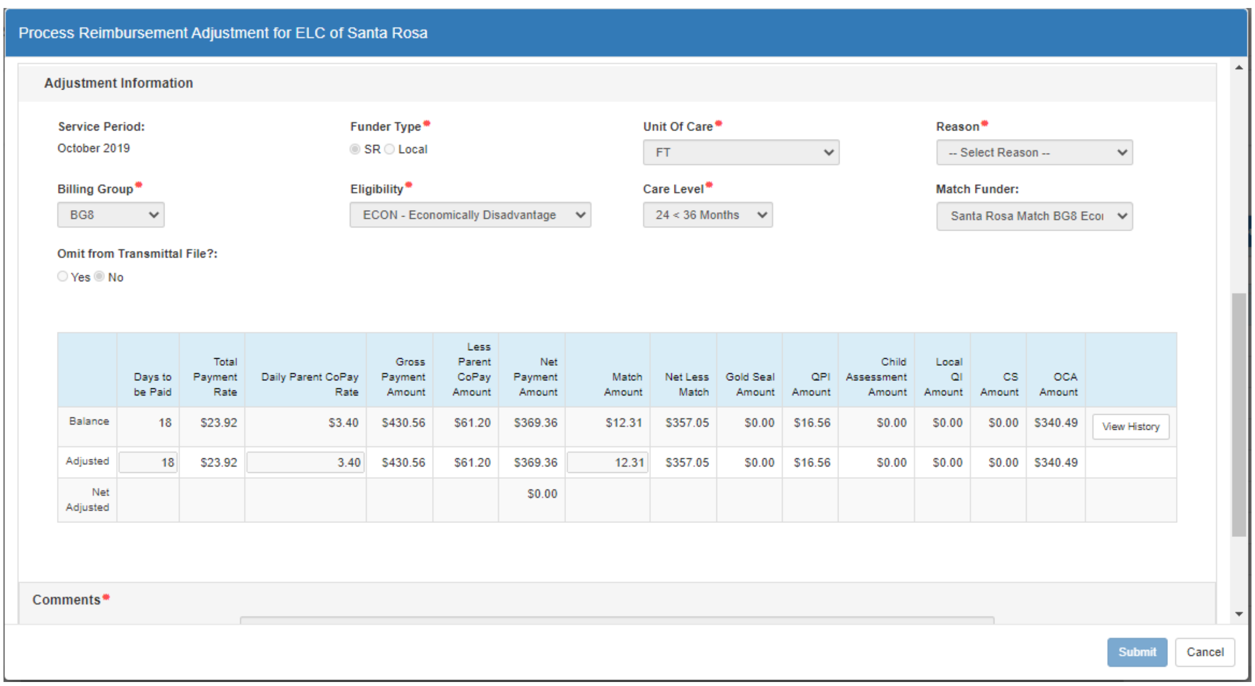
Pending Adjustments

If there are Adjustments pending approval and not in PAID status, then an additional adjustment cannot be created for the record. If a record with a Pending Adjustment is selected, then a pop-up opens notifying the user that there is a Pending Adjustment. A record is related by the Reimbursement Detail ID. For example: if the January attendance for a child is PAID, then a Prior Period Adjustment is created and saved; another Prior Period Adjustment for this record cannot be created until the first PPA is in PAID status.

The screen will be read-only until the Adjustment is in the Updated or Paid status.



The PPA screen will display as read-only, and the **Submit** button is deactivated if there is a Pending Adjustment.



Scenarios - Adjustment Fixes Needed

Below are some scenarios that a Coalition may encounter.

	MTH *(not Paid yet)*	PPA *(Paid in MOD)*	LIA
Calculations are incorrect (i.e. Net Less Match, days x rate, etc.)		--[1]	
Total Payment Rate paid is incorrect		--[2]	
Over/underpaid provider because rate plan differential settings (i.e. Gold Seal, PFP, PFP Assessment, etc.)		--[2]	
Wrap rate paid is double			X
Duplicate payment	X	**X**	
Parent copay fee incorrect	X	**X**	
Over/under paid days	X	**X**	
Split UOC or Care Level		**X**[3]	X[3]

[1]Covered by OEL data fix phase 1
[2]Covered by OEL data fix phase 2 (requires ELCs to review rate plans)
[3]Requires both PPA and LIA

Wrap rate paid is double

If a duplicate record was paid, and days of the payment need to be reversed for a service period.

SR or Local

Create a LIA, by entering all the required fields and enter a negative number for the Days to be Paid, enter the Total Payment Rate, and enter the Daily Parent CoPay Rate, if applicable. If there are differentials that were included, then include those details in the LIA.

VPK

Create a LIA, by entering all the required fields and enter the Hourly Payment Rate, applicable for the year to be adjusted, enter the Total Instructional Hours for the service period month, and enter a negative number in the Hours Attended.

Split Unit of Care or Care Level

A child was paid for all of August 2018 (23 days) at the PR5/FT rate but should have been SCH once school began. The child needs reimbursement for 8 days at the PR5/FT rate. The child needs reimbursement for 15 days at the SCH/PT rate.

SR or Local

Create a prior period adjustment on the paid August 2018 record to reduce the 23 PR5/FT days to 8 PR5/FT days (net – 15 PR5/FT days). Create a LIA for the remaining 15 days at the SCH/PT rate. Enter all the required fields – enter in the related child and provider information, select "PT" for the Unit of Care, select "In School" for the Care Level, enter 15 for Days to be Paid, and enter the Total Payment Rate for the daily payment rate.

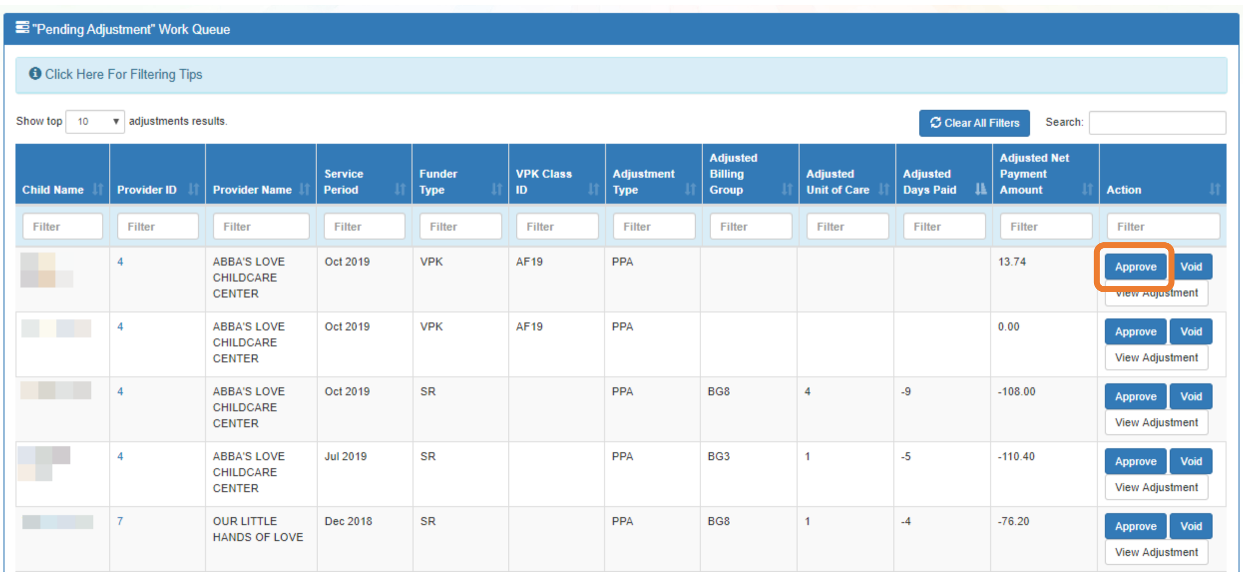
Pending Adjustments Work Queue

When an adjustment is created (current period adjustment, PPA, LIA) it is available for review in the Pending Adjustment Work Queue. To access the Pending Adjustments Work Queue, navigate to **Reimbursement > Adjustment Processing > Adjustments Pending Approval**.

The Pending Adjustment work queue displays all adjustments created that have not been approved and are currently in PENDING status. The Child Name, Provider ID, Provider Name, Service Period, Funder Type, VPK Class ID, Adjustment Type, Adjusted Billing Group, Adjusted Unit of Care, Adjusted Days Paid, Adjusted Net Payment Amount display along with the action buttons. The columns may be sorted by clicking on the column header. Each column may be filtered by typing criteria in the column's filter field.

Approve

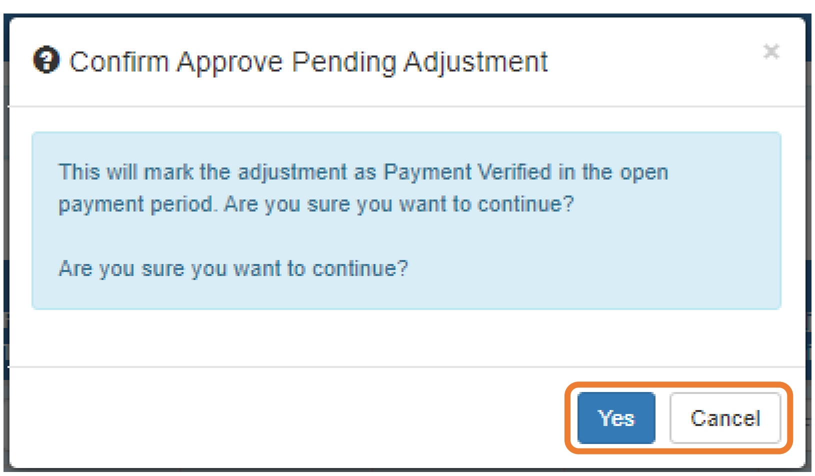
Clicking **Approve** opens the Confirm Approve Pending Adjustment pop-up.


"Pending Adjustment" Work Queue
Click Here For Filtering Tips
Show top 10 adjustments results.
Clear All Filters
Search:

Child Name	Provider ID	Provider Name	Service Period	Funder Type	VPK Class ID	Adjustment Type	Adjusted Billing Group	Adjusted Unit of Care	Adjusted Days Paid	Adjusted Net Payment Amount	Action
Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter
	4	ABBA'S LOVE CHILDCARE CENTER	Oct 2019	VPK	AF19	PPA				13.74	Approve Void View Adjustment
	4	ABBA'S LOVE CHILDCARE CENTER	Oct 2019	VPK	AF19	PPA				0.00	Approve Void View Adjustment
	4	ABBA'S LOVE CHILDCARE CENTER	Oct 2019	SR		PPA	BG8	4	-9	-108.00	Approve Void View Adjustment
	4	ABBA'S LOVE CHILDCARE CENTER	Jul 2019	SR		PPA	BG3	1	-5	-110.40	Approve Void View Adjustment
	7	OUR LITTLE HANDS OF LOVE	Dec 2018	SR		PPA	BG8	1	-4	-76.20	Approve Void View Adjustment

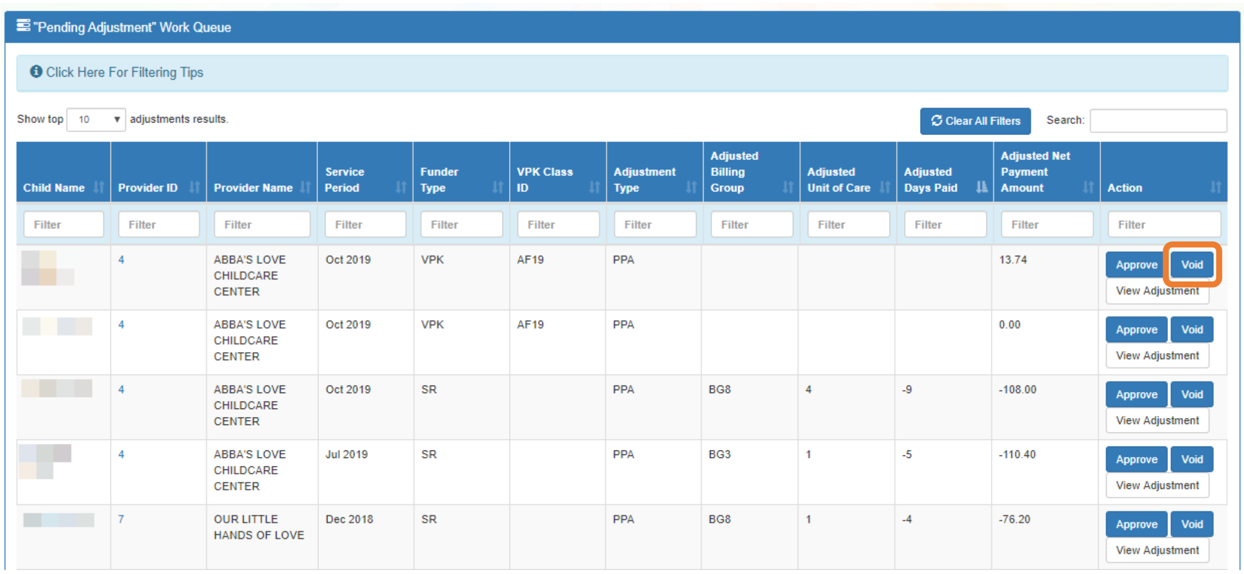
Clicking **Yes** will remove the adjustment from the Pending Adjustment Work Queue and move it to the Payment Verified Work Queue.

Clicking **Cancel** will close the pop-up window and display the Pending Adjustment Work Queue.



Void

Clicking **<u>Void</u>** opens the Confirm Void Pending Adjustment pop-up.


"Pending Adjustment" Work Queue

Click Here For Filtering Tips

Show top 10 adjustments results.

Clear All Filters Search:

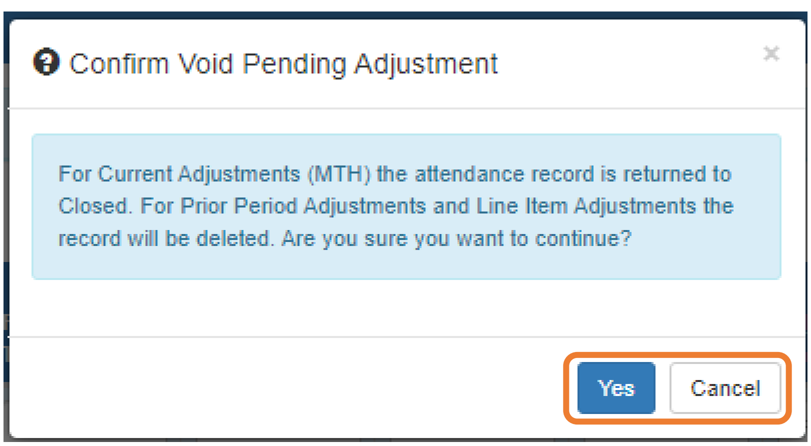
Child Name	Provider ID	Provider Name	Service Period	Funder Type	VPK Class ID	Adjustment Type	Adjusted Billing Group	Adjusted Unit of Care	Adjusted Days Paid	Adjusted Net Payment Amount	Action
Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter
	4	ABBA'S LOVE CHILDCARE CENTER	Oct 2019	VPK	AF19	PPA				13.74	Approve Void View Adjustment
	4	ABBA'S LOVE CHILDCARE CENTER	Oct 2019	VPK	AF19	PPA				0.00	Approve Void View Adjustment
	4	ABBA'S LOVE CHILDCARE CENTER	Oct 2019	SR		PPA	BG8	4	-9	-108.00	Approve Void View Adjustment
	4	ABBA'S LOVE CHILDCARE CENTER	Jul 2019	SR		PPA	BG3	1	-5	-110.40	Approve Void View Adjustment
	7	OUR LITTLE HANDS OF LOVE	Dec 2018	SR		PPA	BG8	1	-4	-76.20	Approve Void View Adjustment

Clicking **<u>Yes</u>** will:

1. Move the current period adjustment (MTH) back to Closed Attendance.
2. Delete the prior period adjustment (PPA).
3. Delete the line item adjustment (LIA).
4. Remove the selected adjustment from the Pending Adjustment work queue.

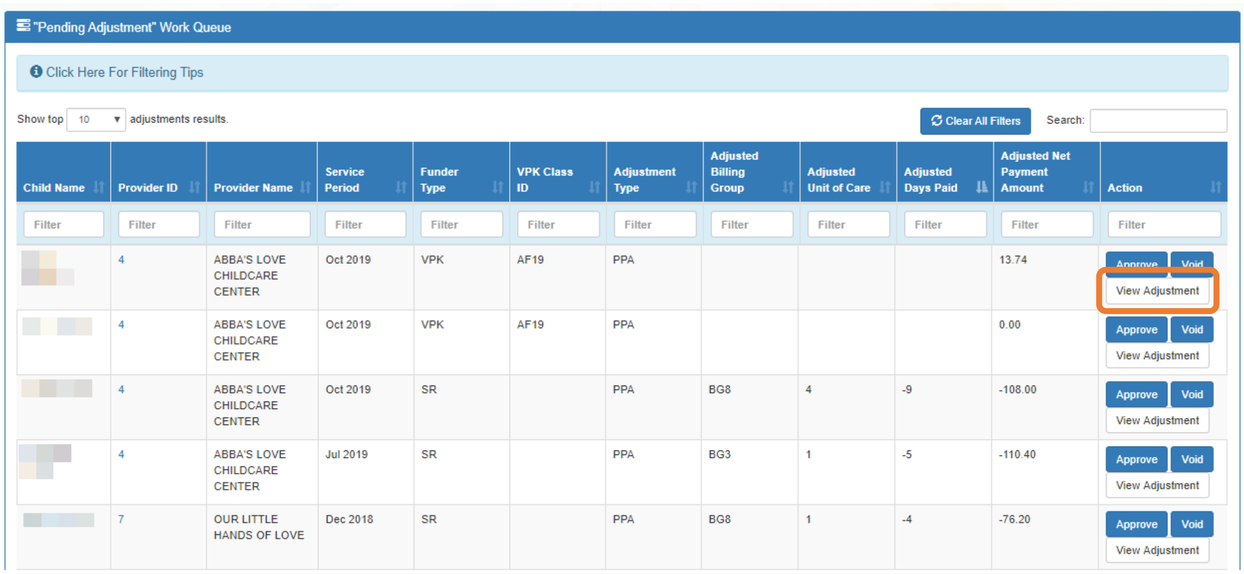
If the PPA or LIA is deleted, and an adjustment is still needed, then a new one must be created.

Clicking **<u>Cancel</u>** will close the pop-up window and display the Pending Adjustment Work Queue.



View Adjustment

Clicking **<u>View Adjustment</u>** opens the Adjustments History pop-up.

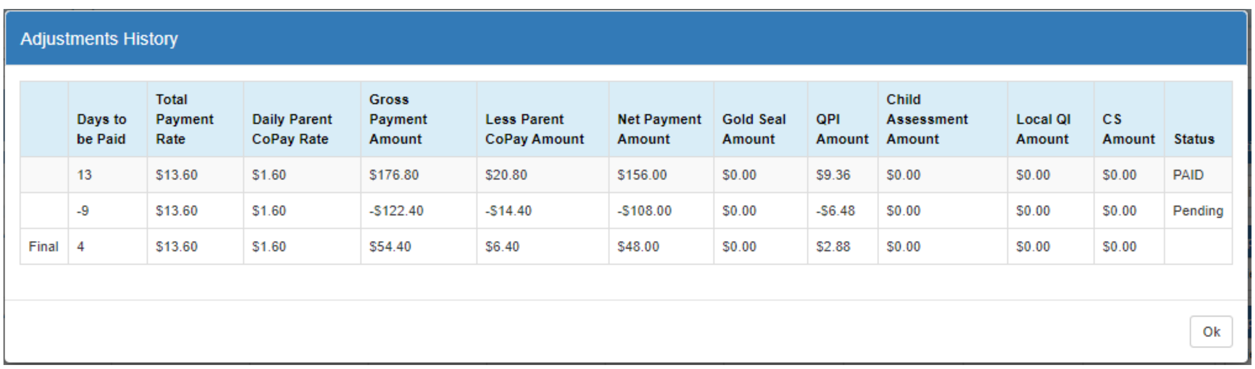


"Pending Adjustment" Work Queue

Click Here For Filtering Tips

Show top 10 adjustments results. Clear All Filters Search:

Child Name	Provider ID	Provider Name	Service Period	Funder Type	VPK Class ID	Adjustment Type	Adjusted Billing Group	Adjusted Unit of Care	Adjusted Days Paid	Adjusted Net Payment Amount	Action
Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter
	4	ABBA'S LOVE CHILDCARE CENTER	Oct 2019	VPK	AF19	PPA				13.74	Approve Void View Adjustment
	4	ABBA'S LOVE CHILDCARE CENTER	Oct 2019	VPK	AF19	PPA				0.00	Approve Void View Adjustment
	4	ABBA'S LOVE CHILDCARE CENTER	Oct 2019	SR		PPA	BG8	4	-9	-108.00	Approve Void View Adjustment
	4	ABBA'S LOVE CHILDCARE CENTER	Jul 2019	SR		PPA	BG3	1	-5	-110.40	Approve Void View Adjustment
	7	OUR LITTLE HANDS OF LOVE	Dec 2018	SR		PPA	BG8	1	-4	-76.20	Approve Void View Adjustment



Adjustments History

	Days to be Paid	Total Payment Rate	Daily Parent CoPay Rate	Gross Payment Amount	Less Parent CoPay Amount	Net Payment Amount	Gold Seal Amount	QPI Amount	Child Assessment Amount	Local QI Amount	CS Amount	Status
	13	$13.60	$1.60	$176.80	$20.80	$156.00	$0.00	$9.36	$0.00	$0.00	$0.00	PAID
	-9	$13.60	$1.60	-$122.40	-$14.40	-$108.00	$0.00	-$6.48	$0.00	$0.00	$0.00	Pending
Final	4	$13.60	$1.60	$54.40	$6.40	$48.00	$0.00	$2.88	$0.00	$0.00	$0.00	

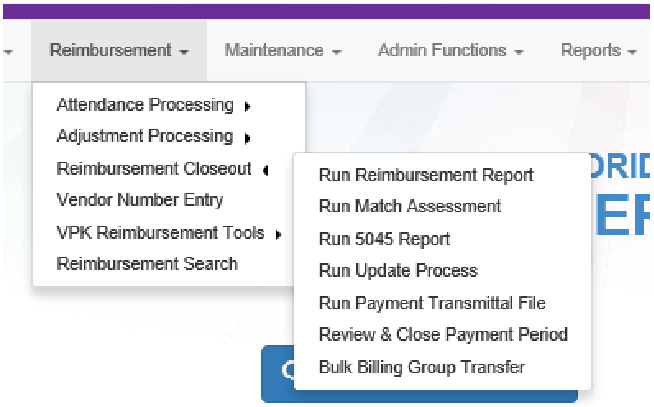
Ok

The Adjustments History pop-up displays the original record at the top and then the adjustment(s) display in the row(s) below.

The Status for the Adjustment is Pending. An additional adjustment (PPA or LIA) cannot be created for the Reimbursement ID record, until it has a status of PAID.

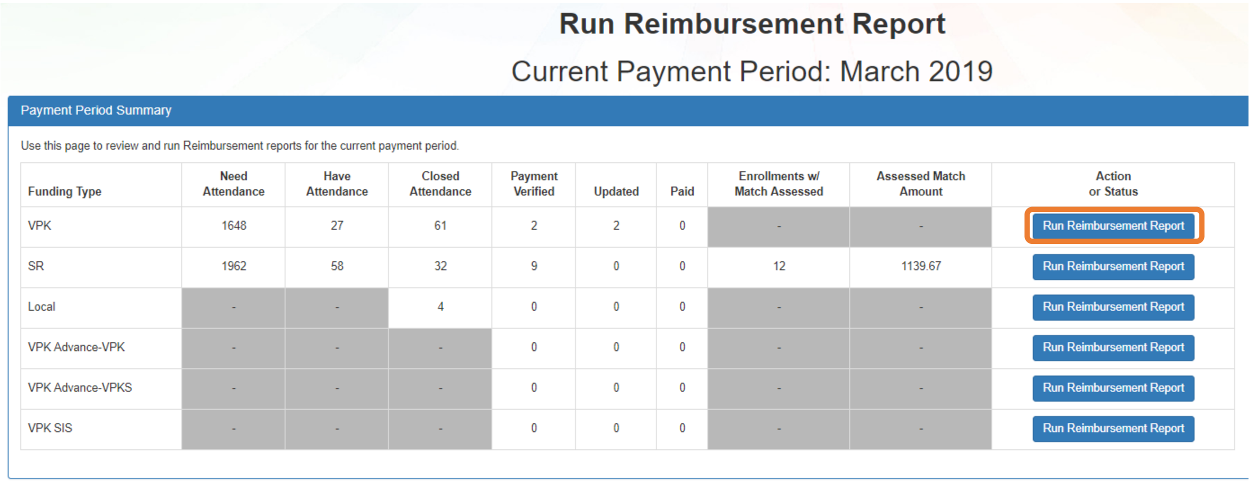
Reimbursement Closeout Process

The Reimbursement Closeout features are available under the Reimbursement menu item. The features included in Reimbursement Closeout are Run Reimbursement Report, Run Match Assessment, Run 5045 Report, Run Update Process, Run Payment Transmittal File, Review & Close Payment Period, and Bulk Billing Group Transfer.



Run Reimbursement Report

Navigate to the **Reimbursement Closeout > Run Reimbursement Report** page. Click the **Run Reimbursement Report** button from the appropriate funder type row.



Run Reimbursement Report

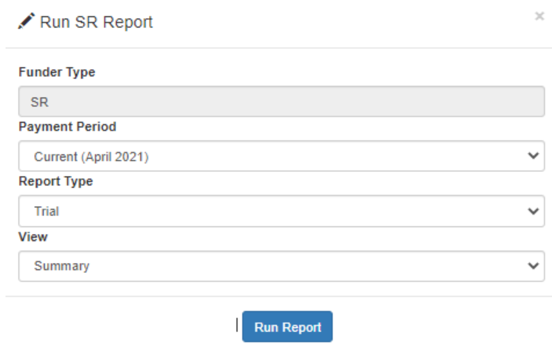
Current Payment Period: March 2019

Payment Period Summary

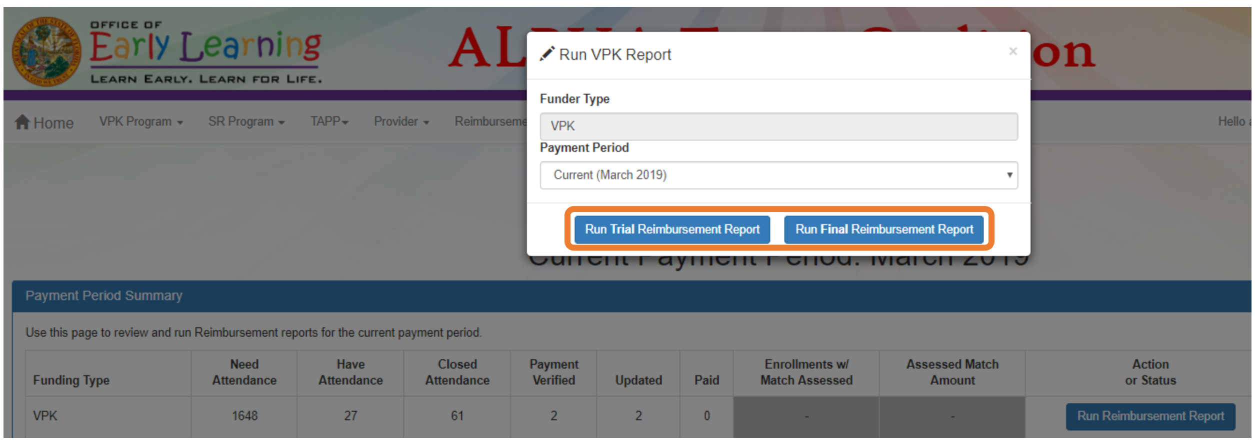
Use this page to review and run Reimbursement reports for the current payment period.

Funding Type	Need Attendance	Have Attendance	Closed Attendance	Payment Verified	Updated	Paid	Enrollments w/ Match Assessed	Assessed Match Amount	Action or Status
VPK	1648	27	61	2	2	0	-	-	Run Reimbursement Report
SR	1962	58	32	9	0	0	12	1139.67	Run Reimbursement Report
Local	-	-	4	0	0	0	-	-	Run Reimbursement Report
VPK Advance-VPK	-	-	-	0	0	0	-	-	Run Reimbursement Report
VPK Advance-VPKS	-	-	-	0	0	0	-	-	Run Reimbursement Report
VPK SIS	-	-	-	0	0	0	-	-	Run Reimbursement Report

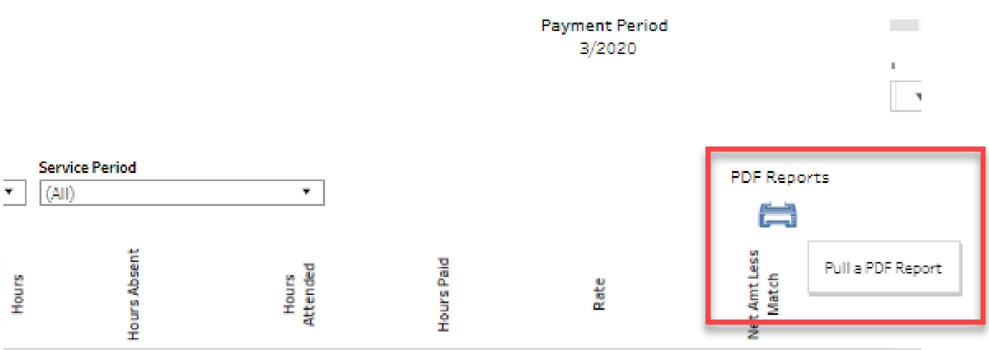
A pop-up message appears to collect the report parameters.



The Trial Reimbursement Report includes records in all statuses for the payment period and funder type selected. The Final Reimbursement Report includes records that are in Updated and Paid statuses for the payment period and funder type selected.



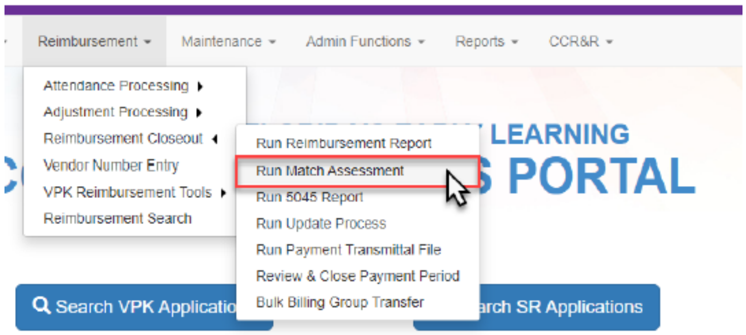
To print a PDF of the report, click on the **PDF Reports** icon. Allow the print menu to display. Hover over the **Get Provider Reimbursement PDF** link and click on it. The PDF report opens.



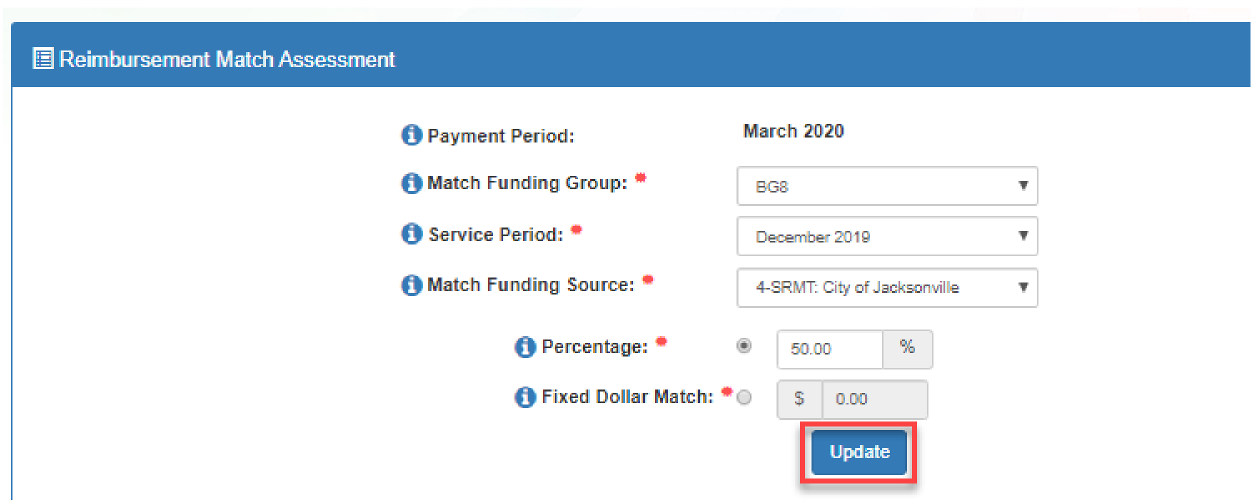
Run Match Assessment

Prior to July 1, 2019 the state required 6% local match participation for BG8 families and a 50% local match for participants in the Child Care Executive Partnership (CCEP) program. The significant change in match for 2019-2020 is that now there is no requirement for local match at the coalition level for BG8 eligible families and the CCEP program no longer exists.

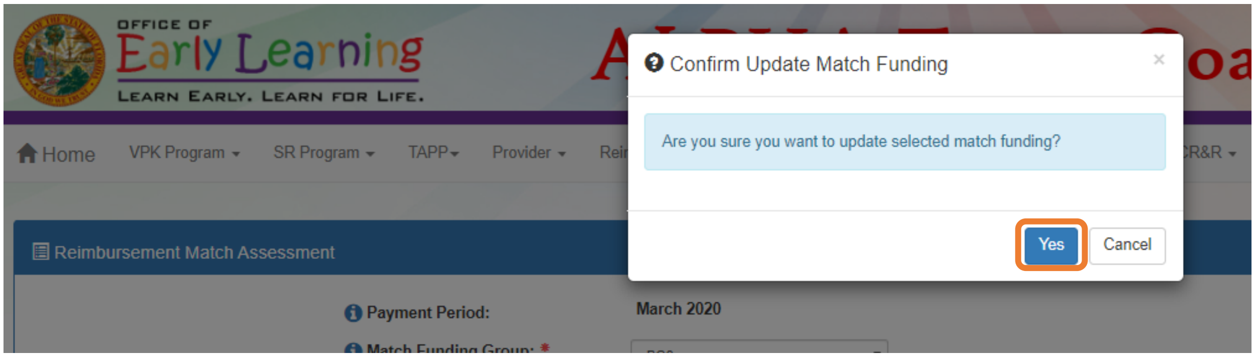
The match assessment process must be run when all service period records are in Payment Verified status. Go to **Reimbursement > Reimbursement Closeout > Run Match Assessment**.



Select the required fields and click **<u>Update</u>**.

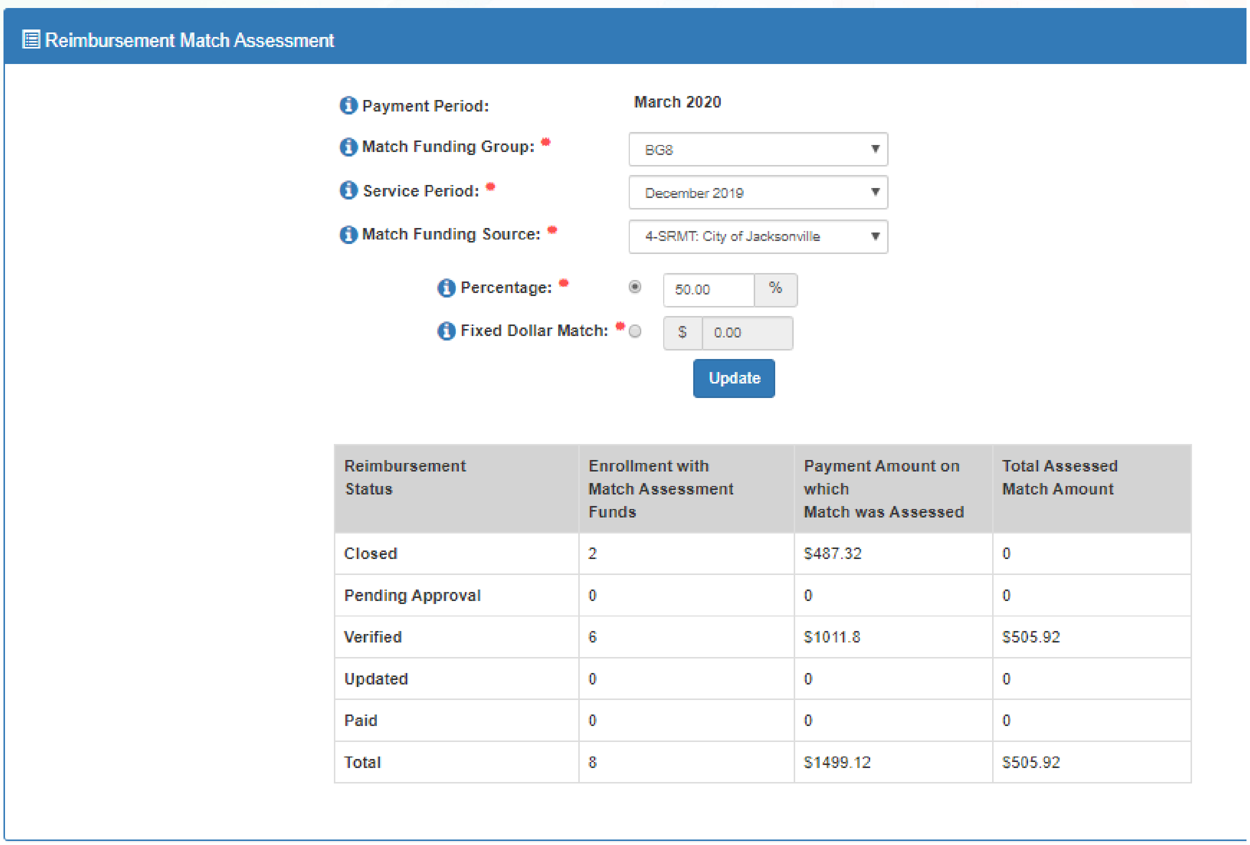


After clicking **Update**, a Confirm Update Match Funding pop-up displays. Click the **Yes** button to confirm.



The page refreshes with the assessed match amount. Match will only be run on monthly (MTH) records. The Run Match process will not be applied to adjustments.

The expanded grid displays the number of records and amounts for the different Reimbursement Statuses. The bottom row provides a total of all the columns. The percentage applies to the MTH records in Reimbursement Status of Verified, Updated, and Paid. In the example below, 50% match was applied to the records in Verified.



Reimbursement Status	Enrollment with Match Assessment Funds	Payment Amount on which Match was Assessed	Total Assessed Match Amount
Closed	2	$487.32	0
Pending Approval	0	0	0
Verified	6	$1011.8	$505.92
Updated	0	0	0
Paid	0	0	0
Total	8	$1499.12	$505.92

This can be run again. This time, try a dollar amount.

Reimbursement Match Assessment

Payment Period: March 2020

Match Funding Group: * BG8

Service Period: * July 2019

Match Funding Source: * 14-MATCH: The Children Trust- BG8 Matcl

Percentage: * 0.00 %

Fixed Dollar Match: * $ 1000.00

Update

Reimbursement Status	Enrollment with Match Assessment Funds	Payment Amount on which Match was Assessed	Total Assessed Match Amount
Closed	4	$350.76	$21.04
Pending Approval	0	0	0
Verified	2	$281.95	$281.95
Updated	0	0	0
Paid	0	0	0
Total	6	$632.71	$302.99

Run 5045 Report

Current Payment Period: March 2019

Payment Period Summary

Use this page to review and run 5045 reports for the current payment period.

Funding Type	Need Attendance	Have Attendance	Closed Attendance	Payment Verified	Updated	Paid	Enrollments w/ Match Assessed	Assessed Match Amount	Action or Status
VPK	1648	27	61	2	2	0	-	-	Run 5045 Report
SR	1953	58	32	15	0	0	17	1729.21	Run 5045 Report
Local	-	-	5	0	0	0	-	-	Run 5045 Report
VPK Advance-VPK	-	-	-	0	0	0	-	-	Run 5045 Report
VPK Advance-VPKS	-	-	-	0	0	0	-	-	Run 5045 Report
VPK SIS	-	-	-	0	0	0	-	-	Run 5045 Report

NOTE: All match assessment runs must be complete prior to initiating the Run Update process. The Run Update process will change the record status to Updated, locking in the payment amounts. Match assessment can only be run on records in the Payment Verified status. The amounts in place when the Run Update process runs is the final match assessment. The Match Funder Report is available in Tableau.

Run Update

To begin the process, go to the **Reimbursement** menu item. Select **Reimbursement Closeout** > **Run Update Process**. Click **Run Update** for the appropriate funder type. The Run Update process completes and the total number of records move from the Payment Verified column to the Updated column.

Run Update Process

Payment Period Summary

Use this page to run the update process for records that have had the payment verified in the open payment period.

Funding Type	Payment Period	Have Attendance	Closed Attendance	Pending Adjustment	Payment Verified	Updated	Paid	Enrollments w/ Match Assessed	Assessed Match Amount	Action or Status
VPK	March 2020	8743	53	0	38	0	0	-	-	Run Update
SR	March 2020	35362	3940	0	13352	0	0	61	8323.74	Run Update
Local	March 2020	-	656	0	0	0	0	-	-	Run Update
VPK Advance-VPK	March 2020	-	-	-	0	3813	0	-	-	Run Update
VPK Advance-VPKS	March 2020	-	-	-	0	0	0	-	-	Run Update
VPK SIS	April 2020	-	-	-	0	0	3	-	-	Run Update

Run Payment Transmittal File

Go to the **Reimbursement** menu item. Select **Reimbursement Closeout > Run Payment Transmittal File**. Click **Run File** for the appropriate funder type.

Run Payment Transmittal File

Payment Period Summary

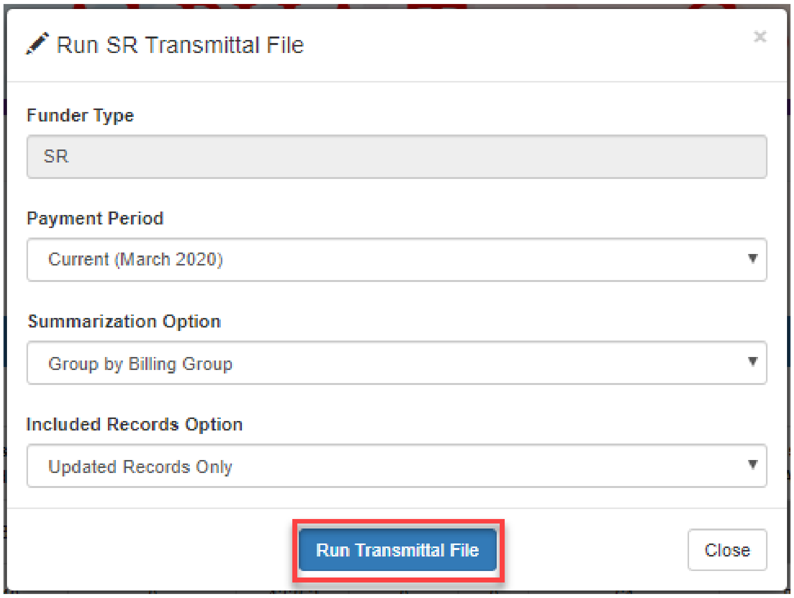
Use this page to review and close

Funding Type	Payment Period	Have Attendance	Closed Attendance	Pending Adjustment	Payment Verified	Updated	Paid	Enrollments w/ Match Assessed	Assessed Match Amount	Action or Status
VPK	March 2020	8743	53	0	38	0	0	-	-	Run File
SR	March 2020	35362	3940	0	13352	0	0	61	8323.74	Run File
Local	March 2020	-	656	0	0	0	0	-	-	Run File
VPK Advance-VPK	March 2020	-	-	-	0	3813	0	-	-	Run File
VPK Advance-VPKS	March 2020	-	-	-	0	0	0	-	-	Run File
VPK SIS	April 2020	-	-	-	0	0	3	-	-	Run File

A pop-up message appears. The Payment Transmittal File default criteria is set:

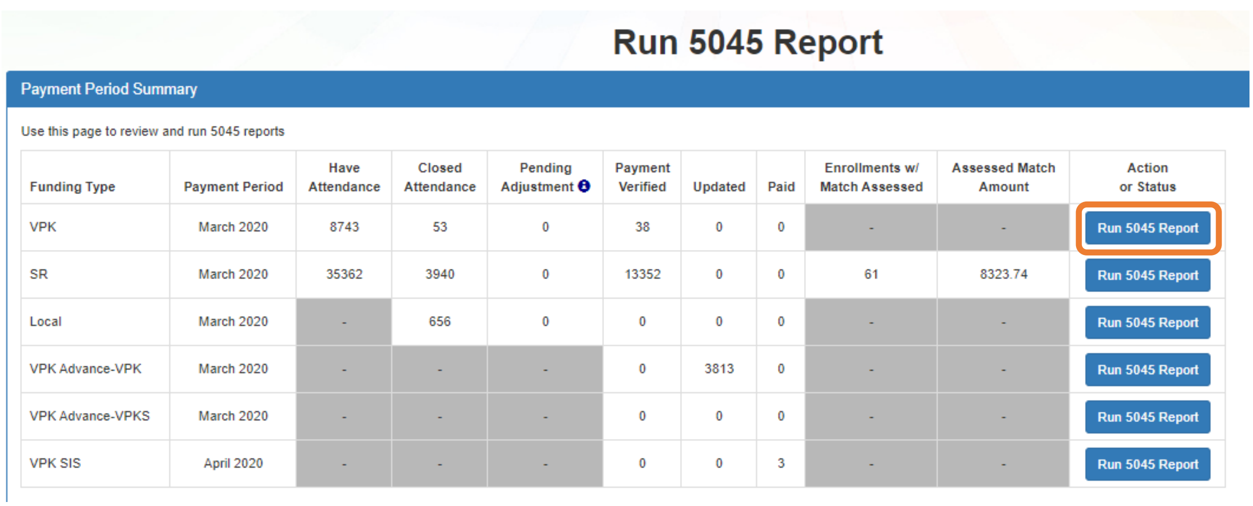
- Payment Period is the current payment period
- Summarization Option of Group by Billing Group
- Included Records Option is Updated Records Only

An Excel file downloads and the total number of records move from the Updated column to the Paid column. Click **Run Transmittal file**. The file downloads and the total number of records display in the Paid column.



Run 5045 Report

Navigate to the **Reimbursement Closeout > Run 5045 Report** page. Click the **Run 5045 Report** button from the appropriate funder type row.



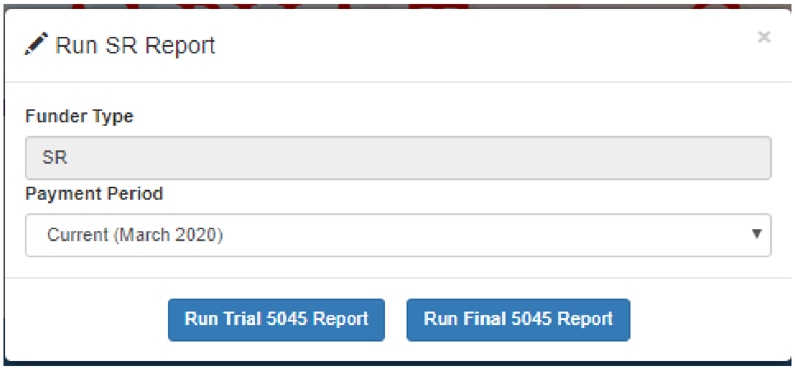
Run 5045 Report

Payment Period Summary

Use this page to review and run 5045 reports

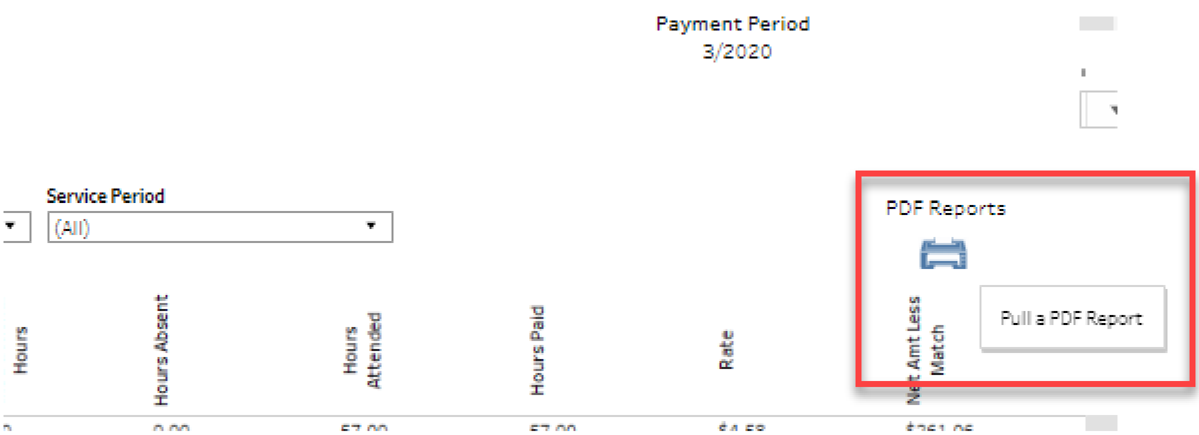
Funding Type	Payment Period	Have Attendance	Closed Attendance	Pending Adjustment	Payment Verified	Updated	Paid	Enrollments w/ Match Assessed	Assessed Match Amount	Action or Status
VPK	March 2020	8743	53	0	38	0	0	-	-	Run 5045 Report
SR	March 2020	35362	3940	0	13352	0	0	61	8323.74	Run 5045 Report
Local	March 2020	-	656	0	0	0	0	-	-	Run 5045 Report
VPK Advance-VPK	March 2020	-	-	-	0	3813	0	-	-	Run 5045 Report
VPK Advance-VPKS	March 2020	-	-	-	0	0	0	-	-	Run 5045 Report
VPK SIS	April 2020	-	-	-	0	0	3	-	-	Run 5045 Report

A pop-up message appears to collect the report parameters.



The Trial Reimbursement Report includes records in all statuses for the payment period and funder type selected. The Final Reimbursement Report includes records that are in Updated and Paid statuses for the payment period and funder type selected.

To print a PDF of the report, click on the **PDF Reports** icon. Allow the print menu to display. Hover over the **Get Provider Reimbursement PDF** link and click on it. The PDF report opens.

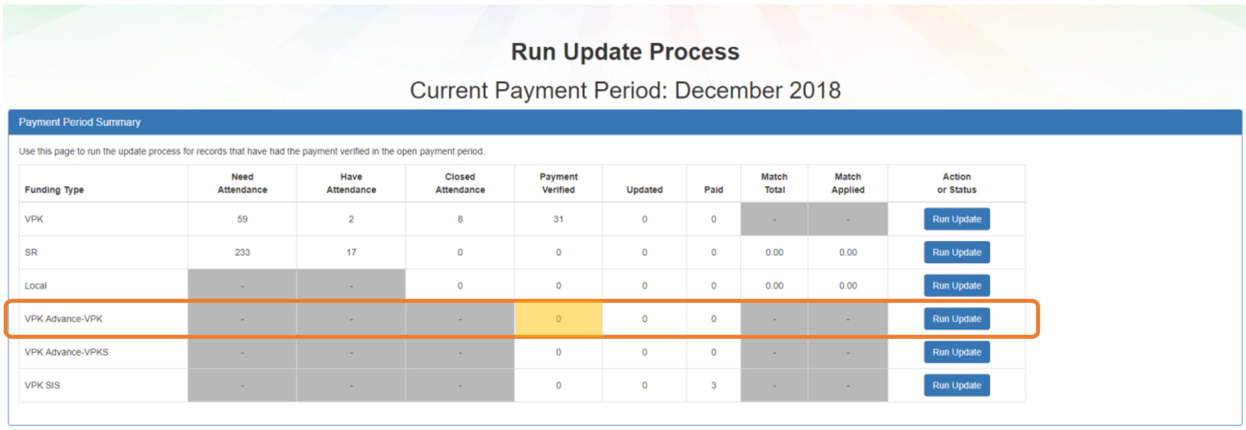


VPK Advance Payment Process

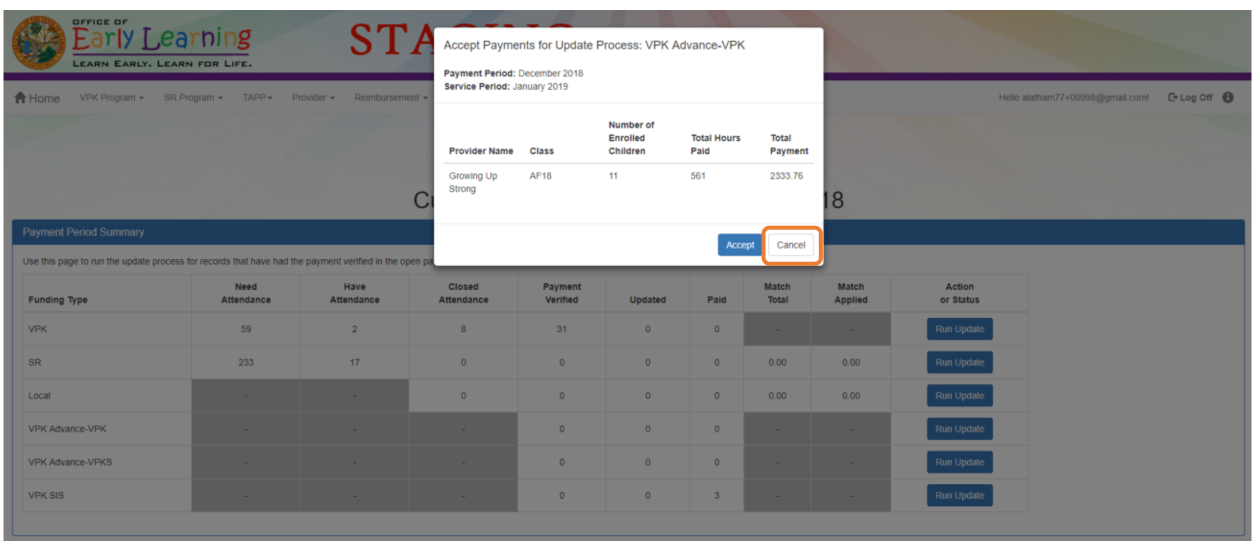
VPK providers that indicate participation in advance payment in the VPK contract are included in the VPK Advance Payment process.

Run Update (Part 1 - Trial)

To begin the process, go to the **Reimbursement** menu item. Select **Reimbursement Closeout > Run Update Process**. Go to the *VPK Advance – VPK* row and click **Run Update**.



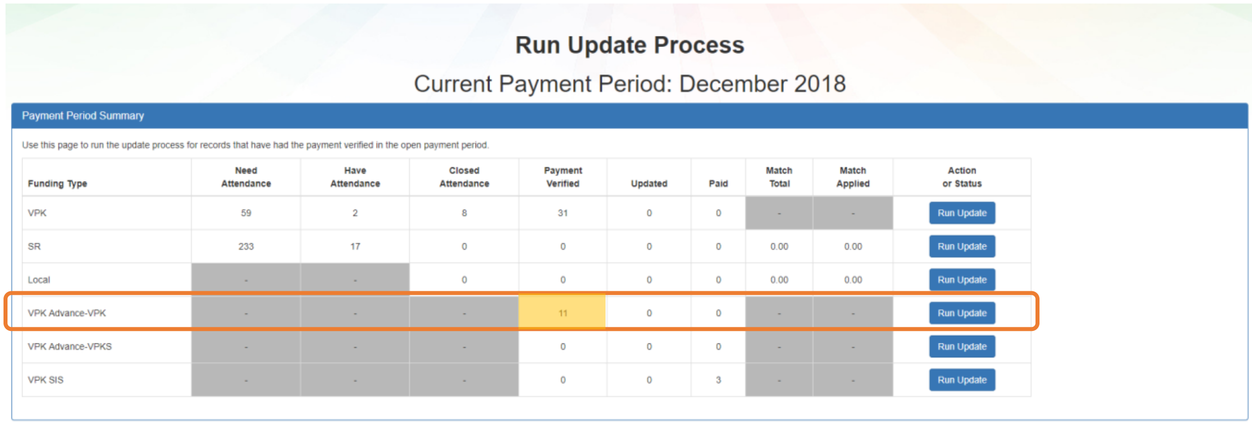
A pop-up message appears. The service period displays at the top and payment information for each VPK provider class (with advance payment) displays below.



a. Total Payment = VPK Hourly Rate x .95 (rounded to the penny) x Total Hours Paid.
b. The service period for advance payment is set one month ahead of the current payment period. For example, if the current payment period is August, the service period is October.
c. The provider's class calendar and each child's enrollment record is used to calculate the Total Hours Paid for the service period.
d. Providers with fewer than four child enrollments cannot start a class so they are excluded from advance payment. When the condition is met, the class is included. **NOTE:** After the initial requirement to start the class is met, the enrollment number may be lower and still be included in the reimbursement process.

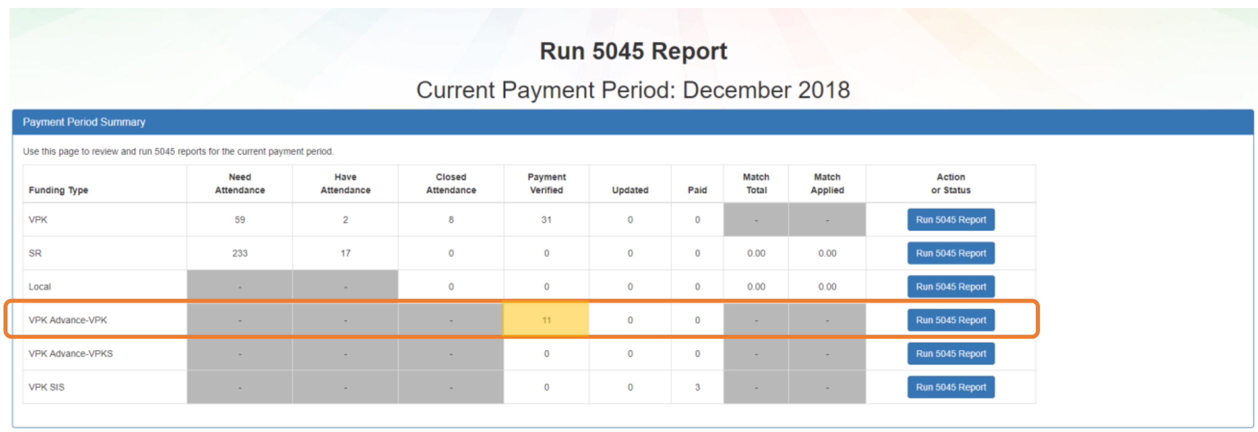
STOP! Click **Cancel**. (Clicking *Accept* completes the Run Update and locks the payment. To see a Trial 5045 and Detail Report BEFORE completing the Update process, click **Cancel**.)

Click the refresh button on your browser or CTRL + F5. The total number of records display in the Payment Verified column.

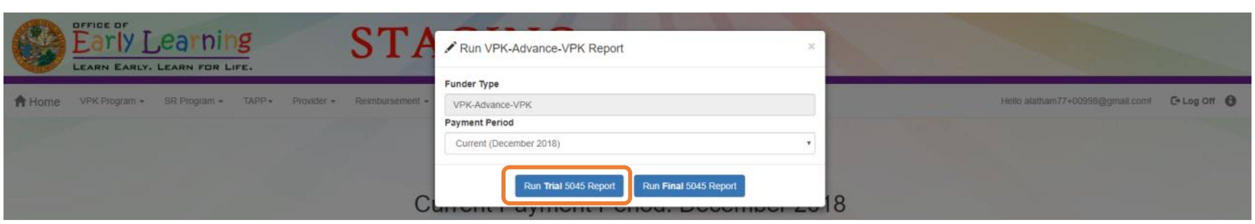


Run Trial 5045 Report

Next, go to the **Reimbursement** menu item. Select **Reimbursement Closeout > Run 5045 Report**. Go to the *VPK Advance – VPK* row and click **Run 5045 Report**.



A pop-up message appears. Click **Run Trial 5045 Report**.

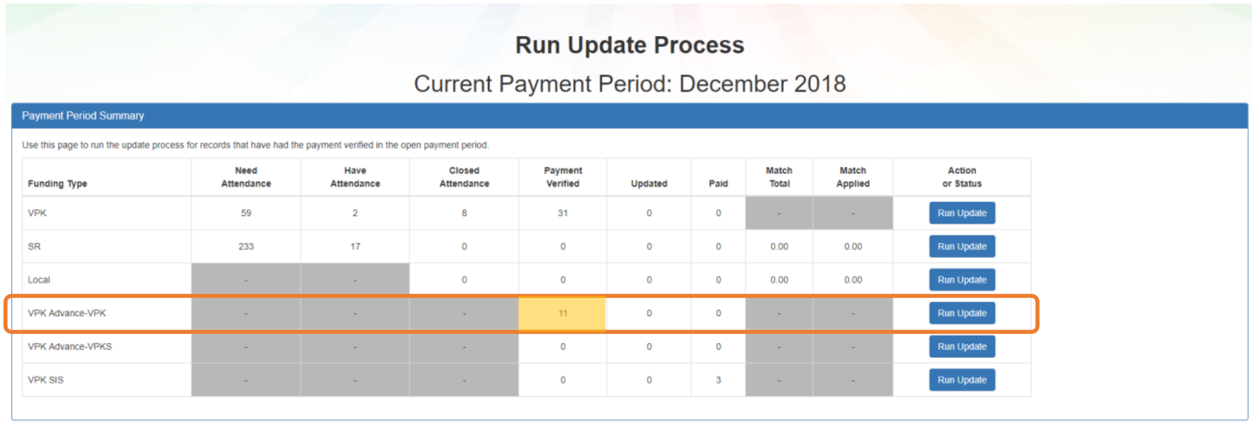


The Trial Advance Payment Summary Report opens.

a. A detail report (with child information) is available by selecting **Detail Report.**
b. To print, click the **Download** button on the bottom right corner of the screen. A download pop-up message displays. Select **PDF**, change the paper orientation to **Landscape**, and click **Create PDF**. When the PDF file is generated, click **Download**. The file may be saved locally.

Run Update (Part 2 - Commit)

Go to the **Reimbursement** menu item. Select **Reimbursement Closeout > Run Update Process**. Go to the *VPK Advance – VPK* row and click **Run Update**.



Run Update Process

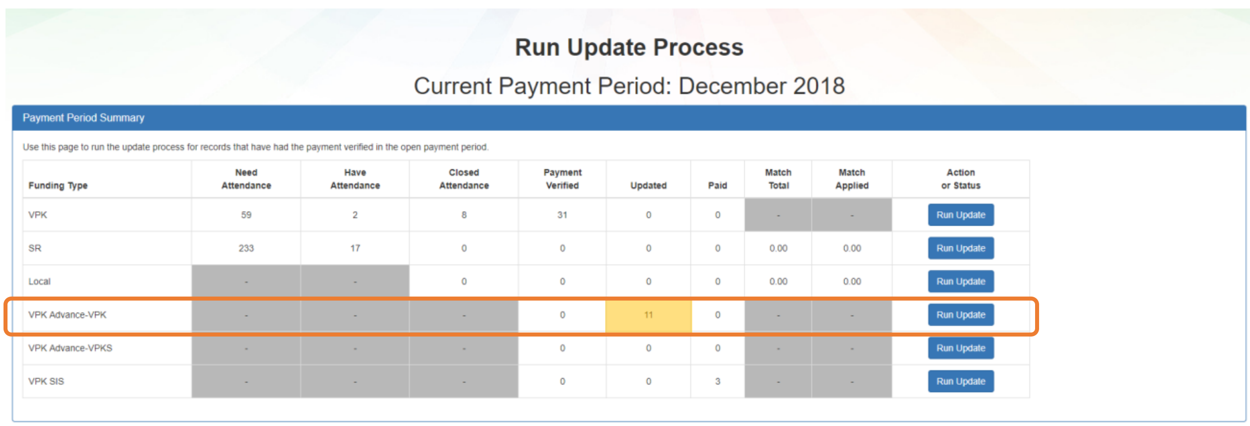
Current Payment Period: December 2018

Payment Period Summary

Use this page to run the update process for records that have had the payment verified in the open payment period.

Funding Type	Need Attendance	Have Attendance	Closed Attendance	Payment Verified	Updated	Paid	Match Total	Match Applied	Action or Status
VPK	59	2	8	31	0	0	-	-	Run Update
SR	233	17	0	0	0	0	0.00	0.00	Run Update
Local	-	-	0	0	0	0	0.00	0.00	Run Update
VPK Advance-VPK	-	-	-	11	0	0	-	-	Run Update
VPK Advance-VPKS	-	-	-	0	0	0	-	-	Run Update
VPK SIS	-	-	-	0	0	3	-	-	Run Update

A pop-up message appears. Click **<u>Accept</u>**. The Run Update process completes and the total number of records display in the Updated column.



Run Update Process

Current Payment Period: December 2018

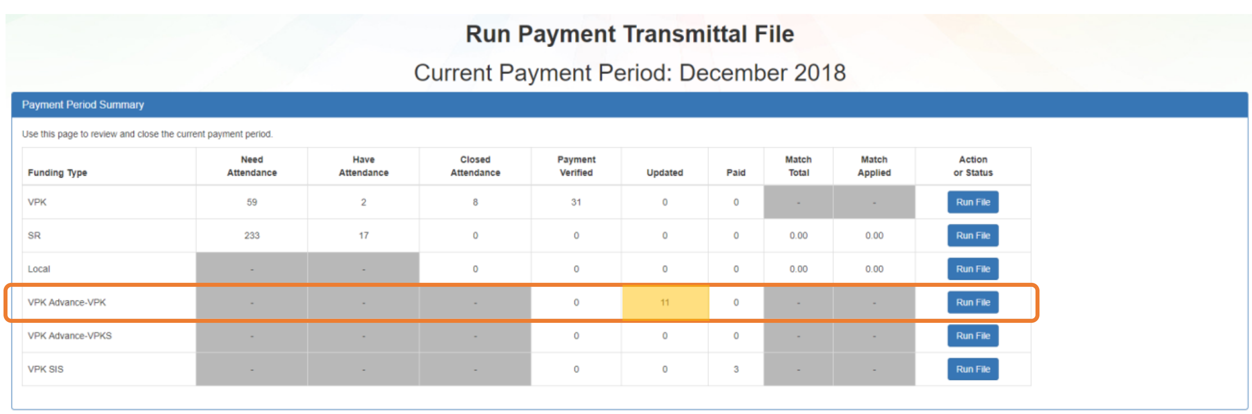
Payment Period Summary

Use this page to run the update process for records that have had the payment verified in the open payment period.

Funding Type	Need Attendance	Have Attendance	Closed Attendance	Payment Verified	Updated	Paid	Match Total	Match Applied	Action or Status
VPK	59	2	8	31	0	0	-	-	Run Update
SR	233	17	0	0	0	0	0.00	0.00	Run Update
Local	-	-	0	0	0	0	0.00	0.00	Run Update
VPK Advance-VPK	-	-	-	0	11	0	-	-	Run Update
VPK Advance-VPKS	-	-	-	0	0	0	-	-	Run Update
VPK SIS	-	-	-	0	0	3	-	-	Run Update

Run Payment Transmittal File

Go to the **Reimbursement** menu item. Select **Reimbursement Closeout > Run Payment Transmittal File**. Go to the *VPK Advance – VPK* row and click **<u>Run File</u>**.



Run Payment Transmittal File

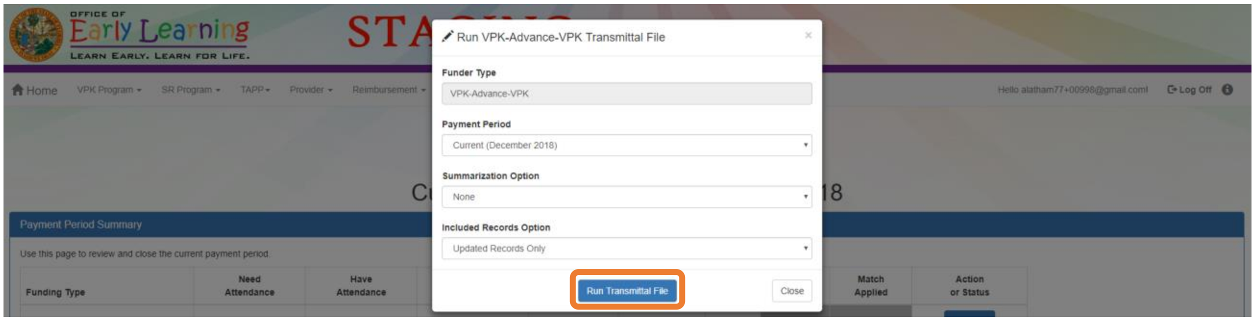
Current Payment Period: December 2018

Payment Period Summary

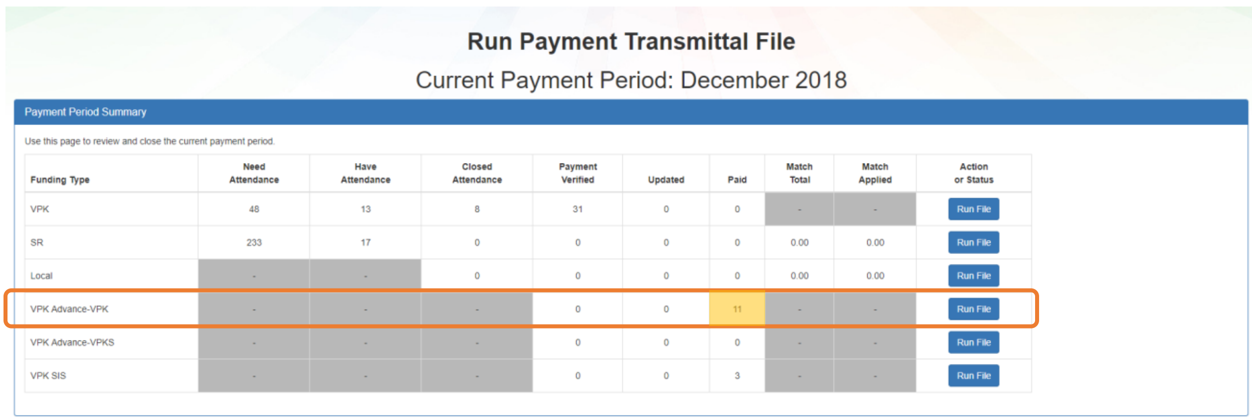
Use this page to review and close the current payment period.

Funding Type	Need Attendance	Have Attendance	Closed Attendance	Payment Verified	Updated	Paid	Match Total	Match Applied	Action or Status
VPK	59	2	8	31	0	0	-	-	Run File
SR	233	17	0	0	0	0	0.00	0.00	Run File
Local	-	-	0	0	0	0	0.00	0.00	Run File
VPK Advance-VPK	-	-	-	0	11	0	-	-	Run File
VPK Advance-VPKS	-	-	-	0	0	0	-	-	Run File
VPK SIS	-	-	-	0	0	3	-	-	Run File

A pop-up message appears. The Payment Transmittal File default criteria is set. Click **Run Transmittal File**.



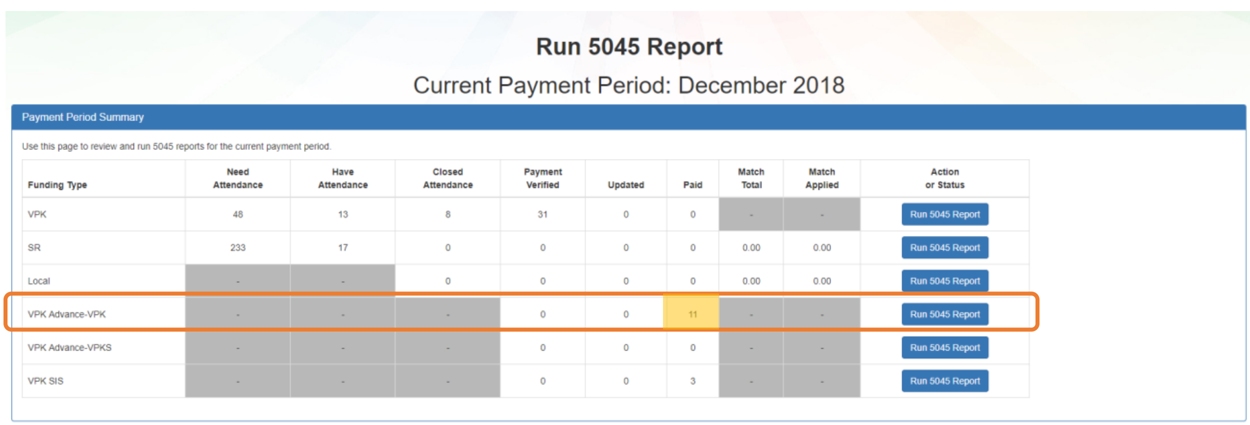
The file downloads and the total number of records display in the Paid column.



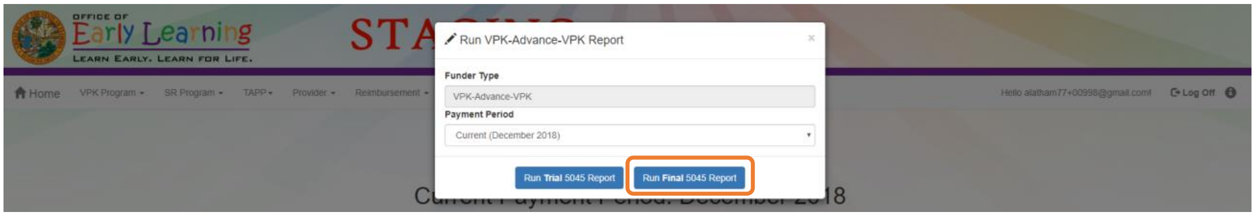
Save the downloaded file locally. See *Payment Transmittal File Layout* below.

Run Final 5045 Report

Go to the **Reimbursement** menu item. Select **Reimbursement Closeout > Run 5045 Report**. Go to the *VPK Advance – VPK* row and click **Run 5045 Report**.



A pop-up message appears. Click **Run Final 5045 Report**.



The Final Advance Payment Summary Report opens.

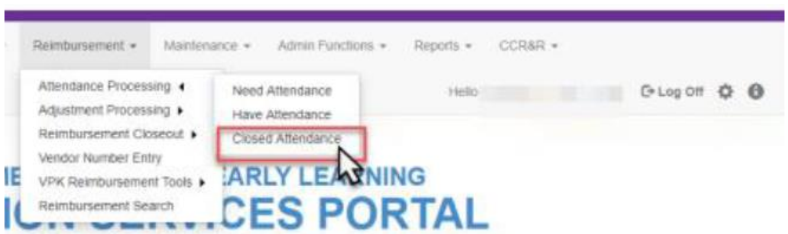
a. A detail report (with child information) is available by selecting **Detail Report**
b. To print, click the **Download** button on the bottom right corner of the screen. A download pop-up message displays. Select **PDF**, change the paper orientation to **Landscape**, and click **Create PDF.** When the PDF file is generated, click **Download**. The file may be saved locally.

Bulk Billing Group Transfer

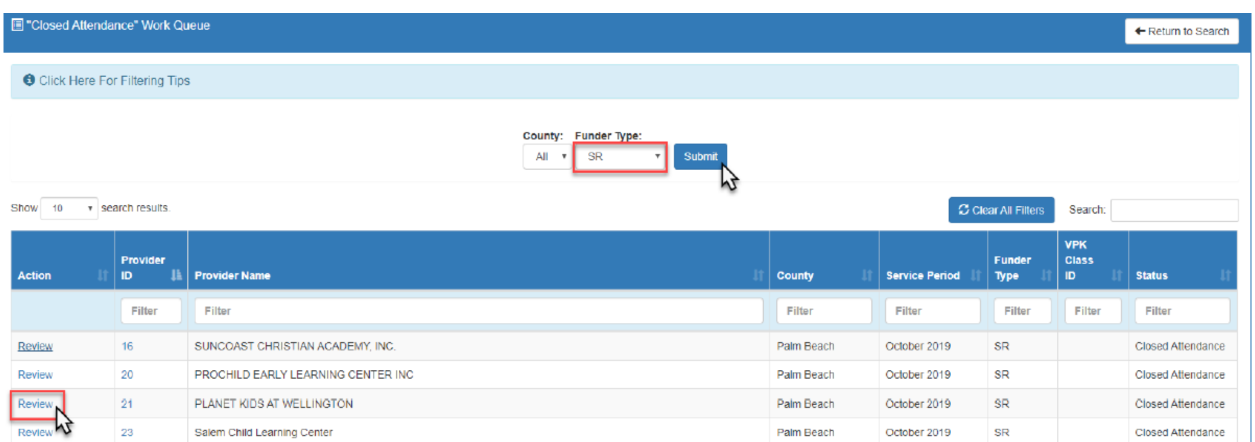
NOTE: See Bulk Billing Group Transfer in Family Processes for CCEP and SR Match changes.

Closed Attendance Check

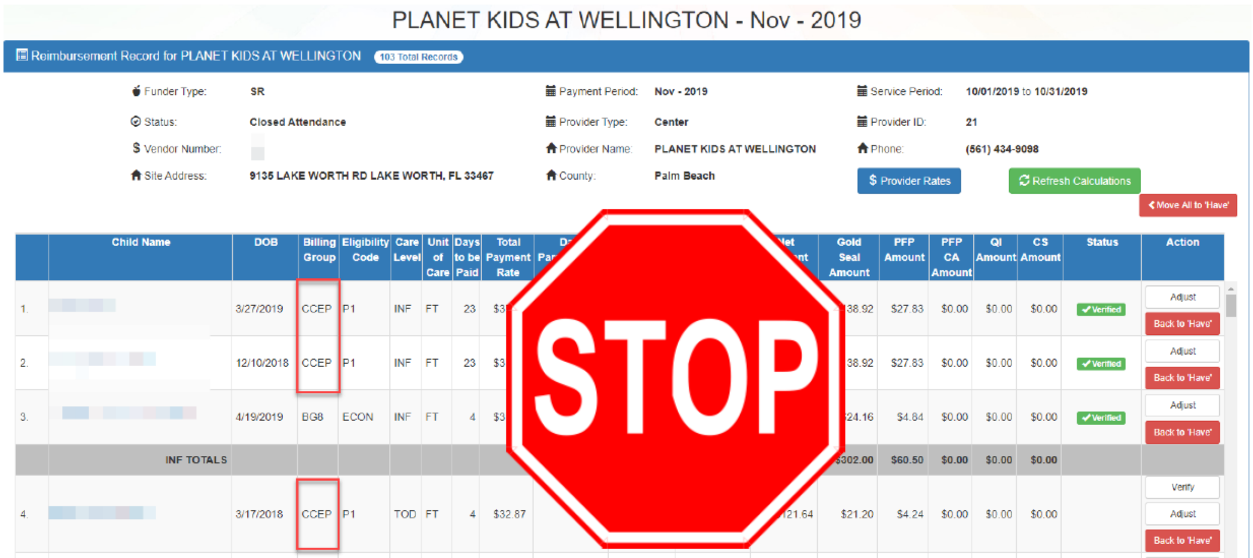
Once the new funder and funding allocations are created (see Bulk Billing Group Transfer in the Family section), at the end of the payment period, go to **Reimbursement > Attendance Processing > Closed Attendance**.



Select the Funder Type (SR) from the funder type drop down menu and click **Submit**. Then, click on the Review link to open a provider's Closed Attendance records for a service period.

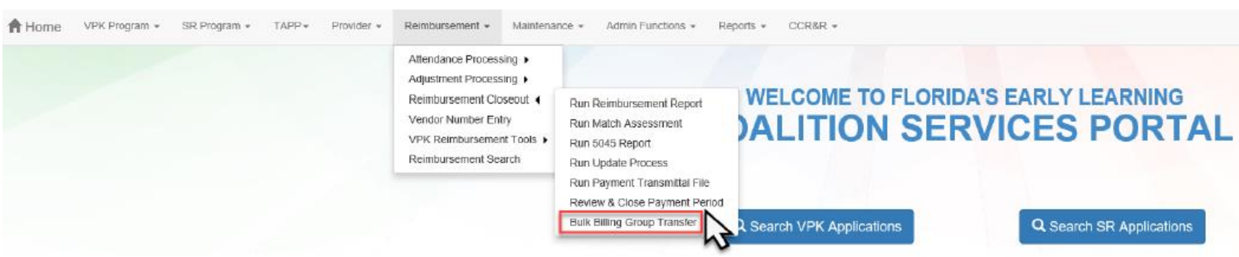


Review the records. Are there are CCEP records? If so, STOP!

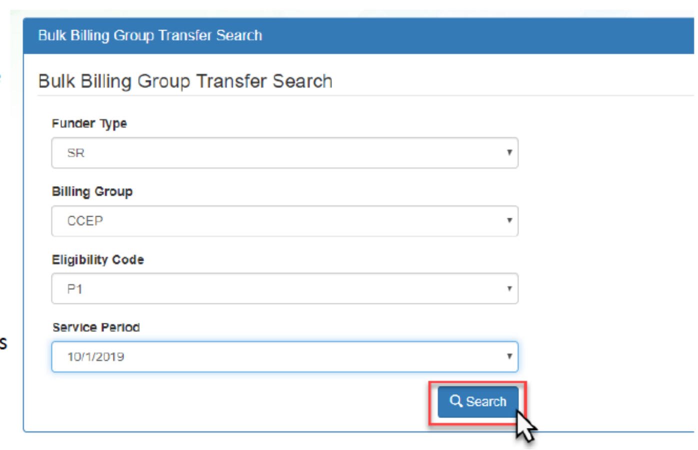


The CCEP records must be changed with the bulk billing group transfer process before verifying.

Go to the Reimbursement menu and select **Reimbursement Closeout > Bulk Billing Group Transfer**.



The **Bulk Billing Group Transfer Search** screen displays. Select the *Funder Type, Billing Group, Eligibility Code,* and *Service Period* that need to be updated and click the **Search** button.



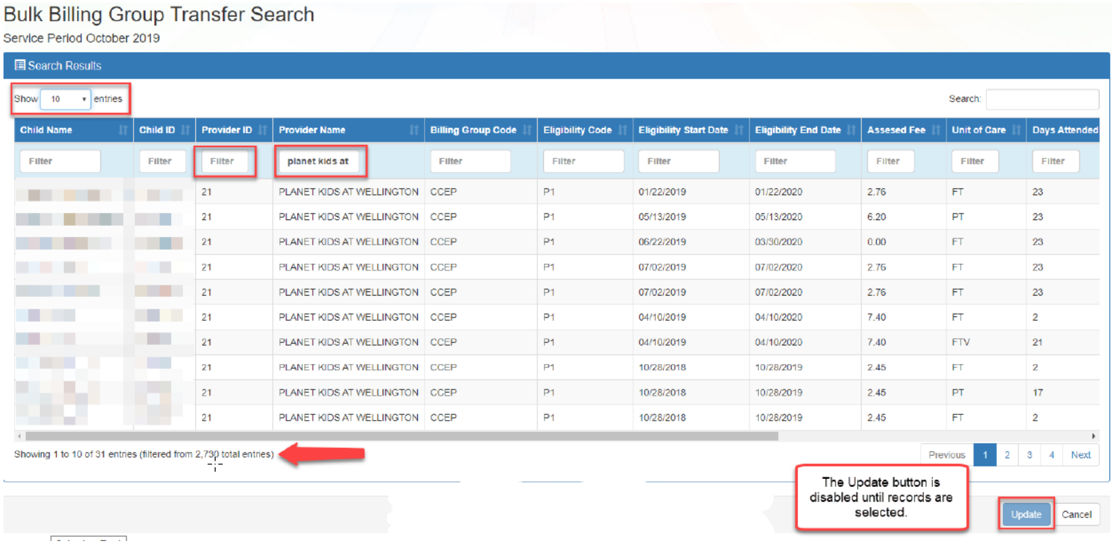
Note: Each selection is a filter that must be selected (in order) before the search can be initiated.

The **Billing Group** dropdown menu displays all of the billing group codes that are associated with the selected funder type.

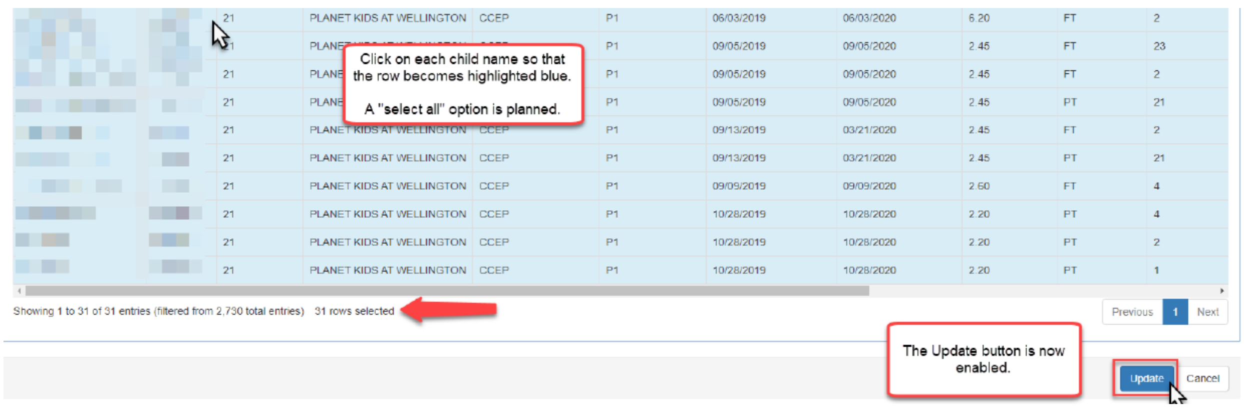
The **Eligibility Code** dropdown menu displays all of the eligibility codes that are associated with the selected funder type and billing group code.

The **Service Period** dropdown menu displays all service periods that are associated with the selected funder type, billing group, and eligibility code <u>AND</u> are in the **Closed Attendance** status.

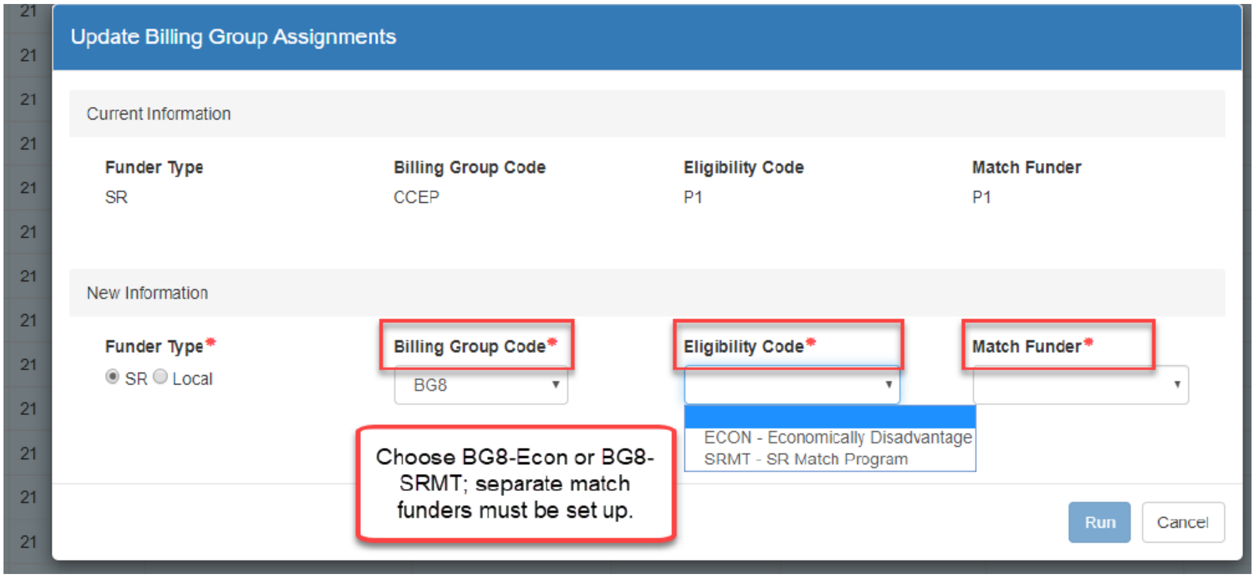
The results display all records in Closed Attendance that have the funder type, billing group, and eligibility combination for the service period selected. Use the Search feature and column filters to narrow results. Scroll to the right to see more.



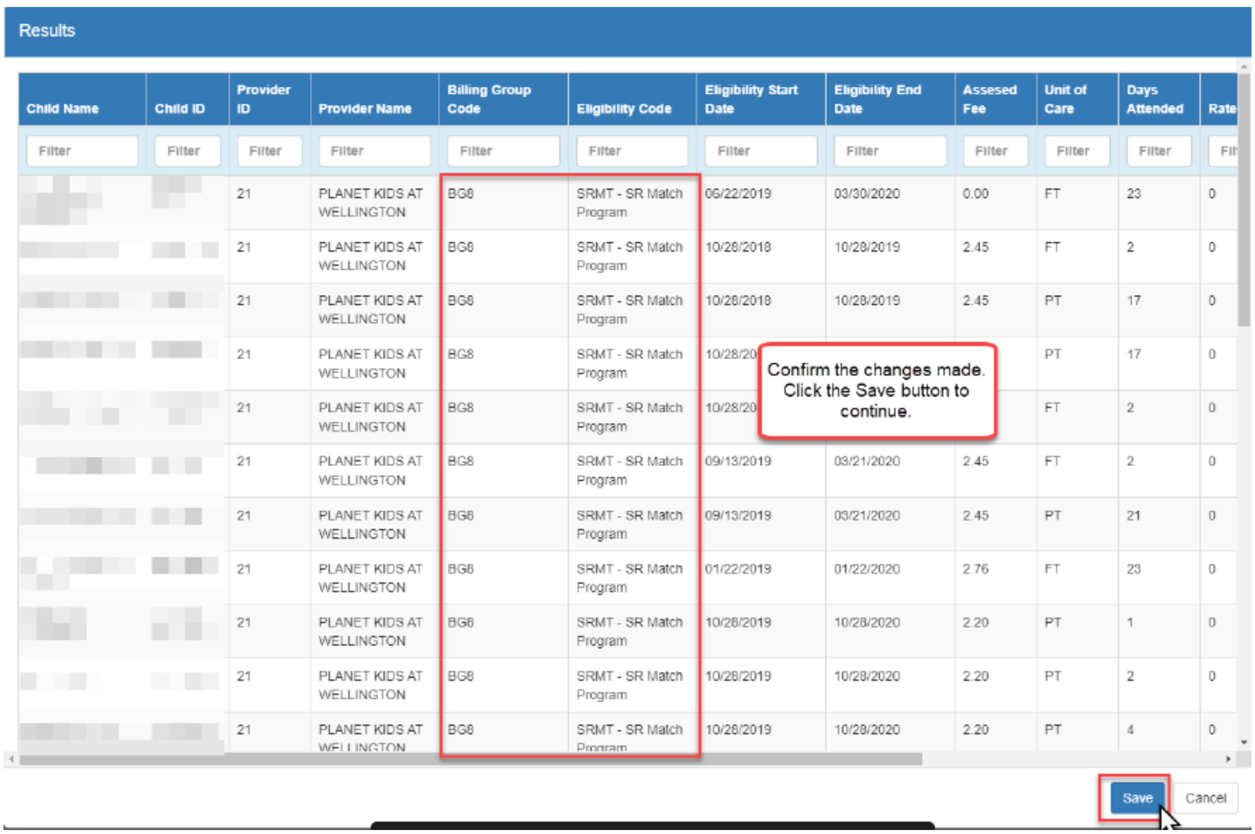
Select each row that needs to be updated by clicking the row. The row becomes highlighted blue and the total number of rows selected display at the bottom of the screen. Click the **Update** button.



The Update Billing Group Assignments pop-up displays. The Current Information area displays the current funder type, billing group, eligibility code and match funder name. Coalition users input the changes needed in the New Information area. Then, click the **Run** button.

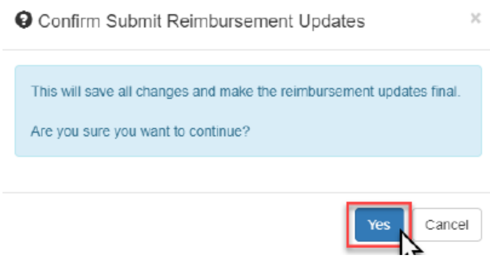


The Results window displays a preview of the updated reimbursement records. Notice the changed billing group, eligibility code. If correct, click the **Save** button. Otherwise, click the **Cancel** button to abandon the changes.

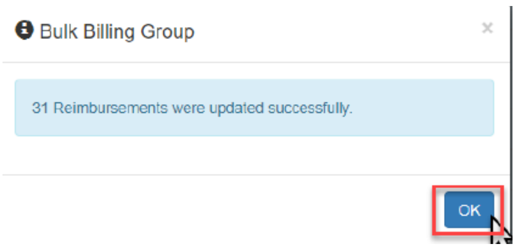


Child Name	Child ID	Provider ID	Provider Name	Billing Group Code	Eligibility Code	Eligibility Start Date	Eligibility End Date	Assesed Fee	Unit of Care	Days Attended	Rate
Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter	Fil
		21	PLANET KIDS AT WELLINGTON	BG8	SRMT - SR Match Program	06/22/2019	03/30/2020	0.00	FT	23	0
		21	PLANET KIDS AT WELLINGTON	BG8	SRMT - SR Match Program	10/28/2018	10/28/2019	2.45	FT	2	0
		21	PLANET KIDS AT WELLINGTON	BG8	SRMT - SR Match Program	10/28/2018	10/28/2019	2.45	PT	17	0
		21	PLANET KIDS AT WELLINGTON	BG8	SRMT - SR Match Program	10/28/20			PT	17	0
		21	PLANET KIDS AT WELLINGTON	BG8	SRMT - SR Match Program	10/28/20			FT	2	0
		21	PLANET KIDS AT WELLINGTON	BG8	SRMT - SR Match Program	09/13/2019	03/21/2020	2.45	FT	2	0
		21	PLANET KIDS AT WELLINGTON	BG8	SRMT - SR Match Program	09/13/2019	03/21/2020	2.45	PT	21	0
		21	PLANET KIDS AT WELLINGTON	BG8	SRMT - SR Match Program	01/22/2019	01/22/2020	2.76	FT	23	0
		21	PLANET KIDS AT WELLINGTON	BG8	SRMT - SR Match Program	10/28/2019	10/28/2020	2.20	PT	1	0
		21	PLANET KIDS AT WELLINGTON	BG8	SRMT - SR Match Program	10/28/2019	10/28/2020	2.20	PT	2	0
		21	PLANET KIDS AT WELLINGTON	BG8	SRMT - SR Match Program	10/28/2019	10/28/2020	2.20	PT	4	0

Next, a confirmation message displays. Click the **Yes** button to commit the changes. Otherwise, click the **Cancel** button to abandon the changes.

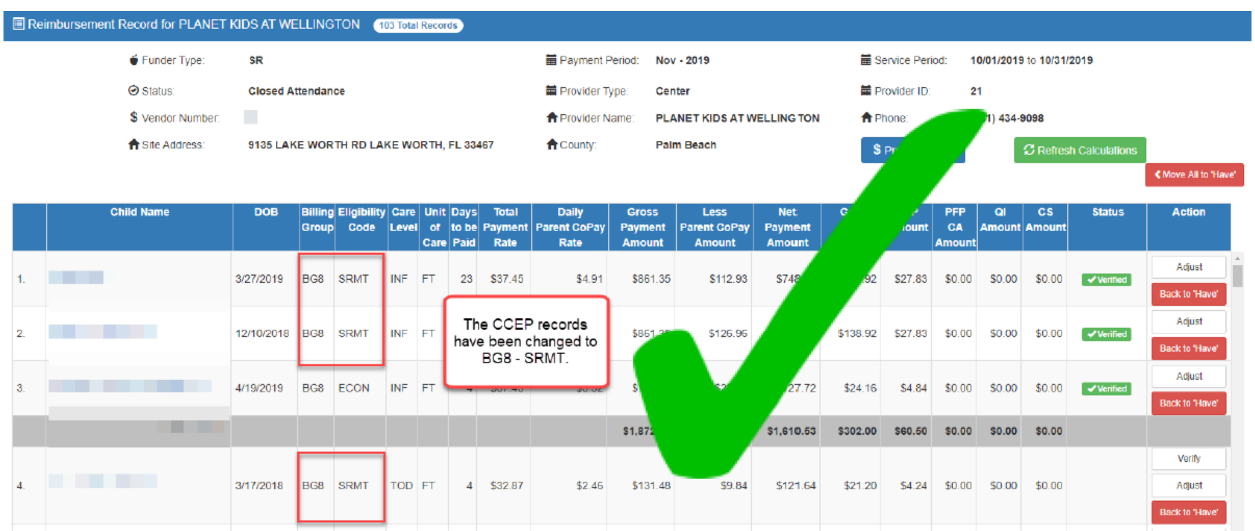


Then, a success message displays with the total number of records that were updated. Click the **OK** button.



When the message is closed, the screen returns to the Bulk Billing Group Transfer search page. The changes can now be verified in Closed Attendance.

Review the records. Now that there are no CCEP records, continue to verify records as usual. Repeat for all service period rosters.

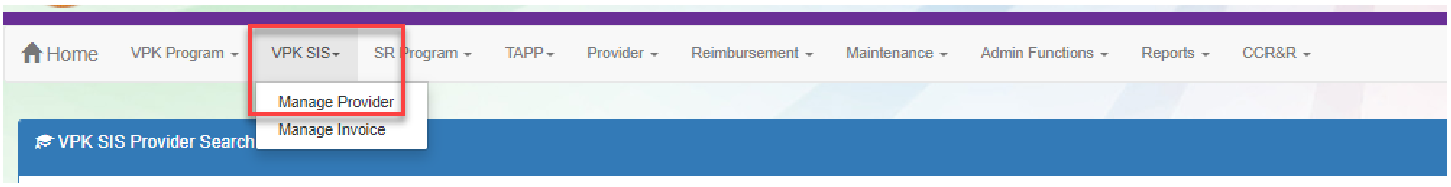


VPK Specialized Instructional Service (SIS) Process

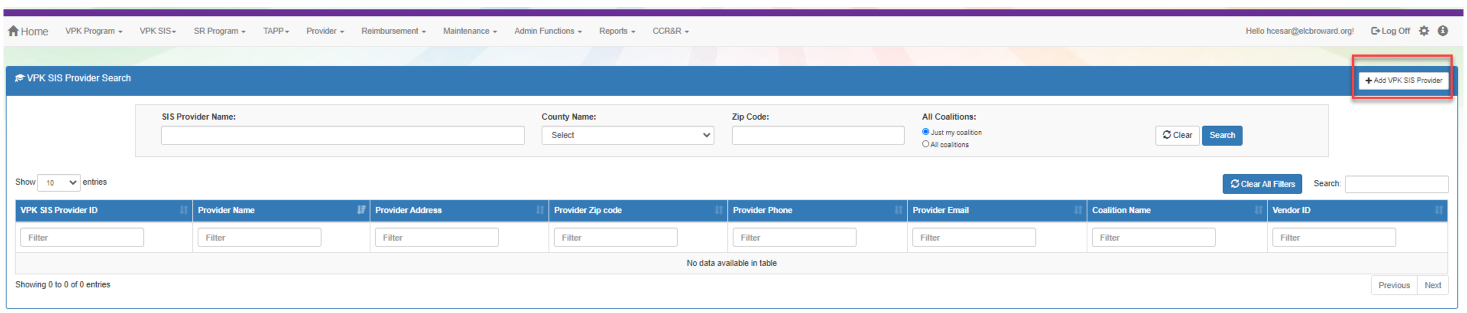
VPK SIS providers are paid through the Coalition Services Portal by enrolling and building a schedule of services for a child. To use this feature, users must be Coalition Admin or Coalition User with "Manage Reimbursements" permissions. In addition, VPK SIS Providers for each coalition must be created and the VPK child application must be approved with a SIS session type.

Add VPK SIS Provider

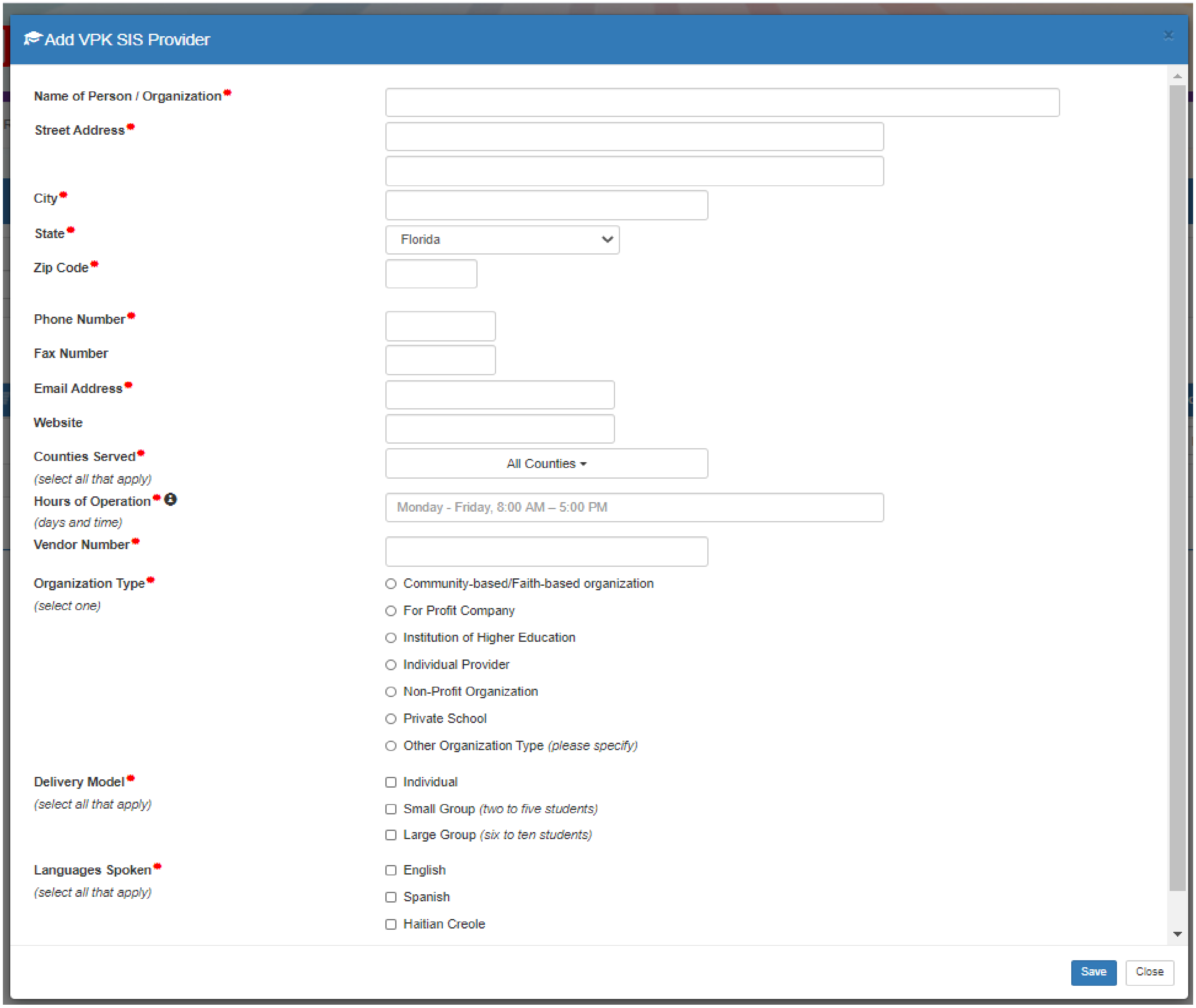
VPK SIS providers do not require a traditional provider profile or document submission; however, Coalition staff enter abbreviated profile information to create VPK SIS providers. To add a VPK SIS provider, navigate to **VPK SIS > Manage Provider**.



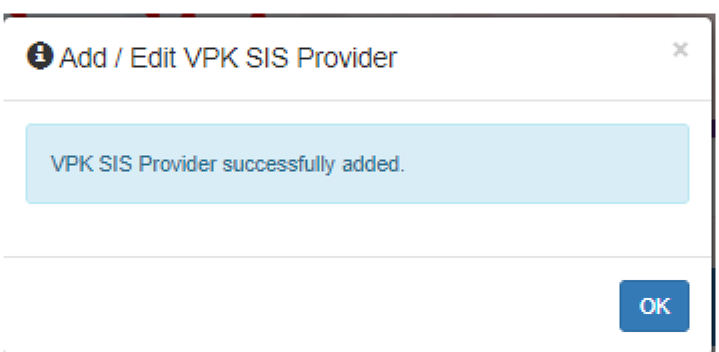
Click the **+Add VPK SIS Provider** button in VPK Search Provider Search Page.



The Add VPK SIS Provider page displays.



Fill in the information and press **Save**. A confirmation message displays.

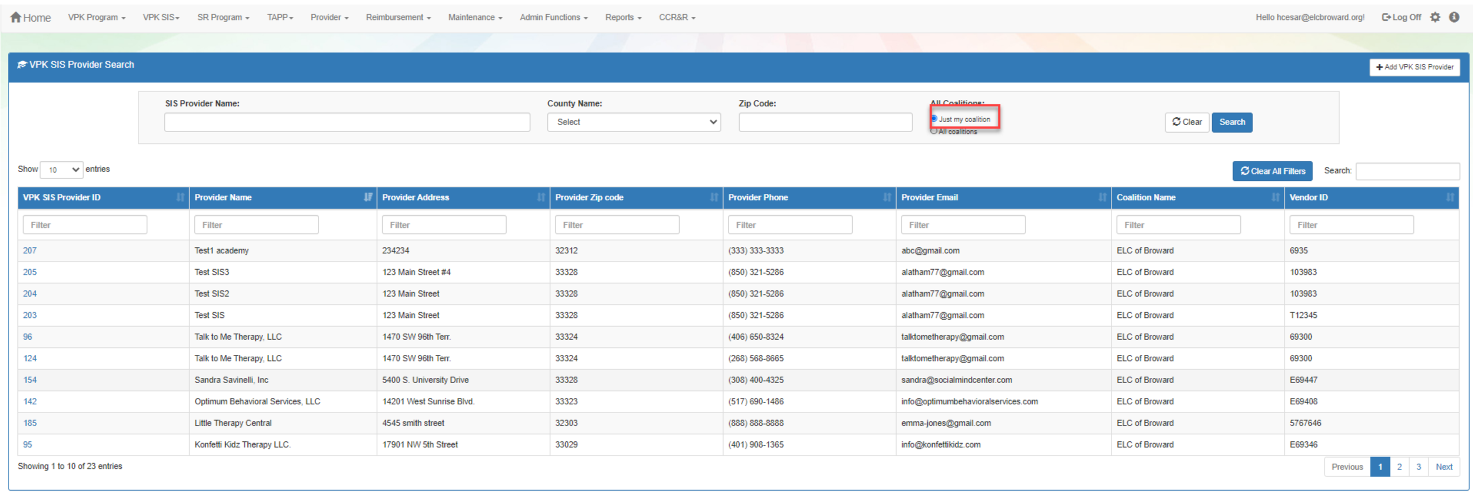


Search VPK SIS Provider

To search for a VPK SIS provider, navigate to **VPK SIS > Manage Provider**.

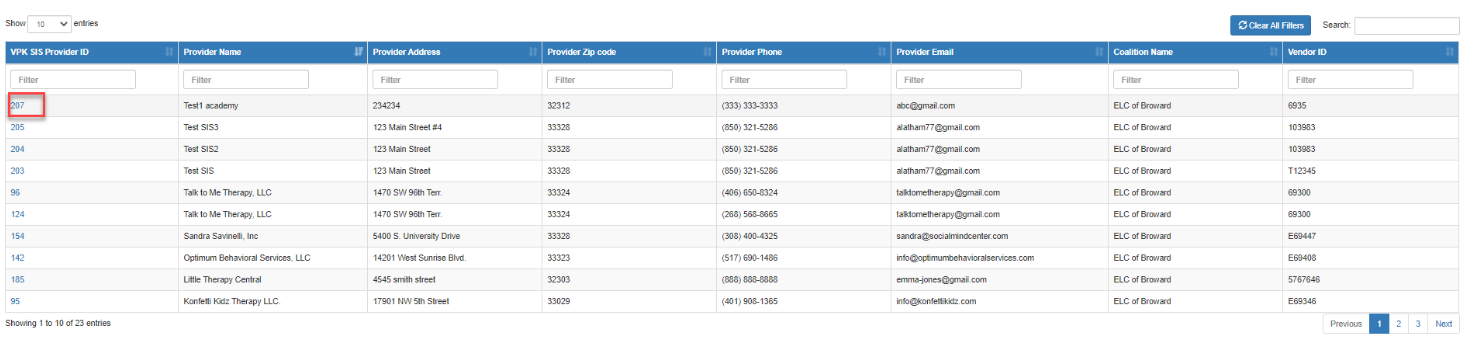
VPK SIS Providers can be searched for by SIS Provider Name, County Name, Zip Code, All Coalition / Just my Coalition.

To search providers only in the logged in user's coalition, click the 'Just my coalition' radio button from the search criteria. Only VPK SIS providers who are registered in the Coalition user's service area are displayed. To search all VPK SIS providers, click the 'All coalitions' radio button.



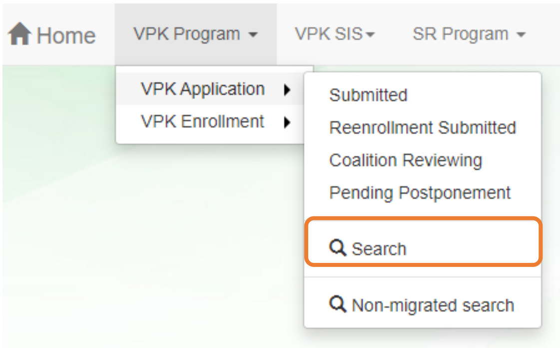
To edit the VPK SIS provider Information, click the VPK SIS provider id link.

NOTE: Only the coalition that created the VPK SIS provider can manage it.



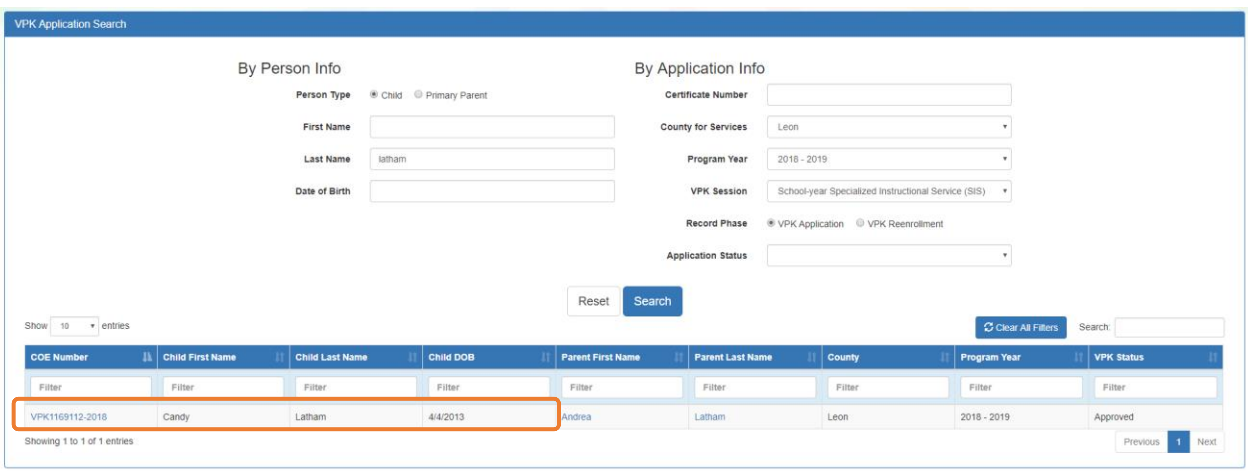
Locate VPK Child Application with SIS Session Type

To begin, locate the VPK child application in need of enrollment. Navigate to **VPK Program > VPK Application > Search**.



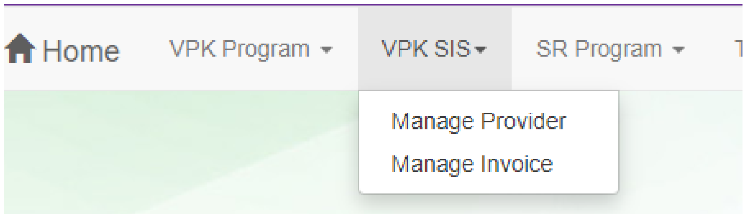
VPK Application Search page displays. Select Program Year and VPK Session > School-year Specialized Instructional Service (SIS) or Summer Specialized Instructional Service (SIS). Click the **<u>Search</u>** button. Results display. The child's COE number, first name, last name, and date of birth are needed for enrollment.

a. If a child's application has the incorrect session type, it may be re-opened to have the session type changed.

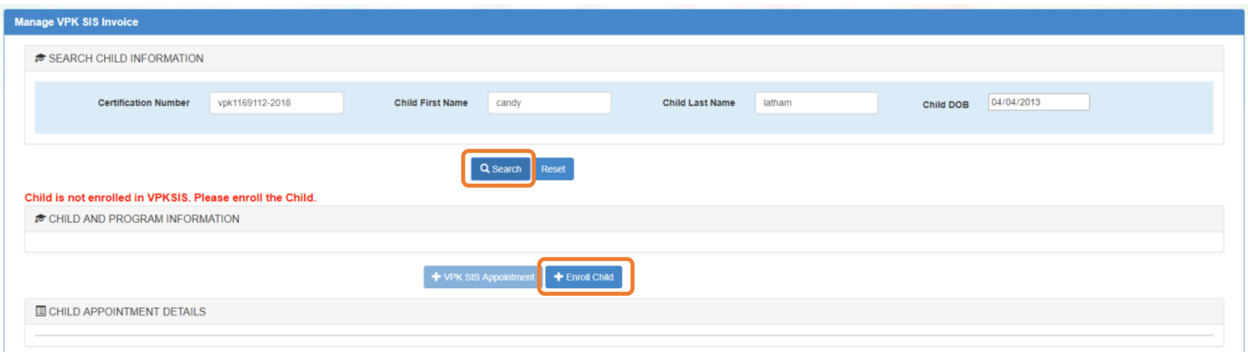


Enroll VPK SIS Child/Build Schedule of Services

Navigate to **VPK SIS > Manage Invoice**.



The Invoice page displays. Enter the Certificate Number (VPK#####-YYYY), Child First Name, Child Last Name, and Child Date of Birth. Click the **Search** button.



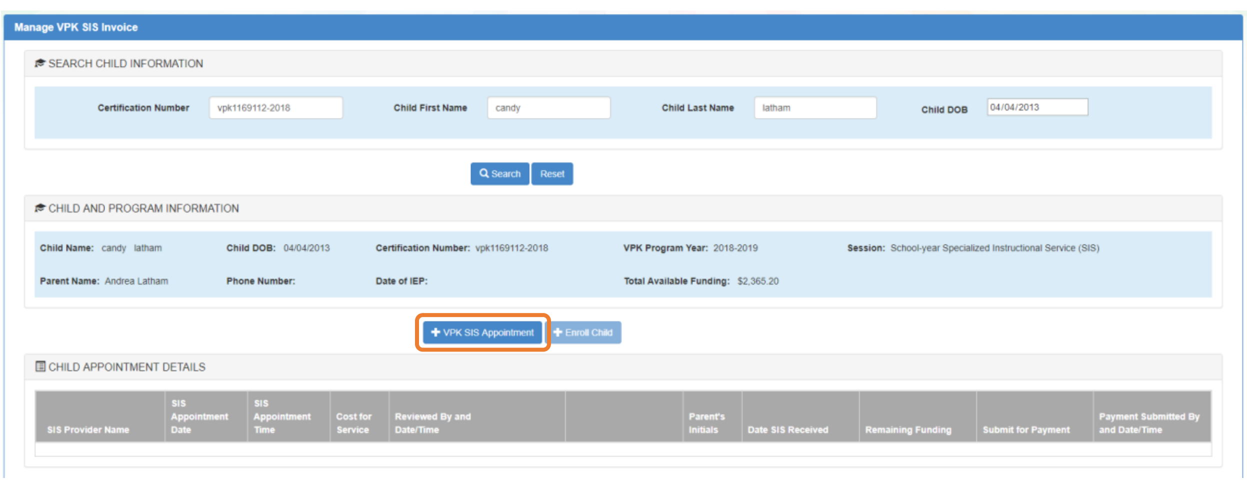
a. Message *"Child not found."* = Re-enter the information because no matching child information was located.

b. Message *"Child is not eligible to receive VPK SIS services. Please review the application."* = Child's VPK application was not approved for a VPK SIS session.

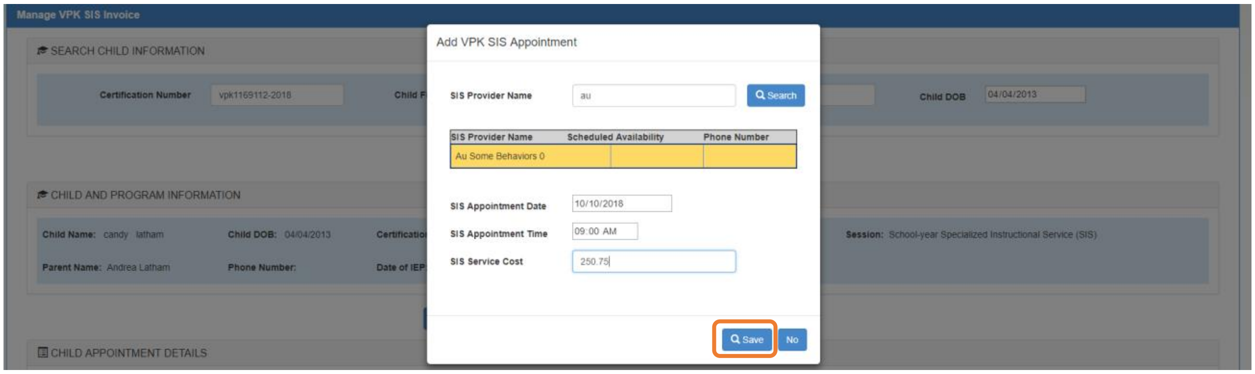
c. Message *"Child is not enrolled in VPK SIS. Please enroll the child."* = Continue to enroll the child.

Click the **Enroll Child** button. The child and program information displays. The VPK SIS Appointment button becomes enabled.

NOTE: The date of the IEP will not be populated until a future enhancement. Total available funding reflects the maximum provider payment for the county on VPK Max Rates. Click the **VPK SIS Appointment** button.

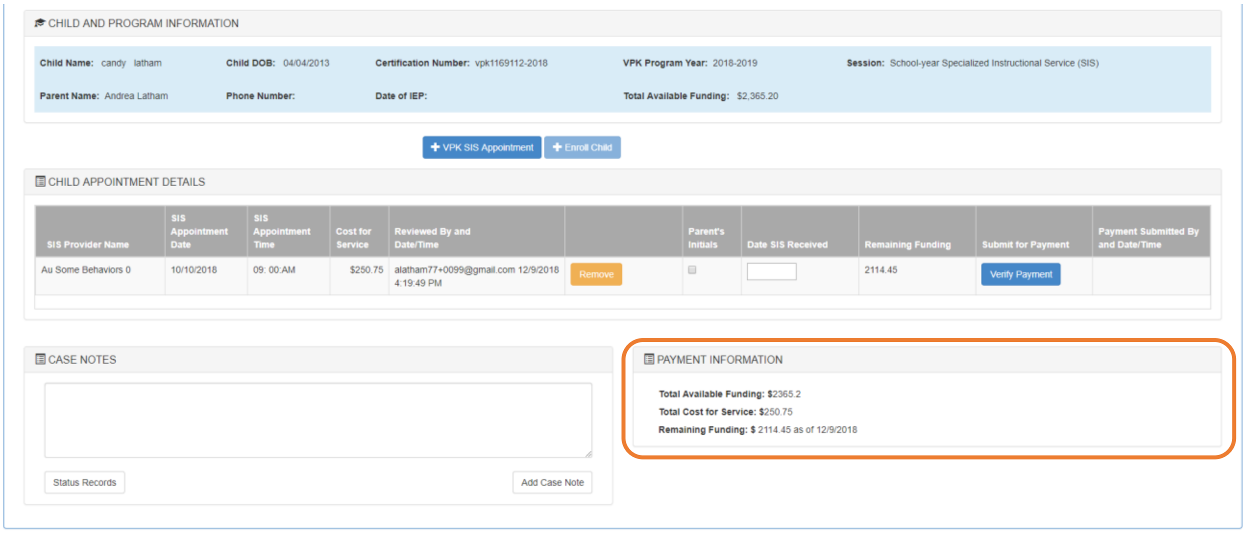


A pop-up message displays to add the VPK SIS appointment.



a. Type SIS provider name in field and click **<u>Search</u>**.
b. Click on the SIS provider name so that it is highlighted.
c. Enter SIS appointment date, time, and cost. Click the **<u>Save</u>** button.

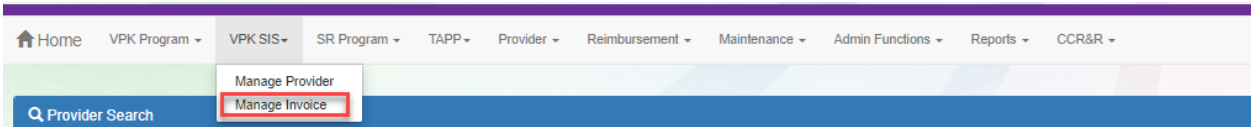
Pop-up message closes. Appointment details display. Cost for service is deducted from the total available funding. Reviewed By information displays. Remove and Verify Payment buttons are enabled. Remaining Funding is updated.



a. Saved appointments with incorrect information may be removed and re-added with corrections. **NOTE:** Once a payment is verified, the appointment cannot be removed.
b. Repeat as needed to save more appointments. Cost for services cannot exceed the remaining funding.

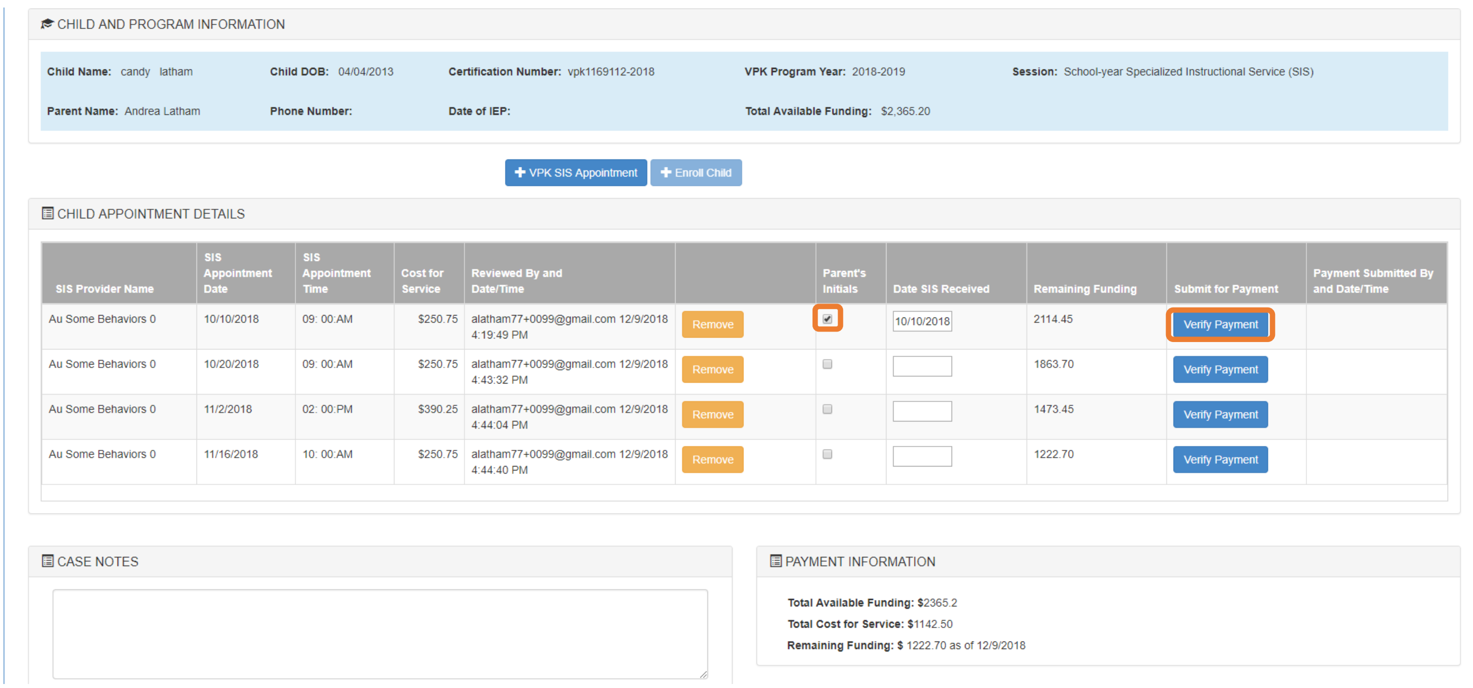
Manage VPK SIS Invoice and Verify Payment

Navigate to **VPK SIS > Manage Invoice**.



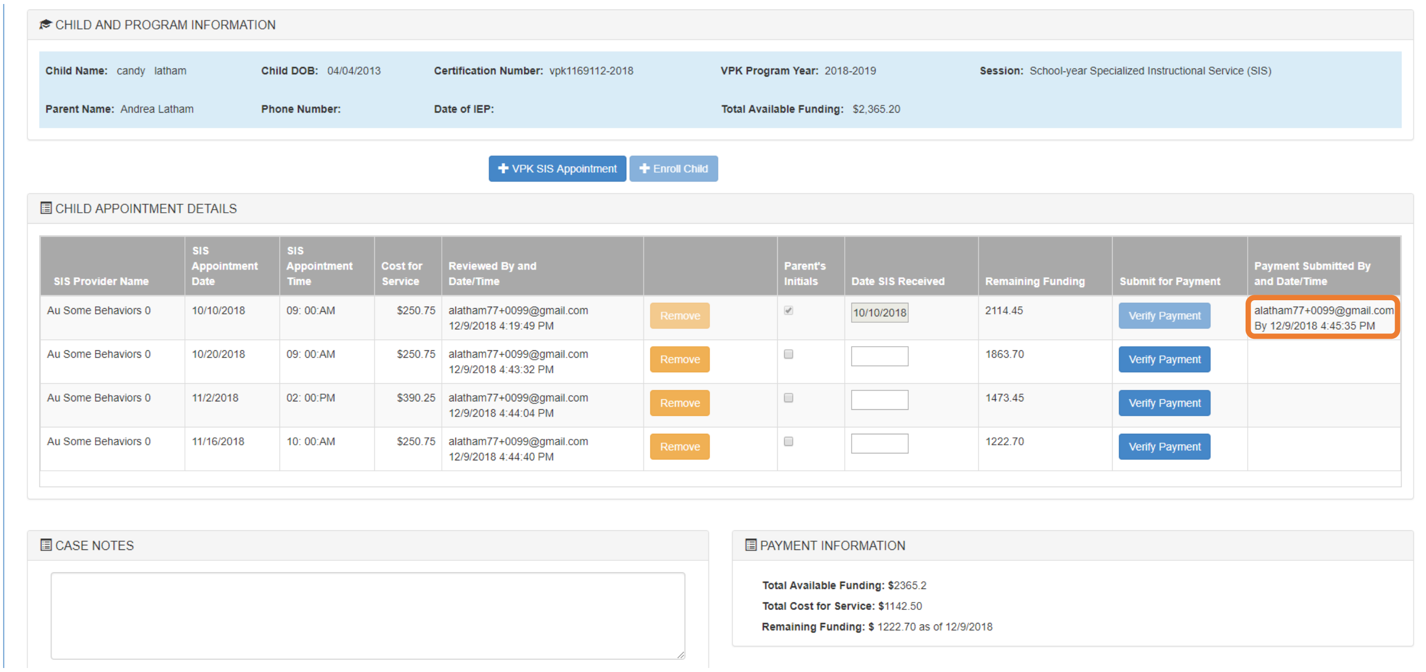
The Invoice page displays. Enter the Certificate Number (VPK#####-YYYY), Child First Name, Child Last Name, and Child Date of Birth. Click the **Search** button. The saved child enrollment and Schedule of Services display.

To initiate payment, check off the **Parent's Initials** box. The SIS appointment date populates in the Date SIS Received field; however, it may be edited if the appointment date changed.



a. Checking the Parent's Initials box is required. A payment cannot be verified without this check box.
b. **NOTE**: This is the last opportunity to remove the appointment if corrections are needed. Once a payment is verified, the appointment cannot be removed.

Click the **Verify Payment** button. Payment submitted by and date/time displays. This record now appears in the Payment Period Summary in the Payment Verified column.



Run Update

Go to the **Reimbursement** menu item. Select **Reimbursement Closeout > Run Update Process.** Go to the *VPK SIS* row and click the **Run Update** button. The total number of records display in the Payment Cycle Summary *Updated* column.

Run Payment Transmittal File

Go to the **Reimbursement** menu item. Select **Reimbursement Closeout > Run Payment Transmittal File.** Go to the *VPK SIS* row and click the **Run File** button. A pop-up message appears. The Payment Transmittal File default criteria is set. Click Run Transmittal File. The file downloads and the total number of records display in the Payment Cycle Summary *Paid* column. Save the downloaded file locally.

Run Trial/Final Reimbursement Report

Go to the **Reimbursement** menu item. Select **Reimbursement Closeout > Run Reimbursement Report**. Go to the *VPK SIS* row and click the **Run Reimbursement Report** button. A pop-up message appears. Click the **Run Trial Reimbursement Report** button or **Run Final Reimbursement Report** button. The Provider Reimbursement Report opens.

a. A detail report (with child information) is available by selecting **Detail Report**
b. To print, click the **Download** button on the bottom right corner of the screen. A download pop-up message displays. Select **PDF**, change the paper orientation to **Landscape**, and click **Create PDF**. When the PDF file is generated, click **Download**. The file may be saved locally.

Run Trial/Final 5045 Report

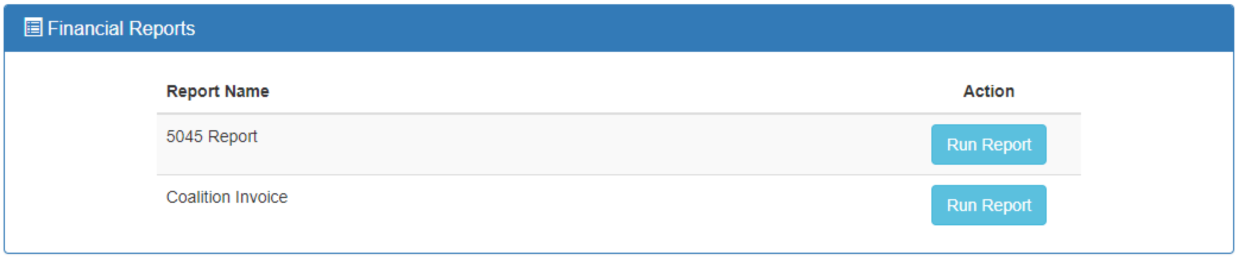
Go to the **Reimbursement** menu item. Select **Reimbursement Closeout > Run 5045 Report**. Go to the *VPK SIS* row and click the **Run 5045 Report** button. A pop-up message appears. Click the **Run Trial 5045 Report** button or **Run Final 5045 Report** button. The 5045 Report opens.

a. A detail report (with child information) is available by selecting **Detail Report**
b. To print, click the **Download** button on the bottom right corner of the screen. A download pop-up message displays. Select **PDF**, change the paper orientation to **Landscape**, and click **Create PDF**. When the PDF file is generated, click **Download**. The file may be saved locally.

Financial Reports

Financial Reports are available in EFS Mod. These reports display the same information as the same reports in Tableau. Navigate to **Reports > Financial Reports.**

NOTE: The reports will also remain in Tableau until all functionality is available in EFS Mod.



5045 Report

The 5045 Report is available in EFS Mod. Navigate to **Reports > Financial Reports.** After clicking the **Run Report** button for 5045 Report, the Run 5045 Report pop-up window opens.

Select the Report Parameters from the dropdown. Each dropdown is required.

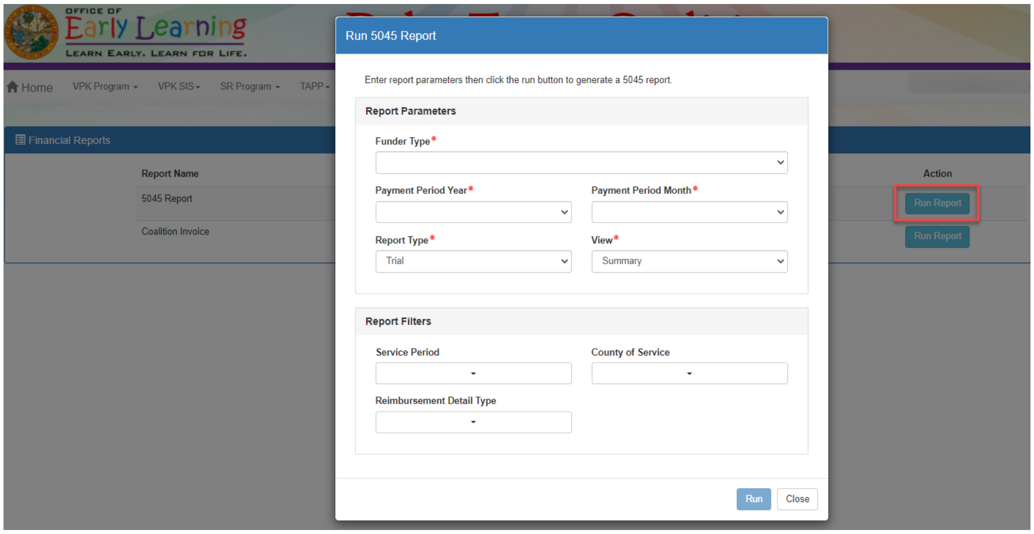
1. Funder Type (SR, VPK or Local)
2. Payment Period Year
3. Payment Period Month
4. Report Type (Pending, Closed, Trial, or Final)
5. View (Summary or Detail)

Additional filters can be selected when the Summary view is selected. If no option is selected, then all records that meet the Report Parameters will display.

1. Service Period
2. County of Service
3. Reimbursement Detail Type

Additional filters can be selected when the Detail view is selected. If no option is selected, then all records that meet the Report Parameters will display.

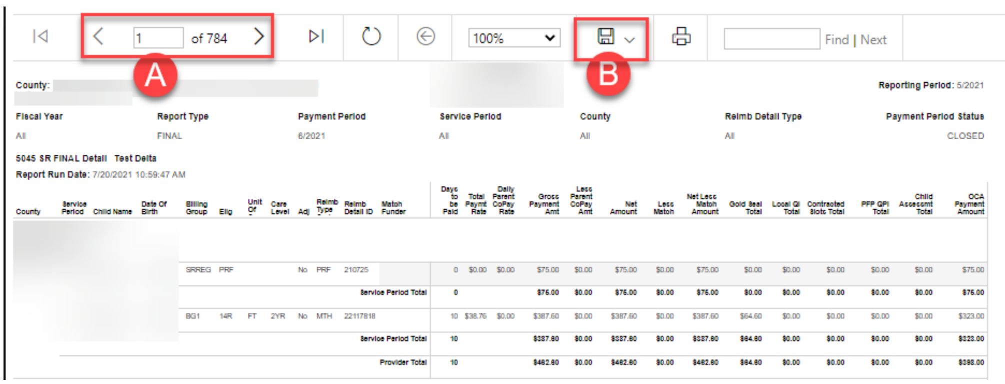
1. Service Period
2. County of Service
3. Provider ID
4. Child ID
5. Reimbursement Detail Type
6. Obscure Child Name



The 5045 Report opens in a new browser tab and displays the information based on the criteria selected.

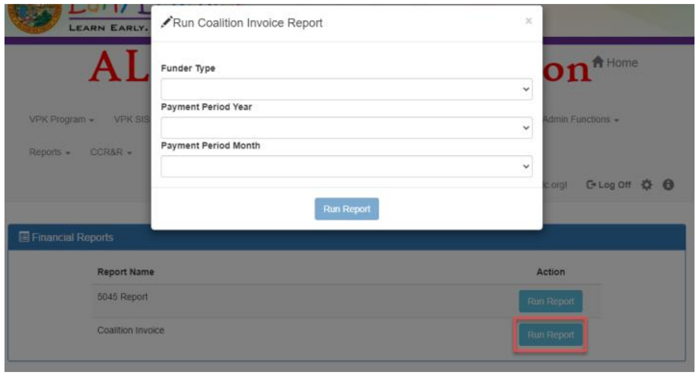
A. Use the arrows to navigate pages.

B. Click the icon and save the report to Excel or PDF.



Coalition Invoice Report

The Coalition Invoice Report is available in EFS Mod. Navigate to **Reports > Financial Reports.** After clicking the **Run Report** button for Coalition Invoice, the Run Coalition Invoice Report pop-up window opens.



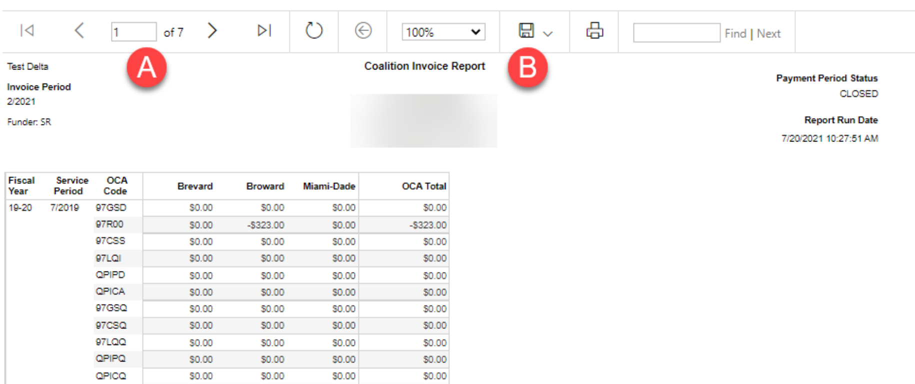
Select the items from the dropdowns, then click the **Run Report** button.

1. Funder Type (SR, VPK, or Local)
2. Payment Period Year
3. Payment Period Month

The Coalition Invoice Report opens in a new browser tab and displays the information based on the criteria selected.

C. Use the arrows to navigate pages.

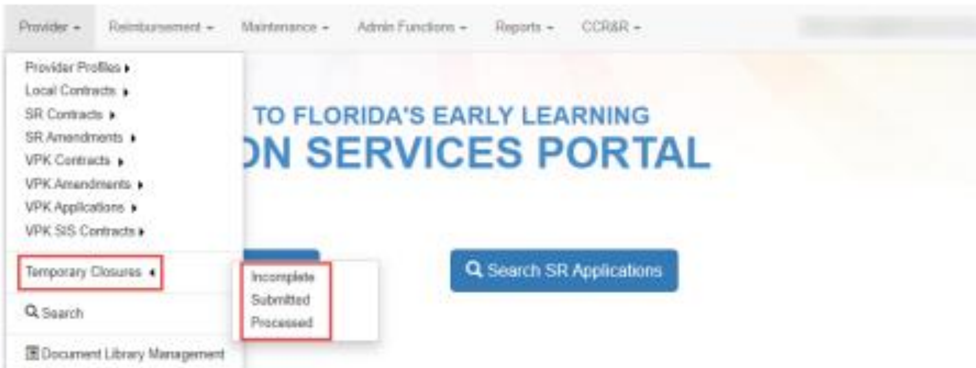
D. Click the icon and save the report to Excel or PDF.



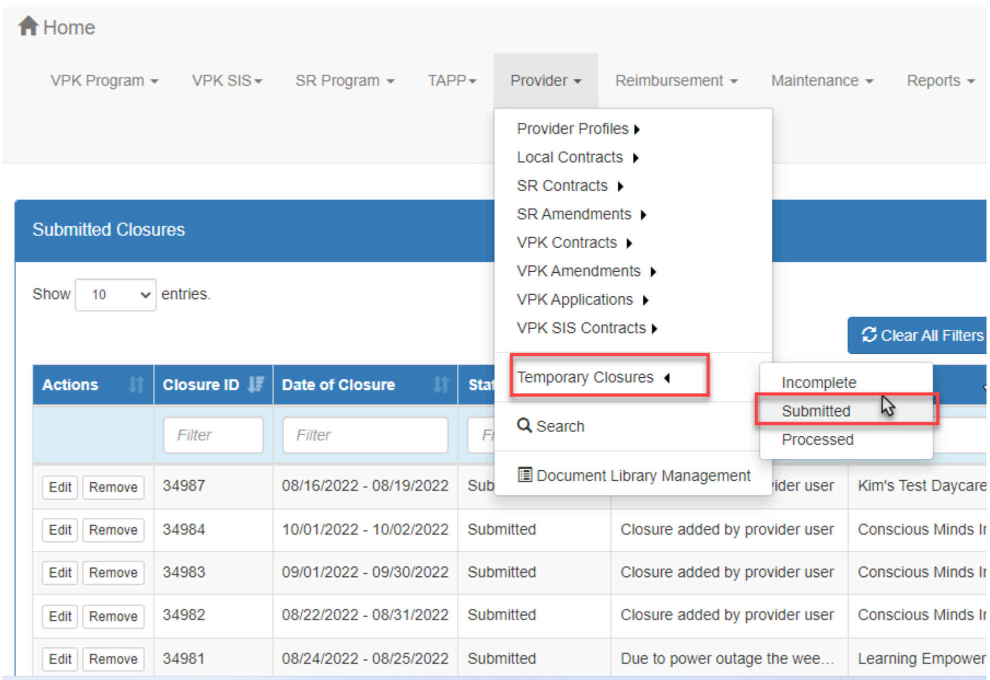
Fiscal Year	Service Period	OCA Code	Brevard	Broward	Miami-Dade	OCA Total
19-20	7/2019	97GSD	$0.00	$0.00	$0.00	$0.00
		97R00	$0.00	-$323.00	$0.00	-$323.00
		97CSS	$0.00	$0.00	$0.00	$0.00
		97LQI	$0.00	$0.00	$0.00	$0.00
		QPIPD	$0.00	$0.00	$0.00	$0.00
		QPICA	$0.00	$0.00	$0.00	$0.00
		97GSQ	$0.00	$0.00	$0.00	$0.00
		97CSQ	$0.00	$0.00	$0.00	$0.00
		97LQQ	$0.00	$0.00	$0.00	$0.00
		QPIPQ	$0.00	$0.00	$0.00	$0.00
		QPICQ	$0.00	$0.00	$0.00	$0.00

Temporary Closures

Coalition Portal users can edit, view, remove and process temporary closure records created by Providers. There are Incomplete, Submitted and Processed queues to view, edit, process and remove the records.



Submitted Closures Queue



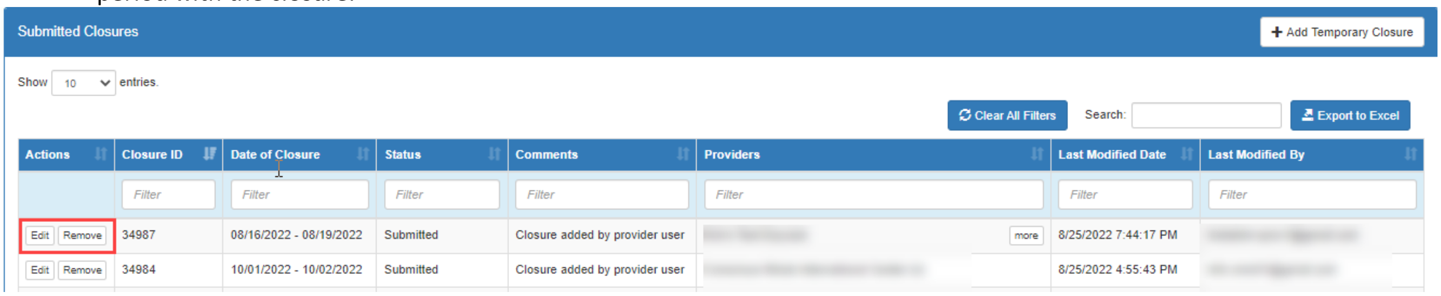
The Submitted Closures queue lists closures submitted by providers and the closures that are in **Coalition Reviewing** or **Submitted** status. From the Submitted queue, Coalition users can:

- Edit temporary closures
- Remove temporary closures
- Change the “Possible Days to be Paid”
- Approve temporary closures

Clicking the **Edit** button will open the Edit Temporary Closure pop-up window.

Clicking the **Remove** button will remove the temporary closure.

NOTE: A temporary closure cannot be removed if at least one provider has a submitted attendance for the service period with the closure.

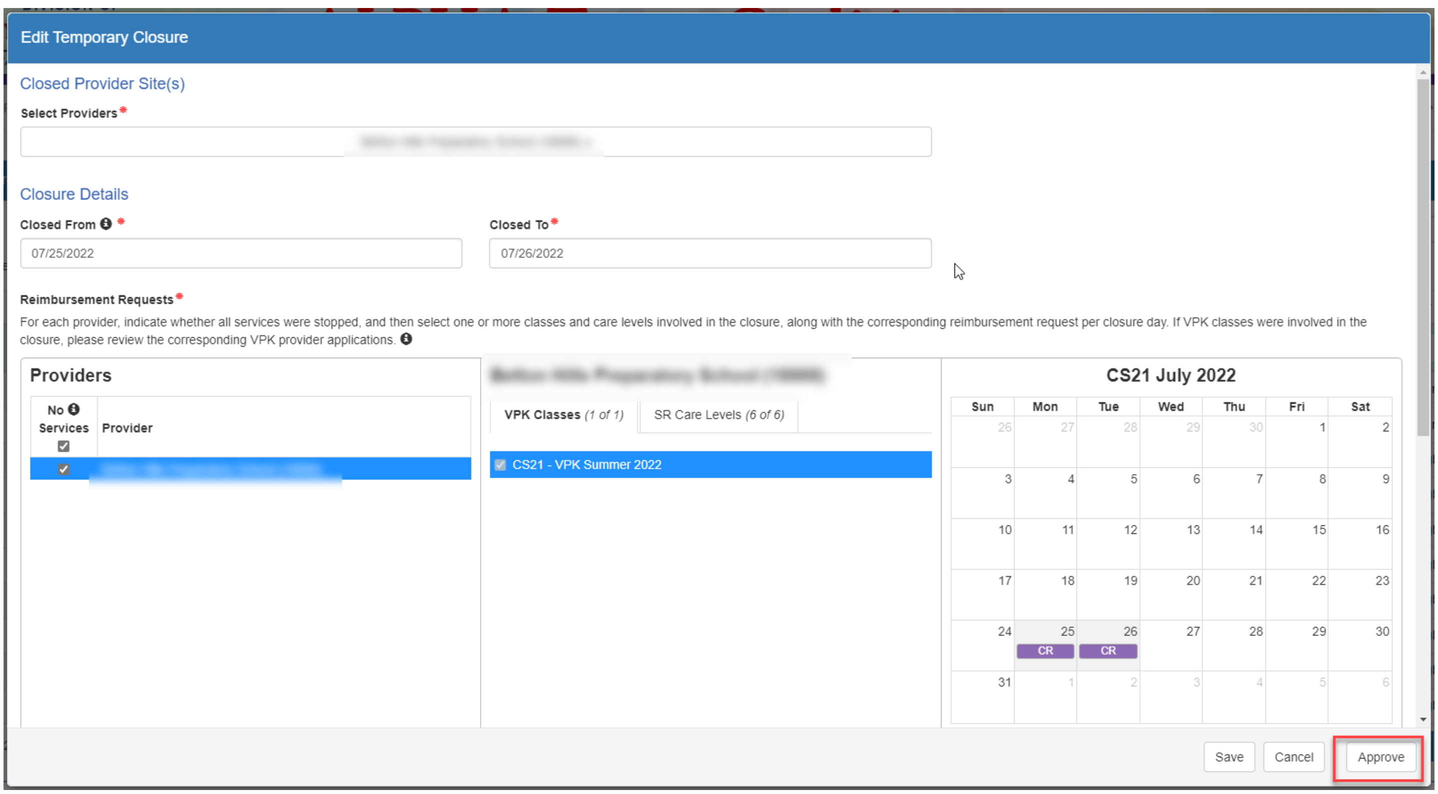


Processing Whole Site Temporary Closures

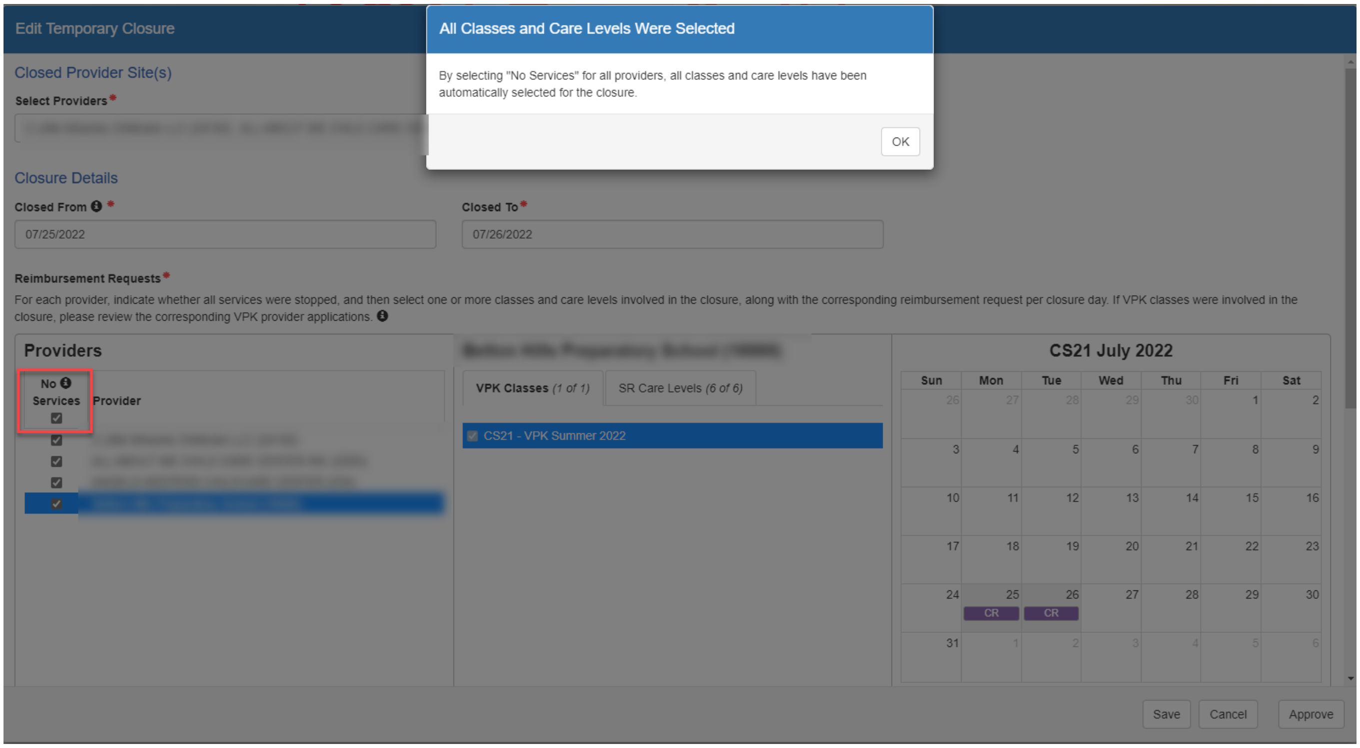
Clicking the **Edit** button from the Submitted Closures queue for a Whole Site Closure opens the Edit Temporary Closure pop-up window.

Coalition users can click on CR and change it to CN and vice versa. Upon clicking the Approve button the closure gets a "Processed" status.

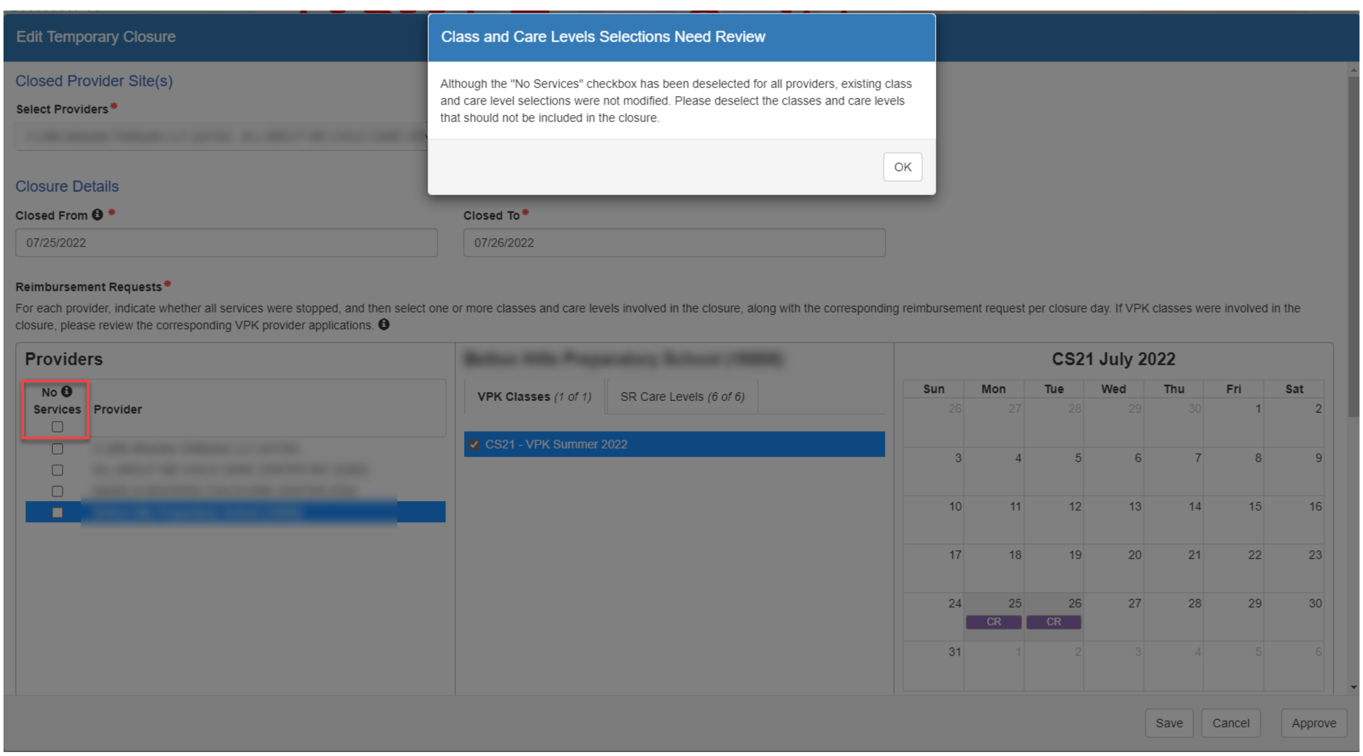
Click the **Approve** button to approve the closure. **NOTE:** The closure status is updated to 'Processed'. The CR or CN days will now display on the provider's attendance roster for the month of the closure.



Clicking the No Services checkbox will select multiple providers with whole site closures and a pop-up will indicate that all classes and care levels are selected for all providers



Unchecking the No Services checkbox will deselect all providers, but all classes and care levels for each provider are still selected. The user will need to deselect classes and care levels for each provider that should not be included in the closure.



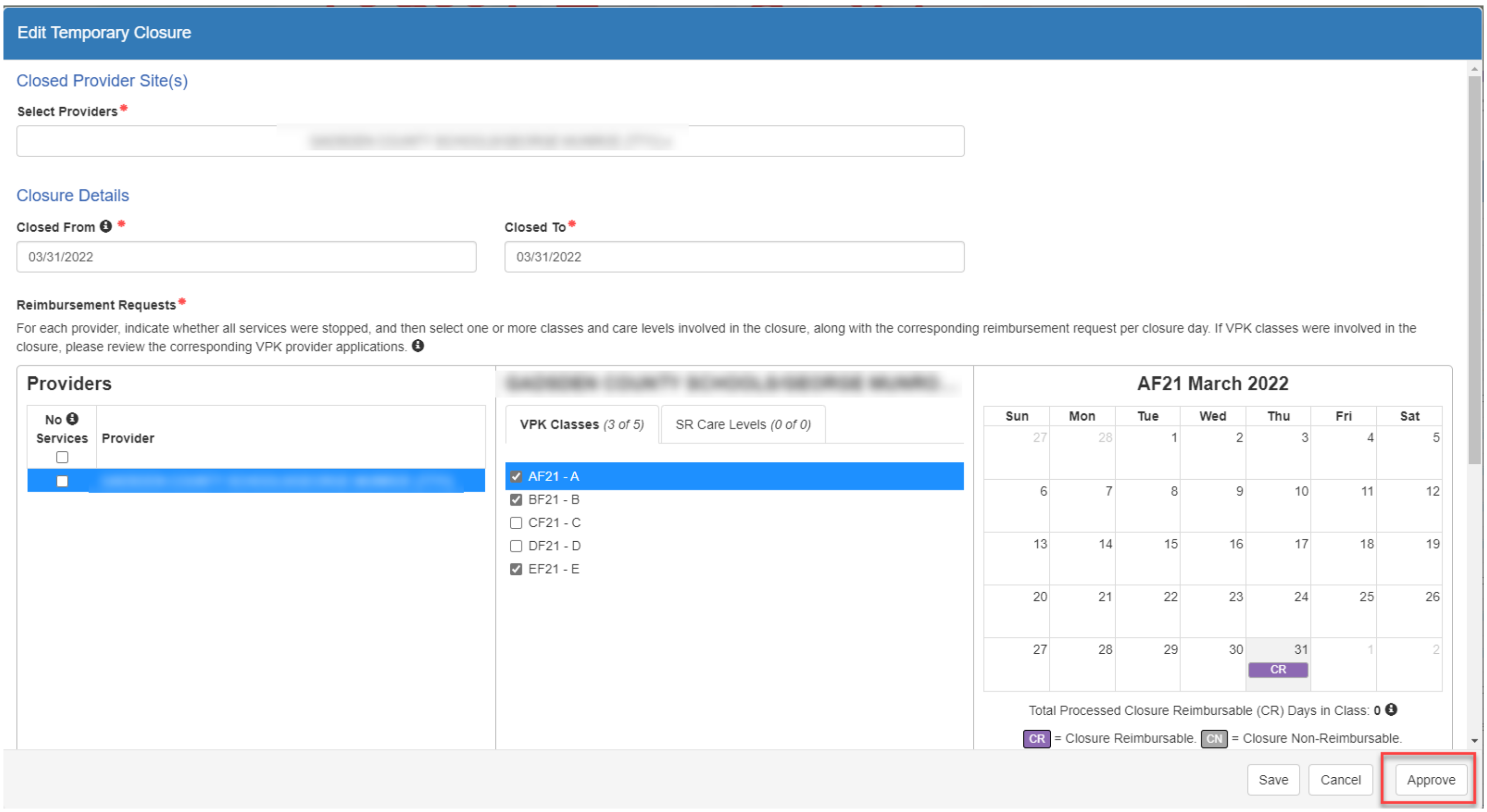
Processing Partial Closure

Clicking the **Edit** button from the Submitted Closures queue for a Partial Closure (VPK or SR) opens the Edit Temporary Closure pop-up window.

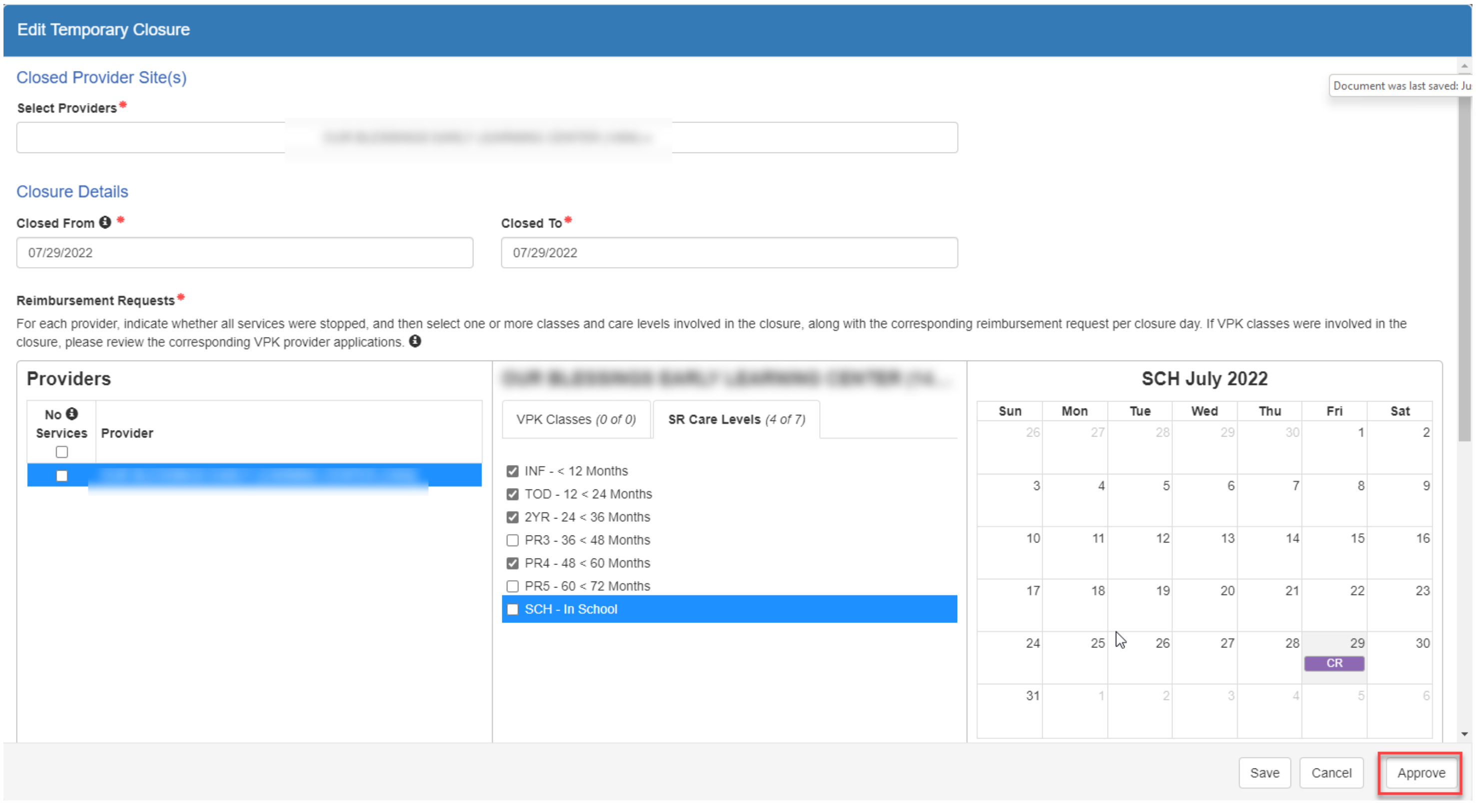
Coalition users can click on CR and change it to CN and vice versa. Upon clicking the **Approve** button the closure gets a "Processed" status.

NOTE: If there are Closure Non-Reimbursable days in the closure, the closure days are written in the calendar.

VPK



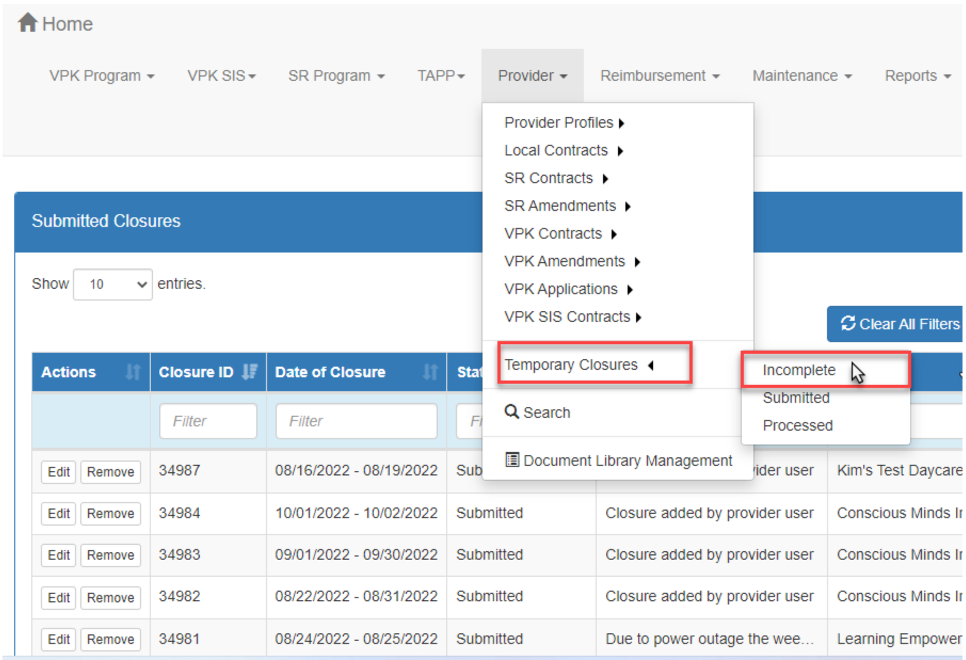
SR



NOTE: Individual students, not affected by a temporary closure, may be edited by the provider in attendance. For example, a 2 Year Old class has 6 children showing a CR for the temporary closure, but 3 of them were present on the CR days. The provider can change the CR days to an X to mark the 3 children present.

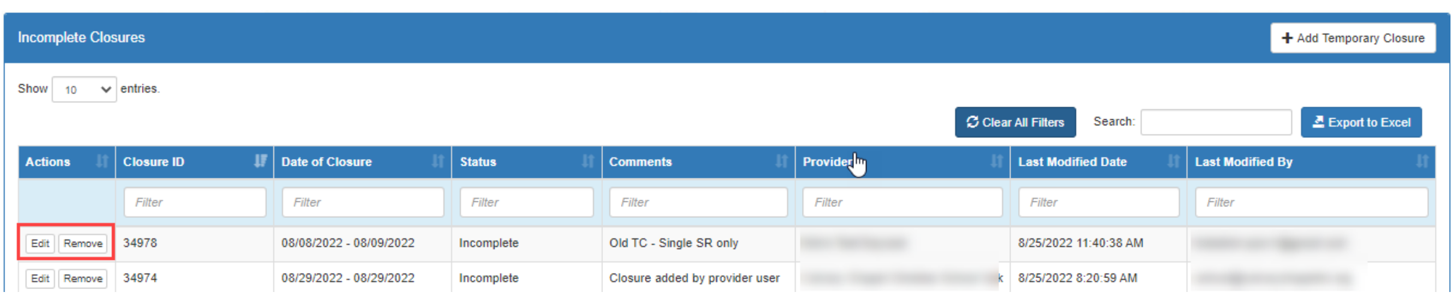
Incomplete Closures Queue

The Incomplete closures queue displays all the temporary closures created by providers within the coalition that have not been submitted. Coalition users can view and assist providers with questions before the temporary closure is submitted for approval.



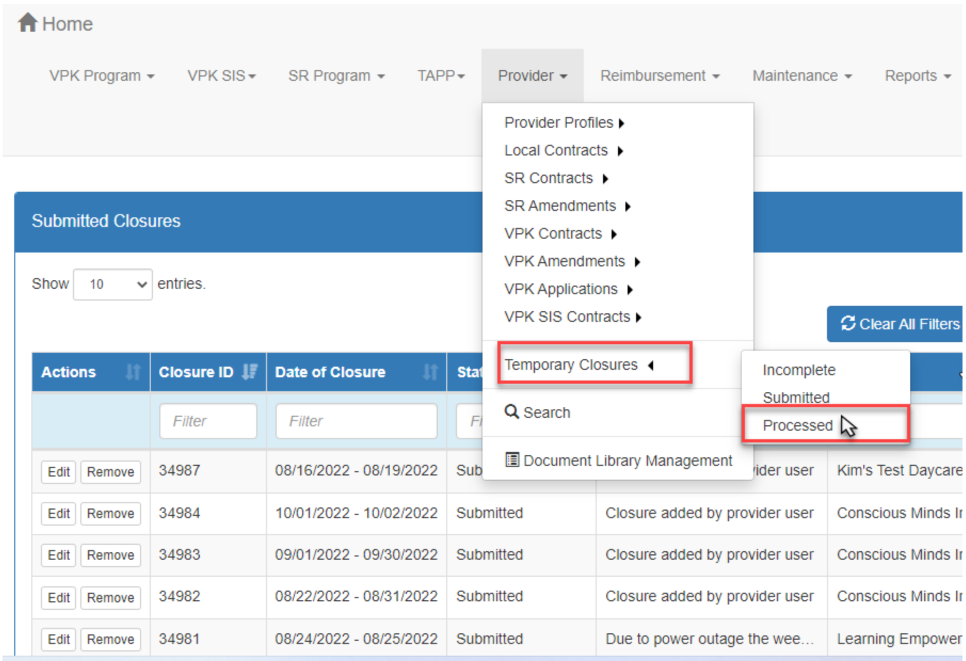
Clicking the **Edit** button will open the Edit Temporary Closure pop-up window. The coalition can make edits and save changes made to the temporary closure. The provider will need to submit the closure for approval.

Clicking the **Remove** button will remove the temporary closure.



Processed Closures Queue

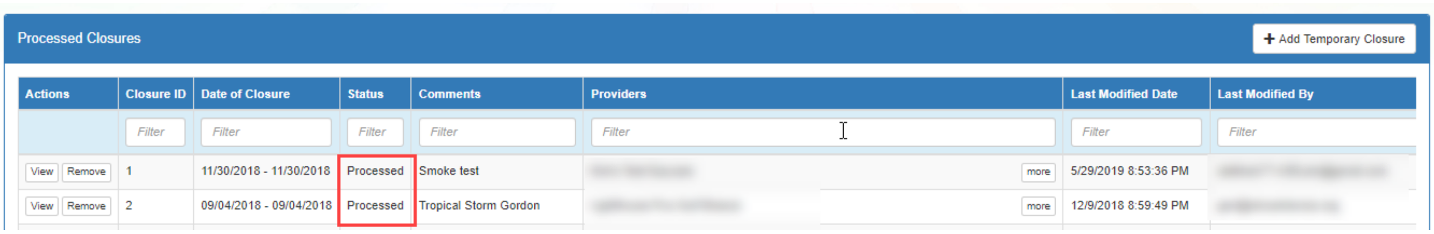
The approved temporary closures display in the Processed Closures queue.



Clicking the **View** button will open the Temporary Closure pop-up window in read-only.

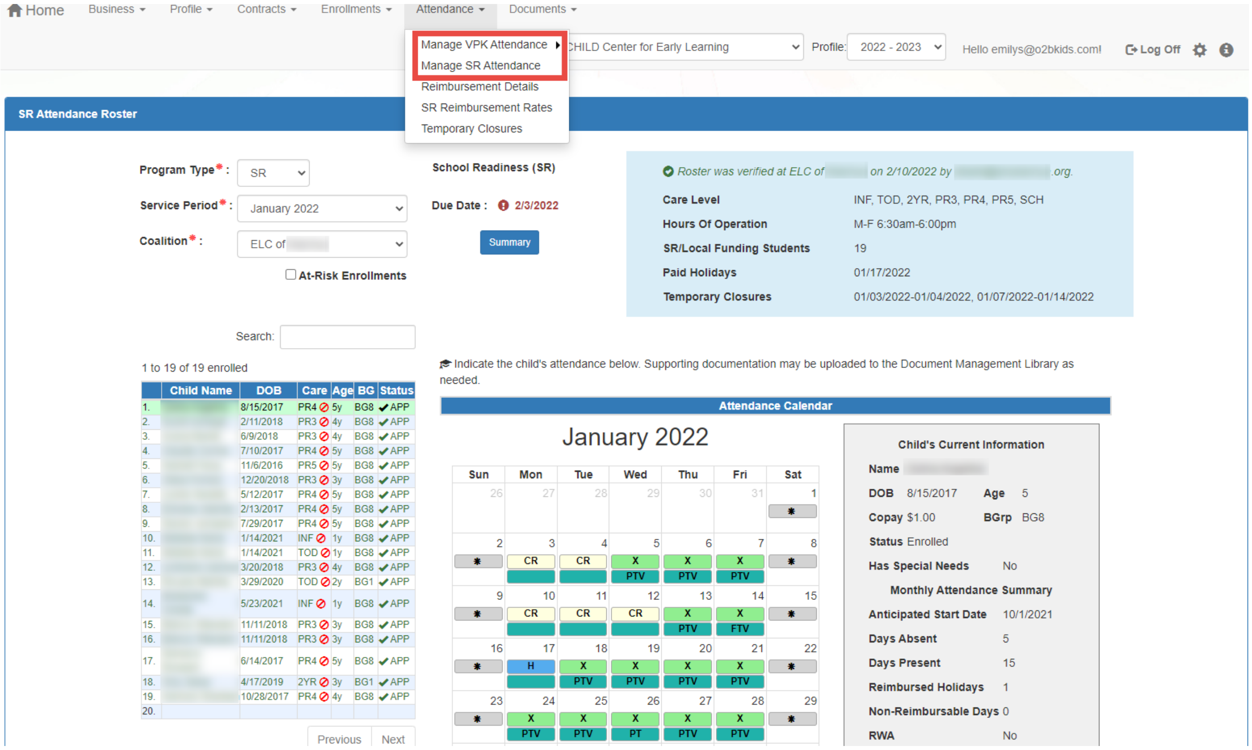
Clicking the **Remove** button will remove the temporary closure.

NOTE: A processed closure cannot be removed if at least one provider has submitted attendance for the service period with the closure.



Closure Reimbursable (CR) or Closure Non-reimbursable (CN) Days in Have Attendance

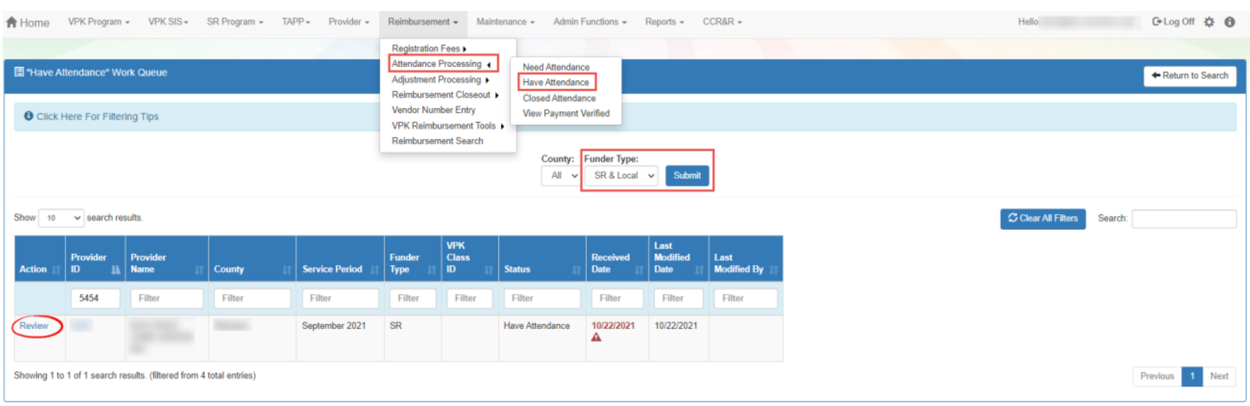
On the provider portal Manage SR Attendance or VPK Attendance pages, temporary closures that were processed by the coalition are displayed as a **CR** or **CN** on the attendance calendar.



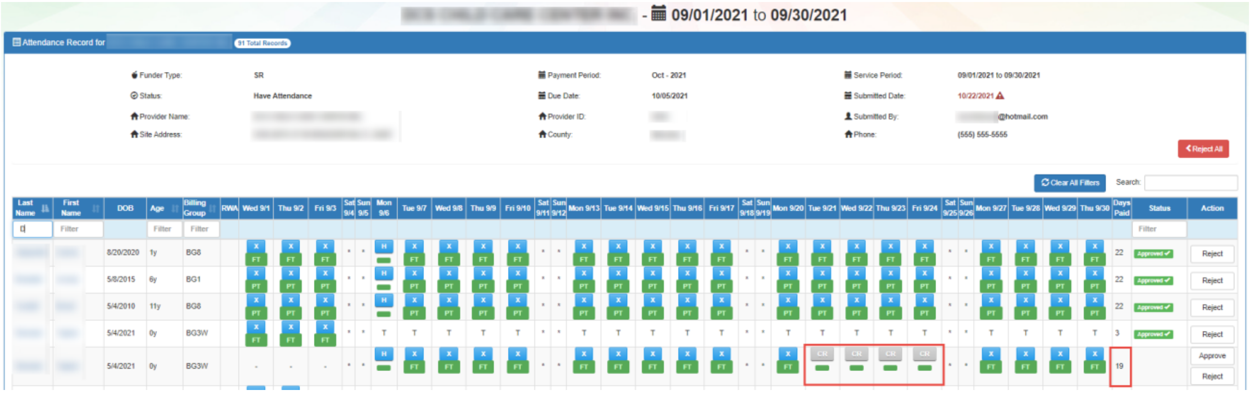
NOTE: The red circle with a slash next to the child's care level indicates it was impacted by a temporary closure.

When the provider submits attendance with temporary closures during the service period, navigate to **Reimbursement > Attendance Processing > Have Attendance**

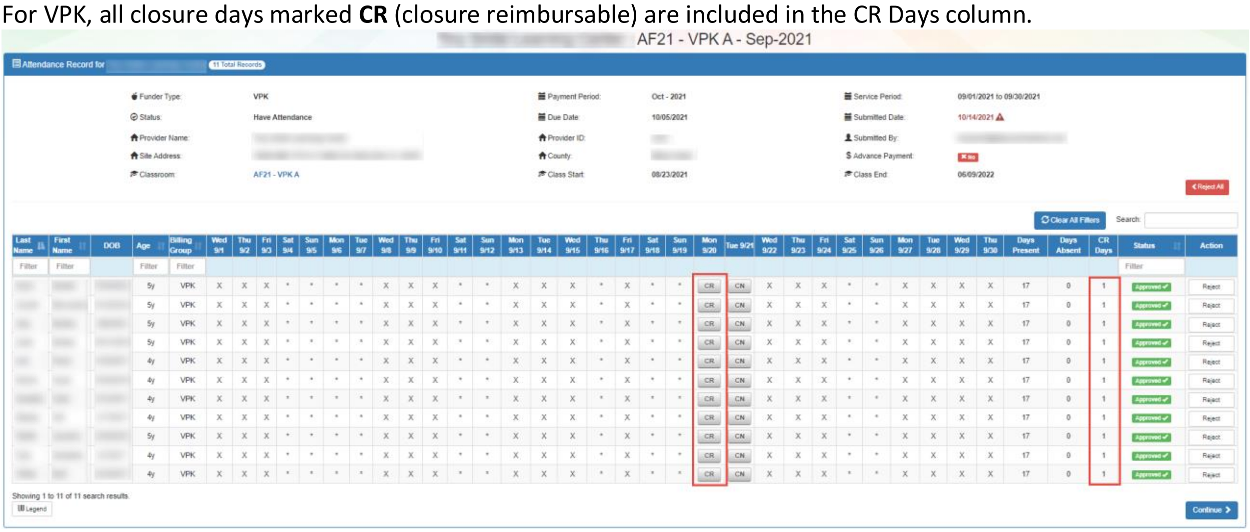
Select Funder Type VPK or SR & Local then **Submit**. The submitted attendance record appears in the Have Attendance queue. Click on the **Review** link to view the roster with temporary closure days.



For SR, all closure days marked CR (closure reimbursable) are included in the Days Paid column.



For VPK, all closure days marked **CR** (closure reimbursable) are included in the CR Days column.

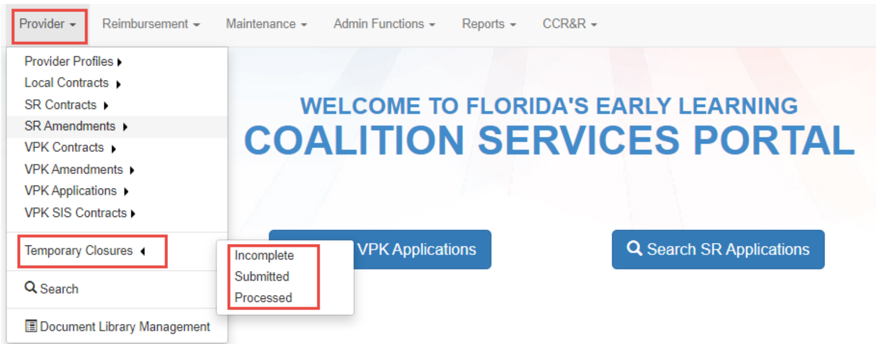


Click <u>**Approve Roster**</u>.

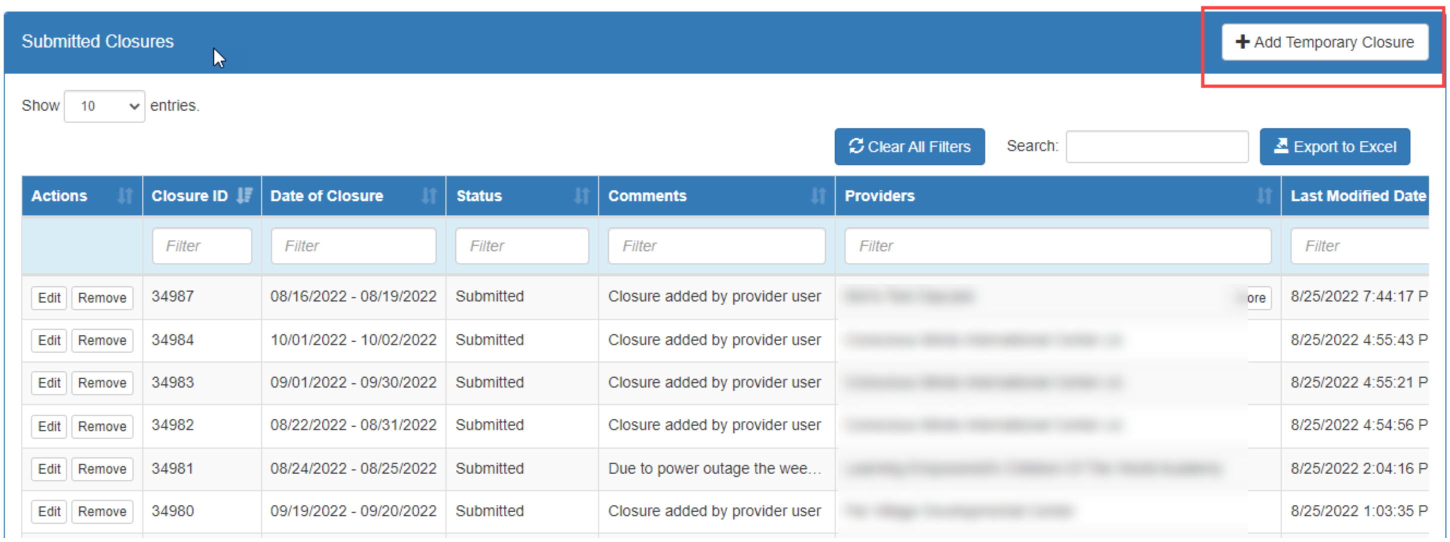
NOTE: Temporary closures that go through the end of the month will not automatically be included in hours paid. If the closure days should be paid, an adjustment can be done. While processing attendance for a service period where the temporary closure goes to the end of the month, a current period adjustment (CPA) can be done if the coalition knows for certain that the child returned to the program following the closure. Otherwise, a prior period adjustment (PPA) can be done to reimburse for those closure days if the child attends after the closure.

Creating a Temporary Closure On Behalf of the Provider

Navigate to any **Temporary Closures** queue.



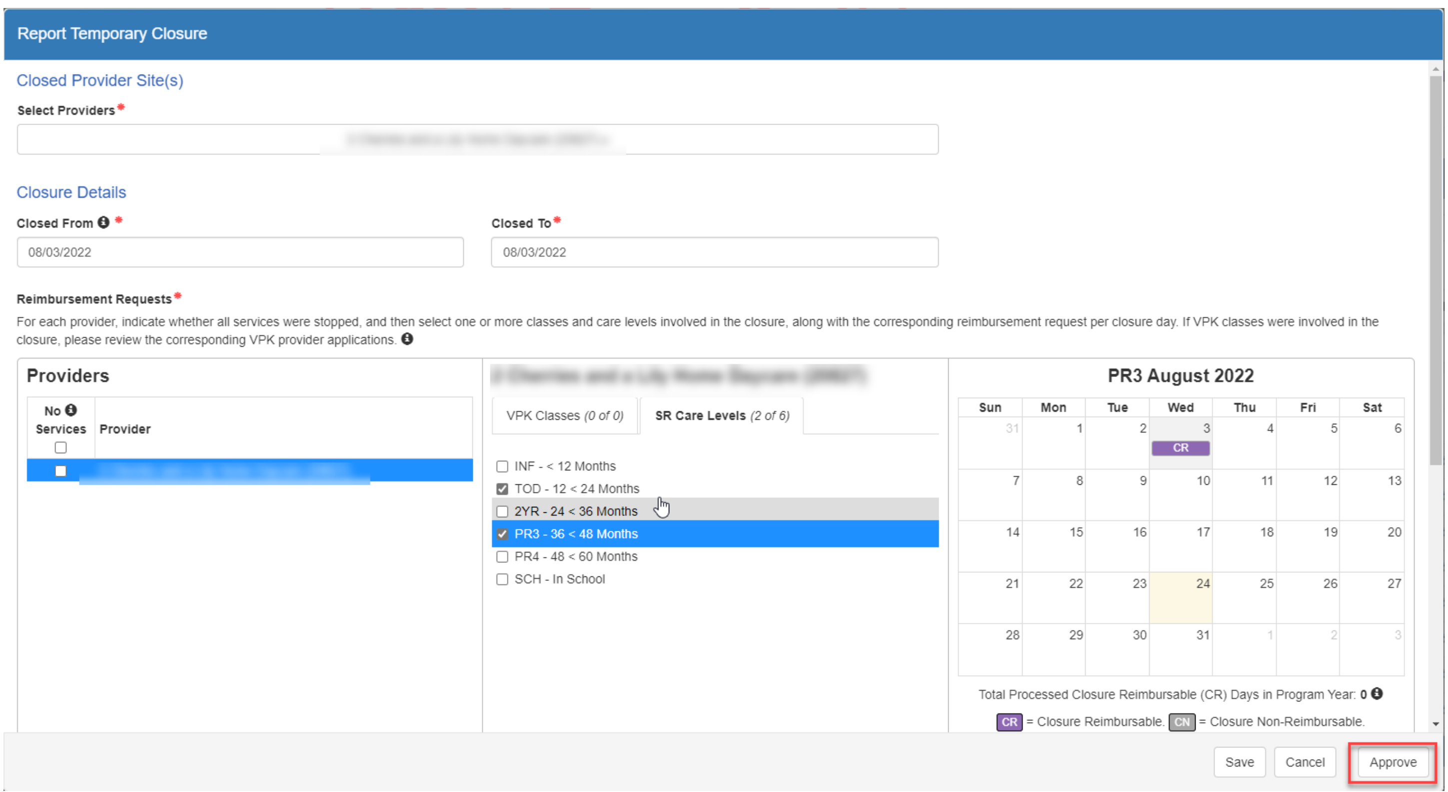
Click the **<u>Add Temporary Closure</u>** button. The temporary closure form appears.



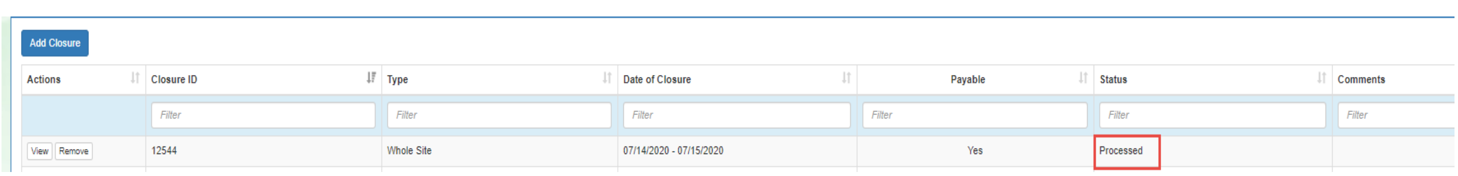
Add the closure details in the fields. The **Possible Days to be Paid** is populated when the closure dates are entered. Click **Save** to save the details and close the form, **Approve** to process the closure, or **Cancel** to close the form without saving.

NOTE: If the provider submitted an attendance roster for the period with the closure days, the closure cannot be created.

- Closed Provider Site(s) – Select the site(s) that were completely temporarily closed due to emergency circumstances. Only active providers with contract statuses 'Certified' and 'Terminated' i.e. Providers who are currently under contract or was up to a certain date are listed. Provider Name is listed in alphabetical order with provider id. **NOTE**: If providers were closed for different dates, they should be unchecked and have separate closure events created.
- Closure Details – Enter the closure date range. The "From" date is the first day of the closure and the "To" date is the last day of the closure. A single day closure would have the same "From" and "To" date. No services are rendered on dates included in the closure date range. **NOTE:** The closure date range is limited to a single month. If the closure crosses into the next month, you will need to create an additional closure to cover that time period.
- Closure Reasons – Select the applicable reasons. If the 'Other' option is checked, enter comments.
- Documentation – Click the **Upload Document** button to upload necessary documents (not mandatory).
- Comments – Enter comments (not mandatory).

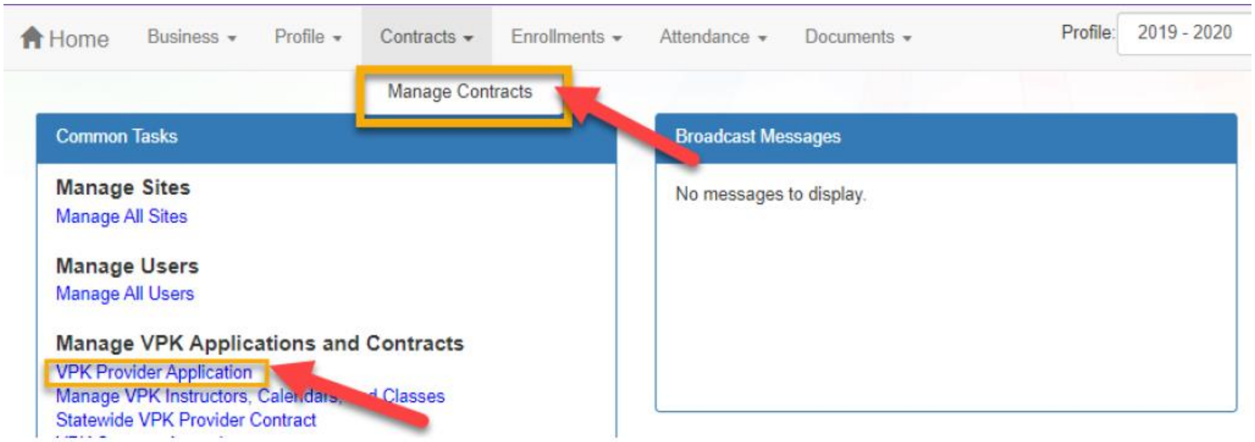


When **Approve** is selected, the closure is processed and the record is moved to the **Processed** queue.

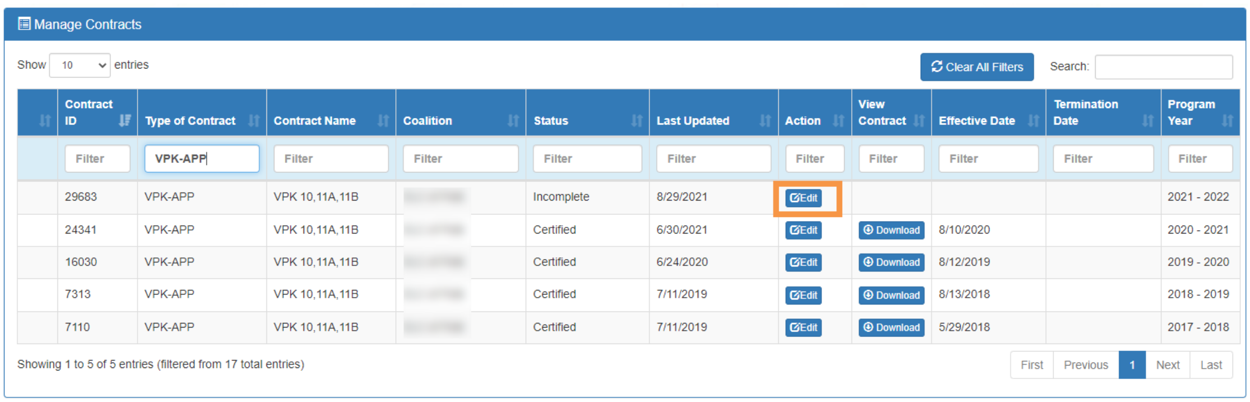


Updating VPK Class Calendar

Providers must revise their VPK class calendar(s) in their VPK-APP to make up the hours for the non-instructional day(s) due to temporary closure (CN days). In the Provider Portal, navigate to the **Contracts > Manage Contracts.** Or, on the home page Common Tasks section, click the VPK Provider Application link.

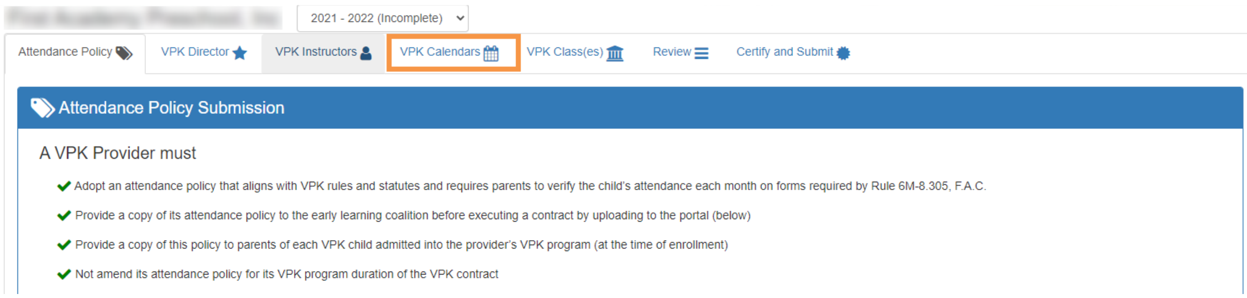


On the Manage Contracts page, click the **Edit** button for the incomplete VPK-APP.

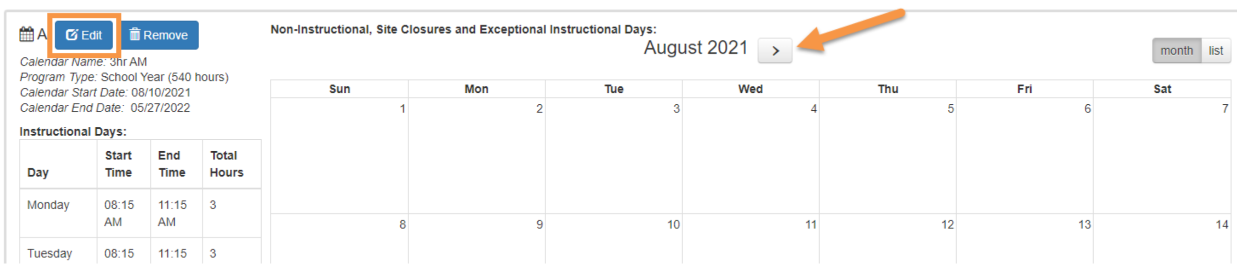


Contract ID	Type of Contract	Contract Name	Coalition	Status	Last Updated	Action	View Contract	Effective Date	Termination Date	Program Year
Filter	VPK-APP	Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter
29683	VPK-APP	VPK 10,11A,11B	[illegible]	Incomplete	8/29/2021	Edit				2021 - 2022
24341	VPK-APP	VPK 10,11A,11B	[illegible]	Certified	6/30/2021	Edit	Download	8/10/2020		2020 - 2021
16030	VPK-APP	VPK 10,11A,11B	[illegible]	Certified	6/24/2020	Edit	Download	8/12/2019		2019 - 2020
7313	VPK-APP	VPK 10,11A,11B	[illegible]	Certified	7/11/2019	Edit	Download	8/13/2018		2018 - 2019
7110	VPK-APP	VPK 10,11A,11B	[illegible]	Certified	7/11/2019	Edit	Download	5/29/2018		2017 - 2018

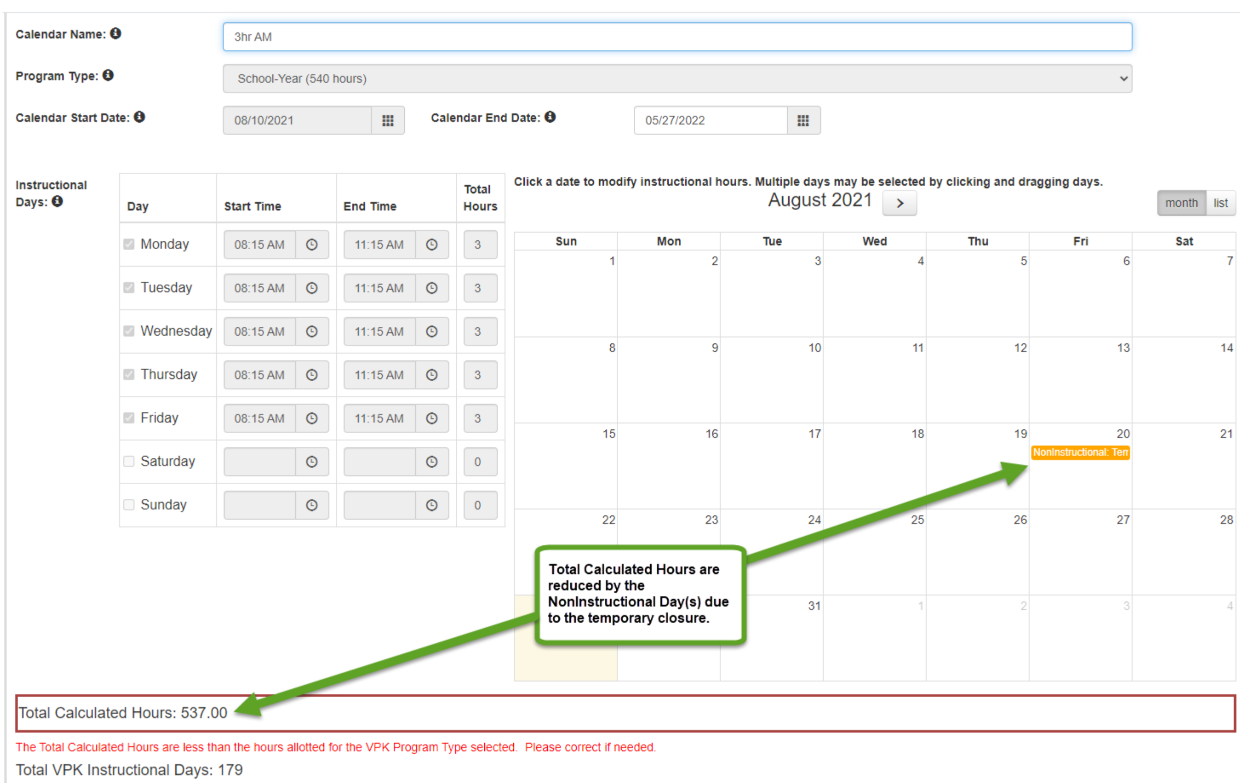
Click the **VPK Calendars** tab to open the calendars page.



Identify the calendar(s) with the non-instructional temporary closure days. Click the **Edit** button to make changes to a calendar. The system defaults to the first calendar month of the class. Click the forward arrow if needed to view the month with the closure.



The Totaled Calculated Hours will be reduced for each non-instructional day based on the hours defined for the day.



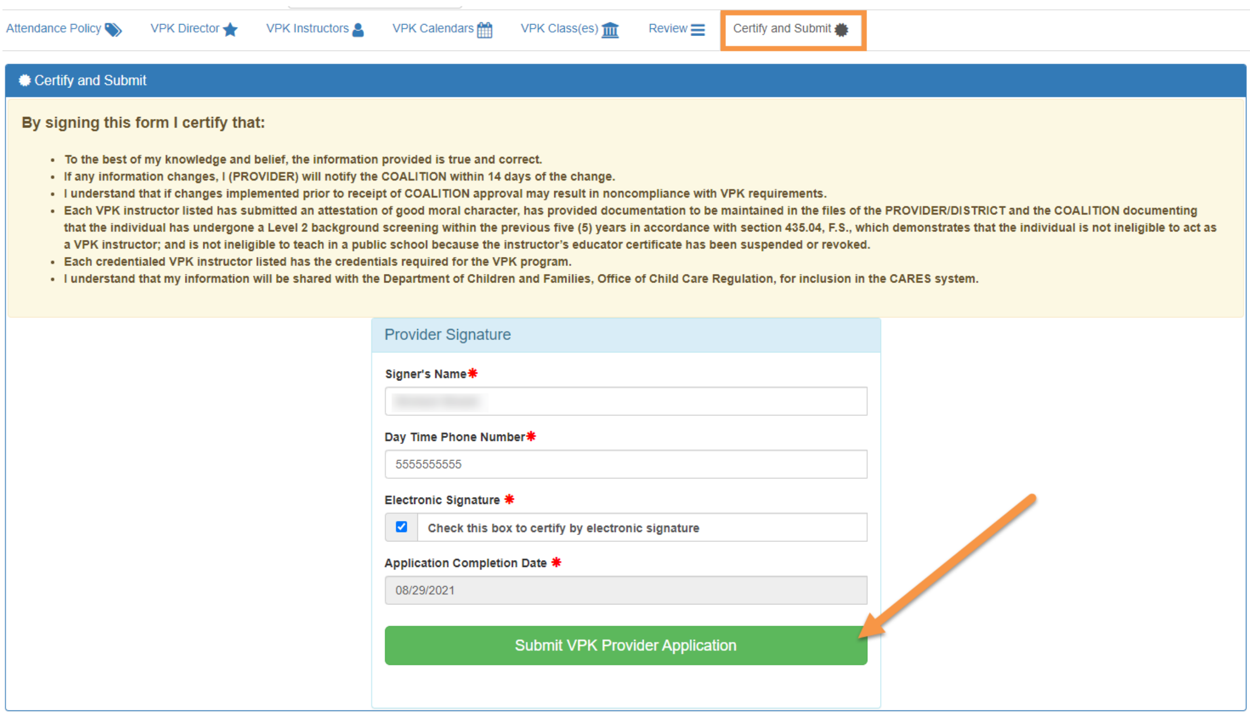
Make adjustments to the calendar to restore the hours to 540. This can be accomplished in a variety of ways such as:

- Canceling previously identified future non-instructional days
- Extending the class end date
- Extending the time on instructional days by creating Instructional Day Exceptions with different class hours

When the changes are done and the calculated hours are restored, click the **Save** button.

NOTE: These steps must be completed for each impacted calendar.

When all impacted calendars are updated, click on the **Certify and Submit** tab. Complete the signature information, then click the **Submit VPK Provider Application** button.

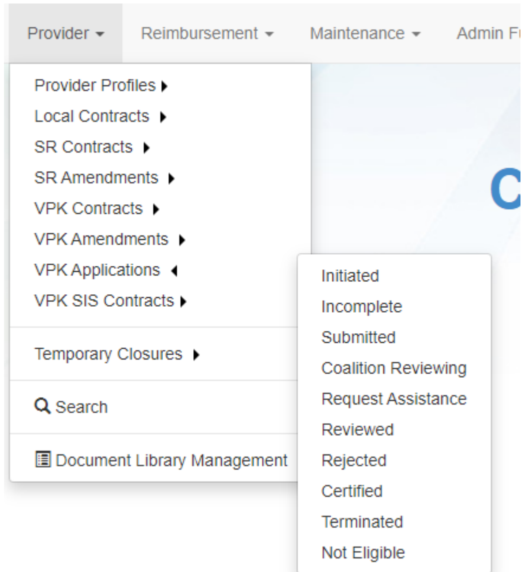


After clicking **Submit VPK Provider Application**, the VPK-APP status changes to "Submitted" and the application is available for the coalition to review.

NOTE: Since reimbursable temporary closure (CR) days do not reduce the total class hours, they will not be added to the VPK calendar.

Verifying VPK Class Calendar

Coalition users should monitor the **Provider > VPK Applications > Submitted** work queue for Submitted VPK provider applications. Click on the contract ID to review changes.



New or changed items requiring verification, such as calendars, classes, and documents, display a **Verify** button. Each tab should be reviewed for changes. For closure specific changes, go to the VPK Calendars tab to review calendar changes. Click **Verify** to accept the changes. When all tabs have been reviewed, click the **Change Status** button to change the contract status back to Certified. Remember, calendars and classes must be verified and have a Certified VPK provider application status in order for providers to process enrollments or attendance.