Iowa Department of Human Services

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September 23, 2011

GENERAL LETTER NO. 14-H-14

ISSUED BY: Division of Field Support

SUBJECT: Employees' Manual, Title 14, Chapter H, ***KINDERTRACK SYSTEM***, Title page, new; Contents (pages 1, 2, and 3), new; and pages 1 through 144, new.

Summary

This letter transmits a partial publication of new manual chapter 14-H, *KINDERTRACK SYSTEM*, that describes the KinderTrack system. The chapter includes a description of KinderTrack screens and step action guides.

The partial chapter is being published to accommodate links to the 14-H chapter that are included in the update of chapter 13-G, *CHILD CARE ASSISTANCE*. This chapter will be updated as sections are updated or completed.

Effective Date

Upon receipt.

Material Superseded

None.

Additional Information

Refer questions about this general letter to your area income maintenance administrator.

September 23, 2011

KINDERTRACK SYSTEM

Iowa Department
of Human Services

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Overview

The KinderTrack (KT) system is designed to manage child care services offered by the Department of Human Services (DHS), including the Child Care Assistance (CCA) program and regulation of child development homes.

The KinderTrack system is used by income maintenance workers, social workers, PROMISE JOBS staff, clerical staff, payment specialists, registration staff, licensing staff, childcare providers, and families seeking child care or Child Care Assistance.

Income maintenance staff and supervisors should send questions to the IM SPIRS Help Desk. PROMISE JOBS staff and supervisors should send questions to your IWD PROMISE JOBS coordinator.

The KinderTrack system is designed to:

- Gather and store information about CCA families.
- Calculate family copayment fee levels.
- Enable approval of benefits.
- Generate notices, reviews, and attendance sheets.
- Provide families with the ability to:
  - Apply on line for CCA benefits, and
  - View their case status.
- Allow people to search for child care providers willing to accept CCA payments:
- Allow childcare providers to:
  - Become a CCA childcare provider,
  - View the CCA families they are authorized to bill for,
  - Enter CCA attendance, and
  - Submit requests for payment on line.

Families and providers can access the CCA portal at:
https://ccmis.dhs.state.ia.us/MainPortal/Welcome.aspx

Most pages found within KinderTrack have the same basic construction and consist of four work areas as follows:

- Navigation Tool
- Command Bar
- Selection Area
- Content Area

Each working area performs a specific function within KinderTrack.

Navigation Tool

The navigation tool runs vertically down the left side of the screen and contains a navigation tree displaying all of the activity modules and their corresponding pages. Activity modules that may appear in the navigation tool are:

- Intake
- Family
- Provider
- Contact
- Payment
- Reports
- Operator
- Program
- Administration

The activity modules visible to each user are granted by permissions set by the user's KinderTrack role. If a user does not have permission to access a certain module, then that module and all the links under it are hidden from the user. Likewise, if a user does not have permission to access a particular page within a module, the link to that page will not appear as an option for that user.

Each activity module opens independently. However, information is shared between the modules. Select an activity on the navigation tool to display the available pages for that item.

Each activity item in the navigation tool has a plus (+) or a minus (-) sign to the left of its name. Click either the activity name or the plus sign to expand the activity item and display all of the page links under it. The plus sign is then replaced by a minus sign. Click the activity name or the minus sign to hide all of the links under that activity item.

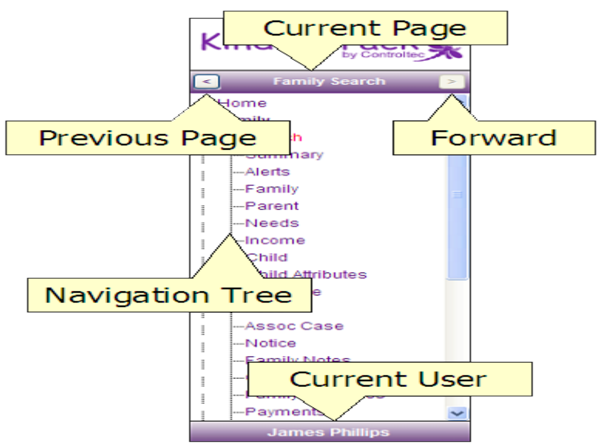
For example, select the FAMILY activity from the navigation tool to display all of the family pages. Click on a page link to access a particular page with information relevant to the selected activity.

In the instructions that follow, the sequence of activity and page selections are separated by a > symbol. Family>Parent instructs you to select the activity, FAMILY and then select the page, PARENT, from the available options. The name of the displayed page is shown in red in the navigation tree.

If a link on the navigation tool is clicked and nothing happens, you are probably in the process of changing or adding data. Click SAVE or CANCEL at the top of the screen being edited. Then click the navigation tool link again.

The navigation tool contains the following sections:

- CURRENT PAGE DISPLAY which shows the current page name and contains previous page and forward scroll arrows which are used to move back and forth between viewed pages.
- CURRENT USER DISPLAY which shows the current user's name.
- NAVIGATION TREE which displays the activity modules and page names.



Command Bar

The command bar is a horizontal bar that runs across to top of each page in KinderTrack. The command bar displays the session timer and command buttons. The user role and the page determine which buttons are visible to the user.

The command buttons are used to perform actions using information in the selection or content area. Available buttons that may appear on a page are:

- NEW adds a new record to the function on the page, such as adding a new parent to the currently selected family.
- EDIT allows changes to the currently selected record.
- DELETE eliminates the currently selected record.
- HISTORY displays a history of all changes to the currently selected record in reverse chronological order based on the effective date of the change. The user can change these entries if permission is granted.
- AUDIT displays a history of all changes to the currently selected record in reverse chronological order based on the date the change was made. These entries are system-generated and cannot be changed.
- SEND ALERT generates an alert or pending task to one's self, another user, the family worker or the provider worker. This button is visible on most pages.
- HELP accesses the context-sensitive online help system for the current page. This button is visible on all pages in KinderTrack.
- LOGOUT logs the user out of the system and returns to the KinderTrack Home page. This button is visible on all pages in KinderTrack.
- EDIT controls allows changes to the names and level of verification of the fields displayed on the page. This button is available only for a few users.

Session Timer

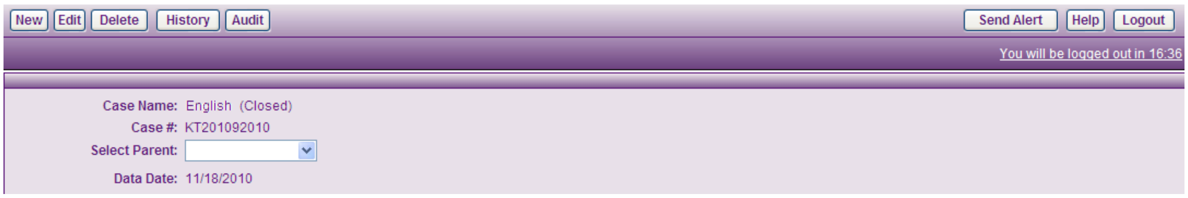
The session timer is located near the upper-right corner of the window in the control bar. This timer will automatically reset to 20 minutes any time an action is performed on a page within KinderTrack. Users can manually reset the timer to 20 minutes by clicking it.

If the timer runs out, the user is automatically logged out of KinderTrack. Log back in through normal process or click the LOGIN TO KINDERTRACK link, as applicable for your role.

The system remembers where the user was, so you **do not** have to go through the Search page to locate the family, child, or parent you were working on before the timeout. However, any data being edited or added will be lost if it was not saved before the timeout.

Selection Area

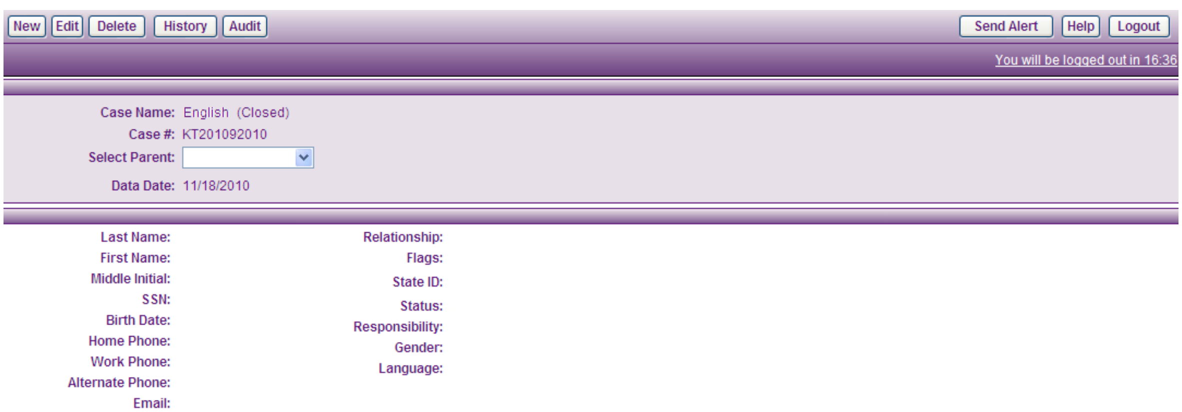
The selection area is always directly below the command bar as shown in the following example from a Family>Parent page.



The selection area displays case information and allows the user to select certain criteria that will determine the information to be displayed in the content area. For the displayed example, the SELECT PARENT drop-down list is used to select the name of the parent whose information is to be displayed in the content area.

Content Area

The content area is located directly below the selection area. Users can view information about the selected record. An example from a Family>Parent page follows:



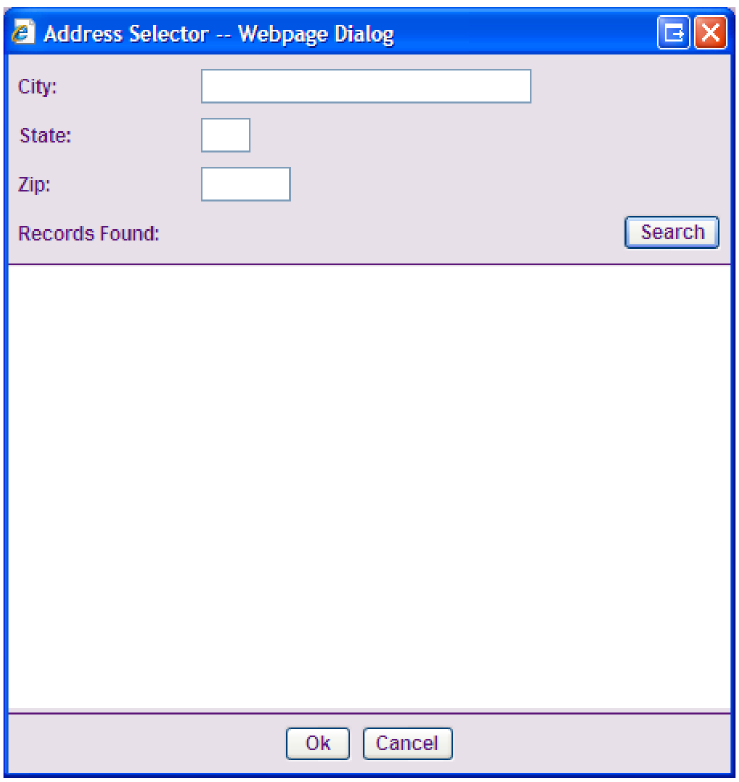
Use the EDIT button in the command bar to change the date, save it, or cancel the action you entered.

Common Functions in KinderTrack

KinderTrack uses several types of selectors, dialog boxes, drop-down lists and data fields. These items are found throughout the many system pages. This section will discuss these common function items.

Address Selector

Many pages throughout KinderTrack require address information. KinderTrack uses a house icon to access an address selector box. The address selector assists with locating the correct city, state or zip code if the information is not known. Some cities have multiple zip codes and the address selector can be used to view and select the correct zip code from the displayed results.



To use the address selector box, complete the following steps:

Step	Action
1	Click the address selector  button located beside the CITY field. The address selector box appears.
2	Enter criteria into any of the following fields: ♦ CITY ♦ STATE ♦ ZIP CODE Entering partial information will return more results. NOTE: If the STATE field is not completed when doing a city search, the system will return any matching results from every state.
3	Click the SEARCH button. Search results will appear.
4	Select the desired city, state, and zip code combination by clicking the radio button in the selection column to the left of the city's name. NOTE: When only one result is returned, it will automatically be selected with a green dot in the selection column's radio button.
5	Once a selection is made, click either: ♦ OK to store the selection and populate the city, state, and zip code fields. ♦ CANCEL to leave the original data unchanged. The address selector box closes.

Change Reason

When editing any data, entering the reason for making the change is mandatory. The CHANGE REASON field is automatically populated with "Record Updated." This reason can be used, a different reason can be manually typed into the field, or the SELECT >> link can be used to open a multi-selector box with the following reasons:

- CASE TRANSFER
- ERROR FIXED
- INCOME CHANGE
- PERSON JOINED OR LEFT HH
- PROVIDER CHANGE
- REVIEW
- UPDATE
- WORKER CHANGE

See Multi-Select Links for information on using a multi-selector box. If the CHANGE REASON field is cleared and another reason is not entered before the user attempts to save the changes, a message appears informing the user the field is required.

Data Fields

Data is entered and stored in single fields that can be located in the command bar, selection area or content area. Data fields are used to collect information such as first and last names, addresses, and phone numbers.

Users manually enter information into most fields. Some fields require users to use other methods to populate them. For example, fields that require a date can be filled by manually typing the date or by using a calendar control. The other methods for inputting data are explained in the following sections.

The content area displays the data field names in one of the following colors:

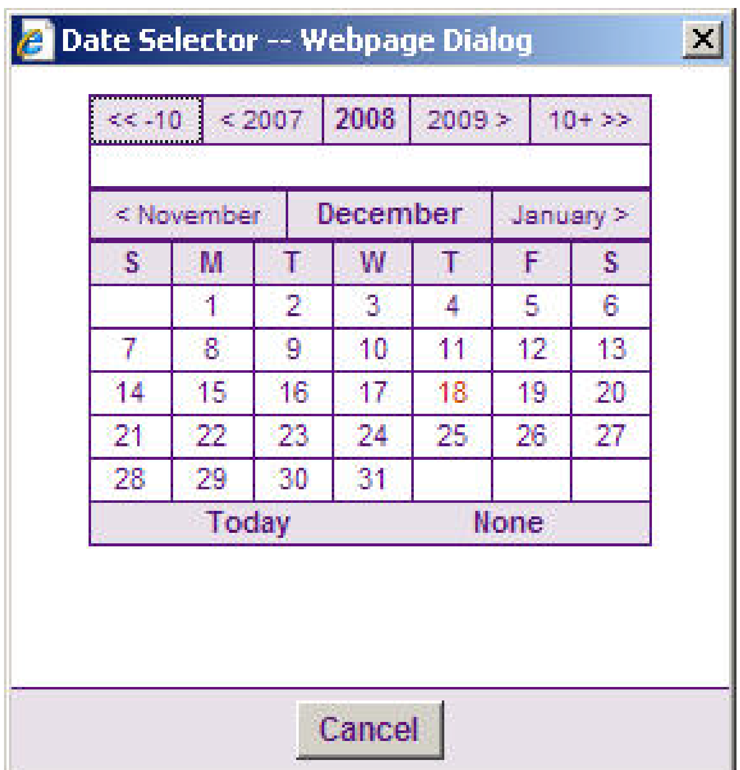
- **Red** with an asterisk identifies required fields that must have data entered before proceeding.
- **Green** identifies preferred fields. These are not required to be completed, but do provide users with more information about the item or person.
- **Purple** identifies fields that are not required to be completed.

A message appears whenever a red or green field is left blank. For red fields, the message prevents the user from saving information until all the red fields have been completed. For the green fields, the message is a reminder that the user has left some preferred fields blank. The user can continue or go back and complete these fields. See Warn Prevent Ignore (WPI) Messages for more information.

Dates

Throughout KinderTrack are fields which require a date to be entered. Dates can be manually entered in the mm/dd/yyyy format. If an invalid date, such as "4/31/2008," is manually entered, an error message will be displayed.

Users can also choose a date using the CALENDAR button located beside the date field. Clicking this button opens the date selector dialog box.



The date selector box displays the current month and year in bold with the current day's date in red.

Users can select the appropriate day, month and year using the following navigation aids and button:

- <<-10 moves the calendar back 10 years. The month remains the same.
- <YYYY moves the calendar back to the year shown. The month remains the same.
- YYYY> moves the calendar forward to the year shown. The month remains the same.
- 10+>> moves the calendar forward 10 years. The month remains the same.
- <(MONTH) moves the calendar back to the previous month.
- (MONTH)> moves the calendar forward to the next month.
- TODAY closes the date selector box and populates the current day's date into the date field.
- NONE closes the date selector box without making any changes.
- CANCEL closes the dialog box without making any changes.

To use the date selector, complete the following steps:

Step	Action
1	Click the CALENDAR  button located beside the DATE field. The date selector box appears.
2	If the current day's date or no date is desired, go to step 3. If a different date is desired, go to step 4.
3	Click either: ♦ TODAY to close the date selector and populate the date field with the current day's date, or ♦ NONE or CANCEL to close the date selector without making changes. If the date selected needs to be changed, return to step 1. Otherwise, return to KinderTrack page to continue work.

Step	Action
4	Choose the desired year by using the scroll arrows to either side of the year on the top of the calendar. The double arrows scroll by ten years; the single arrows scroll by single years.
5	Choose the desired month by using the scroll arrows to either side of the month.
6	Select a date by clicking the applicable number. The date selector box will close and the selected month, day, and year will be displayed in the date field. If the date selected needs to be changed, return to step 1 otherwise, return to KinderTrack page to continue work.

Drop-Down Lists

A drop-down list is used to populate a field with one of the offered selections. Drop-down lists are identified by the arrow to the right of the field.

To use a drop-down list, click on the arrow. The drop-down list appears with all available selections. Click on the desired selection to have it populate the field.

NOTE: Users cannot manually enter information into a field with a drop-down list.

Tables

Several pages in KinderTrack contain tables that display lists of data formatted in columns and rows as shown in the following example from the Family>Summary page.

The column headers are different for each table. Clicking a header causes the list to be sorted by that column. Clicking the same header twice reverses the sort order for that column.

Users can change the view of the table by using the OPTIONS button found above the top right corner of the table. Users can choose which column headers are displayed and the number of entries viewed on one page.

To change table options, complete the following steps:

Step	Action
1	Click the OPTIONS button located by the top right corner of the table. The table options box appears.
2	Click the VISIBLE COLUMNS: field's SELECT >> link to open a multi-selector box displaying the available column headers for the table.
3	Select or deselect one or more of the desired options by either: ♦ Clicking in the option's check box to add or remove the checkmark for an individual header. ♦ Clicking the CHECK-ALL link to check every option. ♦ Clicking the CLEAR-ALL link to deselect every option. NOTE: KinderTrack has all column header choices checked by default.
4	When the final selections are chosen, click either: ♦ OK to store your selection, or ♦ CANCEL to leave the original data unchanged. The multi-selector dialog box closes. NOTE: If an individual option is selected, the selection is displayed after the field name. For example: FAMILY STATUS: CLOSED SELECT >>. When more than one option is chosen, an ellipsis (…) indicates the multiple selections so the user can open the multi-selector dialog box to view the selections. For example: FAMILY STATUS: CLOSED… SELECT >>.

Step	Action
5	Enter the number of records to be viewed on one page in the PAGE SIZE field, if applicable. NOTE: KinderTrack defaults the number of records per page to five. When the results exceed the number of records per page selected, KinderTrack displays page numbers at the bottom left corner of the table. Click a page number to view results on that page. If there are more than 10 pages of results, an ellipsis (…) indicates additional pages. Click on the ellipsis to display the previous or next 10 page numbers.
6	When table options are selected, click either: ♦ OK to store your selection and change the displayed pages view, or ♦ CANCEL to leave the original data unchanged. The multi-selector dialog box closes. NOTE: Changing the page size to a large number will result in more scrolling.

Help Button

The HELP button appears on every screen in KinderTrack in the top right corner of the control bar. Clicking the HELP button opens the help guide in a new window. Information about the specific page being viewed will be displayed.

The help guide may not be current, so users need to check the published date on the first page of the document. If any questions still exist, refer to this chapter.

Hyperlinks

Several pages in KinderTrack use hyperlinks to assist users with navigating to different screens. Information that appears underlined on a page acts as a link to the named page so users can view more details or edit the record. Hyperlinks are most frequently seen and used on the Search and Summary pages.

Hyperlinks are also used to open documents and reports in a new window. These items can then be viewed or printed.

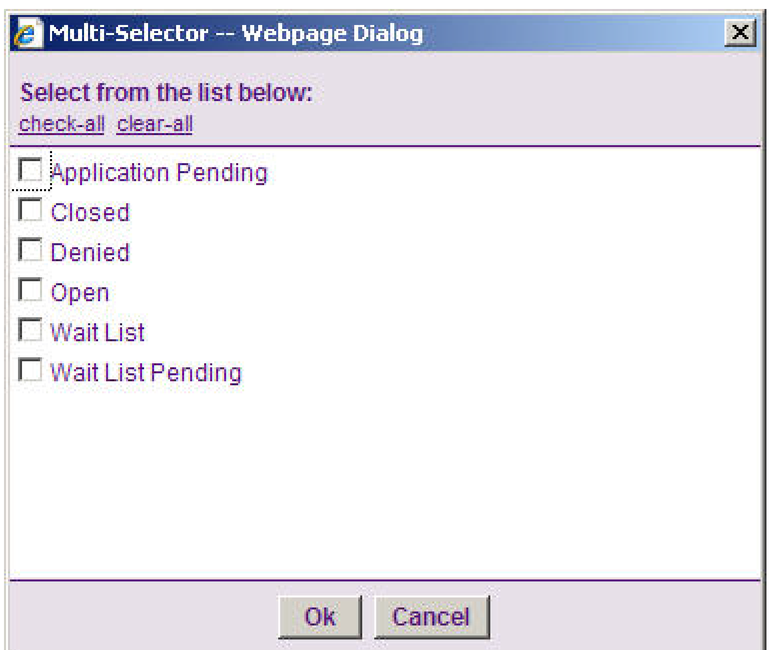
Multi-Select Links

Multi-select links are used to make multiple selections or to complete a search for a single field by opening a dialog box. Multi-select links are located to the right of the field name. Clicking the SELECT >> link opens a multi-selector box, an operator search selector box, or a provider search selector box.

NOTE: Multi-select links can also be found within some search dialog boxes. Clicking the link opens a second dialog box. The various dialog boxes that may appear are described in the following sections.

Multi-Selector Box

A multi-selector box allows the user to select one or more of the offered options, depending on if the box contains radio buttons or checkboxes. When radio buttons are displayed, the user is limited to only one selection. Multiple selections can be made when checkboxes are displayed. An example of a multi-selector box follows.



To use a multi-selector box, complete the following steps:

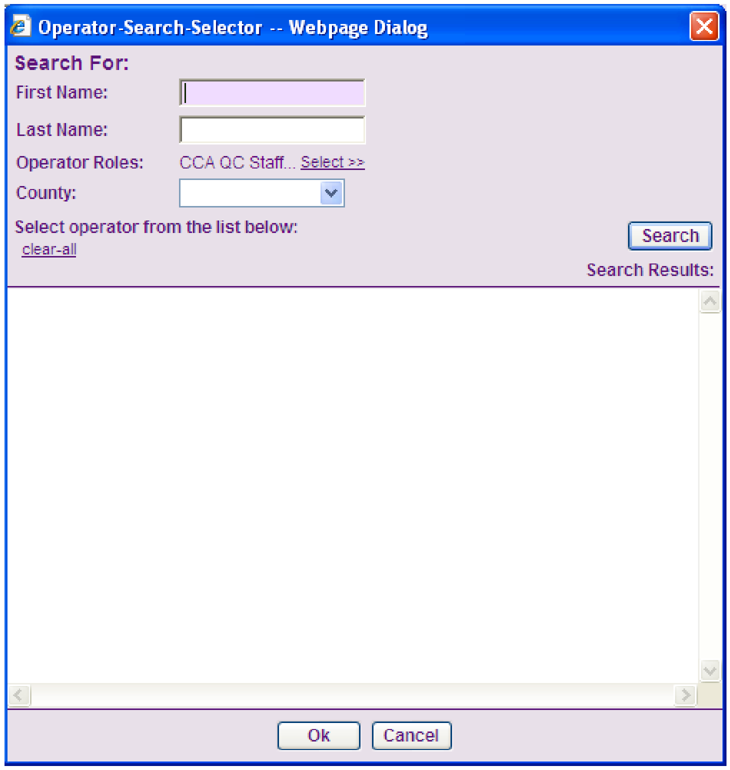
Step	Action
1	Click the data field's SELECT >> link. A dialog box appears.
2	Select or deselect one or more of the desired options by either: ♦ Clicking in the option's check box to add or remove the checkmark for each option to be changed. ♦ Clicking the CHECK-ALL link to check every option. ♦ Clicking the CLEAR-ALL link to deselect every option.
3	When the final desired options are chosen, click either: ♦ OK to store your selection, or ♦ CANCEL to leave the original data unchanged. The dialog box closes. NOTE: If an individual option is selected, the selection is displayed after the field name. Example: FAMILY STATUS: CLOSED <u>SELECT >></u>. When more than one option is chosen, an ellipsis (…) indicates the multiple selections so the user can open the multi-selector dialog box to view the selections. Example: FAMILY STATUS: CLOSED… <u>SELECT >></u>.

Operator Search Selector Box

The operator search selector is used to identify the worker for the case. The OPERATOR ROLES field must be one of the search criteria. Using more of the parameters will return a smaller search results listing. The search parameter fields are:

- FIRST NAME
- LAST NAME
- OPERATOR ROLES
- COUNTY

Users will enter the desired search criteria then click the SEARCH button. Search results display in the search results section.



The OPERATOR ROLES field is required and uses a multi-select link to open a multi-selector box. Valid options for the field are:

- FAMILY CASE WORKER
- FAMILY WORKER SUPERVISOR
- PROMISE JOBS WORKER
- PROVIDER CASE WORKER
- SUPPORT STAFF (CLERICAL)

The operator search selector box also contains the following buttons and link:

- SEARCH initiates a search using the selected parameters.
- OK stores the chosen search result.
- CANCEL closes the dialog box without making any changes.
- CLEAR-ALL clears all of the chosen search results.

To use an operator search selector, complete the following steps:

Step	Action
1	You must be in either new or edit mode on the page. Click the WORKER: field's SELECT >> link. The operator search selector box appears.
2	Enter worker name information into either the first or last name fields or into both fields. NOTE: For best results, enter only partial names.
3	Click the OPERATOR ROLES: field's SELECT >> link to open a multi-selector box.
4	Select or deselect one or more of the desired options by either: ♦ Clicking in the option's check box to add or remove the checkmark for each role to be searched. ♦ Clicking the CHECK-ALL link to check every option. ♦ Clicking the CLEAR-ALL link to deselect every option. NOTE: KinderTrack remembers the options chosen for future searches. Changes may be needed if all roles are not chosen.
5	When the final desired roles are chosen, click either: ♦ OK to store your selection, or ♦ CANCEL to leave the original data unchanged. The multi-selector dialog box closes. NOTE: If an individual option is selected, the selection is displayed after the field name. Example: FAMILY STATUS: CLOSED SELECT >>. When more than one option is chosen, an ellipsis (…) indicates the multiple selections so the user can open the multi-selector dialog box to view the selections. Example: FAMILY STATUS: CLOSED… SELECT >>.

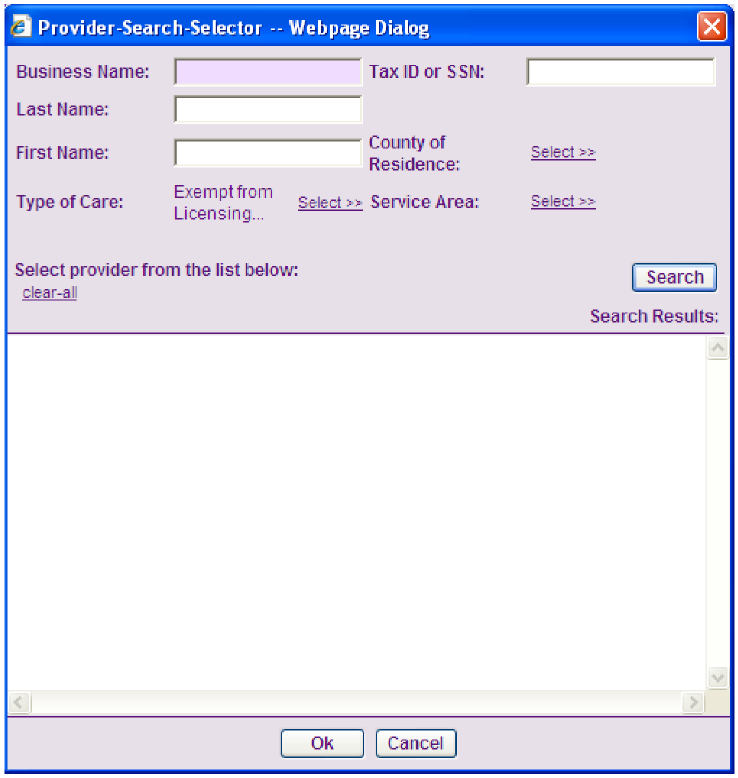
Step	Action
6	Select a county, if desired, or leave blank to search all counties. To select a particular county, use the drop-down list arrow to display all county options. Scroll to the county name and click it to select and populate the field.
7	Click the SEARCH button. Search results will appear.
8	Select the desired person by clicking the radio button in the selection column to the left of their name. NOTE: When only one result is returned, it is automatically selected with a green dot in the selection column's radio button.
9	Once a selection is made, click either: ♦ OK to store the selection and populate the worker field. ♦ CANCEL to leave the original data unchanged. The operator search selector box closes. NOTE: Click CLEAR-ALL to clear the selection or click a different radio button to select another name.

Provider Search Selector Box

The provider search selector is used to identify the provider for a child or the family. The search parameter fields are:

- BUSINESS NAME
- TAX ID OR SSN
- LAST NAME
- FIRST NAME
- COUNTY OF RESIDENCE
- TYPE OF CARE
- SERVICE AREA

Users will enter the desired search criteria then click the SEARCH button. Using more of the parameters will return a smaller search results listing. Search results display in the search results section.



The COUNTY OF RESIDENCE, TYPE OF CARE, and SERVICE AREA fields use a multi-select link to open a multi-selector box. Valid options for these fields are:

♦ COUNTY OF RESIDENCE opens a list of all 99 Iowa counties in alphabetical order

♦ TYPE OF CARE opens the following list:
  - EXEMPT FROM LICENSING
  - IN-HOME
  - LICENSED CENTER
  - NON-REGISTERED CHILD CARE HOME
  - REGISTERED CHILD DEVELOPMENT HOME A
  - REGISTERED CHILD DEVELOPMENT HOME B
  - REGISTERED CHILD DEVELOPMENT HOME C
  - REGISTERED CHILD DEVELOPMENT HOME C1

- SERVICE AREA opens the following list:
  - CEDAR RAPIDS
  - DES MOINES
  - EASTERN
  - NORTHERN
  - WESTERN

The provider search selector box also contains the following buttons:

- SEARCH initiates a search using the selected parameters.
- OK stores the chosen search result.
- CANCEL closes the dialog box without making any changes.
- CHECK-ALL checks all of the displayed search results.
- CLEAR-ALL clears all of the chosen search results.

To use a provider search selector, complete the following steps:

Step	Action
1	You must be in either new or edit mode on the page. Click the PROVIDER: field's SELECT >> link. The provider search selector box appears.
2	Enter information into one or more of the following fields: ♦ BUSINESS NAME ♦ TAX ID OR SSN ♦ LAST NAME ♦ FIRST NAME NOTE: For best results, enter only partial names.
3	Click the SELECT >> link to open a multi-selector box, if needed, for the following fields: ♦ TYPE OF CARE ♦ COUNTY OF RESIDENCE ♦ SERVICE AREA

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>4</td><td>Select or deselect one or more of the desired options by either:
♦ Clicking in the option’s check box to add or remove the checkmark for each role to be searched.
♦ Clicking the CHECK-ALL link to check every option.
♦ Clicking the CLEAR-ALL link to deselect every option.
NOTE: KinderTrack remembers the options chosen for future searches. Changes may be needed if all roles are not chosen.</td></tr>
<tr><td>5</td><td>When the final selections are chosen, click either:
♦ OK to store your selection, or
♦ CANCEL to leave the original data unchanged.
The multi-selector dialog box closes.
NOTE: If an individual option is selected, the selection is displayed after the field name. Example: FAMILY STATUS: CLOSED SELECT >>.
When more than one option is chosen, an ellipsis (…) indicates the multiple selections so the user can open the multi-selector dialog box to view the selections. Example: FAMILY STATUS: CLOSED… SELECT >>.
Complete steps 3 - 5 for each field as needed. When needed fields are completed, go to step 6.</td></tr>
<tr><td>6</td><td>Click the SEARCH button. Search results will appear.</td></tr>
<tr><td>7</td><td>Select the desired provider by clicking the radio button in the selection column to the left of the name.
NOTE: When only one result is returned, it is automatically selected with a green dot in the selection column’s radio button.</td></tr>
<tr><td>8</td><td>Once a selection is made, click either:
♦ OK to store the selection and populate the worker field.
♦ CANCEL to leave the original data unchanged.
The provider search selector box closes.
NOTE: Click CLEAR-ALL to clear the selection or click a different radio button to select another name.</td></tr>
</table>

Printing

Users can print copies of a *Notice of Decision* (NOD) and other forms or reports. Forms are accessed by clicking on a link to open a dialog box. The forms dialog box may require specific information to be entered, such as a person's name, return date, start date, or end date. If the information is not entered, an error message will display when the PRINT button is clicked.

All printing dialog boxes have an OUTPUT TYPE field which uses a drop-down list arrow to display options available for the selected document. Available options are:

♦ CENTRAL PRINTING sends a *Notice of Decision* that has not yet been authorized to central printing for printing and mailing.

♦ CSV (for "comma separated values") creates a text file with one line per record. The fields within a line are separated by commas. Use this format to open the report in a spreadsheet such as Microsoft Excel.

♦ HTML displays the results directly on the screen to give users a quick look at the data.

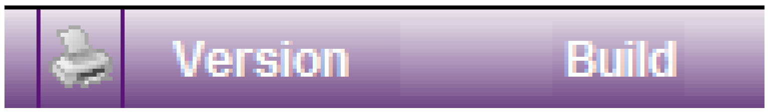
♦ PDF allows the document to be printed from the Adobe Reader window.

♦ TAB creates a text file with one line per record. The fields within a line are separated by tabs. Some reports that are submitted to governmental entities must be in this format.

Forms can be printed only in the local office. Newly authorized notices of decision can either be printed in the local office or be sent to central printing. Older notices that were previously printed can only be reprinted locally.

Print Screen

The PRINT CONTENTS button is used to print a copy of the current page without the navigation tool or the browser toolbars. The button displays a printer icon and is located in the bottom right corner of the screen. Click the button to open a new window displaying the information to be printed. Use the window's PRINT button to open a print dialog box to select printing options and to print the page.



Scroll Arrows

Scroll arrows are found on the top of several pages in KinderTrack. They are activated when users select more than one search result on a Search page, then click to a specific page, such as going from the Family>Search page to the Family>Summary page or the Family>Family page.

Scroll through records using the back and forward arrows. The single arrows allow users to scroll record by record.

The double arrows to the left returns the user to the beginning of the records selected on the Search page. The double arrows to the right take the user to the end of the records selected.

If you come across a record that is not needed, click the REMOVE button to remove that record from the selected search results but not from the KinderTrack database.

Send Alert Button

The SEND ALERT button is found near the upper right corner of every page in KinderTrack. A user can send an alert message to other KinderTrack users.

User-generated alerts are created by a user and can be sent specifically to the family or provider worker or to one or more other users, such as members of a specific work unit, supervisors or central office staff.

User-to-user alerts can be viewed on the Home page.

Send an Alert

To send an alert, use the following steps:

Step	Action
1	Click the SEND ALERT button on the command bar. The send alert dialog box appears.
2	Use the drop-down list arrow to select the correct ALERT TYPE. Options are: ♦ OTHER USER(S) which requires the user to complete the SEND TO: field by selecting who is to receive the alert. ♦ FAMILY WORKER will populate the SEND TO: field with the name of the family worker associated with the case in KinderTrack. ♦ PROVIDER WORKER will populate the SEND TO: field with the name of the provider worker associated with the case in KinderTrack. If OTHER USER(S) is selected go to next step; otherwise go to step 13.
3	Manually enter the date when the alert is to appear or click the CALENDAR button to open the date selector box.
4	Complete the SEND TO: field by clicking the SELECT >> link. The operator search selector box appears.

Step	Action
5	Enter worker name information into the first and last name fields. For best results, enter only partial names. NOTE: If you are sending the alert to more than one person, do not complete either name field.
6	Click the OPERATOR ROLES: field's SELECT >> link to open a multi-selector box.
7	Select or deselect one or more of the desired options by either: ♦ Clicking in the option's check box to add or remove the checkmark for each role to be searched. ♦ Clicking the CHECK-ALL link to check every option. ♦ Clicking the CLEAR-ALL link to deselect every option. If you are sending the alert to more than one person, select only the needed roles to reduce the number of search results. NOTE: KinderTrack remembers the options chosen for future searches. Changes may be needed if all roles are not chosen.
8	When the final desired roles are chosen, click either: ♦ OK to store your selection, or ♦ CANCEL to leave the original data unchanged. The multi-selector dialog box closes.
9	Select a county, if desired, or leave the COUNTY field blank to search all counties. To select a particular county, use the drop-down list arrow to display all county options. Scroll to the county name and click it to select and populate the field.
10	Click the SEARCH button. Search results will appear.
11	Select each person to receive the alert by clicking in the check box in the selection column to the left of the person's name. NOTE: When only one result is returned, it is automatically selected with a green check in the selection column's check box.

Step	Action
12	Once selections are made, click either: ♦ OK to store the selection and populate the worker field. ♦ CANCEL to leave the original data unchanged. The operator search selector box closes. NOTE: Click CLEAR-ALL to clear all selections so different names can be selected.
13	Enter the subject heading in the ALERT SUBJECT: field.
14	Enter any other information in the ALERT MESSAGE: field.
15	When all entries are made, click either: ♦ SEND to forward the alert to the chosen person, or ♦ CANCEL to cancel the alert without sending. The operator search selector box closes.

Warn Prevent Ignore (WPI) Messages

KinderTrack utilizes pop-up messages to inform users of potential problems, items that need to be reviewed, or entries that are not allowed. The types of messages are:

- WARN MESSAGES, which notify users of attempts to save information that may not be correct. KinderTrack allows users to continue with the information as entered or to cancel so information can be reviewed or changed.
- PREVENT MESSAGES, which notify users of actions being taken that are not allowed by the system. Users need to make necessary corrections based on the message before the entries can be saved in KinderTrack.
- IGNORE MESSAGES, which are not displayed to the user. They are messages that have been inactivated by administrative staff.

WPI messages are created and maintained through the Administration activity. Only staff with proper administrative roles can create, change or update the messages. The current WPI messages are listed in the following chart:

NUMBER	WPI MESSAGE	MESSAGE DESCRIPTION	TYPE
0	Duplicate user name	Displays when the operator user name being entered is the same as another operator’s user name.	Prevent
1	Password same as user name	Displays when the operator password being entered is same as the operator’s user name.	Prevent
2	Password already in history	Displays when the operator’s password has recently been used.	Warn
3	Password less than min length	Displays when the operator’s password contains less than the minimum number of characters.	Prevent
4	Password less than min digits	Displays when the operator’s password contains less than the minimum number of digits.	Prevent
5	Password same as existing password	Displays when the operator’s new password is same as the existing password.	Prevent
6	Duplicate person found in the system	Displays when the last name and first name entered match another entry in the operator table.	Warn
7	Duplicate e-mail address found in the system	Displays when the email address entered matches the email address of another operator in the system.	Warn
2001	Duplicate provider number	Displays when provider number entered is the same as another providers’ number.	Warn
2002	Duplicate provider tax ID	Displays when the provider tax identification number entered is the same as another provider’s tax identification number.	Warn
2003	Duplicate provider address	Displays when the provider address entered is the same as another provider’s address.	Warn
2004	Duplicate provider name	Displays when provider name entered is the same as another provider’s name.	Warn
2005	Max days exceeded for attendance group	Displays when the number of modified days in the attendance group exceeds the agency-defined amount.	Prevent
2006	Due date falls on closed day	Displays when the due date entered falls on a day when the office is closed for business.	Warn

Number	WPI Message	Message Description	Type
2007	Duplicate state ID	Displays when the state identification number entered is the same as another state identification number in the database.	Warn
2008	Missing primary parent	Displays when no primary parent exists for a family as of the effective date.	Warn
2011	Inactivate primary parent with no secondary parent	Displays when no secondary parent exists for a family as of the effective date when the primary parent is inactivated.	Prevent
2012	Duplicate parent SSN	Displays when the parent social security number entered has already been entered for a parent in the system.	Warn
2013	Duplicate SSN	Displays when the social security number entered already exists in the system.	Warn
2014	Duplicate child	Displays when another child with the same name as the child being entered has already been entered for the family.	Prevent
2015	Family exists	Displays when a family with similar characteristics already exists in the system.	Warn
2016	Age exceeds special need limit	Displays when the child's age exceeds the limit for the special need.	Prevent
2017	Duplicate contact	Displays when a contact being entered already exists in the system.	Warn
2018	Duplicate child SSN	Displays when the child social security number being entered already exists for a child in the system.	Warn
2019	Duplicate family case number	Displays when the case number being already exists for a family in the system.	Warn
2020	Income eligibility range	Displays when a parent or child's income is outside the eligibility range.	Warn
2021	Family type not standard	Displays when a family is not the standard type.	Warn
2022	Education funding limit	Displays when service for a parent with education as the need reason exceeds 24 months.	Warn
2023	Overlapping schedule	Displays when an existing schedule overlaps the new schedule being entered.	Warn

NUMBER	WPI MESSAGE	MESSAGE DESCRIPTION	TYPE
2024	Age exceeds system age limit	Displays when a child's age exceeds the system age limit.	Warn
2025	Child has active schedule	Displays when there is an attempt to inactivate a child who has an active schedule.	Warn
2026	Co-provider role	Displays when a contact has the co-provider role and the provider does not have a type C license.	Prevent
2027	Multiple primary parents	Displays when a family has multiple primary parents as of the effective date.	Prevent
2028	Inactive provider	Displays when data is saved for a provider that is currently inactive.	Warn
2029	Schedule range limit	Displays when the schedule start to end date range exceeds the system parameter.	Prevent
2031	Provider county association	Displays when a provider zip code is not mapped to a county.	Warn
2033	Payment made after start of schedule	Displays when the payment entered occurs before or after the new schedule dates.	Prevent
2034	Schedule start date occurs after review date	Displays when the schedule start date occurs after the family's review date.	Prevent
2038	Schedule start date is when provider is inactive	Displays when the schedule start date occurs while the provider is inactive.	Warn
2039	Schedule end date is when provider is inactive	Displays when the schedule end date occurs while the provider is inactive.	Warn
2040	Schedule end date occurs when child is inactive	Displays when the schedule end date occurs while the child is inactive.	Prevent
2043	Schedule is outside provider's operating hours	Displays when the schedule hours fall outside the provider's operating hours.	Prevent

Number	WPI Message	Message Description	Type
2044	Scheduled hours conflict with parent need	Displays when the schedule hours do not coincide with the parent's need hours.	Warn
2045	Child age exceeds age limit for program	Displays when the child is older than the maximum age allowed for a program.	Warn
2048	Schedule cannot be saved for an inactive family	Displays when the schedule being saved is for an inactive family.	Prevent
2049	Child enrolled in another program	Displays when a child is already enrolled in another program.	Warn
2050	Child has more than one schedule at this provider	Displays when a child already has active schedules at the same provider.	Prevent
2051	Child has non-school schedule at this provider	Displays when a child already has a non-school active schedule at the same provider.	Prevent
2052	Child enrolled in same program and profile	Displays when a child is already enrolled at the same provider in the same program and profile.	Prevent
2053	Provider has reached its allocated capacity	Displays when a provider has reached capacity for the provider's license.	Warn
2054	Provider has reached its capacity for age group	Displays when a provider has reached capacity for a license in a specific age group.	Warn
2055	Absolute eligibility range	Displays when the income of a family exceeds the maximum for eligibility.	Warn
2056	Deny protective services	Displays when the program does not allow protective service families.	Warn
2057	The following required files are missing	Displays when the family has missing files.	Warn
2058	Family has missing files	Displays when the family has missing files.	Warn

Number	WPI Message	Message Description	Type
2059	Schedule start date has changed	Displays when the start date for a schedule has changed.	Warn
2060	Inactive program	Displays when the program is no longer active.	Warn
2061	Schedule end date occurs after review date	Displays when the schedule end date occurs after the family's review date.	Prevent
2063	Schedule times conflicts with another schedule	Displays when the schedule in or out times conflict with another schedule.	Warn
2064	Provider is going to be inactive	Displays when a provider will be inactive due to closure Notice of Action.	Warn
2065	Start date before the time specified	Displays when a schedule start date does not meet the programmed number of days.	Warn
2067	WPI schedule alert note	Displays when the note function 'schedule alert' exists.	Warn
2068	WPI zero payment	Displays when rate comparisons are done.	Prevent
2070	Child is younger than age minimum of the program	Displays when a child does not meet the minimum age requirement for a program.	Prevent
2071	Cannot save schedule for a closed family	Displays when a schedule is being saved for a family with a closed status.	Warn
2072	Child is not enrolled	Displays when a schedule is being saved for a child who is not currently enrolled.	Warn
2073	Child is enrolled in another program	Displays when a schedule is being saved for a child who is already enrolled in another program.	Warn
2075	Schedule ends on or after family's close date	Displays when a schedule being saved has an end date that is after the family's close date.	Warn
2076	No active provider agreement	Displays when a provider does not have an active agreement.	Warn
2078	Varying school hours exceed max units	Displays when the result of the varying school hours entered exceeds the maximum units allowed.	Warn

NUMBER	WPI MESSAGE	MESSAGE DESCRIPTION	TYPE
2079	Varying non school hours exceed max units	Displays when the result of the varying non school hours entered exceeds the maximum units allowed.	Warn
2080	School schedule has no scheduled hours	Displays when school hours are entered without a calendar or a calendar is entered without hours.	Prevent
2081	Schedule has no hours	Displays when a schedule is entered without hours.	Prevent
2082	Consecutive hours exceed 24	Displays when the consecutive hours entered exceed 24 hours.	Warn
2088	Payment prohibited	Displays when you are attempting to pay one or more payments before the respective billing cycles have ended.	Prevent
2091	Expiration date falls on closed day	Displays when the RFI expiration date falls on a closed day in the business calendar.	Prevent
2092	Family income has not been verified	Displays when the Notice of Action is for an employment need but no income exists for that period.	Prevent
2094	Child's age is 4 or 5 but the kindergarten date is blank	Displays when the child's age is 4 or 5 and the kindergarten date has not been entered.	Prevent
2095	Overlapping attendance	Displays when the new attendance period entered overlaps with an existing attendance period.	Warn
2096	Start/end dates conflict with schedule	Displays when the attendance period start and end dates entered conflict with the schedule start and end dates.	Warn
2097	Start or end date conflict with family's close date	Displays when an attendance period start or end dates conflict with the family's case closing date.	Warn
2098	Start or end date conflict with child's close date	Displays when an attendance period start or end date conflicts with the child's closing date.	Prevent

Number	WPI Message	Message Description	Type
2100	Start or end date conflict with provider's close date	Displays when an attendance period start or end date conflicts with the provider's closing date.	Prevent
2101	Cannot inactivate child, a pending notice exists	Displays when a child being inactivated is associated with a pending notice.	Warn
2102	Schedule associated with a pending notice	Displays when a schedule being deleted is associated with a pending notice.	Prevent
2103	Schedule associated with an approved notice	Displays when the start date or provider is modified for a schedule that is attached to an approved notice.	Prevent
2104	Same care different provider	Displays when the attendance times entered overlap the child's attendance entered with a different provider.	Warn
2105	Overlapping schedules	Displays when the time entries on this schedule conflict with an existing schedule. Attendance cannot be entered with hours (time in/out pairs) overlapping another schedule that is active at the same time.	Warn
2107	Consecutive hours	Displays when the attendance entered exceeds 24 hours of consecutive care. Payments cannot contain more than 24 hours of consecutive care.	Warn
2109	Provider closed hours	Displays when the schedule hours entered fall outside of this provider's operating hours.	Warn
2110	Child absences	Displays when the total number of absences entered exceeds the group limit for the given absence period.	Warn
2112	Varying schedule exceeds max weekly units	Displays when the total number of units in one of the payment weeks exceeds the maximum weekly hours that were approved in the schedule.	Warn
2113	Negative payment amount	Displays when the payment calculation has resulted in a negative payment total.	Prevent

NUMBER	WPI MESSAGE	MESSAGE DESCRIPTION	TYPE
2114	Payment cancelled	Displays when the payment status has been set to 'canceled.'	Warn
2115	Payment alert note	Displays when the payment entered has an associated alert note.	Warn
2116	Duplicate advanced query	Displays when the report name matches one already in the system.	Warn
2117	Allow 'EXEC' in adv query free form SQL	Displays when the parameters of an advanced query use the free-form SQL text.	Warn
2118	Duplicate user report	Displays when the report name entered matches another report in the same location.	Warn
2119	Username already exists in the database	Displays when the user name entered matches another user name in the operator table.	Prevent
2120	Password has already been used	Displays when the password entered is already in the password history list for this user.	Warn
2121	Duplicate person found in the system	Displays when the last name and first name entered match existing data in the operator table.	Warn
2122	Duplicate e-mail address found in the system	Displays when the email address entered matches the email address of another operator in the system.	Warn
2123	Provider contacts do not match	Displays when the provider contacts do not match for the provider application intake.	Warn
2124	Parents do not match	Displays when the parents on an application do not match KinderTrack records	Warn
2125	Children do not match	Displays when the children on an application do not match KinderTrack records.	Warn
2126	The number of family members do not match	Displays when the number of KinderTrack family members does not match the number entered for the application.	Warn
2127	The review date must be after the application date	Displays when the review date entered for a family is before their application date.	Prevent

Number	WPI Message	Message Description	Type
2128	The notice issue date cannot be in the past	Displays when the issue date entered for a notice is a past date.	Prevent
2129	Negative payment adjustment amount	Displays when the payment adjustment total is negative.	Prevent
2130	Cannot delete child, a pending notice exists	Displays when a child is being inactived as of the effective date for a pending notice.	Prevent
2131	Child is inactive	Displays when a child is inactive.	Warn
2132	Provider does not have a tax ID	Displays when a provider does not have a tax identification number for a CCA agreement.	Prevent
2133	Previous day to billing cycle over midnight hours not paid	Displays when the hours for the previous day to this billing cycle have not yet been paid but the start of this cycle is 12:00 AM.	Warn
2134	Required school schedule max units	Displays when maximum units (S) are entered but no maximum units per day (S) are entered or when maximum units per day (S) are entered but no maximum units (S) are entered.	Prevent
2135	Duplicate primary parent	Displays when a parent with the same state identification number exists on more than one parent or caretaker case.	Warn
2136	Duplicate provider exists	Displays when a provider with the same tax identification number exists based on the type of care.	Warn
2137	Approval notice effective date	Displays when the approval effective date entered for a *Notice of Decision* is before the schedule start date or after the schedule end date.	Prevent
2138	Cancellation notice effective date	Displays when the cancellation effective date entered for a *Notice of Decision* is before the schedule start date or more than one day after the schedule end date.	Prevent

NUMBER	WPI MESSAGE	MESSAGE DESCRIPTION	TYPE
2139	Change notice effective date	Displays when the change effective date entered for a *Notice of Decision* is before the schedule start date or after the schedule end date.	Prevent
2140	Denial notice effective date	Displays when the denial effective date is not the day after the current schedule ends.	Prevent
2141	More than one primary contact	Displays when more than one primary contact is active at any given time.	Prevent
2142	No primary contact	Displays when there is no primary contact for the record being saved.	Warn
2143	Duplicate contact SSN	Displays when the social security number entered for a contact already exists for a contact in the system.	Prevent

Home Page and Actions

When logged in to KinderTrack, users will first view their Home page. From the Home page users can:

- Navigate to a new page using the navigation tool. (See Navigation Tool.)
- Review and respond to alerts in the alerts table.
- Send alerts to other users, family workers or provider workers. (See Send an Alert.)

The Home page displays alerts in the alerts table. Alerts will remain on the table until they are processed by viewing the message. NOTE: Users can change viewing options by using the OPTIONS button.

A sample Home page follows:

The command bar displays the following buttons:

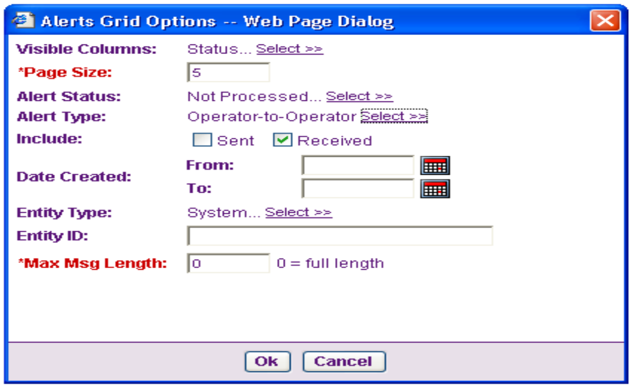
- SEND ALERT sends alerts to other users, family workers or provider workers. See Send an Alert for more information.
- HELP opens a help guide in a new window that displays information about the page being viewed when the button was clicked.
- LOGOUT logs the user out of KinderTrack.
- REFRESH refreshes the page being viewed.

The alerts table always displays an action column along with other columns chosen by the user. For each visible alert, the action column contains the following hyperlinks:

- VIEW opens a view alert box so the user can read the alert message and reply to the sender, if desired. When a reply is sent or the box is closed manually, the alert's status changes to 'processed' and the alert may be removed from the table, depending on the options chosen.
- DEL allows the selected alert to be deleted.

Alert Options Button

The alerts OPTIONS button is located above the top right corner of the alert table. Users can customize the table view by using this button to open the alerts table option box as follows:



The alerts table options box contains the following fields and buttons:

- VISIBLE COLUMNS uses a multi-select link to display the column headings that can be selected and viewed in the alert table. Available choices are:
  - ALERT ID displays the system-generated identification number.
  - DIR displays whether the alert was sent or received.
  - ST displays an abbreviated version of status of the alert: an "N" for not processed or a "P" for processed.
  - STATUS displays the status of the alert.
  - ALERT TYPE displays the type of alert.
  - ENTITY displays the name of the provider or family noted in the alert.
  - ENTITY TYPE displays the type of entity (family, provider or operator) noted in the alert.
  - FROM displays the name of the sender.
  - TO displays the name to whom a message was sent.
  - SUBJECT displays the subject heading of the alert message.
  - MESSAGE displays the text of the alert message.

- DATE SENT displays the date and time the message was sent.
- DATE PROCESSED displays the date and time the message was processed.

♦ PAGE SIZE is a mandatory field and allows users to change how many lines of data are visible in the table before creating a new page. The amount of scrolling done on a page is controlled by how many lines are allowed per page.

♦ ALERT STATUS uses a multi-select link to display the alert statuses. Only the selected statuses will appear in the alert table. Available options are:

- DELETED refers to messages that have been deleted by the user.
- NOT PROCESSED refers to messages that have not yet been viewed.
- PROCESSED refers to messages that have been viewed or had a reply sent.

♦ ALERT TYPE allows selection of different types of user- and system-generated alerts to appear in the alert table. Available options are:

- OPERATOR TO OPERATOR
- PARENT
- CHILD
- PROVIDER
- FAMILY APPLICATION
- PROVIDER AGREEMENT
- FAMILY
- PARENT NEED
- SCHEDULE
- PROVIDER CONTACT
- PROVIDER APPLICATION
- PROVIDER NARRATIVES

♦ INCLUDE allows users to choose whether to view sent alerts, received alerts, or both.

♦ DATE CREATED FROM indicates the beginning date of alerts to be displayed. This field has a CALENDAR button to open the date selector box.

♦ DATE CREATED TO Indicates the ending date of alerts to be displayed. This field has a CALENDAR button to open the date selector box.

♦ ENTITY TYPE uses a multi-select link to allow selection of various types of entities to appear in the alert table. Available options are:

- AGENCY
- CHILD
- FAMILY
- PARENT
- PROGRAM
- PROVIDER AGREEMENT
- PROVIDER CONTACT
- SCHEDULE
- TRAINING ORGANIZATION
- CENTER
- CLIENT APPLICATION
- OPERATOR
- PAYMENT
- PROVIDER
- PROVIDER APPLICATION
- PROVIDER NARRATIVE
- SYSTEM

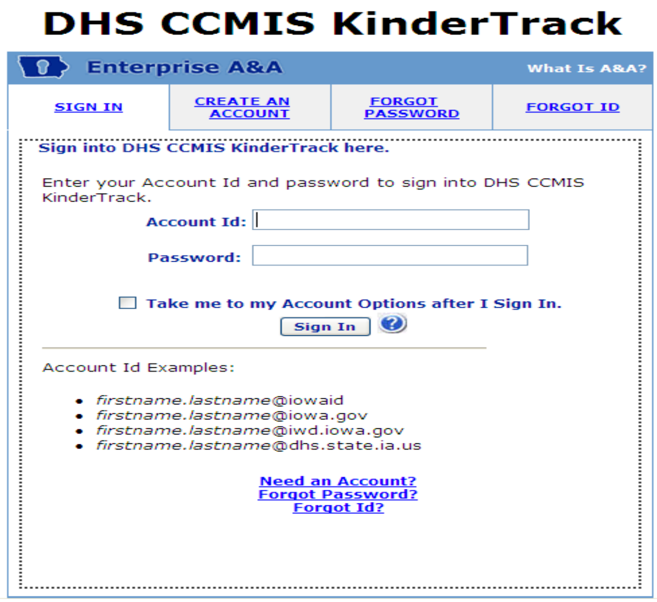
- ENTITY ID displays the KinderTrack provider or family identification number.
- MAX MSG LENGTH indicates how many characters should be displayed in the message column. Zero is the default number and allows the entire message to be viewed in the alert table.
- OK saves changes to the alert table.
- CANCEL closes the alerts table options box without saving changes.

When changes are made and saved, the Home page automatically refreshes. The refreshed page displays the alerts according to the options selected.

Log into KinderTrack

State workers access KinderTrack by using a favorite or shortcut link. For income maintenance staff, the link is on the Field IM Staff SharePoint site.

DHS staff are automatically logged into KinderTrack. PROMISE JOBS staff will see the following screen:



Enter your email address as your account ID and your IWD network password.

Log Out of KinderTrack

If the timer runs out, users are automatically logged out of KinderTrack. A message appears stating "We're sorry. Your session has expired. Please click the link below to login again." NOTE: Any data being edited or added will be lost if it wasn't saved before the timeout.

Click on the LOGIN TO KINDERTRACK link to log back in. When a user is automatically logged out of KinderTrack, the system will remember where the user left off so you do not have to go through the Search page to locate the family, child, or parent you were working on when the logout occurred.

To exit KinderTrack, click the LOGOUT button located near the upper right corner of the KinderTrack screen to return to the Home screen. Click the "X" in the top right corner of the screen to close the browser.

NOTE: Do not close the browser while editing a record. This will lock the case being reviewed for up to 20 minutes.

Delete a Home Page Alert

To delete an alert on the Home page, complete the following steps for each alert to be deleted:

Step	Action
1	Locate the alert to be deleted. Then click the alert's DEL hyperlink in the ACTION column. .
2	A pop-up message appears asking the user to verify deletion of the alert. Click either: ♦ OK to confirm the deletion, or ♦ CANCEL to cancel the action without saving. The pop-up closes and the user is returned to the alert table.

Process a Home Page Alert

To process an alert on the Home page, complete the following steps for each alert to be processed:

Step	Action
1	Locate the alert to be processed. Then click the alert's VIEW hyperlink in the ACTION column.
2	A view alert box appears. Review the message and then click either: ♦ REPLY to send a reply to the alert (see Reply to a Home Page Alert), or ♦ CLOSE to close the view alert box without sending a reply. The view alert box closes and the alert is marked as processed. The user is returned to the alert table. If the user has not chosen to view processed alerts, the processed alert is removed from the alert table.

Reply to a Home Page Alert

To reply to an alert on the Home page, complete the following steps each alert needing a response:

Step	Action
1	Locate the alert that needs a response sent. Then click the alert's VIEW hyperlink in the ACTION column. A pop-up message appears.
2	Click the REPLY button. A reply field appears below the message section in the view alert box.
3	Type comments in the reply field.
4	When comments are completed, click either: ♦ SEND to send the reply to the recipient, or ♦ CANCEL to cancel the action without sending the response. The view alert box closes and the alert is marked as processed. The user is returned to the alert table. If the user has not chosen to view processed alerts, the processed alert is removed from the alert table.

View a Home Page Alert

Alerts can be viewed in an alert view box. While the alert message can be read, the box also contains the following additional information:

- ALERT ID
- ALERT TYPE
- ENTITY ID
- SUBJECT
- SENT FROM
- SENT TO
- DATE CREATED
- DATE PROCESSED

To view an alert on the Home page, complete the following steps for each alert to be viewed:

Step	Action
1	Locate the alert to be viewed. Then click the alert's VIEW hyperlink in the ACTION column. A view alert box appears.
2	Review the message and then click either: ♦ REPLY to send a reply to the alert (see Reply to a Home Page Alert), or ♦ CLOSE to close the view alert box without sending a reply. The view alert box closes and the alert is marked as processed. The user is returned to the alert table. If the user has not chosen to view processed alerts, the processed alert is removed from the table.

Intake Activity Screens

KinderTrack works with the CCA family and provider web sites. Families can submit applications to receive CCA services and providers can apply to receive CCA payments or to become a registered provider through the respective web sites. These applications can then be imported into KinderTrack.

The activity module screens are discussed in the following sections.

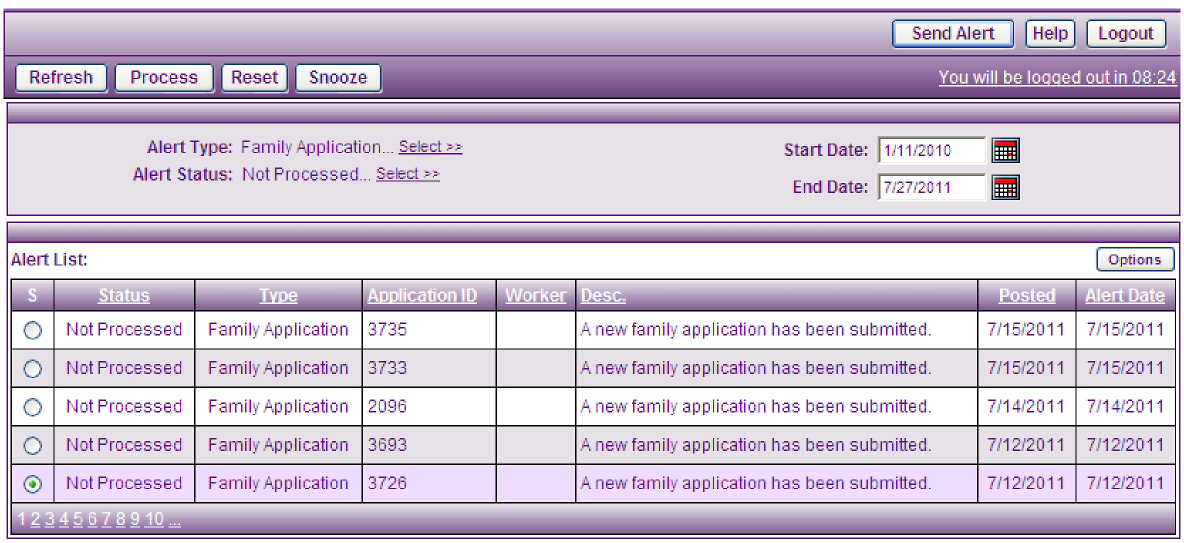
The Intake activity module contains screens that allow users to:

- Be notified when a new electronically submitted family application, provider application or CCA provider agreement is received.
- Import the family and provider applications into KinderTrack.
- Print CCA provider agreements.
- Reprint the original family and provider applications as they were submitted through the family and provider web sites.
- Import existing PROMISE JOBS case information into KinderTrack.

Intake Alerts

KinderTrack receives an alert when a family or provider has submitted a new application or CCA provider agreement from one of the web sites.

A sample of an Intake>Alerts screen displaying family applications follows:



The Intake>Alerts page displays the system-generated alerts regarding the receipt of a new electronic application or CCA provider agreement in the alerts table. Alerts remain on the table until they are processed. NOTE: Users can change viewing options by using the OPTIONS button.

The command bar displays the following buttons:

- SEND ALERT issues alerts to other users, family workers or provider workers. For more information on sending alerts, see Send an Alert.
- HELP opens a help guide in a new window that displays information about the specific page being viewed when the button was clicked.
- LOGOUT logs the user out of KinderTrack.
- REFRESH updates the page.
- PROCESS processes the selected alert.
- RESET CHANGES an alert's status from "processed" back to "not processed."
- SNOOZE sets a future date for the alert to reappear.

The selection area displays the following fields:

- ALERT TYPE uses a multi-select link to display the alert types that can be selected and viewed in the alert table. Available choices are:
  - FAMILY APPLICATION
  - PROVIDER AGREEMENT
  - PROVIDER APPLICATION
- ALERT STATUS uses a multi-select link to display the types of statuses that can be selected and viewed in the alert table. Available choices are:
  - NOT PROCESSED
  - PROCESSED
- START DATE sets the beginning date of alerts to be displayed. This field has a CALENDAR button to open the date selector box.
- END DATE sets the ending date of alerts to be displayed. This field has a CALENDAR button to open the date selector box.

The alerts table displays a selection (S) column along with other columns chosen by the user. Click the selection column radio button to select a specific alert so action can be taken.

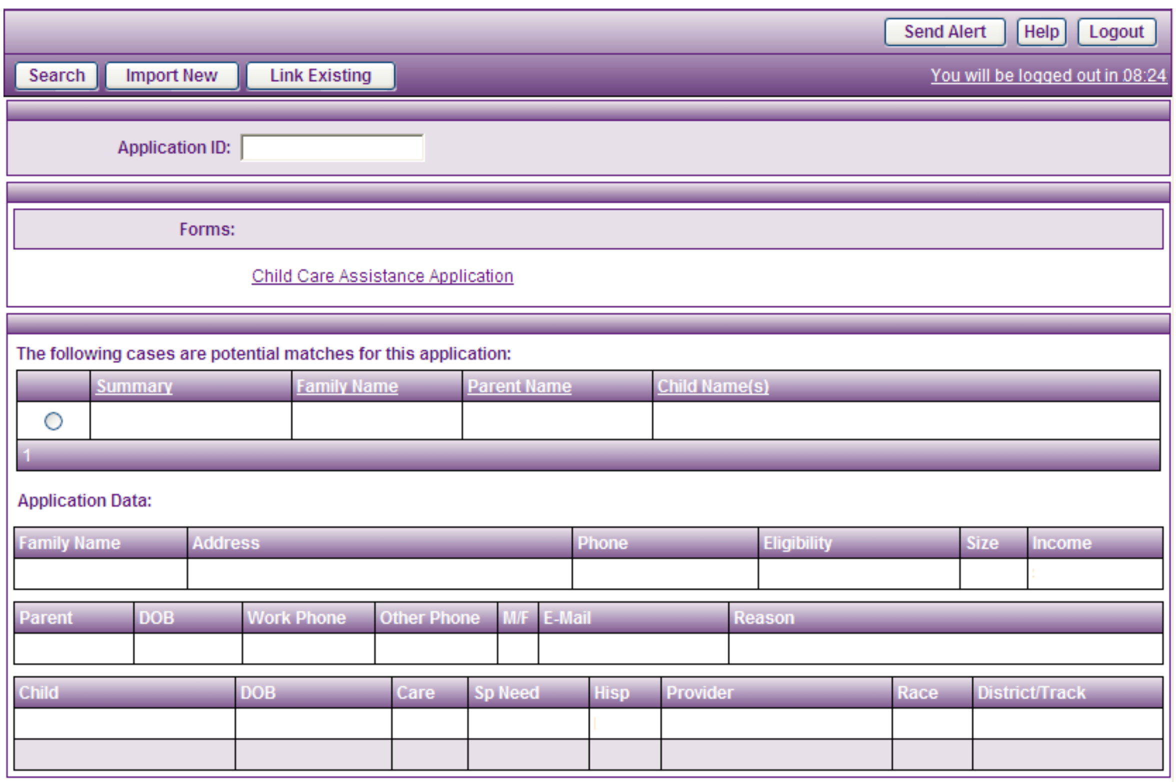
Family App Import

The Family App Import page can be accessed by using the navigation tool to click on the page link or by processing an intake alert for a family application. See Process an Intake Application Alert for more information.

On the Family App Import page, users can:

- Search for applications using an application identification number.
- Import information from an electronically submitted application and either create a new KinderTrack case or link the application to an existing KinderTrack case.
- View and print a copy of the application.
- View at a glance information submitted on the application.

A sample of a blank Family App Import page follows:



The Intake>Family App Import page displays information about the application listed at the bottom of the page. KinderTrack also searches through the families that already exist within the system to see if any might match the family in the new application. There are three possible outcomes:

- No match was found in KinderTrack.
- A family was found in KinderTrack that might match the family in the new application. This information is displayed in the table located above the APPLICATION DATA: information.
- A family was found in KinderTrack that definitely matches the family in the new application **and** the application has already been linked to that family. A worker has already imported the application into KinderTrack or has linked the application to an existing KinderTrack family.

  This information will be displayed in the table located above the APPLICATION DATA: information and is identified by the statement "This application is currently linked to:."

The command bar displays the following buttons:

- SEND ALERT issues alerts to other users, family workers or provider workers. For more information on sending alerts, see Send an Alert.
- HELP opens a help guide in a new window and will be displaying information about the specific page being viewed when the button was clicked.
- LOGOUT logs the user out of KinderTrack.
- SEARCH initiates a search using an application identification number.
- IMPORT new brings a family's application information into KinderTrack and creates a new KinderTrack case when a match is not found during the search process. This button is visible only if the user comes to this page by processing an alert or by completing a search by application ID with results.
- LINK EXISTING connects an application to an existing KinderTrack case and imports the application data into KinderTrack. This button is visible only if a case is selected by clicking the radio button in the selection column in the potential match table.

  NOTE: Linking to an existing case allows the system to update information currently in KinderTrack with information from the application using the current day's date as the effective date.

The selection area contains an APPLICATION ID field. The application's identification number is either:

- Automatically populated when the user accesses the Family App Import page by processing an intake alert, or
- Entered by the user before performing a search.

The content area displays the following:

- A child care assistance application hyperlink which allows the user to view and print a copy of the electronically submitted application.
- A sentence stating the application is linked to a KinderTrack case along with a CASE NAME/FAMILY ID hyperlink or a potential matches table.
- An application data table.

The potential matches table displays the following columns:

- SELECT BUTTON is used to select the most appropriate match, if any.
- SUMMARY displays a hyperlink used to move to the Family>Summary page.
- FAMILY NAME displays the family's last name.
- PARENT NAME displays the first and last name of the primary parent as found on the KinderTrack case.
- CHILD NAME(S) displays the first and last name of all children listed on the KinderTrack case.

The application data table displays the information provided on the electronic application, in the following fields:

- FAMILY NAME displays the family's last name.
- ADDRESS displays the family's address including street, city, state, and zip code.
- PHONE displays the family's phone number.
- ELIGIBILITY displays if the family is income-eligible based on the income information provided. Valid values are:
  - FIP INCOME ELIGIBLE for families reporting that they currently receive a FIP payment.
  - INCOME ELIGIBLE for families who are eligible based on the number of people listed on the application and the total income listed for all members.
  - BLANK for families who are not eligible based on the number of people listed on the application and the total income listed for all members.

- SIZE displays the total number of people listed on the application.
- INCOME displays the total amount of all income listed on the application.
- PARENT displays the first and last name of a parent. NOTE: If more than one parent is listed on the application, each parent has a separate row of information.
- DOB displays the parent's date of birth.
- WORK PHONE displays the phone number for that parent's employment.
- OTHER PHONE displays an alternative phone number.
- M/F displays the parent's gender. Valid values are:
  - M for male.
  - F for female.
- E-MAIL displays the parent's email address.
- REASON displays the parent's reasons for needing child care assistance. More than one reason may be displayed for a parent. Valid values are:
  - Employment (The employer's name is also displayed, if entered on the application.)
  - School (The school's name is also displayed, if entered on the application.)
  - Blank if neither employment nor school is selected or another type of need is manually entered.
- CHILD displays the first and last name of the child. If more than one child is listed on the application each child has a separate row of information.
- DOB displays the child's date of birth.
- CARE indicates whether or not the child needs child care. Valid values are:
  - Y for yes.
  - N for no.
- SP NEED indicates if the child is listed as having special needs. Valid values are:
  - Y for yes.
  - N for no.
- HISP indicates whether the child is listed as having Hispanic or Latino ethnicity. Valid values are:
  - Y for yes.
  - N for no.

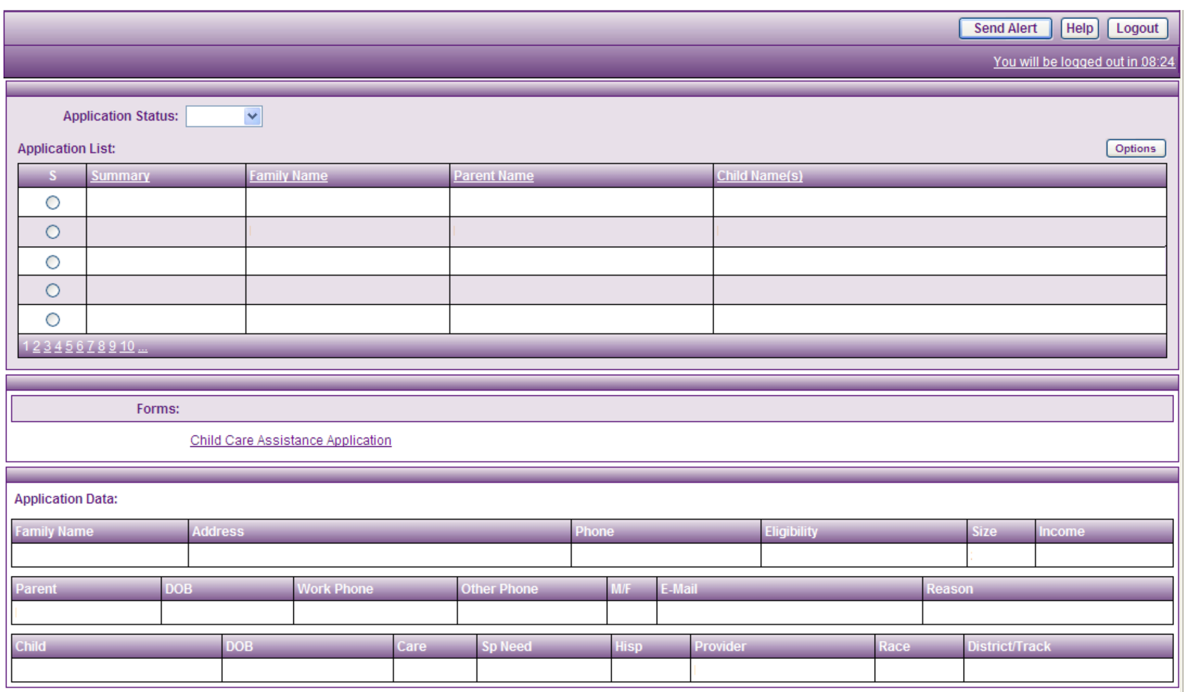
- PROVIDER displays the name of the provider that the family wishes to use.
- RACE displays all options selected for the child's race. Valid options are:
  - A for Asian.
  - B for Black or African American.
  - I for American Indian or Alaskan Native.
  - N for Native Hawaiian or other Pacific Islander.
  - W for white.
- DISTRICT/TRACK is not used at this time.

Family App Lookup

The Family App Lookup page is accessed by using the navigation tool to click on the page link. On the Family App Lookup page, users can:

- Search for a previously submitted electronic application based on its application status.
- View and print a copy of the application.
- View at a glance information submitted on the application.

A sample of a blank Family App Lookup page follows:



The Intake>Family App Lookup page displays a listing of all electronically submitted applications by application status. NOTE: Users can change viewing options by using the OPTIONS button.

The command bar displays the following buttons:

- SEND ALERT issues alerts to other users, family workers or provider workers. For more information on sending alerts, see Send an Alert.
- HELP opens a help guide in a new window that displays information about the specific page being viewed when the button was clicked.
- LOGOUT logs the user out of KinderTrack.

The selection area contains an application status field and an application list table. The application status field uses a drop-down list arrow to display valid status options that can be selected. These are:

- ARCHIVED to view applications with a received date that is more than five months in the past.
- IMPORTED to view applications that have had information imported into KinderTrack through the Intake>Alerts processing procedure.
- PENDING to view applications that did not have information imported into KinderTrack.

The application list table displays a selection (S) column along with other columns chosen by the user. Click the selection column radio button to select a specific application.

The available column headings for selection and viewing are:

- SUMMARY displays a hyperlink to the Family>Summary page. The field is blank if the application is not linked to a KinderTrack case number.
- FAMILY NAME displays the family's last name.
- PARENT NAME displays the first and last name of the primary parent as found on the KinderTrack case.
- CHILD NAME(S) displays the first and last name of all children listed on the KinderTrack case.

The column headings in the application list table can be used to sort the displayed results. Clicking one of the headers will cause the list to be sorted by that column. Clicking the same header twice will reverse the sort order for that column.

The content area displays a hyperlink and an application data table. The CHILD CARE ASSISTANCE APPLICATION hyperlink is used to view and print a copy of the application.

The application data table displays information as provided on the electronic application, in the following fields:

- FAMILY NAME displays the family's last name.
- ADDRESS displays the family's address including street, city, state, and zip code.
- PHONE displays the family's phone number.
- ELIGIBILITY displays if the family is income eligible based on the information provided on the income. Valid values are:
  - FIP INCOME ELIGIBLE for families reporting they currently receive a FIP payment.
  - INCOME ELIGIBLE for families who are eligible based on the number of people listed on the application and the total income listed for all members.
  - BLANK for families who are not eligible based on the number of people listed on the application and the total income listed for all members.
- SIZE displays the total number of household members listed on the application.
- INCOME displays the total amount of all income listed on the application.
- PARENT displays the first and last name of a parent. If more than one parent is listed on the application, each parent has a separate row of information.
- DOB displays the parent's date of birth.
- WORK PHONE displays the phone number for that parent's employment.
- OTHER PHONE displays an alternative phone number.
- M/F displays the parent's gender. Valid values are:
  - M for male.
  - F for female.
- E-MAIL displays the parent's email address.

- REASON displays the parent's reasons for needing child care. More than one reason may be displayed for a parent. Valid values are:
  - EMPLOYMENT (The employer's name is also displayed, if entered on the application.)
  - SCHOOL (The school's name is also displayed, if entered on the application.)
  - Blank if neither employment nor school is selected or another type of need is manually entered.
- CHILD displays the first and last name of the child. If more than one child is listed on the application each child has a separate row of information.
- DOB displays the child's date of birth.
- CARE displays whether or not the child needs child care assistance. Valid values are:
  - Y for yes.
  - N for no.
- SP NEED displays if the child is listed as having special needs. Valid values are:
  - Y for yes.
  - N for no.
- HISP displays whether or not the child is of Hispanic or Latino ethnicity. Valid values are:
  - Y for yes.
  - N for no.
- PROVIDER displays the name of the provider the family wishes to use.
- RACE displays the child's race and will display all options selected. Valid options are:
  - A for Asian.
  - B for Black or African American.
  - I for American Indian or Alaskan Native.
  - N for Native Hawaiian or other Pacific Islander.
  - W for white.
- DISTRICT/TRACK is not used at this time.

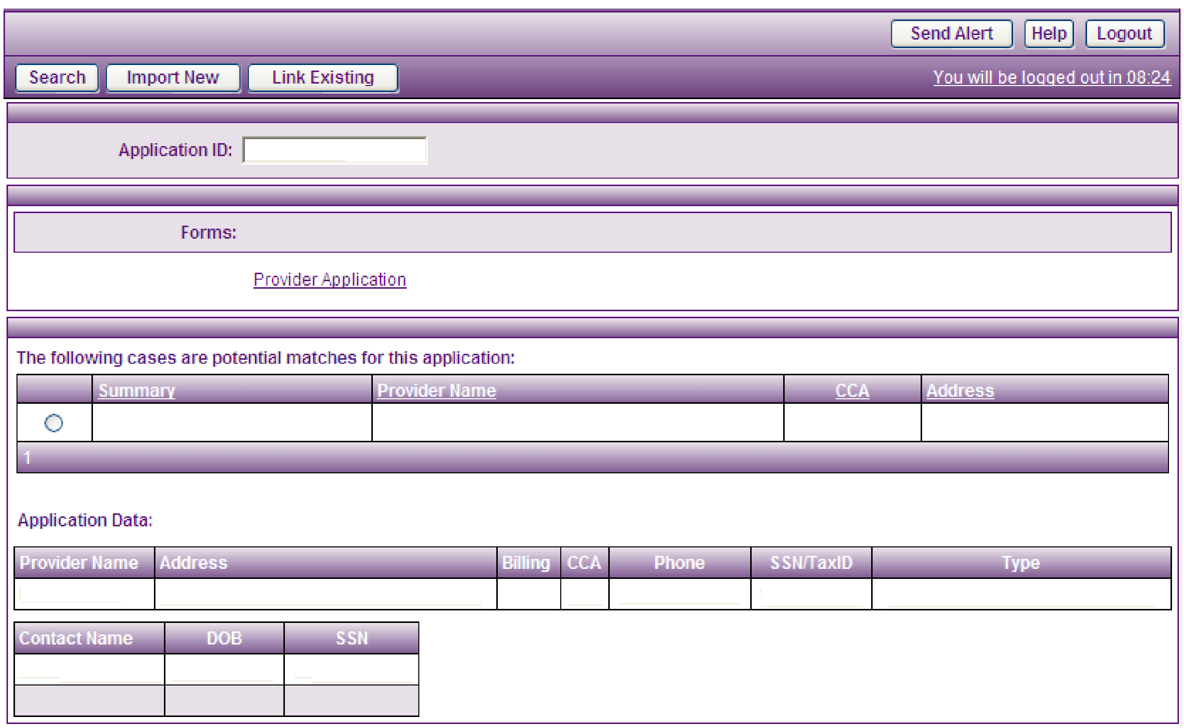
Provider App Import

The Provider App Import page can be accessed by using the navigation tool to click on the page link or by processing an Intake alert for a provider application. See Process an Intake Application Alert for more information.

On the Provider App Import page, users can:

- Search for applications using an application identification number.
- Import information from an electronically submitted provider application and either create a new KinderTrack case or link the application to an existing KinderTrack case.
- View and print a copy of the application.
- View at a glance information submitted on the application.

A sample of a blank Provider App Import page follows:



The Intake>Provider App Import page displays information about the application at the bottom of the page. KinderTrack also searches through the providers that already exist within the system, to see if any might match the provider in the new application. There are three possible outcomes:

- No match was found in KinderTrack.
- A provider was found in KinderTrack that might match the provider in the new application. This information will be displayed in the table located above the APPLICATION DATA: information.
- A provider was found in KinderTrack that definitely matches the provider in the new application **and** the application has already been linked to that provider. A worker has already imported the application into KinderTrack or has linked the application to an existing KinderTrack provider.

  This information will be displayed in the table located above the APPLICATION DATA: information and is identified by the statement "This application is currently linked to:."

The command bar displays the following buttons:

- SEND ALERT issues alerts to other users, family workers or provider workers. For more information on sending alerts, see Send an Alert.
- HELP opens a help guide in a new window and will be displaying information about the specific page being viewed when the button was clicked.
- LOGOUT logs the user out of KinderTrack.
- SEARCH initiates a search using an application identification number.
- IMPORT NEW brings a family's application information into KinderTrack and creates a new KinderTrack case when a match is not found during the search process. This button is visible only if the user comes to this page by processing an alert or by completing a search by application ID with results.
- LINK EXISTING connects an application to an existing KinderTrack case and imports the application data into KinderTrack. This button is visible only if a case is selected by clicking the radio button in the selection column in the potential match table.

  NOTE: Linking to an existing case allows the system to update information currently in KinderTrack with information from the application using the current day's date as the effective date.

The selection area contains an APPLICATION ID field. The application's identification number is either:

- ♦ Automatically populated when accessing the Provider App Import page by processing an intake alert, or
- ♦ Entered by the user before performing a search.

The content area displays the following:

- ♦ A PROVIDER APPLICATION hyperlink which allows the user to view and print a copy of the electronically submitted application.
- ♦ A sentence stating the application is linked to a KinderTrack provider along with a PROVIDER NAME/PROVIDER ID hyperlink or a potential matches table.
- ♦ An application data table.

When viewed, the potential matches table displays the following columns:

- ♦ SELECT BUTTON is used to select the most appropriate match, if any.
- ♦ SUMMARY displays a hyperlink which is used to move to the Provider>Summary page.
- ♦ PROVIDER NAME displays the provider's last name or the business name.
- ♦ CCA displays whether the provider has a CCA provider agreement. Valid values are:
  - Y for yes. An agreement is present, or
  - N for no. Either no agreement is on file or it has expired.
- ♦ ADDRESS displays the street address where the child care is provided.

The application data table displays information, if provided on the electronic application, in the following fields:

- ♦ PROVIDER NAME displays the provider's last name or the business name.
- ♦ ADDRESS displays the address information including street, city, state, and zip code of the location where the child care is provided.
- ♦ BILLING displays the billing address for the provider, if different than the business address.

- CCA displays whether the provider has indicated they wish to have a CCA provider agreement. Valid values are:
  - Y for yes. An agreement is wanted, or
  - N for no.
- PHONE displays the provider's phone number.
- SSN/TAX ID displays either the provider's social security number or federal tax identification number.
- TYPE displays the provider type. Valid values:
  - EXEMPT FROM LICENSING
  - IN-HOME
  - LICENSED CENTER
  - NON-REGISTERED CHILD CARE HOME
  - REGISTERED CHILD DEVELOPMENT HOME A
  - REGISTERED CHILD DEVELOPMENT HOME B
  - REGISTERED CHILD DEVELOPMENT HOME C
  - REGISTERED CHILD DEVELOPMENT HOMEC1
- CONTACT NAME displays the first and last name of the contact person. NOTE: If more than one contact is listed on the application each contact will have a separate row of information.
- DOB displays the contact person's date of birth.
- SSN displays the contact person's social security number.

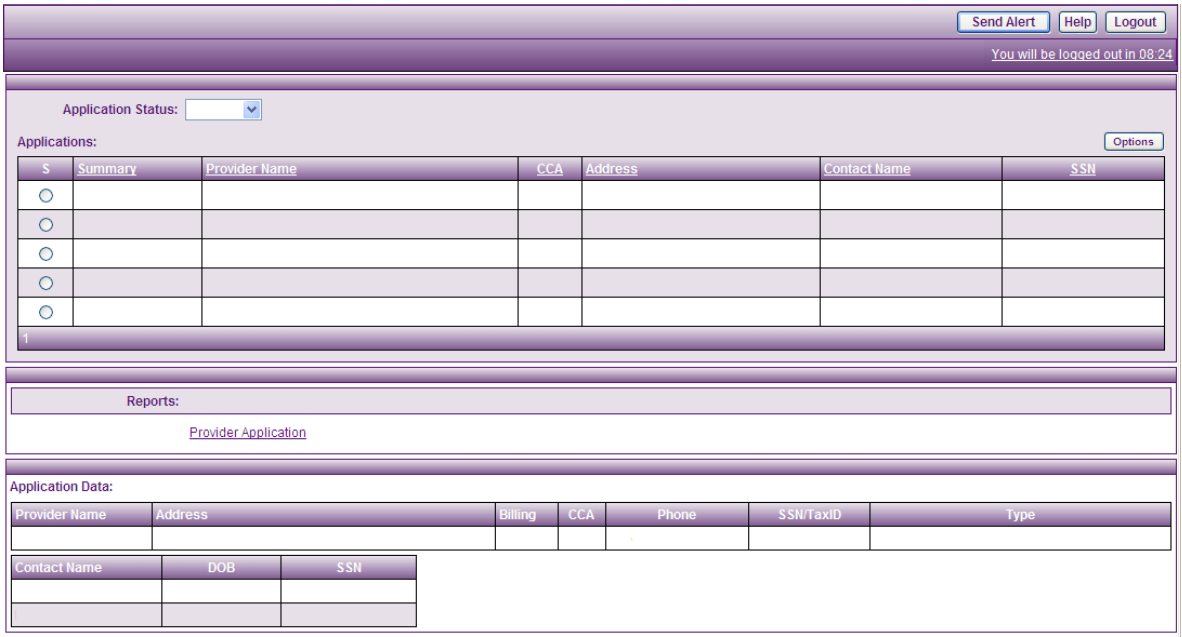
Provider App Lookup

The Provider App Lookup page is accessed by using the navigation tool to click on the page link. On the Provider App Import page, users can:

- Search for a previously submitted electronic application based on its application status.
- View and print a copy of the application.
- View at a glance information submitted on the application.

The Intake>Provider App Lookup page displays a listing of all electronically submitted applications by application status. NOTE: Users can change viewing options by using the OPTIONS button.

A sample of a blank Provider App Lookup page follows:



The command bar displays the following buttons:

- SEND ALERT issues alerts to other users, family workers or provider workers. For more information on sending alerts, see Send an Alert.
- HELP opens a help guide in a new window and will be displaying information about the specific page being viewed when the button was clicked.
- LOGOUT logs the user out of KinderTrack.

The selection area contains a field and an application list table. The application status field uses a drop-down list arrow to display valid status options that can be selected. The valid options are:

- ARCHIVED to view applications with a received date that is more than six months in the past.
- IMPORTED to view applications that have had information imported through the Intake>Alerts processing procedure into KinderTrack.
- PENDING to view applications that did not have information imported into KinderTrack.

The applications table displays a selection (S) column along with other columns chosen by the user. Click the selection column radio button to select a specific application.

The available column headings for selection and viewing are:

- SUMMARY displays a hyperlink which is used to move to the Provider>Summary page. The field is blank if the application is not linked to a KinderTrack provider.
- PROVIDER NAME displays the provider's first and last name or business name.
- CCA DISplays whether the provider has a current CCA provider agreement. Valid values are:
  - Y for yes. An agreement is current and valid, or
  - N for no. Either no agreement is on file or it has expired.
- ADDRESS displays the street address where the child care is provided.
- CONTACT NAME displays the first and last name of the primary contact person.
- SSN displays the primary contact person's social security number.

The column headings in the applications table can be used to sort the displayed results. Clicking one of the headers will cause the list to be sorted by that column. Clicking the same header twice will reverse the sort order for that column.

The content area displays a hyperlink and an application data table. The PROVIDER APPLICATION hyperlink is used to view and print a copy of the application.

The application data table displays information, if provided on the electronic application, in the following fields:

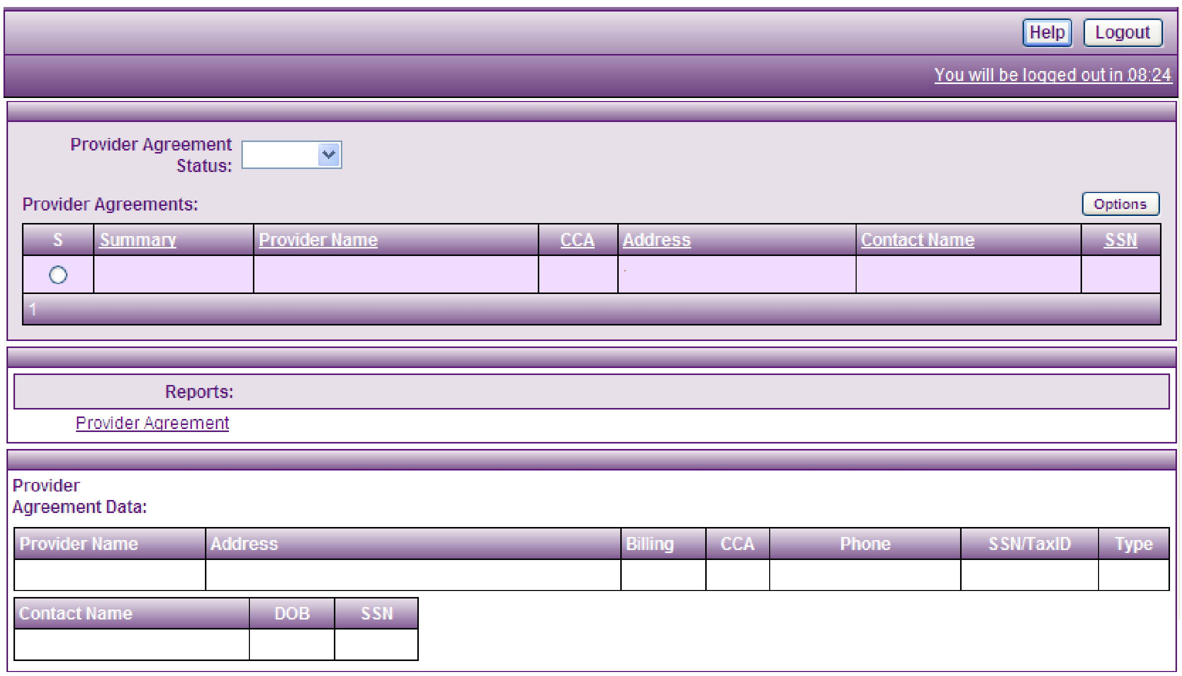
- PROVIDER NAME displays the provider's first and last name or business name.
- ADDRESS displays the address information including street, city, state, and zip code of the location where the child care is provided.
- BILLING displays the billing address for the provider, if different than the business address.
- CCA displays whether the provider indicated they wanted a CCA provider agreement. Valid values are:
  - Y for yes. An agreement is wanted, or
  - N for no.

- PHONE displays the provider's phone number.
- SSN/TAX ID displays either the provider's social security number or federal tax identification number.
- TYPE displays the provider type. Valid values:
  - EXEMPT FROM LICENSING
  - IN-HOME
  - LICENSED CENTER
  - NON-REGISTERED CHILD CARE HOME
  - REGISTERED CHILD DEVELOPMENT HOME A
  - REGISTERED CHILD DEVELOPMENT HOME B
  - REGISTERED CHILD DEVELOPMENT HOME C
  - REGISTERED CHILD DEVELOPMENT HOMEC1
- CONTACT NAME displays the first and last name of the contact person. NOTE: If more than one contact is listed on the application each contact will have a separate row of information.
- DOB displays the contact person's date of birth.
- SSN displays the contact person's social security number.

Provider Agreements

Providers can submit a CCA provider agreement form through the web portal. The Provider Agreement page is used to print the electronically submitted forms when processing an alert and to search for agreements that need to be reprinted.

NOTE: Any CCA provider agreements printed from this page will display only the information the provider originally entered through the portal.



The Intake>Provider Agreements page displays electronically submitted provider agreements. NOTE: Users can change viewing options by using the OPTIONS button.

The command bar displays the following buttons:

- HELP opens a help guide in a new window that displays information about the specific page being viewed when the button was clicked.
- LOGOUT logs the user out of KinderTrack.

The selection area contains a field and a list table. The provider AGREEMENT STATUS field uses a drop-down list arrow to display valid status options that can be selected. These are:

♦ ARCHIVED to view applications with a received date that is more than six months in the past.

♦ IMPORTED is no longer used for provider agreements. Agreements submitted before July 16, 2011, may display if the information was 'imported' to KinderTrack.

♦ PENDING to view all agreements submitted since July 16, 2011.

The provider agreements table displays a selection (S) column along with other columns chosen by the user. Click the selection column radio button to select a specific form.

The available column headings for selection and viewing are:

♦ SUMMARY displays a hyperlink to the Provider>Summary page. The field is blank if the agreement is not linked to a KinderTrack provider.

♦ PROVIDER NAME displays the provider's first and last name or business name.

♦ CCA displays whether the provider has a CCA provider agreement. Valid values are:

  - Y when agreement is present, or
  - N when no agreement is on file or the agreement on file has expired.

♦ ADDRESS displays the street address where the child care is provided.

♦ CONTACT NAME displays the first and last name of the primary contact person.

♦ SSN displays the primary contact person's social security number.

The column headings in the provider agreements table can be used to sort the displayed results. Click one of the headers to be sort the table by entries in that column. Clicking the same header twice reverses the sort order for that column.

The content area displays a hyperlink and a provider agreement data table. The PROVIDER AGREEMENT hyperlink is used to view and print a copy of the form.

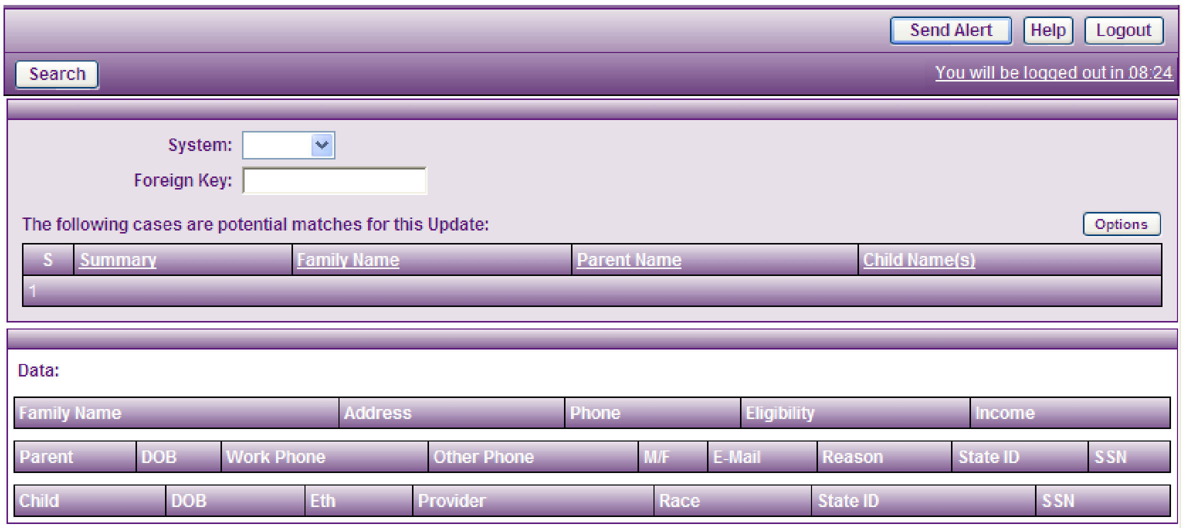
The provider agreement data table displays information as provided on the electronic form, in the following fields:

- PROVIDER NAME displays the provider's first and last name or business name.
- ADDRESS displays the address information including street, city, state, and zip code of the location where the child care is provided.
- BILLING displays the billing address for the provider, if different than the business address.
- CCA always displays a "Y."
- PHONE displays the provider's phone number.
- SSN/TAX ID displays either the provider's social security number or the provider's federal tax identification number.
- TYPE is not used for agreements.
- CONTACT NAME displays the first and last name of the contact person.
- DOB displays the contact person's date of birth.
- SSN displays the contact person's social security number.

Other System Import

PROMISE JOBS staff use the Other System Import page to import existing family case information from the PJCase system into KinderTrack. PROMISE JOBS can import the information either to create a new family case in KinderTrack or to update an existing case.

A sample of a blank Other System Import page follows:



The Intake>Other System Import page is used to search for and display a list of all potential matches to an existing case in the PJCase system. NOTE: Users can change viewing options by using the OPTIONS button.

The command bar displays the following buttons:

- ♦ SEND ALERT issues alerts to other users, family workers or provider workers. For more information on sending alerts, see Send an Alert.
- ♦ HELP opens a help guide in a new window and will be displaying information about the specific page being viewed when the button was clicked.
- ♦ LOGOUT logs the user out of KinderTrack.
- ♦ SEARCH initiates a search using an application identification number.

- IMPORT NEW brings a family's application information into KinderTrack and creates a new KinderTrack case when a match is not found during the search process. This button is visible only if the user comes to this page by processing an alert or by completing a search by application ID with results.
- UPDATE is used to update an existing KinderTrack case with information from the PJCase system. This button is visible only if a KinderTrack case is selected by clicking the radio button in the selection column in the potential match table.

  NOTE: Linking to an existing case allows the system to update information currently in KinderTrack with information from the PJCase system. This can result in unwanted changes that could affect the family's eligibility and copayment if the family is active and currently receiving CCA benefits.

The selection area contains some fields and a potential match table. The available fields are:

- SYSTEM uses a drop-down list arrow to display and select a system name. The only valid option is PJCase.
- FOREIGN KEY is used to enter the ABC case number for the PJCase family.

The potential matches table displays a selection (S) column along with other columns chosen by the user. Click the selection column radio button to select a specific form.

The available column headings for selection and viewing are:

- SELECTION displays a radio button which can be clicked to select that KinderTrack case.
- SUMMARY displays a hyperlink to the Family>Summary page.
- FAMILY NAME displays the family's last name.
- PARENT NAME displays the first and last name of the primary parent as found on the KinderTrack case.
- CHILD NAME(S) displays the first and last name of all children listed on the KinderTrack case.

The column headings in the potential match table can be used to sort the displayed results. Clicking a header causes the list to be sorted by the entries in that column. Clicking the same header twice reverses the sort order for that column.

The content area displays a data table. The table displays a selected family's PJCase information in the following fields:

- FAMILY NAME displays the family's last name.
- ADDRESS displays the family's address including street, city, state, and zip code.
- PHONE displays the family's phone number.
- ELIGIBILITY is not used for PJCase imports.
- INCOME displays the total amount of all income listed in PJCase.
- PARENT displays the first and last name of a parent. If more than one parent is present in PJCase, each parent has a separate row of information.
- DOB displays the parent's date of birth.
- WORK PHONE displays the phone number for that parent's employment.
- OTHER PHONE displays an alternative phone number.
- M/F displays the parent's gender. Valid values are:
  - M for male.
  - F for female.
- E-MAIL is not used for PJCase imports.
- REASON is not used for PJCase imports.
- STATE ID displays the parent's state identification number (SID).
- SSN displays the parent's social security number.
- CHILD displays the first and last name of the child. NOTE: If more than one child is listed in PJCase, each child will have a separate row of information.
- DOB displays the child's date of birth.
- ETH is not used for PJCase imports.
- PROVIDER is not used for PJCase imports.
- RACE is not used for PJCase imports.
- STATE ID displays the child's state identification number (SID).
- SSN displays the child's social security number.

Intake Case Actions

This section provides specific instructions for KinderTrack entries that can be completed on screens found in the intake module.

Delete an Intake Alert

Intake alerts cannot be deleted. If a user selects NOT PROCESSED as the only type of alert to be viewed, the alerts are automatically removed from the screen once they are processed.

Import a Family or Provider Application

An electronically submitted family or provider application can be accessed either by processing a new application alert or by going directly to the Intake>Family App Import or Intake>Provider App Import page and completing a search using the application identification number.

NOTE: Application identification numbers can be found by locating the application alert on the Intake>Alerts page. Change the alert status to include processed alerts and adjust the start and end dates for the appropriate time frame.

Either method will result in the Intake>Family App Import or Intake>Provider App Import page being displayed. Information from the application is displayed at the bottom of the screen.

The system searches through the families or providers that already exist in KinderTrack, to see if any might match the family or provider in the new application. There are three possible outcomes:

- ♦ No match was found in KinderTrack.
- ♦ A family or provider was found in KinderTrack that might match the family or provider in the new application.
- ♦ A family or provider was found in KinderTrack that definitely matches the family or provider in the new application and the application has already been linked to that family or provider. A worker has already imported the application into KinderTrack or has linked the application to an existing KinderTrack family or provider.

NOTE: The worker importing the application is automatically assigned as the worker for the case. If another worker, such as clerical person, completes the import process, the case must be reassigned to the correct case worker. See Reassigning a Case to Another Worker for more information.

To import a family or provider application, use the following steps:

Step	Action
1	Review the Intake>Family App Import or Intake>Provider App Import page to determine whether or not there is a possible match or if the application has already been linked to a case. If the application: ♦ Has no potential matches listed, go to step 2. ♦ Has potential matches listed, go to step 4. ♦ Has already been linked to an existing case, go to step 12.
2	Click the IMPORT NEW button. KinderTrack creates a new family or provider record using the application information. The screen refreshes showing the application is now linked to a case along with a CASE NAME/FAMILY ID or PROVIDER NAME/PROVIDER ID hyperlink.
3	Importing the new application information into KinderTrack is complete. To view or act on the imported information, click on the: ♦ CASE NAME/FAMILY ID link to go to the Family>Summary page, or ♦ PROVIDER NAME/PROVIDER ID link to go to the Provider>Summary page.
4	Using the list of potential matches, determine if the applicant family or provider already exists in KinderTrack. To display a copy of the application to compare with information already in the system, click the CHILD CARE ASSISTANCE APPLICATION or PROVIDER APPLICATION link. A print dialog box appears. Click PRINT. The application appears in a new window which can be left open until no longer needed and then closed.

Step	Action
5	If the answer is: ♦ No, none of the potential matches is the applicant family or provider, return to step 2. ♦ Yes, one of the potential matches is the applicant family or provider, and you want to **link** the application to an existing case, go to step 7. ♦ Yes, one of the potential matches is the applicant family or provider, but you **don't** want to link the application to an existing case or provider and **don't** want to import the application information, go to step 6. **IMPORTANT:** Linking to an existing family or provider allows the system to update information currently in KinderTrack with information from the application using the current day's date as the effective date.
6	Click on the CASE NAME/FAMILY ID or PROVIDER NAME/PROVIDER ID link to go to the Family>Summary or Provider>Summary page. Manually enter any needed information from the application on the family or provider activity screens to continue with the application process. This completes the process of importing the application. The window displaying the application data can be closed.
7	To link the application, click the radio button in the selection column to the left of the desired KinderTrack case match. The page refreshes and a LINK EXISTING button appears in the control bar.
8	Click the LINK EXISTING button. A dialog box appears asking if you are sure you want to link the application to the selected family or provider.
9	Answer the question by selecting either: ♦ CANCEL to cancel the action without saving any changes. Return to step 4 if another case or provider needs to be chosen or to step 6 if linking the case is not required. ♦ OK to confirm the action and save changes to the family or provider file. Go to next step. The dialog box closes.

Step	Action
10	A dialog box appears stating "WARNING: This will overwrite any existing date in KinderTrack. Do you want to import the data from the portal?" Answer the question by selecting either: ♦ OK to confirm the action and to save changes to the family or provider file. Go to next step, or ♦ CANCEL to cancel the action without saving any changes. Return to step 4 if another case or provider needs to be chosen or to step 7 if linking the case is not required. The dialog box closes. NOTE: Other warning dialog boxes may appear if information from the application doesn't match the information already in KinderTrack. The Family App Import or Provider App Import page refreshes to display that the application is now linked to a case or provider in KinderTrack.
11	Importing the new application information into KinderTrack is complete. To view or act on the imported information, click on the: ♦ CASE NAME/FAMILY ID link to go to the Family>Summary page, or ♦ PROVIDER NAME/PROVIDER ID link to go to the Provider>Summary page. The window displaying the application can be closed.
12	Is the application linked to the correct family case or provider? If the answer is: ♦ Yes, go to next step. ♦ No, go to step 2. NOTE: If an application is linked to the wrong family case it can't be unlinked. However, clicking the IMPORT NEW button on the Family App Import or Provider App Import page will allow the system to create a new family or provider case using the information from the application. To ensure new cases and IDs are not created for an existing family or provider, be certain this is necessary before creating a new case.

Step	Action
13	Importing the new application information into KinderTrack is complete. To view or act on the imported information, click on the: ♦ CASE NAME/FAMILY ID link to go to the Family>Summary page, or ♦ PROVIDER NAME/PROVIDER ID link to go to the Provider>Summary page. This completes usage of this step action chart for this process.

Reassigning a Case to Another Worker

The worker importing an application on the Family App Import page is automatically assigned as the worker for the case. If another worker, such as clerical person, completes the import process, the case will need to be reassigned to the correct case worker.

To reassign an imported application to the correct worker, use the following steps:

Step	Action
1	Access the Family>Family or Provider>Provider screen for the correct family or provider.
2	Click the EDIT button.
3	Complete the DATA DATE field on the Family>Family screen or the EFFECTIVE DATE field on the Provider>Provider screen by either: ♦ Manually entering a date, or ♦ Clicking the CALENDAR button to open the date selector box so a date can be selected. Use the current day’s date.

Step	Action
4	Click the SELECT >> link for the WORKER FIELD. A search box opens. Complete the following steps: ♦ Enter the worker's first and last name. Remember, fewer letters return better results. ♦ Click SEARCH. ♦ Select the correct worker from the returned results by clicking the checkbox. If only one result is returned it will already be selected. ♦ Click OK to close the search box.
5	Click the SAVE button. The screen refreshes and the saved, updated information is displayed in the content area. The new worker will receive an alert on their Family>Alerts or Provider>Alerts screen notifying them of the case assignment.

Importing From Other Systems

KinderTrack was designed to allow users to import client information from other systems that they may use. Currently, this function is available only for PROMISE JOBS staff to import family information from the PJCase system.

When PROMISE JOBS staff become aware that a family they serve needs child care services, workers need to determine if the family already exists in KinderTrack. A search for the family needs to be completed in KinderTrack. See Search for Family, Parent, or Child for more information.

If the family is not found in KinderTrack, PROMISE JOBS staff can quickly import the family's information from PJCase and create a new family case in KinderTrack. NOTE: Staff not wanting to import from PJCase can still manually create a new family case in KinderTrack and enter all data manually.

If the family is found in KinderTrack, PROMISE JOBS staff have the option of updating the KinderTrack information with PJCase data.

On the Intake>Other System Import screen, PROMISES JOBS staff search for PJCase information by entering the ABC Case number in the FOREIGN KEY field. The system pulls the PJCase information and searches KinderTrack to see if any families might match.

Potential matches are displayed along with the PJCase information. If an existing case is found in KinderTrack, scroll through the potential matches to locate the correct family file for updating.

NOTE: The worker importing PJCase information to create a new family file or to update an existing file is automatically assigned as the worker for the case. If another worker, such as clerical person, completes the import process, the KinderTrack case will need to be reassigned to the correct case worker. See Reassigning a Case to Another Worker for more information.

To import information from the PJCase system, use the following steps:

Step	Action
1	Access the Intake>Other System Import page.
2	Use the SYSTEM field's drop-down list to select PJCase.
3	Enter the PJCase identification number (the ABC case number) in the FOREIGN KEY field. NOTE: Letters must be entered in upper case to prevent receiving an error message and to complete a search.
4	Click the SEARCH button. The page refreshes and the PJCase data displays on the bottom of the screen and any potential KinderTrack matches are displayed as well. ♦ If the search results include potential matches, go to step 5. ♦ If the search results include no potential matches, go to step 9.
5	Review the potential matches. ♦ If a match is found, go to step 6. ♦ If a match is not found, go to step 9.

Step	Action
6	When a match is found, click the radio button for the desired case. An UPDATE button appears in the control bar.
7	Click the UPDATE button. A dialog box appears stating "WARNING: This will overwrite any existing date in KinderTrack. Do you want to import the data of the selected family from the PJCASE system?" Answer the question by selecting either: ♦ OK to confirm the action and to save changes to the family file. Go to next step, or ♦ CANCEL to cancel the action without saving any changes. Return to step 5 if another case needs to be chosen or to step 9 if updating the case information is not the correct action. The dialog box closes.
8	The Other System Import page refreshes and the UPDATE button disappears. Updating the case information from PJCase into KinderTrack is complete. Relocate the family and click on the SUMMARY/FAMILY ID link to go to the Family>Summary page. Users are now ready to review the family information on all of the family activity screens. This completes usage of this step action chart for this process.
9	Click the IMPORT button. The screen refreshes showing the information is now linked to a case along with a CASE NAME/FAMILY ID hyperlink. NOTE: KinderTrack creates a new family record using the PJCase information. Be sure this is the proper action to take to avoid creating a duplicate identification number for the family.
10	Importing the PJCase information into KinderTrack is complete. Click on the CASE NAME/FAMILY ID hyperlink to go to the Family>Summary page to check or act on the family intake information.

Locate, Print or View a Family or Provider Application

When an application is submitted electronically, a copy remains available in KinderTrack for future reference. If needed, the application can be viewed or printed at any time from the following screens:

- Intake>Family App Import
- Intake>Family App Lookup
- Intake>Provider App Import
- Intake>Provider App Lookup

NOTE: When printing an electronically submitted application, only the information submitted from the portal will be displayed on the application.

To print a KinderTrack family or provider application, use the following steps:

Step	Action
1	Go to the Intake>Family App Lookup or Intake>Provider App Lookup page.
2	Using the drop-down list arrow, select the appropriate APPLICATION STATUS: ♦ ARCHIVED to view applications with a received date that is more than five months old for families or six months old for providers. ♦ IMPORTED to view applications that have had information imported through the Intake>Alerts processing procedure into KinderTrack. ♦ PENDING to view applications that did not have information imported into KinderTrack. The screen refreshes and displays all applications with the selected status. NOTE: KinderTrack remembers previous settings used, so the APPLICATION STATUS field may already have the needed selection displayed.

Step	Action
3	Look for the application. Click the application list column headers to sort the list in alphabetical ascending or descending order. Click once for ascending, twice for descending. Use the application list OPTIONS button to display more names per page. Use the page numbers below the list to move between pages. Once you find the correct application, go to step 4.
4	Click the radio button in the selection column to the left of the application to be viewed or printed. The screen refreshes and information from the application is displayed at the bottom of the screen.
5	To view or print the application, click the CHILD CARE ASSISTANCE APPLICATION or PROVIDER APPLICATION link. A dialog box appears with its OUTPUT TYPE field automatically populated with PDF.
6	Click PRINT. The application is displayed in a new window for viewing.
7	To print the application, click the print icon in the upper left corner of the window. A print dialog box appears. Select appropriate settings then click the OK button to send to printer.
8	When finished viewing or printing the application, close the window by clicking the "X" in the upper right corner. To locate, print or view another application return to step 1.

Locate, Print or View a Provider Agreement

When a provider agreement is submitted electronically, a copy remains available in KinderTrack for future reference. The application can be viewed or printed at any time on the Intake>Provider Agreements page. NOTE: When printing an electronically submitted provider agreement, only the information submitted from the portal will be displayed on the form.

To print a KinderTrack provider agreement, use the following steps:

Step	Action
1	Go to the Intake>Provider Agreements page.
2	Select the appropriate PROVIDER AGREEMENT STATUS using the drop-down list arrow. The available options are: ♦ ARCHIVED to view applications with a received date that is more than six months in the past. ♦ IMPORTED displays old provider agreements (earlier than 7/16/11). ♦ PENDING to view agreements submitted since 7/16/11. The screen refreshes and displays all applications with the selected status. NOTE: KinderTrack remembers previous settings used, so the PROVIDER AGREEMENT STATUS field may already have the needed selection displayed.
3	Look for the correct agreement. Once the agreement is found, go to the next step. NOTE: Click the column headers to sort the list in alphabetical ascending or descending order. Click a heading once for ascending order or twice for descending order. Use the OPTIONS button to display more names per page. Use the page numbers below the list to move between pages.
4	Click the radio button in the selection column to the left of the agreement. The screen refreshes and information from the provider agreement is displayed at the bottom of the screen.

Step	Action
5	To view or print the agreement, click the PROVIDER AGREEMENT link. A dialog box appears with its OUTPUT TYPE field automatically populated PDF.
6	Click PRINT. The agreement is displayed in a new window for viewing.
7	To print the agreement, click the print icon in the upper left corner of the window. A print dialog box appears. Select appropriate settings then click the OK button to send to printer.
8	When finished viewing or printing the agreement, close the window by clicking the "X" in the upper right corner. To locate, print or view another provider agreement return to step 1.

Process an Intake Application Alert

All family and provider applications received from the CCA portals create an alert to notify staff of the new application. The alerts need to be processed and the application information should either be imported into KinderTrack or be printed for manual processing and data entry.

To process an intake application alert, use the following steps:

Step	Action
1	On the Intake>Alerts page, review the alert type and status selections to ensure the correct alerts appear in the alert list. Locate the alert to be processed. Click the alert's radio button in the selection column. NOTE: The PROCESS, RESET, and SNOOZE buttons appear once an alert is selected.
2	Click the PROCESS button. A dialog box appears.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>3</td><td>The dialog box asks if the user wants to move to the associated page for the application. Click either:

♦ OK to confirm moving to the new page. Go to next step, or
♦ CANCEL to cancel the action. Go to step 5.

Completing either action causes the KinderTrack system to change the alert’s status to PROCESSED. If an alert’s status needs to be returned to NOT PROCESSED, see Reset an Intake Alert for more information.</td></tr>
<tr><td>4</td><td>The dialog box closes and the system refreshes and displays the Family App Import or Provider App Import page. Finish the process by importing the information on the family or provider application to create a new file or to update an existing file. See Import a Family or Provider Application for more information.

NOTE: If you want to manually enter the application information instead of importing it, you can print a copy of the application. Click the CHILD CARE ASSISTANCE APPLICATION or PROVIDER APPLICATION link to open a dialog box. Click the PRINT button.

The application appears in a new window. Click the PRINT button to open a print dialog box. Select print settings then click OK. When application is printed, close the window.

NOTE: When finished importing the application, you can return to the Intake>Alerts page. If you have chosen to not view processed alerts, then the recently processed alert will not be visible in the alert table.

If more alerts need to be processed, return to step 1. Otherwise, this completes usage of this step action chart for this process.</td></tr>
<tr><td>5</td><td>The dialog box closes and the system refreshes the Intake>Alerts page. The previously selected alert’s status has been changed to PROCESSED. If the alert’s status needs to be returned to NOT PROCESSED, see Reset an Intake Alert for more information.

If more alerts need to be processed or to complete the application import that was previously canceled, return to step 1 otherwise, this completes usage of this step action chart for this process.</td></tr>
</table>

Process an Intake Provider Agreement Alert

All provider agreements received from the CCA portal create an alert to notify staff. The alerts need to be processed and the agreement needs to be printed for manual processing and data entry.

To process an intake provider agreement alert, use the following steps:

Step	Action
1	On the Intake>Alerts page, review the alert type and status selections to ensure the correct alerts appear in the alert list. Locate the alert to be processed. Click the alert's radio button in the selection column. NOTE: The PROCESS, RESET and SNOOZE buttons appear once an alert is selected.
2	Click the PROCESS button. A dialog box appears.
3	The dialog box asks if the user wants to move to the associated page for the application. Click either: ♦ OK to confirm moving to the new page. Go to next step, or ♦ CANCEL to cancel the action. Go to step 5. NOTE: Completing either action causes the system to change the alert's status to PROCESSED. If an alert's status needs to be returned to NOT PROCESSED, see Reset an Intake Alert for more information.
4	The dialog box closes and the system refreshes and displays the Provider Agreements page. The user finishes the process by clicking the PROVIDER AGREEMENT link to open the document in a new window. The agreement can then be printed. NOTE: When finished printing the provider agreement, the user can return to the Intake>Alerts page. If the user has chosen to not view processed alerts, then the recently processed alert will not be visible in the alert table. If more provider agreement alerts need to be processed, return to step 1.

Reset an Intake Alert

Intake alerts marked as PROCESSED can have the status changed back to NOT PROCESSED. Typically, an alert status is reset when a user decides not to process the application now.

If the application has already been imported into KinderTrack, resetting the status will not undo the import. The only effect resetting has is that the alert will now be found when searching for NOT PROCESSED alerts.

To reset an intake alert, use the following steps:

Step	Action
1	Can the user view processed alert on the Intake>Alerts page? If the answer is: ♦ YES, go to step 6. ♦ NO, go to step 2.
2	Click the ALERT STATUS: field's SELECT >> link to open a multi-selector box displaying the available status options.
3	Click in the PROCESSED check box to select the status.
4	When the selection is made, click OK. The multi-selector dialog box closes. NOTE: If an individual option is selected, the selection is displayed after the field name. Example: FAMILY STATUS: CLOSED SELECT >>. When more than one option is chosen, an ellipsis (…) indicates the multiple selections so the user can open the multi-selector dialog box to view the selections. Example: FAMILY STATUS: CLOSED… SELECT >>.
5	Click the REFRESH button. The page refreshes and will display the selected statuses.

Step	Action
6	On the Intake>Alerts page locate the alert needing the status change. If the alert cannot be found, check the start date and end date fields to confirm they cover the date of alert. Change the dates as needed. Click the alert's radio button in the selection column. The PROCESS, RESET, and SNOOZE buttons appear once an alert is selected.
7	Click the RESET button. A dialog box appears.
8	The dialog box asks if the user wants to reset the alert. Click OK to confirm resetting the alert status to NOT PROCESSED. The dialog box closes and the system refreshes the Intake>Alerts page. The alert's status has been reset to NOT PROCESSED. NOTE: To restore the previous view after resetting the alert's status, repeat steps 2 – 5 and uncheck the PROCESSED check box in step 3.

Snooze an Intake Alert

If an alert does not need to be acted on right away, users can delay its appearance on the alert list. "Snoozing" an intake alert temporarily removes it from the list until the future date selected by the user.

To snooze an intake alert, use the following steps:

Step	Action
1	On the Intake>Alerts page, locate the alert to be delayed. If the alert cannot be found, check the start date and end date fields to confirm they cover the date of alert. Change the dates as needed. Click the alert's radio button in the selection column. NOTE: The PROCESS, RESET, and SNOOZE buttons appear once an alert is selected.
2	Click the SNOOZE button. A dialog box appears.

Step	Action
3	Enter the number of days to postpone the alert. This is the number of days in the future the alert will reappear in the alert list. By default, the system automatically populates the field with the number five. Click either: ♦ OK to confirm the action and save the change, or ♦ CANCEL to cancel the action without saving any changes. The dialog box closes. If OK was selected, the page will refresh and the alert will no longer be visible until after the number of days entered.

View Intake Alerts

Users determine which alert types and statuses are viewable in their alert list. A specific date range can also be chosen. Whenever changes are made to these selections, the page must be refreshed.

To change the view of intake alerts, use the following steps:

Step	Action
1	Go to the Intake>Alerts page. To change the following selection area fields: ♦ ALERT TYPE, go to step 2. ♦ ALERT STATUS, go to step 3. ♦ START DATE, go to step 6. ♦ END DATE, go to step 6.
2	Click the ALERT TYPE: field's SELECT >> link to open a multi-selector box displaying the available alert type options. Go to step 4.
3	Click the ALERT STATUS: field's SELECT >> link to open a multi-selector box displaying the available alert status options. Go to next step.

Step	Action
4	Select or deselect one or more of the options by either: ♦ Clicking in the option’s check box to add or remove the checkmark for each option to be changed. ♦ Clicking the CHECK-ALL link to check every option. ♦ Clicking the CLEAR-ALL link to deselect every option.
5	When the final desired options are chosen, click either: ♦ OK to store your selection, or ♦ CANCEL to leave the original data unchanged. The dialog box closes. If other fields need to be changed, return to step 1; otherwise, go to step 14. NOTE: If an individual option is selected, the selection is displayed after the field name. Example: FAMILY STATUS: CLOSED SELECT >>. When more than one option is chosen, an ellipsis (…) indicates the multiple selections so the user can open the multi-selector dialog box to view the selections. Example: FAMILY STATUS: CLOSED… SELECT >>.
6	Complete the START DATE or END DATE field by: ♦ Entering a date manually, as described in step 7. ♦ Using the CALENDAR button as described in step 8.
7	Type the desired beginning or ending dates into the appropriate date field, as needed. Enter the date in the mm/dd/yyyy format. Repeat this step for the other date field, if needed, otherwise: ♦ Go to step 1 to make other field changes, or ♦ Go to step 14 if all changes are complete.
8	Click the CALENDAR button located beside the START DATE or END DATE field. The date selector box appears.
9	If the current day’s date or no date is desired, go to next step. If a different date is desired, go to step 11.

Step	Action
10	Click either: ♦ TODAY to close the date selector and populate the date field with the current day's date, or ♦ NONE to close the date selector without making changes. If the other date field needs to be changed, return to step 6. Otherwise: ♦ Go to step 1 to make other field changes, or ♦ Go to step 14 if all changes are complete.
11	Choose the correct year using the scroll arrows to either side of the year on the top of the calendar. The double arrows scroll by ten years; the single arrows scroll by single years.
12	Choose the correct month using the scroll arrows to either side of the month.
13	Select a date by clicking the applicable number. The date selector box will close and the selected month, day, and year will be displayed in the date field. If the other date field needs to be changed, return to step 6. Otherwise: ♦ Go to step 1 to make other field changes, or ♦ Go to the next step if all changes are completed.
14	Click the REFRESH button. The page refreshes and will display only the alerts meeting the entered criteria.

Family Case Actions

The CCA program uses KinderTrack to manage the services provided by DHS and PROMISE JOBS staff. All information about families applying for assistance is entered into KinderTrack regardless of the final status of the application. Existing information may be edited to update the case information to reflect changes in the family's case.

This information is used to determine eligibility and fees and to create schedules for children with their providers. KinderTrack generates a variety of documents, including notices of decision, attendance sheets, and *Certificates of Enrollment* based on the data stored in KinderTrack.

This section provides specific instructions for KinderTrack entries that can be completed on screens found in the Family module.

Add a Child

To add a child to the KinderTrack system, use the following steps:

Step	Action
1	If you are already working in the desired family file, go to step 2. Otherwise, complete a search for the family, parent, or child. See Search for Family, Parent, or Child for more information.
2	Go to the Family>Child page. Click NEW to display a blank Child screen. NOTE: Within the CONTENT AREA, entries in the fields labeled with an asterisk (*) and red text are required to save the record. Fields labeled with green text should be completed if the information is available.
3	Complete the DATA DATE field by either: ♦ Manually entering a date, or ♦ Clicking the CALENDAR button to open the date selector box so a date can be selected. NOTE: The data date is the effective date for the child data you enter. When entering a new family, the child's data date must be the same as the data date on the Family screen.

Step	Action
4	Click the SID button. The STATE ID interface box opens.
5	Complete a search by using either the child's state identification number, if known, or one or more of the following: ♦ LAST NAME ♦ FIRST NAME ♦ SSN ♦ RELIGIOUS PREFERENCES ♦ GENDER ♦ BIRTH DATE Enter known information in the applicable fields.
6	Click the SEARCH button in the section completed. If no match is found, a pop-up message stating "No Record Found" is displayed. Click OK and go to step 10; otherwise continue to next step.
7	Review the search results. ♦ If the desired child is listed, go to step 8. ♦ If the desired child is not listed, go to step 10.
8	Click the SELECTION button for the correct child.
9	Click OK. Go to step 12.
10	Click the CREATE NEW STATE ID button. KinderTrack interfaces with the ABC system to create a new state identification number for the child. The number displays in the STATE ID field and a search result is displays with the child's information and the selection radio button marked.
11	Click OK. The New Child screen refreshes with the child's information from the SID search.
12	Enter data in all of the remaining required fields. NOTE: If the applicant does not supply the race or ethnicity data, obtain the information from the ABC system, if available, or use your best judgment in making a selection for those fields.
13	If applicable, enter comments in the note field.

Step	Action
14	Complete the following fields, if necessary: ♦ FLAGS. Use the FLAGS: SELECT >> link to identify a child who meets the criteria for special needs. ♦ KINDERGARTEN DATE. For children aged 4 through 6, enter either: • The anticipated date the child will start kindergarten, or • The actual date the child started kindergarten. This date determines when the child should be charged school-age rates. ♦ ALIEN STATUS. If "NO" is selected in the CITIZENSHIP field, enter either "Eligible" or "Ineligible." Explain why the child is or is not eligible for CCA by entering the qualifying, non-qualifying, or illegal/ undocumented status in the NOTE field. Alien statuses can be found in 13-G, *Child Care Assistance*.
15	Click SAVE. The screen refreshes and the new child information displays. Answer any pop-up messages or take corrective action mentioned in the pop-up. If corrective action was needed, click SAVE again after completing the actions.
16	Repeat steps 1 - 15 to enter each child under age 18 (or 19 if a child needs child care as a special needs child) connected to the family.

Add a Child Note

Notes provide a place to track the progress of a case and identify specifics that are private and for staff use only. Notes are informational messages and reminders to other DHS staff members. This information is viewable only by staff with CCA case record access.

To add a child note, use the following steps:

Step	Action
1	If you are already working in the desired family file, go to step 2. Otherwise, complete a search for the family, parent, or child. See Search for Family, Parent, or Child for more information.
2	Go to the Family>Child Notes page. Use the SELECT CHILD drop-down list to select the child for whom the note is being entered.
3	Click NEW. The page refreshes and NOTE, TYPE and DATE fields appear at the bottom of the page.
4	Enter the note message in the NOTE comment field. NOTE: A SPELL CHECK button is located directly above the comment field. Click the button to check for spelling errors. If errors are found, a Spell Checker dialog box displays with spelling suggestions. Staff can choose to ignore, add, or replace the "error."
5	Select the note type using the TYPE drop-down list. Valid options are: ♦ Child note ♦ Payment ♦ Schedule ♦ Schedule note NOTE: "Schedule" notes will prompt users with a WPI message on the child schedule screen every time a schedule is created or edited for the child. "Payment" notes will prompt users with a WPI message on the payment screen every time a payment for the child is being processed.
6	If a date other than the current day's date is needed for the note, enter that date in the DATE field or select the date using the CALENDAR button. The system will automatically assign the current day's date to the note if the DATE field is left blank.
7	Click SAVE. The note information is saved and the screen refreshes. NOTE: If the note is not displayed in the Notes List, check the selections for the NOTE TYPE field. Click SELECT >> to view and select the types of notes to be displayed then click REFRESH.
8	Repeat steps 3 – 7 to add notes for other children associated with the current case.

Add a Family

To add a new family to KinderTrack, use the following steps:

Step	Action
1	Complete a search for the family, parent, or child. See Search for Family, Parent, or Child for more information.
2	Go to the Family>Family page. Click NEW to display a blank Family screen. NOTE: Within the CONTENT AREA, entries in the fields labeled with an asterisk (*) and red text are required to save the record. Fields labeled with green text should be completed if the information is available.
3	Complete the DATA DATE: field by either: ♦ Manually entering a date, or ♦ Clicking the CALENDAR button to open the date selector box so a date can be selected. NOTE: The data date is the effective date for the family information entered on this page. It can be a past date.
4	Complete all required fields and the other fields where the information is known. Remember the review date field is the last day of the certification period. For information on determining the review date, see 13-G, Establishing the Certification Period. NOTE: The OVERDUE APPLICATION EXPLANATION comment box is used to enter an explanation concerning why an application was not processed timely.
5	Click SAVE. The information is saved, and a new family record is created. Answer any pop-up messages or take corrective action mentioned in the pop-up. If corrective action was needed, click SAVE again after completing the actions.

Add a Family Narrative

Narratives track the progress of a case and identify specific information that documents why case actions were taken. A family narrative should be entered each time there is contact with the family when processing applications and reviews, requesting information and when taking case actions.

Do not enter any private data into the narratives. The information in a family narrative is viewable by staff with access to the CCA case record **and** by the family through the web portal. Private information should be entered as either a Family or Child Note.

To add a Family Narrative, use the following steps:

Step	Action
1	If you are already working in the desired family file, go to step 2. Otherwise, complete a search for the family, parent, or child. See Search for Family, Parent, or Child for more information.
2	Go to the Family>Family Narratives page. Click NEW. The page refreshes and NOTE, TYPE, and DATE fields appear at the bottom of the page.
3	Enter the narrative message in the NOTE comment field. NOTE: A SPELL CHECK button is located directly above the comment field. Click the button to check for spelling errors. If errors are found, a Spell Checker dialog box displays with spelling suggestions. You can choose to ignore, add, or replace the "error."
4	The TYPE field displays a default selection of "Narrative" which is the only valid option.
5	The system automatically assigns the current day's date to the narrative if the DATE field is left blank. If a date other than the current day's date is needed for the narrative, enter that date in the DATE field or select the date using the CALENDAR button.
6	Click SAVE. The narrative information is saved and the screen refreshes. NOTE: If the narrative is not displayed in the Notes List, check the selections for the NOTE TYPE field. Click the SELECT >> link to view and select the types of notes to be displayed then click REFRESH.
7	Repeat steps 3 – 6 to add any additional narrative to the same case.

Add a Family Note

Notes provide a place to track the progress of a case and identify specifics that are private and for staff use only. Notes are informational messages and reminders to other DHS staff members. This information is viewable only by staff with proper security roles.

To add a family note, use the following steps:

Step	Action
1	If you are already working in the desired family file, go to step 2. Otherwise, complete a search for the family, parent, or child. See Search for Family, Parent, or Child for more information.
2	Go to the Family>Family Notes page. Click NEW. The page refreshes and NOTE, TYPE, and DATE fields appear at the bottom of the page.
3	Enter the note message in the NOTE comment field. NOTE: A SPELL CHECK button is located directly above the comment field. Click the button to check for spelling errors. If errors are found, a Spell Checker dialog box displays with spelling suggestions. You can choose to ignore, add or replace the "error."
4	Select the note type using the TYPE drop-down list. Valid options are: ♦ Alert ♦ Payment ♦ Reminder ♦ Schedule "Payment" alerts prompt users with a WPI message on the payment page every time any child in the family has a payment to process. "Schedule" alerts prompt users with a WPI message on the schedule page every time a schedule is created or edited for any child in the family.
5	The system automatically assigns the current day's date to the narrative if the DATE field is left blank. If a date other than the current day's date is needed for the note, enter that date in the DATE field or select the date using the CALENDAR button.

Step	Action
6	Click SAVE. The note information is saved and the screen refreshes. NOTE: If the note is not displayed in the Notes List, check the selections for the NOTE TYPE field. Click SELECT >> to view and select the types of notes to be displayed then click REFRESH.
7	Repeat steps 3 – 6 to add any additional family notes to the same case.

Add a Need

The Needs screen identifies the specific reason (i.e., work, school, etc.) why the parent needs child care services. The need is based upon a caretaker or parent schedule. A family can have more than one need identified.

To add a need for a parent, use the following steps:

Step	Action
1	If you are already working in the desired family file, go to step 2. Otherwise, complete a search for the family, parent, or child. See Search for Family, Parent, or Child for more information.
2	Go to the Family>Needs page. Use the SELECT PARENT drop-down list to select the parent who has the need to be added. If the parent you are looking for does not appear in the list, you may need to add the person to the case. See Add a Parent for directions.
3	Click NEW. A NEED REASON field appears below the need list table.
4	Use the NEED REASON drop-down list to select the applicable need for service reason. The screen refreshes showing multiple fields and a blank schedule section. The number and name of the displayed fields vary according to the need selected.

Step	Action
5	Enter the detailed information about the need. If the need is varying, go to step 6. If the need is fixed, go to step 7. NOTE: Within the CONTENT AREA, entries in the fields labeled with an asterisk (*) and red text are required to save the record. Fields labeled with green text should be completed if the information is available.
6	For a need that is varying, complete the following: ♦ Click in the VARYING checkbox and enter the maximum hours per week the parent participates in the activity selected in the MAX HOURS field. ♦ Enter the START DATE of the activity. ♦ Enter the END DATE of the activity, if appropriate. NOTE: For employment needs for service, the END DATE normally should be left blank. Go to step 8.
7	For a need that is fixed, complete the following: ♦ Enter the FROM and TO times for Monday through Sunday. A quick way to complete the schedule is to enter the times for Monday and click the PASTE M-S button to the right of the row. To clear the times for any days not needed, click CLEAR above the day of the week. If any of the times need to be changed for a particular day, click in the appropriate field and enter the revised time. ♦ Enter the START DATE of the activity. ♦ Enter the END DATE of the activity, if appropriate. NOTE: For employment needs for service, the END DATE normally should be left blank. For all other needs, enter the appropriate end date. Go to step 8.

Step	Action
8	Click SAVE after all required and necessary information has been completed. The need is displayed in the NEED LIST of the SELECTION AREA. Answer any pop-up messages or take corrective action mentioned in the pop-up. If corrective action was needed, click SAVE again after completing the actions.
9	Repeat steps 3 - 8 to enter another need connected to this family. Multiple needs may exist for the same family and even the same parent/caretaker. NOTE: After adding a need, a new schedule may be needed or an existing schedule may need to be edited. To create or edit a schedule, see Add a Schedule or Edit a Schedule.

Add a Parent

To add a parent, use the following steps:

Step	Action
1	If you are already working in the desired family file, go to step 2. Otherwise, complete a search for the family, parent, or child. See Search for Family, Parent, or Child for more information.
2	Go to the Family>Parent page. Use the SELECT PARENT drop-down list to confirm the parent to be added is not already listed. If not listed go to next step. If listed, see Edit a Parent for information on editing the parent's information.
3	Click NEW to display a blank Parent screen. NOTE: Within the CONTENT AREA, entries in the fields labeled with an asterisk (*) and red text are required to save the record. Fields labeled with green text should be completed if the information is available.

Step	Action
4	Complete the DATA DATE field by either: ♦ Manually entering a date, or ♦ Clicking the CALENDAR button to open the date selector box so a date can be selected. NOTE: The data date is the effective date for the parent's information. When entering a new family record, the parent's DATA DATE must be the same as the DATA DATE on the Family screen.
5	Click the SID button. The STATE ID interface box opens.
6	Complete a search by using either the child's state identification number, if known, or one or more of the following: ♦ LAST NAME ♦ FIRST NAME ♦ SSN ♦ RELIGIOUS PREFERENCES ♦ GENDER ♦ BIRTH DATE Enter known information in the appropriate fields.
7	Click the SEARCH button in the section completed. If no match is found, a pop-up message stating "No Record Found" is displayed. Click OK and go to step 11, otherwise continue to next step.
8	Review the search results. ♦ If the desired parent is listed, go to step 9. ♦ If the desired parent is not listed, go to step 11.
9	Click the SELECTION radio button for the correct parent.
10	Click OK. The dialog box closes and the screen refreshes with the parent's information from the search. Go to step 13.
11	Click the CREATE NEW STATE ID button. KinderTrack interfaces with the ABC system to create a new state identification number. The number displays in the STATE ID field and a search result displays with the parent's information and the selection radio button marked.
12	Click OK. The dialog box closes and the screen refreshes with the parent's information from the SID search.

Step	Action
13	Enter data in all of the remaining required fields.
14	If necessary, complete the following fields: ♦ WORK PHONE. Enter the parent's work phone number, if known. ♦ ALTERNATE PHONE. Enter any alternate phone number for the parent, if known. ♦ E-MAIL. Enter the parent's email address, if known. ♦ FLAGS. Leave blank. ♦ LANGUAGE. Use the SELECT >> link to open a dialog box and select the language spoken by the parent. Multiple selections can be made.
15	Click SAVE. The screen refreshes and the new parent information displays. Answer any pop-up messages or take corrective action mentioned in the pop-up. If corrective action was needed, click SAVE again after completing the actions.
16	Repeat steps 3 - 15 to enter another parent connected to the family.

NOTE: Once a parent has been added to KinderTrack, you can add information pertaining to that parent's need for service and enter the parent's income into the system. See Add a Need and Edit Income for directions. For information on approving, changing or canceling CCA benefits, see Complete a Notice of Decision.

Add a Schedule

Every CCA-eligible child must have a schedule. The Schedule screen identifies the child care provider who will provide the care, the rate the provider will be paid, the specific hours and units a child needs care and the school calendar, if appropriate.

- If there is more than one CCA-eligible child in the home, each child has a separate schedule.
- If there is more than one provider, each provider is identified on a separate schedule for each child receiving care from that provider.

If the family has not identified a provider, staff must contact the family to identify the family's choice of provider.

If a child is school-age, two schedules are created for each provider: a school schedule and a non-school schedule for days when school is not in session.

If a child has more than one provider, each provider must have a schedule in order to be paid. Some families may use multiple providers depending upon their needs, or they may identify a backup provider to use when their primary provider is not available.

A family application can't be approved without creating a child schedule. Do not delay the approval of an application based solely on the lack of a chosen, approved provider. If the family has not chosen a provider or the chosen provider is not yet approved in KinderTrack, select the provider name "No Provider Chosen" when creating the child's schedule.

KinderTrack cannot save a child's schedule unless a provider with an approved or pending status is selected. Selection of a provider must occur before a notice of decision can be created.

To enter a schedule, use the following steps:

Step	Action
1	If you are already working in the desired family file, go to step 2. Otherwise, complete a search for the family, parent, or child. See Search for Family, Parent, or Child for more information.
2	Go to the Family>Family page and take note of the family's review date. This date will be referred to in a later step.
3	Go to the Family>Schedule page. NOTE: A Child screen must be completed for each CCA child before a schedule can be created.
4	Use the SELECT CHILD drop-down list to select a child's name. The screen refreshes and displays the NEW button in the control bar and the child's age in the CHILD AGE field.

Step	Action
5	Click NEW. The schedule form displays in the content area of the screen. ♦ If there are no previously entered schedules or no schedule that can be copied, go to step 6. ♦ If there is a previously entered schedule that can be copied for the schedule being created, go to step 16.
6	Click the PROVIDER: SELECT >> link. The Provider Search dialog box appears.
7	Enter data in the applicable fields or use the multi-select links to open dialog boxes to select desired search criteria. NOTE: Better search results may be achieved with fewer search criteria or filters. Search for "No Provider Chosen" if the family has not chosen a provider.
8	Click SEARCH. The results of the provider search display in the lower half of the Provider Search dialog box.
9	Click on the SELECTION button to select the provider selected by the family and click OK. If a thorough search does not return the family's chosen provider, go back to step 7 and search for the "No Provider Chosen" entry. The dialog box closes and the screen refreshes and populates the PROGRAM and RATE TYPE drop-down lists with the information specific to the selected provider.
10	Complete the following required fields: ♦ PROGRAM ♦ RATE TYPE ♦ START DATE ♦ END DATE NOTE: The date entered in the END DATE field should normally be the same as the review date shown on the Family screen or the day the need for service activity ends, such as the last day of school.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>11</td><td>
If a child is school age and the parent’s need schedule overlaps with the child’s school hours, complete both a non-school day and school day schedule.
NOTE: If the family has multiple needs and any of the “active” needs have a varying schedule, then a varying schedule needs to be entered. Go to step 12.
To enter a fixed daily schedule for both non-school day and school day schedules, use the following steps:
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>11a</td><td>Fixed schedule times can either be:
♦ Manually entered as directed in step 11b, or
♦ Copied from a parent’s needs page as shown in step 11e.</td></tr>
<tr><td>11b</td><td>Enter the FROM and TO hours in the Monday fields on the non-school day schedule and the school day schedule. Include the parent’s travel time to the start and end time for each day.</td></tr>
<tr><td>11c</td><td>Click the PASTE M-S button to the right of each row for both schedules, if applicable. This populates every day in that row with the same hours.</td></tr>
<tr><td>11d</td><td>Click CLEAR above any weekday column to clear the all of the times listed for that specific day. Complete this step for both schedules, if applicable.
NOTE: If any of the times need to be changed for a particular day, click in the applicable field and enter the revised time.
Go to step 11j.</td></tr>
<tr><td>11e</td><td>Click the COPY FROM NEED button. A Copy from Needs dialog box appears.</td></tr>
</table>
</td></tr>
</table>

Step	Action
11f	Select the needs schedules to be copied by clicking in the selection box to the left of the row. More than one need can be selected.
11g	Enter the start and end dates unless already completed in step 10.
11h	Select what types of schedules are being created by clicking in the NON-SCHOOL DAY SCHEDULE and SCHOOL DAY SCHEDULE selection boxes. Remember, if a child is in school, both schedules need to be completed.
11i	Click OK. The selected schedules displaying the correct start and end times based on the selected needs. The system automatically includes the parent's travel time.
11j	If a school schedule was completed, go to step 11k. Otherwise, go to step 11p.
11k	All school day schedules need to be associated with a school calendar. To choose the appropriate school calendar, click the SCHOOL CALENDAR: SELECT >> link to open the Calendar Search dialog box.
11l	Use the COUNTY or DISTRICT drop-down list to select a search criterion or enter the calendar name in the CALENDAR NAME field.
11m	Click SEARCH.
11n	In the search results, select the applicable school calendar by clicking the SELECTION button.
11o	Click OK. The dialog box closes and the SCHOOL CALENDAR field displays the selected school.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td></td><td>
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>11p</td><td>Click SAVE on the Family Schedule screen.
Answer any pop-up messages or take corrective action mentioned in the pop-up. If corrective action was needed, click SAVE again after completing the actions.</td></tr>
<tr><td>11q</td><td>If another schedule needs to be entered, return to step 8.
If all necessary schedules have been entered, go to step 20.</td></tr>
</table>
</td></tr>
<tr><td>12</td><td>Click in the VARYING check box to identify the schedule is varying.
The screen refreshes and new fields appear below the VARYING SCHEDULE check box.</td></tr>
<tr><td>13</td><td>Enter the number of units needed to meet the family needs for non-school day and school day schedules, if needed due to the child’s age. Be sure to include the parent’s travel time to and from their need activity.</td></tr>
<tr><td>14</td><td>Click SAVE. The screen refreshes and the schedule information is displayed.
Answer any pop-up messages or take corrective action mentioned in the pop-up. If corrective action was needed, click SAVE again after completing the actions.</td></tr>
<tr><td>15</td><td>If another schedule needs to be entered, return to step 4.
If all necessary schedules have been entered, go to step 20.</td></tr>
<tr><td>16</td><td>Use the FILL FROM SCHEDULE drop-down list to select the previously entered schedule to be copied for the schedule being created.
NOTE: Select the schedule with the correct provider and schedule start and end dates if available. Do not worry about the child’s name, as only the provider and schedule information will be copied for the current child’s schedule being created.</td></tr>
</table>

Step	Action
17	Click the FILL SCHEDULE button. The screen refreshes with the provider and schedule information. Review all the copied information and make any necessary changes such as start and end date, units, program or rates if needed.
18	Click SAVE. The screen refreshes and the schedule information is displayed. Answer any pop-up messages or take corrective action mentioned in the pop-up. If corrective action was needed, click SAVE again after completing the actions.
19	If another schedule needs to be entered, return to step 4. If all necessary schedules have been entered, go to next step.
20	After adding all necessary schedules to a case, a *Notice of Decision* must be created. See Complete a Notice of Decision for more information.

Add Income

To add income for a household member, see Edit Income.

Authorize a Notice of Decision

A *Notice of Decision* can be created and saved in KinderTrack without authorizing it. However, a notice must be authorized before it can become effective and timesheets can be printed, attendance recorded, or payments made.

Authorizing an approval notice changes the family's status from "Application Pending" or "Denied" to "Open."

To authorize a *Notice of Decision* (NOD), use the following steps:

Step	Action
1	If you are already working in the desired family file, go to step 2. Otherwise, complete a search for the family, parent, or child. See Search for Family, Parent, or Child for more information.
2	Go to the Family>Notices page. Click on the SELECTION button to the left of the NOD to be authorized. The page refreshes and information regarding the selected NOD appears at the bottom of the screen. To review a copy of the notice for completeness and accuracy before authorizing, click the PRINT button. A dialog box displays. Select PDF and click PRINT to open the NOD in a new window. The NOD displays as it will print. After reviewing, close the window by clicking the "X" in the upper right corner.
3	Click AUTHORIZE. A dialog box displays "Are you sure you want to authorize this Notice?" NOTE: Once the NOD is authorized, it cannot be changed. To change the NOD for the family, a new NOD must be prepared and authorized.
4	Click OK. A print dialog box displays. Use the OUTPUT TYPE drop-down list to select one of the following: ♦ PDF to be able to print and mail the notice from the local office. ♦ CENTRAL PRINTING to have the notice printed and mailed from central office.
5	Click PRINT. The NOD appears in a new window. If a local copy is needed, click the PRINT button on the toolbar. NOTE: When a provider is canceled, a provider cancellation letter needs to be printed and mailed from the local office. Click the PROVIDER CANCELLATION LETTER button to print a copy.
6	When finished, close the NOD window by clicking the "X" in the upper right corner of the screen.

Complete a Certificate of Enrollment

The KinderTrack system automatically creates for 470-4444, *Certificate of Enrollment*, when the notice of decision to approve an application for CCA services is created and the child has been assigned to a provider. When viewing or printing the NOD documents, the certificate follows the NOD.

Complete a Notice of Decision

The KinderTrack system issues form 470-4558, *Notice of Decision: Child Care*, to identify the number of units that will be covered by DHS, the effective date of the decision and if there is copayment for the services. A notice is completed at time of approval and when there is a change that affects the number of units authorized or the copayment amount.

The notice of decision is also used to notify the family of a denial or cancellation of services. There are also some notices that are used to update system information without being sent to the family.

To create and authorize a notice of decision (NOD), use the following steps:

Step	Action
1	If you are already working in the desired family file, go to step 2. Otherwise, complete a search for the family, parent, or child. See Search for Family, Parent, or Child for more information.
2	Go to the Family>Notices page. Verify the case name is correct and the correct screen is being viewed.
3	Click NEW. The EFFECTIVE DATE field is displayed.
4	Complete the EFFECTIVE DATE field by either: ♦ Manually entering a date, or ♦ Clicking the CALENDAR button to open the date selector box so a date can be selected. Press the TAB key or click off the date field. The screen refreshes and displays the children and schedules that correspond to the effective date that has been selected.

Step	Action
	NOTE: When ending a schedule or canceling a case, the effective date has to be the day **after** the last day of CCA services. This allows the provider to be paid for the last day. For example, to cancel a case with a schedule end date of November 2, the effective date is November 3. Also, the effective date cannot be more than one day past the current schedule end date. A warning pop-up appears. Double-check the effective date and the schedule end date.
5	Select the appropriate ACTION using the drop-down list. The action selected defines the options available in the REASON FOR ACTION field.
6	Select the appropriate REASON FOR ACTION using the drop-down list. Click the SELECTION box for each child whose is affected by this NOD action.
7	Complete the ISSUE DATE field by either: ♦ Manually entering a date, or ♦ Clicking the CALENDAR button to open the date selector box so a date can be selected. NOTE: The ISSUE DATE is the date the notice is being issued. This must be the current day's date or a future date.
8	If sending the notice by certified mail, complete the DISTRIBUTION OF NOTICE field by using the drop-down list and then go to step 9; otherwise go to step 10. NOTE: Leave blank if you are not sending the notice by certified mail.
9	Complete the DATE OF DISTRIBUTION field by either: ♦ Manually entering a date, or ♦ Clicking the CALENDAR button to open the date selector box so a date can be selected.
10	Click save when all the information has been entered. This updates the Family Notices screen and enables the AUTHORIZE and PRINT buttons. The system will also display the PROVIDER CANCELLATION LETTER and PROVIDER PENDING LETTER buttons, as applicable to the NOD.

Step	Action
11	Select PRINT in the command bar to preview the NOD. A dialog box appears. By default, the OUTPUT TYPE field should display PDF. If not, use the drop-down list to select PDF.
12	Click PRINT. The NOD appears in a new window, displayed as it will print. If you are approving an application, the *Certificate of Enrollment* follows the NOD. Scroll down to view the certificate. When finished, close window by clicking the "X" in the upper right corner. If the notice is correct go to step 13. If the notice needs to be changed, go back to step 4.
13	Click AUTHORIZE. A dialog box displays "Are you sure you want to authorize this Notice?" NOTE: Once the NOD is authorized, it cannot be changed. A new NOD must be prepared and authorized.
14	Click OK. A print dialog box displays. Use the OUTPUT TYPE drop-down list to select one of the following: ♦ PDF to be able to print and mail the NOD from the local office. ♦ CENTRAL PRINTING to have the NOD and the *Certificate of Enrollment*, if applicable, printed and mailed from central office.
15	Click PRINT. The NOD appears in a new window. If a local copy is needed, click the PRINT button on the toolbar. When finished, close the NOD window by clicking the "X" in the upper right corner of the screen. NOTE: When a provider is canceled, a provider cancellation letter must be printed and mailed from the local office. Click the PROVIDER CANCELLATION LETTER button to print a copy. NOTE: If the family's chosen provider is not yet approved when the family application is being approved, a provider pending letter needs to be printed and mailed from the local office. Click the PROVIDER PENDING LETTER button to print the notice of pending enrollment for the provider. Another notice of decision must be authorized before timesheets can be printed, attendance recorded, or payments made.

Edit a Child

To edit a child's information, use the following steps:

Step	Action
1	If you are already working in the desired family file, go to step 2. Otherwise, complete a search for the family, parent, or child. See Search for Family, Parent, or Child for more information.
2	Go to the Family>Child page. Use the SELECT CHILD drop-down list to select the child whose information needs to be updated.
3	Click EDIT.
4	Complete the DATA DATE field by either: ♦ Manually entering a date, or ♦ Clicking the CALENDAR button to open the date selector box so a date can be selected. NOTE: The data date is the effective date for this child.
5	Enter changes in the necessary fields.
6	Click SAVE. The screen refreshes and the edited information is displayed.

Edit a Child Note

To edit a child note, use the following steps:

Step	Action
1	If you are already working in the desired family file, go to step 2. Otherwise, complete a search for the family, parent, or child. See Search for Family, Parent, or Child for more information.
2	Go to the Family>Child Notes page. Use the SELECT CHILD drop-down list to select the name of the child for whom note information needs to be changed.

Step	Action
3	Click on the SELECTION button in the S column of the Notes List to select the item to be updated. NOTE: If the note is not displayed in the Notes List, check the parameters of the selection area. The Note Type must include the type of note and the start and end date must include the date range of the item. After updating the parameters click REFRESH to refresh the list.
4	Click EDIT.
5	Make the needed changes to the note.
6	Click SAVE. The screen refreshes and the edited information is displayed.

Edit a Family

To edit family information, use the following steps:

Step	Action
1	If you are already working in the desired family file, go to step 2. Otherwise, complete a search for the family, parent, or child. See Search for Family, Parent, or Child for more information.
2	Go to the Family>Family page. Click EDIT.
3	Complete the DATA DATE field by either: ♦ Manually entering a date, or ♦ Clicking the CALENDAR button to open the date selector box so a date can be selected. NOTE: The data date is the effective date for the change.
4	Enter changes in the necessary fields.
5	Click SAVE. The screen refreshes and the edited information is displayed.

Edit a Family Narrative

To edit a family narrative, use the following steps:

Step	Action
1	If you are already working in the desired family file, go to step 2. Otherwise, complete a search for the family, parent, or child. See Search for Family, Parent, or Child for more information.
2	Go to the Family>Family Narratives page. Click on the SELECTION button in the S column of the Notes List to select the item to be updated. NOTE: If the narrative is not displayed in the Notes List, check the parameters of the selection area. The Note Type must be checked for narrative and the start and end date must include the date range of the item. After updating the parameters click REFRESH to refresh the list.
3	Click EDIT.
4	Make the needed changes to the narrative.
5	Click SAVE. The screen refreshes and the edited information is displayed.

Edit a Family Note

To edit a family note, use the following steps:

Step	Action
1	If you are already working in the desired family file, go to step 2. Otherwise, complete a search for the family, parent, or child. See Search for Family, Parent, or Child for more information.
2	Go to the Family>Family Notes page. Click on the SELECTION button in the S column of the Notes List to select the item to be updated. NOTE: If the note is not displayed in the Notes List, check the parameters of the selection area. The Note Type must include the type of note and the start and end date must include the date range of the item. After updating the parameters click REFRESH to refresh the list.

Step	Action
3	Click EDIT.
4	Make the needed changes to the note.
5	Click SAVE. The screen refreshes and the edited information is displayed.

Edit a Need

To edit a need for a parent, use the following steps:

Step	Action
1	If you are already working in the desired family file, go to step 2. Otherwise, complete a search for the family, parent, or child. See Search for Family, Parent, or Child for more information.
2	Go to the Family>Needs page. Use the SELECT PARENT drop-down list to choose the parent with the needs reason to be changed.
3	Click on the SELECTION button in the S column of the Need List to select the item to be updated.
4	Click EDIT.
5	Make the necessary changes. NOTE: If the change in need is due to changing employment, edit the existing employment need by adding an End Date and saving the change. A new need has to be added for the new job. See Add a Need for more information. Remember, changes to the number of need hours may affect family eligibility and the number of units of child care that are required. Review the need change to determine if changes to the child's schedule are also required or if a new family NOD needs to be issued.
6	Click SAVE. The screen refreshes and the edited information is displayed.

Edit a Parent

To edit a parent's information, use the following steps:

Step	Action
1	If you are already working in the desired family file, go to step 2. Otherwise, complete a search for the family, parent, or child. See Search for Family, Parent, or Child for more information.
2	Go to the Family>Parent page. Use the SELECT PARENT drop-down list to select the parent whose information needs editing.
3	Click EDIT.
4	Complete the DATA DATE field by either: ♦ Manually entering a date, or ♦ Clicking the CALENDAR button to open the date selector box so a date can be selected. NOTE: The data date is the effective date for this parent.
5	Enter changes in the necessary fields.
6	Click SAVE. The screen refreshes and the edited information is displayed.

Edit a Pending Notice of Decision

The *Notice of Decision: Child Care* can be changed only before it is authorized. Until the notice is authorized, changes can be made to incorrect family data, schedules, family review dates, as well as notice actions or reason language.

If the information on a pending notice is not correct and the user is unable to fix the information, the notice can be deleted if needed. Once the notice has been authorized, a new notice is required for any corrections.

To edit a pending notice of decision (NOD), use the following steps:

Step	Action
1	If you are already working in the desired family file, go to step 2. Otherwise, complete a search for the family, parent, or child. See Search for Family, Parent, or Child for more information.
2	Go to the Family>Notices page. Click the SELECTION button to select the NOD to be edited.
3	Click EDIT. The details of the NOD display in the lower portion of the screen.
4	Review the EFFECTIVE DATE and ISSUE DATE and select the appropriate denial or approval action and reason in the ACTION and REASON FOR ACTION fields.
5	Update other data as needed.
6	Click SAVE. To authorize a NOD, see Authorize a Notice of Decision.

Edit a Schedule

To edit a schedule, use the following steps:

Step	Action
1	If you are already working in the desired family file, go to step 2. Otherwise, complete a search for the family, parent, or child. See Search for Family, Parent, or Child for more information.
2	Go to the Family>Schedule page. Use the SELECT CHILD and SELECT SCHEDULE drop-down lists to select the child and schedule that needs editing.
3	Click EDIT.

Step	Action
4	Enter changes in the necessary fields. Changes can't be made to the schedule start date, program or provider information. If changes to start date, program or provider are needed, you must end the current schedule and create a new schedule. NOTE: If the changes entered affected the schedule END DATE or the number of units used, a notice of decision must be issued before the changes will become effective. See Complete a Notice of Decision.
5	Click SAVE. The screen refreshes and the edited information is displayed.

Edit Income

To add or edit income for a household member, use the following steps:

Step	Action
1	If you are already working in the desired family file, go to step 2. Otherwise, complete a search for the family, parent, or child. See Search for Family, Parent, or Child for more information.
2	Go to the Family>Income page. Use the SELECT FAMILY MEMBER drop-down list to select the family member whose income will be entered. If the family member does not appear in the list, you may need to add the person to the case. See Add a Parent or Add a Child as appropriate.
3	Click EDIT.
4	Complete the DATA DATE field by either: ♦ Manually entering a date, or ♦ Clicking the CALENDAR button to open the date selector box so a date can be selected. NOTE: The data date is the effective date for the change.

Step	Action
5	Enter the monthly income amount in the appropriate fields for the family member selected. Use the MONTHLY INCOME WORKSHEET button to calculate the income based on the pay period type. See Monthly Income Worksheet for Family for more information.
6	Select the appropriate STATUS to indicate if the income is VERIFIED or PENDING. A notice cannot be created until all income has a verified status.
7	Click SAVE. The screen refreshes and the income information displays. Answer any pop-up messages or take corrective action mentioned in the pop-up. If corrective action was needed, click SAVE again after completing the actions. If another family member has income, repeat steps 2 - 7. Otherwise, go to next step.
8	After editing an individual's income, a notice of decision may need to be created if it affects the family's eligibility or copayment. See Complete a Notice of Decision for more information.

Monthly Income Worksheet for Family

The Income screen provides an easy to use Income Worksheet tool. The MONTHLY INCOME WORKSHEET button is available on the income screen for the family member whose income is being edited.

To use the monthly income worksheet, use the following steps:

Step	Action
1	If you are already working in the desired family file, go to step 2. Otherwise, complete a search for the family, parent, or child. See Search for Family, Parent, or Child for more information.
2	Go to the Family>Income page. Use the SELECT FAMILY MEMBER drop-down list to choose the family member with income to be calculated.

Step	Action
3	Click EDIT.
4	Complete the DATA DATE field by either: ♦ Manually entering a date, or ♦ Clicking the CALENDAR button to open the date selector box so a date can be selected. NOTE: The data date is the effective date for the change.
5	Use the STATUS drop-down list to indicate if the income is VERIFIED or PENDING. A notice cannot be created until all income has a verified status.
6	Click the MONTHLY INCOME WORKSHEET button. The Monthly Income Worksheet dialog box displays.
7	Use the PAY PERIOD TYPE drop-down list to select the type of pay period. Valid options are: ♦ Weekly ♦ 4 weeks ♦ Bi-weekly ♦ Monthly ♦ Twice a month ♦ Quarterly/yearly/varying ♦ Self-employed
8	Enter the gross amount of income for the applicable number of pay periods. For example, if the person is paid weekly, enter at least four checks.
9	Click CALCULATE. The total monthly income amount displays.
10	Use the APPLY INCOME TO drop-down list to select the correct income type the income should be applied on the Income screen.
11	Click DONE. The Monthly Income Worksheet dialog box closes and the calculated income displays in the appropriate field of the Income screen.
12	Click SAVE. If another family member has income, repeat steps 2 - 12.

Print a Payment Summary Report

Staff can generate a Payment Summary Report from the Reports section of the Family>Payment page. The Payment Summary Report allows users to print a summary of the payments in the queue. The records on the report will be specific to the entered search criteria.

To print a payment summary report after a payment search has been completed, use the following steps:

Step	Action
1	Select the records to be included on the report by clicking the check boxes to the left of each payment or use the plus (+) sign on the upper left of the table to select or deselect all records.
2	Click the PAYMENT SUMMARY REPORT link. A dialog box opens.
3	Use the OUTPUT TYPE drop-down list to select the correct output option.
4	Click the PRINT button. The report opens in a new window. Use the new window's print functionality to print a copy of the report. When finished, close the print window. If another payment summary record needs to be printed, return to step 1.

Print Attendance Sheets for a Family

The KinderTrack system automatically generates form 470-4534, *Child Care Assistance Billing/Attendance*, when a notice is issued to approve a schedule in KinderTrack. The forms are printed and mailed from Central Printing.

Do not print attendance sheets when approving a family because that prevents the forms from being sent by Central Printing. Print attendance sheets only when a provider requests a duplicate copy or a provider must resubmit new attendance sheets due to errors on the original.

To print blank attendance sheets for a family, use the following steps:

Step	Action
1	If you are already working in the desired family file, go to step 2. Otherwise, complete a search for the provider. See Search for Family, Parent, or Child for more information.
2	Go to the Family>Summary page. Under Forms, click the ATTENDANCE SHEETS link. The attendance sheets dialog box displays.
3	Complete the START DATE and END DATE fields by either: ♦ Manually entering a date, or ♦ Clicking the CALENDAR button to open the date selector box so a date can be selected. NOTE: KinderTrack will generate attendance sheets for all billing periods within the dates entered.
4	Click PRINT to display the attendance sheets. A new window is displayed.
5	Click the PRINT icon. A print dialog box opens. **IMPORTANT**: Locate the Page Handling section of the print dialog box. Use the PAGE SCALING field's drop-down list to select NONE. If any other option is selected for this field, the printed attendance sheets will not be formatted correctly and can't be scanned when returned by the provider. The sheets will need to be printed and sent to the provider again.
6	When finished close the PRINT window. If attendance sheets for another family need to be printed, return to step 1.

NOTE: Replacement attendance sheets can also be printed from the Family>Payment page by selecting the individual payments before clicking the ATTENDANCE SHEETS links.

Search for Family, Parent, or Child

A search can be completed by family, parent or child. Family, parent and child information can be located regardless of which search is completed. Enter one or more criteria to perform a search. Better search results may be achieved with fewer search criteria or filters.

To search for a family, parent, or child, use the following steps:

Step	Action
1	Go to the Family>Search page. Click the SELECT: field radio button to select the type of search to be completed. The screen refreshes and displays additional search fields. The search fields displayed vary by the type of search being done. NOTE: For a child search, the results table options will include a CHILD NAME column in addition to the SUMMARY, FAMILY NAME, and PARENT NAME columns displayed for a family or parent search.
2	Enter data in the applicable fields or use the multi-select link to open dialog boxes so desired search criteria can be selected. Better search results may be achieved with fewer search criteria or filters.
3	Click the SEARCH button or press ENTER. The screen refreshes and the search results are displayed in the lower half of the screen. This table provides multiple links to more detail and navigation options.
4	On the search results screen, if the desired family is: ♦ Found. Access the Summary screen using one of the following methods: • Click in the selection box in front of the desired result to check the box then go to the Family>Summary page, or • Click on the link in the SUMMARY column. Review the screen information to verify this is the correct case. If yes, go to next step. If not, return to step 1 and try again. ♦ Not found. Complete one of the following: • Click CLEAR to start a new search for the family using different search filters. Go to step 2. • Click the ADD FAMILY button. A blank Family screen displays and family information can be entered in to KinderTrack to create a new case. NOTE: Before using the ADD FAMILY button, be sure to complete a thorough search so a duplicate family case is not created in KinderTrack.

Step	Action
5	Once the correct family case is found or a new Family is created and saved, use the navigation tree to move to the next screen to be viewed.

View Payments by Family

Payments related to a family can be tracked and a report can be produced to display more details using the following steps:

Step	Action
1	Complete a search to locate and select the family. See Search for Family, Parent, or Child for more information.
2	After selecting the family, go to the Family>Payments page. Select the date range for the payments to be viewed by completing the start date and end date fields by either: ♦ Manually entering a date, or ♦ Clicking the CALENDAR button to open the date selector box so a date can be selected.
3	Use the PAYMENT STATUS: SELECT >> link to select which payment statuses are to be viewed.
4	Use the PAYMENT FLAGS: SELECT >> link to select which payment flags are to be viewed.
5	Click the REFRESH button. The Family Payments page refreshes and displays the payments made to all providers associated with this family. NOTE: Sort payments by clicking any of the column headings displayed. One click sorts the list of payments in ascending order. Two clicks sort the list in descending order.
6	To view detailed information on an individual payment, click on the PAYMENT ID link.

View and Print Family Narratives

To view and print family narratives use the following steps:

Step	Action
1	If you are already working in the desired family file, go to step 2. Otherwise, complete a search for the family, parent, or child. See Search for Family, Parent, or Child for more information.
2	Go to the Family>Family Narratives page. Enter the START DATE and END DATE parameters for the time period you wish to view. If you wish to view all narratives, leave the START DATE field blank and enter today's date in the END DATE field.
3	Click REFRESH. A table with all narratives that match the date parameters entered will display.
4	To print one narrative entry, go to step 5. To print all narratives that appear in the table, go to step 7.
5	Click on the SELECTION button in the S column of the Notes List to display the item to be viewed.
6	To print the selected note, click the NOTES link. A print dialog box opens. NOTE: The print dialog box may open behind the current window. If this happens, select the print dialog box from your taskbar or minimize the KinderTrack window to view the print dialog box. Go to step 11.
7	To print all narratives that appear in the table, click the Note Type SELECT >> link that appears after Note Type. A multi-selector dialog box will appear.
8	Check the NARRATIVE box and click OK. The multi-selector box will close.
9	Click REFRESH.

Step	Action
10	Click the NOTES link. A print dialog box opens. NOTE: The print dialog box may open behind the current window. If this happens, select the print dialog box from your taskbar or minimize the KinderTrack window to view the print dialog box.
11	Select either ALL NOTES IN QUEUE or SELECTED NOTE as appropriate. Select an output type. Click PRINT.
12	Click the PRINT icon and use the dialog box options to save, open or print the report.

Provider Case Actions

Add a Provider

Before adding a provider to KinderTrack, complete a provider search to ensure the provider is not already in the system. See Search for Provider for directions.

To add a new provider, use the following steps:

Step	Action
1	If you are already working in the desired provider file, go to step 2. Otherwise, complete a search for the provider. See Search for Provider for more information.
2	Go to the Provider>Provider page. Click NEW. The Adding Record page displays. The fields labeled with an asterisk (*) and red text within the content area are required information to save the record.
3	Complete the EFFECTIVE DATE field by either: ♦ Manually entering a date, or ♦ Clicking the CALENDAR button to open the date selector box so a date can be selected. NOTE: For new providers, the effective date entered must match the effective date on the Type of Care, Rate, and Profile pages and the NOD APPROVAL effective date.

Step	Action
4	Use the CCA AGREEMENT field's drop-down list to select whether or not the provider has submitted a CCA provider agreement with the application. Valid options are: ♦ Yes ♦ No NOTE: The provider must submit a tax identification number (either a social security number or employer identification number). If the provider has not provided a tax identification number, request the information from the provider and set the CCA agreement field to NO.
5	Use the VENDOR TYPE field's drop-down list to select the correct vendor type option for the provider.
6	Type the data in the appropriate field or use the field's SELECT >> link to select the desired data for the following required fields: ♦ LAST NAME ♦ FIRST NAME ♦ CARE ADDRESS 1 ♦ CITY ♦ STATE ♦ ZIP CODE ♦ PHONE ♦ WORKER, if the correct worker name is not already system-populated KinderTrack allows information to be saved only when all of the required fields are completed.
7	Click SAVE. The screen refreshes and the provider's information is saved and displayed. NOTE: Pop-up messages will appear if required fields have not been completed or to warn the user that duplicate data may already exist in the system. Complete the missing fields and address any warning messages and click SAVE again.
8	Once the provider details are saved, use the navigation tool to move to the next page to view, add or edit information.

Add Provider Rates

See Edit Provider Rates for instructions.

Add Type of Care

See Edit Type of Care for instructions.

Edit a Provider

To edit existing provider information, use the following steps:

Step	Action
1	If you are already working in the desired provider file, go to step 2. Otherwise, complete a search for the provider. See Search for Provider for more information.
2	Go to the Provider>Provider page. Click EDIT. The Editing Record page displays. The fields labeled with an asterisk (*) and red text within the content area are required information to save the record.
3	Complete the EFFECTIVE DATE field by either: ♦ Manually entering a date, or ♦ Clicking the CALENDAR button to open the date selector box so a date can be selected.
4	Edit the data as needed. See Add a Provider for more information. KinderTrack allows information to be saved only when all required fields are completed.
5	Click SAVE. The screen refreshes and the provider's information is saved and displayed. NOTE: Pop-up messages appear if required fields are not completed or if duplicate data may already exist in the system. Complete the missing fields and address any warning messages and click SAVE again.
6	Once the provider details are saved, use the navigation tool to move to the next page to view, add or edit information.

Edit Provider Rates

The Rates page collects information about the amount the provider charges for different rate types.

NOTE: If the provider's rates are unknown because the provider did not submit a *Child Care Assistance Provider Agreement*, skip this page.

To add a new rate type or edit a previously entered rate, use the following steps:

Step	Action
1	Go to the Provider>Rates page. Use the RATE TYPE field's drop-down list to select the rate type to be added or edited. The page refreshes and will display the rates and effective date, if entered, that exist in KinderTrack.
2	Click the HISTORY button to see if the rate change has already been entered for a future date. The page refreshes displaying all entered rate amounts by effective date. If the rate is not entered, go to the next step; otherwise, no further action is required.
3	Click the EXIT HISTORY button to return to the Rates page.
4	Click EDIT. The page refreshes and now displays SAVE and CANCEL buttons. A FILL – SMR button will appear if the SHOW STATE MAXIMUM AS OF check box is checked.
5	Complete the EFFECTIVE DATE field by either: ♦ Manually entering a date, or ♦ Clicking the CALENDAR button to open the date selector box so a date can be selected. The effective date is the day the new rates start or the date the rates become inactive if the provider will no longer be receiving CCA payments.
6	Use the STATUS drop-down list to select the appropriate status. Valid options are ACTIVE or INACTIVE.

Step	Action
7	Enter the provider's payment rates as stated on their CCA provider agreement by either: ♦ Manually entering the actual rates in the appropriate fields, or ♦ Clicking the FILL-SMR button to populate the table with the state maximum rate amounts if that is what the provider reported on their CCA Provider Agreement. NOTE: KinderTrack always pays the lower of the provider's actual rate or the state market rate (SMR).
8	Click SAVE. The screen refreshes displaying the rates for the most recent effective date. If a future date was entered in the EFFECTIVE DATE field, the rates will not be displayed on this screen until that date. To view future dates, click the HISTORY button.
9	To enter or edit a rate amount for different rate type, repeat steps 1 – 8.

Edit Type of Care

The Type of Care page records information about the provider's license or registration dates, if applicable, and CCA provider agreement details. All provider type of care information displays in history.

NOTE: The HISTORY button displays history only for the selected type of care. It will not display history for all types of care in one table.

To enter provider type of care information, use the following steps:

Step	Action
1	Go to the Provider>Type of Care page. Use the TYPE OF CARE field's drop-down list to select the provider type to be added or edited. The page refreshes displaying the type of care information with the most current effective date, if entered.
2	Click EDIT on the command bar. The Editing Record page displays.

Step	Action
3	Complete the EFFECTIVE DATE field by either: ♦ Manually entering a date, or ♦ Clicking the CALENDAR button to open the date selector box so a date can be selected. NOTE: KinderTrack automatically populates the START field with the date entered once the changes are saved.
4	Select the status from the STATUS drop-down list. If a provider changes the type of care provided, do not automatically inactivate the old type of care. Keep it active so the provider can submit claims for payments incurred while the old type was in effect.
5	Complete the EXPIRATION DATE field by either: ♦ Manually entering a date, or ♦ Clicking the CALENDAR button to open the date selector box so a date can be selected. The expiration date can be no more than two years from the start date.
6	If a completed CCA provider agreement is in the file, complete the following: ♦ CCA STATUS. Use the drop-down list to select ACTIVE. ♦ CCA AGREEMENT. Click in the checkbox. ♦ CCA START DATE. Enter the start date. ♦ CCA AGREEMENT EXPIRATION. Enter the end date for the agreement. ♦ CCA NOTE. Enter a note, if appropriate. If the provider does not have a CCA provider agreement, or the agreement has expired, complete the following: ♦ CCA STATUS. Use the drop-down list to select INACTIVE. ♦ CCA AGREEMENT. Uncheck the checkbox, if necessary. ♦ CCA AGREEMENT EXPIRATION. Enter the end date. ♦ CCA NOTE. Enter a note, if appropriate.
7	Click SAVE. The screen refreshes displaying the type of care information with the most recent effective date. If a future date was entered in the EFFECTIVE DATE field, the information will not be displayed on this screen until that date. To view future dates, click the HISTORY button.

Print a Payment Summary Report

The Payment Summary Report allows users to print a summary of the payments for the provider. The payments that appear on the report are specific to the entered search criteria and are limited to those payments selected from the search table. See View Payments by Provider for information on searching for provider payments.

Staff can generate a Payment Summary Report from the Reports section of the Provider>Payments page. use the following steps to print the report:

Step	Action
1	Once a payment search has been completed, the user may print a Payment Summary Report. Select the records to be included on the report by clicking the check boxes to the left of each payment or use the plus (+) sign on the upper left of the table to select or deselect all records.
2	Click the PAYMENT SUMMARY REPORT link. A dialog box opens.
3	Use the OUTPUT TYPE drop-down list to select the correct output option.
4	Click the PRINT button. The report opens in a new window. Use the new window's print functionality to print a copy of the report. When finished, close the print window. If another payment summary record needs to be printed, return to step 1.

Print a Family's Attendance Sheets for a Provider

The KinderTrack system automatically issues form 470-4534, *Child Care Assistance Billing/Attendance*, when a family notice is issued in KinderTrack. Attendance sheets are automatically generated and mailed from Central Printing

Do not print attendance sheets when approving a family because it prevents them from being sent by Central Printing. Print attendance sheets only when a provider requests a duplicate copy or needs to submit new attendance sheets because the originals were submitted with errors.

To print blank attendance sheets for a provider, use the following steps:

Step	Action
1	If you are already working in the desired provider file, go to step 2. Otherwise, complete a search for the provider. See Search for Provider for more information.
2	After selecting the provider, go to the Provider>Payments page. Complete the START DATE and END DATE fields by either: ♦ Manually entering a date, or ♦ Clicking the CALENDAR button to open the date selector box so a date can be selected.
3	Use the PAYMENT STATUS: SELECT >> link to select which payment statuses are to be viewed.
4	Use the PAYMENT FLAGS: SELECT >> link to select which payment flags are to be viewed.
5	Click the REFRESH button. The Provider Payments page refreshes and displays the payments using the entered criterion for all families associated with this provider.
6	Select the payments for which you need to print a timesheet by clicking the selection box next to that payment.
7	Click the ATTENDANCE SHEETS link. The attendance sheets dialog box displays.
8	Click the PRINT button. The report opens in a new window.
9	Click the PRINT icon. A print dialog box opens. **IMPORTANT**: Locate the Page Handling section of the print dialog box. Use the PAGE SCALING field's drop-down list to select NONE. If any other option is selected for this field, the printed attendance sheets cannot be scanned when returned by the provider. The sheets will need to be printed and sent to the provider again.
10	When finished close the print window. If attendance sheets for another provider need to be printed, return to step 1.

Print All Attendance Sheets for a Provider

If a provider needs attendance sheets printed for all of the families served in one or more billing periods, use the following steps:

Step	Action
1	Click the REPORTS tab and then click on the PRINT QUEUE link.
2	Click CLEAR to remove any previous search criteria. After the screen refreshes, select "Attendance sheets" from the drop-down box.
3	Enter the start and end dates of the billing periods of the timesheets you want to print in the FROM and TO fields by either: ♦ Manually entering a date, or ♦ Clicking the CALENDAR button to open the date selector box so a date can be selected.
4	Use the PROVIDER NAME: SELECT >> link to select the provider name or enter the provider identification number in the PROVIDER NUMBER field.
5	Click the SEARCH button. The timesheets for the selected provider and billing periods will display in the results table.
6	Click the ATTENDANCE SHEETS link. The attendance sheets dialog box displays.
7	Select the OUTPUT TYPE (PDF is the default) and click PRINT.
8	When the report opens, use the print icon in the window to print the timesheets. The timesheets will print with a cover page that includes the provider's name and mailing address. **IMPORTANT**: Locate the Page Handling section of the print dialog box. Use the PAGE SCALING field's drop-down list to select NONE. If any other option is selected for this field, the printed attendance sheets can't be scanned when returned by the provider. The sheets will need to be printed and sent to the provider again.
9	When finished close the print window. If attendance sheets for another provider need to be printed, return to step 1.

Search for Provider

The Search page allows users to search for existing providers in KinderTrack based on the criteria chosen. Some tips to assist in completing a search are:

- ♦ Click CLEAR on the command bar to begin a brand new search. Note: This button clears information entered for previous searches. However, the dhs service area field repopulates with the default service area based on the user profile and may need to be changed to complete a statewide search.
- ♦ Partial matches are found for the beginning of name fields; for example typing "Car" will find all results that begin with those letters like Carson or Carlisle.
- ♦ Multiple parameters can be identified in a single search. For example, entering a first name and city for a provider will find providers that meet both criteria.
- ♦ Fields with a SELECT >> link allow the user to search based on the specific criteria-related to that field. To edit the options, click the field's SELECT >> LINK to open a multi-selector box. Click in an individual option's checkbox to select or deselect the option. To clear all options for the field, click the CLEAR-ALL link.
- ♦ When the user selects one criterion, the field displays the chosen option. When multiple options are chosen, an ellipsis (…) is visible. Example: If the user selects "English" from the dialog box for the languages field, the field displays as follows: 00 – English select >>. If the user selects "English" as well as other options, the field displays as follows: 00 – English … select >>.

To search for a provider, use the following steps:

Step	Action
1	Go to the Provider>Search page. By default, the provider selection radio button should be selected. If not, click in the button.
2	Enter data in the applicable fields or use the multi-select links to set your search criteria.
3	Click SEARCH. The page refreshes and your search results are displayed in the selection area.

Step	Action
4	In the search results: ♦ If the desired provider is **found**, access the Provider screen using one of the following methods: • Click in the selection box in front of the provider's name to check the box, then click the Provider>Provider link in the navigation tool; or • Click on the provider NAME AND ID link in the PROVIDER NAME column. Review the information to verify that this is the correct provider. If not, return to the Provider>Search screen and try again. ♦ If the desired provider is **not** found, complete one of the following: • Click CLEAR to start a new search for the family using different search filters. Go to step 2. • Click the ADD PROVIDER button. A blank Provider screen displays. Enter the provider's information. See Add a Provider for directions.

View Payments by Provider

Payments related to all families of a specific provider can be tracked and a report can be produced to display more details. To view provider payments, use the following steps:

Step	Action
1	Complete a search to locate and select the provider. See Search for Provider for more information.
2	After selecting the provider, go to the Provider>Payments page. Select the date range for the payments to be viewed by completing the start date and end date fields by either: ♦ Manually entering a date, or ♦ Clicking the CALENDAR button to open the date selector box so a date can be selected.

Step	Action
3	Use the PAYMENT STATUS: SELECT >> link to select which payment statuses are to be viewed.
4	Use the PAYMENT FLAGS: SELECT >> link to select which payment flags are to be viewed.
5	Click the REFRESH button. The Provider Payments page refreshes and displays the payments using the entered criterion for all families associated with this provider. You can sort payments by clicking any of the column headings displayed. One click sorts the list of payments in ascending order based on the entries in that column. Two clicks sort the list in descending order.
6	To view information on an individual payment, click on the ID link. To print a Payment Summary Report, select the records to be included on the report by clicking the check boxes to the left of each provider. Use the plus (**+**)sign on the upper left of the table to select or deselect all records.
7	Click the PAYMENT SUMMARY REPORT link. A dialog box opens.
8	Use the OUTPUT TYPE drop-down list to select the correct output option.
9	Click the PRINT button. The report opens in a new window. Use the new window's print functionality to print a copy of the report. When finished, close the print window. If another payment summary record needs to be printed, return to step 1.

View Provider Rates

To view previously entered rates charged by a provider, use the following steps:

Step	Action
1	Go to the Provider>Rates page. Use the RATE TYPE field's drop-down list to select the applicable rate type. The page refreshes displaying the rates existing in KinderTrack.
2	To view the state maximum rates (SMR) for this rate type, click in the checkbox to the left of SHOW STATE MAXIMUM AS OF. The page refreshes and displays the state maximum rates as of the current date. NOTE: A CALENDAR button appears to the right of the date field and the REFRESH button is activated.
3	To view the state maximum rates for another date, either: ♦ Manually enter a date, or ♦ Click the CALENDAR button to open the date selector box so a date can be selected. Click the REFRESH button. The page refreshes displaying the state maximum rates for the date entered.
4	To view a different rate type, use the RATE TYPE drop-down list to select the rate type. The screen refreshes displaying the rates existing in KinderTrack. Repeat this step for each rate type to be viewed.

Payment Case Actions

The payment module is used to process payments submitted by providers. Payments can be searched, attendance data entered and reviewed, payments calculated and authorized for payment, additional payments entered, and payment data reconciled.

Adjustments to a Processed Payment

When a payment has been moved to the Paid status, it is locked and can no longer be changed. If a provider missed hours or provides verification of approved extra units, the provider must submit another attendance sheet. DHS staff use the new information to adjust the payment and create a new payment for the extra units.

To adjust a provider payment, use the following steps:

Step	Action
1	Go to the Payment>Payment page. Enter the payment identification number in the PAYMENT ID field and click REFRESH to view the payment information.
2	Click the ADJUST button. A dialog box appears asking, "Are you sure you want to create a payment adjustment?" Click OK. The page refreshes and displays a newly created payment with a Not Calculated status. It is identified as an adjustment to an original payment by the payment flag entry in the PAYMENT CHARACTERISTICS field.
3	Click the EDIT button. Add or adjust the child care attendance types and hours as needed. The system will use the original payment to figure the amount of the adjustment.
4	Click CALCULATE. The page refreshes and displays the amount of the adjusted payment. Verify the new payment amount under Show Payment Summary section. The previous and current payment amounts are displayed showing the difference that will be paid for this payment.

Step	Action
5	Click SAVE. The page refreshes and the PAYMENT STATUS field displays Calculated. To update this claim's status to Authorized and Paid, go to the Payment>Summary page; otherwise go to step 10. NOTE: Calculated and Authorized payments can be moved as a group to the next processing status. See Process Calculated Payments and Process Authorized Payments for more information.
6	On the Summary page, click the update status button. A pop-up appears.
7	Use the NEW PAYMENT STATUS drop-down list to select Authorized then click OK. The page refreshes and the payment status has been updated.
8	Click the UPDATE STATUS button. A pop-up appears.
9	Use the NEW PAYMENT STATUS drop-down list to select Paid then click OK. The page refreshes and the payment status has been updated and the payment has been sent to State Accounting for payment to the provider.
10	To adjust another payment, return to step 1.

NOTE: The original payment identifies the adjusted payment with a link to that payment.

Edit Payment Information

Child care payments automatically process to an "Authorized" status if the attendance sheet submitted by the provider matches the schedule identified for the child. If attendance does not match the schedule, a "Received" status is applied to the record. Further research is needed to process the unmatched payments.

If the payment status is "Rejected," "Received," "Not Calculated," or "Calculated," the payment information may still be edited to calculate the payment, if necessary. See Process Received Payments for instructions on how to process a payment with one of these statuses.

Print or View a Payment Summary Report

Staff can generate a Payment Summary Report from the Reports section of the Payment>Search page. The Payment Summary Report allows users to print a summary of the payments in the queue. The report includes:

- The case number,
- The family name,
- The payment identification numbers,
- The billing period,
- The unit cost,
- The gross amount,
- The family fees, and
- The net amount for each payment, along with:
  - The gross total amount,
  - The total family fees, and
  - The net payment due for all payments in the report.

The records on the report will be specific to the entered search criteria.

To print a payment summary report, use the following steps:

Step	Action
1	Go to the Payment>Search page. Complete the FROM and TO date fields by either: ♦ Manually entering a date, or ♦ Clicking the CALENDAR button to open the date selector box so a date can be selected.
2	Select the desired search criteria either by entering information or by using a field's SELECT >> link to select options for the remaining fields. NOTE: Using more search criteria results in fewer results being shown. KinderTrack remembers the last search criteria entered.
3	Click SEARCH. The page refreshes and any search results matching the entered criteria will be displayed at the bottom of the screen.

Step	Action
4	To view information on an individual payment, click on the SUMMARY or PAYMENT ID links. To print a Payment Summary Report, select the records to be included on the report by clicking the check boxes to the left of each payment, or use the plus (+) sign on the upper left of the table to select or deselect all records.
5	Click the PAYMENT SUMMARY REPORT link. A dialog box opens.
6	Use the OUTPUT TYPE drop-down list to select the correct output option.
7	Click the PRINT button. The report opens in a new window. Use the new window's print functionality to print a copy of the report. When finished, close the print window. If another payment summary record needs to be printed, return to step 1.

Process Authorized Payments

Payments for child care automatically process to a status of "Authorized" if the attendance sheet submitted by the provider matches the schedule identified for the child. From the "Authorized" status, the payment can be moved to a "Paid" status to be sent to the State Accounting Enterprise for payment.

The payment status can be changed individually or a group of payments can be processed together. To process of group of payments from Authorized to Paid, use the following steps:

Step	Action
1	Go to the Payment>Payment Processing page. Select PAID in the LIST ALL PAYMENTS THAT CAN BE MOVED TO drop-down list.
2	Complete the FROM and TO date fields by either: ♦ Manually entering a date, or ♦ Clicking the CALENDAR button to open the date selector box so a date can be selected.

Step	Action
3	Use the SELECT >> links to select the Worker, Program, Payment Type or other search criteria, if appropriate.
4	Click SEARCH. The page refreshes and displays a table of payments that meet the identified criteria. The UPDATE STATUS button displays on the command bar. NOTE: Click the radio button in the VIEW column to view the payment details of any one provider listed. Detailed information appears at the bottom of the page. Review the list carefully to be certain these payments are accurate and ready to be paid.
5	To move the claims to Paid, click the UPDATE STATUS button. A dialog box displays to confirm the requested action. Click OK to move **all** of the payments to a "Paid" status and the state accounting system. NOTE: This action moves **all** payments displayed to a "Paid" status, not just the payments selected with the radio button. EXCEPTION: Payments will not move into a "Paid" status if the provider does not have a vendor identification number or if the provider is a state employee. Refer to 13-G, *Child Care Assistance*, for more information.

Process Calculated Payments

Attendance sheets received from providers that do not match the schedule identified in KinderTrack are set to a status of "Received." These payments are processed manually to a status of "Calculated" or "Rejected."

To continue processing the calculated payments, the payments must be changed to "Authorized" status and then "Paid" status. The status of a payment can be changed individually or a group of payments can be processed together. To process a group of calculated payment to "Authorized" status, use the following steps:

Step	Action
1	Go to the Payment>Payment Processing page. Select Authorized in the LIST ALL PAYMENTS THAT CAN BE MOVED TO drop-down list.

Step	Action
2	Complete the FROM and TO date fields by either: ♦ Manually entering a date, or ♦ Clicking the CALENDAR button to open the date selector box so dates can be selected.
3	Use the SELECT >> links to select the Worker, Program, Payment Type or other search criteria, if appropriate.
4	Click SEARCH. The page refreshes and displays a table of payments that meet the identified criteria. The UPDATE STATUS button displays on the command bar. NOTE: Click the radio button in the VIEW column to view the payment details of any one provider listed. Detailed information appears at the bottom of the page. Review the list carefully to be certain these payments are accurate and ready to be authorized.
5	To move the claims to "Authorized" status, click the UPDATE STATUS button. A dialog box displays to confirm the requested action. Click OK to move **all** of the payments displayed to an "Authorized" status. NOTE: This action moves **all** payments displayed to an "Authorized" status, not just the payments selected with the radio button.
6	Select "Paid" in the LIST ALL PAYMENTS THAT CAN BE MOVED TO drop-down list.
7	Click SEARCH. The page refreshes and displays a table of payments that meet the identified criteria. The UPDATE STATUS button displays on the command bar.
8	To move the claims to "Paid" status, click the UPDATE STATUS button. A dialog box displays to confirm the requested action. Click OK to move **all** of the payments to a "Paid" status and the state accounting system. NOTE: Payments will not move into a "Paid" status if the provider does not have a vendor identification number or if the provider is a state employee. Refer to 13-G, *Child Care Assistance*, for more information.

Process Received Payments

Payments for child care automatically process to a status of "Authorized" if the attendance sheet submitted by the provider matches the schedule identified for the child. If the attendance and schedule do not match, a status of "Received" is applied to the record. Further research is needed to process the unmatched payment.

To process "Received" status payments, use the following steps:

Step	Action
1	Go to the Payment>Search page. Complete the FROM and TO date fields by either: ♦ Manually entering a date, or ♦ Clicking the CALENDAR button to open the date selector box so dates can be selected.
2	Select the desired search criteria by either entering information or using a field's SELECT >> link to select available options for the remaining fields. Using more search criteria results in fewer results being shown. KinderTrack remembers the last search criteria entered.
3	Click SEARCH. The page refreshes and any search results matching the entered criteria will be displayed at the bottom of the screen.
4	Click the payment id for the first payment to be processed. The Payment>Payment page displays.
5	Click the EDIT button. The Editing Record page appears.
6	Click the CALCULATE button. Review the information to determine why the submitted information does not match what was approved. If the attendance submitted exceeds the daily or weekly authorization, edits may need to be made to the attendance types. NOTE: Attendance data submitted by the provider should **not** be modified. Only the attendance types for a day may be changed to pay additional units if necessary. If an extra unit should be paid, select the attendance type PRESENT – OVERRIDE UNITS using the attendance drop-down list to pay for units over the original authorized units.

Step	Action
	When finished reviewing and editing, if changes were made click the CALCULATE button again to recalculate the payment amount. The screen refreshes showing the recalculated payment amount.
7	Click SAVE. Pop-up messages appear if there are any problems with the payment, such as hours exceeding number of approved units or excess absence days being claimed. Take note of each pop-up message received; then click OK. Send notification to the provider, if necessary, as listed in 13-G, *Child Care Assistance*. Once all pop-up messages have been addressed, the screen refreshes and the PAYMENT STATUS field displays "Calculated." NOTE: All received payment claims must be calculated and paid or rejected to meet processing timeframes. See *Child Care Assistance* for required processing time frames.
8	To update this payment's status to "Authorized and Paid," go to the Payment>Summary page; otherwise go to step 13. NOTE: "Calculated" and "Authorized" payments can be moved as a group to the next processing status. See Process Calculated Payments and Process Authorized Payments for more information.
9	On the Summary page, click the UPDATE STATUS button. A pop up appears.
10	Use the NEW PAYMENT STATUS drop-down list to select Authorized then click OK. The page refreshes and the payment status has been updated.
11	Click the UPDATE STATUS button. A pop up appears.
12	Use the NEW PAYMENT STATUS drop-down list to select "Paid" then click OK. The page refreshes and the payment status is updated. The payment will be sent to the State Accounting Enterprise for payment to the provider.
13	To process the next received claim, return to step 1.

Search Payments

The Payment>Search page allows staff to find payments based on criteria about the family, the provider, or the payment. To complete a search, use the following steps:

Step	Action
1	Go to the Payment>Search page. Complete the FROM and TO date fields by either: ♦ Manually entering a date, or ♦ Clicking the CALENDAR button to open the date selector box so a date can be selected.
2	Select the desired search criteria by either entering information or using a field's SELECT >> link to select available options for the remaining fields. NOTE: Using more search criteria results in fewer results being shown. KinderTrack remembers the last search criteria entered.
3	Click SEARCH. The page refreshes. Any search results matching the entered criteria are displayed at the bottom of the screen.
4	Look for the payment. Click the search results column headers to sort the information in alphabetical ascending or descending order. Click a heading once for ascending, twice for descending. Use the SEARCH RESULTS OPTIONS button to display more items per page. Use the page numbers below the list to move between pages. Once the correct payment is found, go to the next step.
5	Once the payment is found, you can use the hyperlinks to: ♦ View payment, provider or child information. ♦ View payment summary and update the payment status, if applicable. ♦ Print a payment summary report for all payments selected. See Print or View a Payment Summary Report for more information. When finished, click the CLEAR button to start a new search.

View Payment Information

The Payment>Payment page provides details regarding attendance, payment summary, provider rates, and other information regarding a payment. The payment identification number is unique for each attendance sheet produced by the system and can be used to track the payment to the provider.

To view a payment, use the following steps:

Step	Action
1	If the payment identification number is known, go to step 2. Otherwise, complete a search for the payment to locate the identification number. See Search Payments for more information.
2	Go to Payment>Payment page. Enter the attendance sheet or payment identification number in the PAYMENT ID: field.
3	Click the REFRESH button. The page refreshes displaying the payment information.
4	View additional payment information by clicking in the check box for the following options: ♦ SHOW ATTENDANCE provides a detailed list of each day of attendance. ♦ SHOW PAYMENT SUMMARY provides information on the provider amount, reimbursable amount, copayment amount and the payment amount. ♦ SHOW NOTES lists any notes regarding payments. ♦ SHOW RATES displays the provider rate for each date of attendance. ♦ SHOW TRACE displays the specific details used for calculation of each day of the attendance sheet. NOTE: Each option section of the Payment page is displayed or hidden using the check box.
5	To view information on another payment, return to step 1.