CARES PLUS DATA SYSTEM: DATA ENTRY GUIDE FOR LEAD AGENCIES

Version 1.0

Table of Contents

DATA ENTRY QUICK START GUIDE

Enrollment Complete/Update Program Participation	
For existing participants, enter required information to change the *Program Participation Status* from "*Pending*" to "*Enrollment Complete.*"	1. Search Participant 2. Select Participant 3. Select Program Summary 4. Update Program Participation 5. Review and Update Participant Contact Information 6. Review and Update Current Employment 7. Review and Update Education 8. Select Program Summary 9. Approve Program Components

Add a New Participant	
Follow the four-step wizard to add a new participant to the data system. Once the participant is added to the system, enter all other required program information.	1. Search Participant 2. Add New Participant 3. Select *Go to Participant Record* 4. Select Program Summary 5. Update Program Participation 6. Add Participant Contact Details 7. Add Employment 8. Add Education 9. Approve Program Components

Track MTP Materials	
Record the receipt of cameras from CDTC, and send and receive cameras to and from MTP participants.	1. Receive Cameras 2. Assign Cameras to MTP Participants

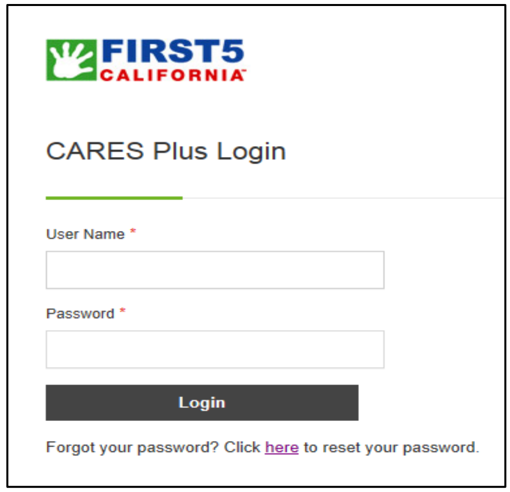
Reports	
All system users have the ability to generate reports. Reports can be used to verify participant information and review the status of the county's MTP and CLASS participants.	1. Select Reports 2. Select View Report 3. Enter Selection Criteria 4. Select View Report 5. Report Can Be Saved as a PDF, CSV, or Excel file. Save as a PDF for Printing.

SYSTEM ACCESS AND WEB BROWSER

The URL for the CARES Plus Data System is https://apps.ccfc.ca.gov/caresplus. Internet Explorer 9 is the recommended web browser.

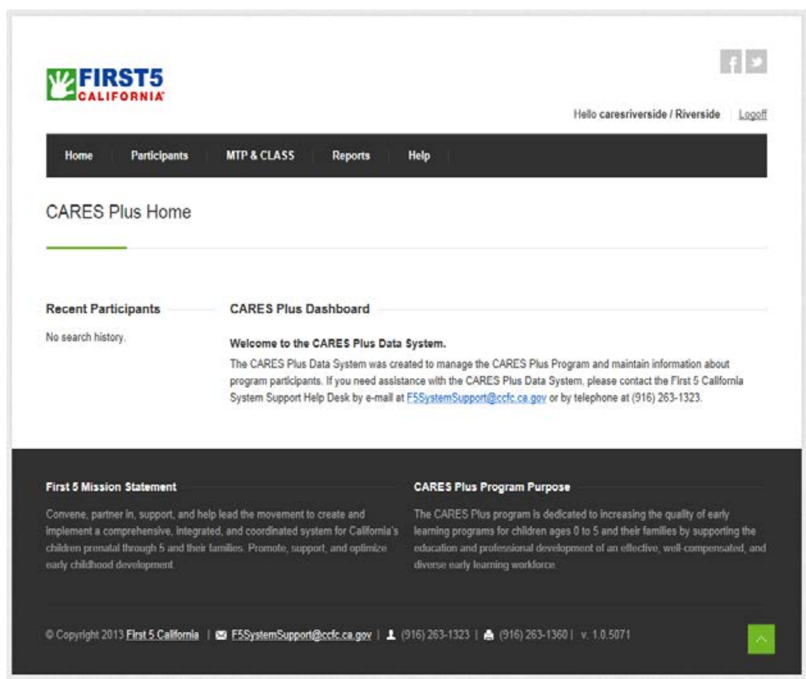
CARES PLUS LOGIN

- User Name
- Password
- **Password Reset**: Users may reset their own password on the CARES Plus Login page. The user will enter their user name and the security CAPTCHA. The new password will be sent to the e-mail address associated with the user's account and will contain a link that will allow the user to change their password.

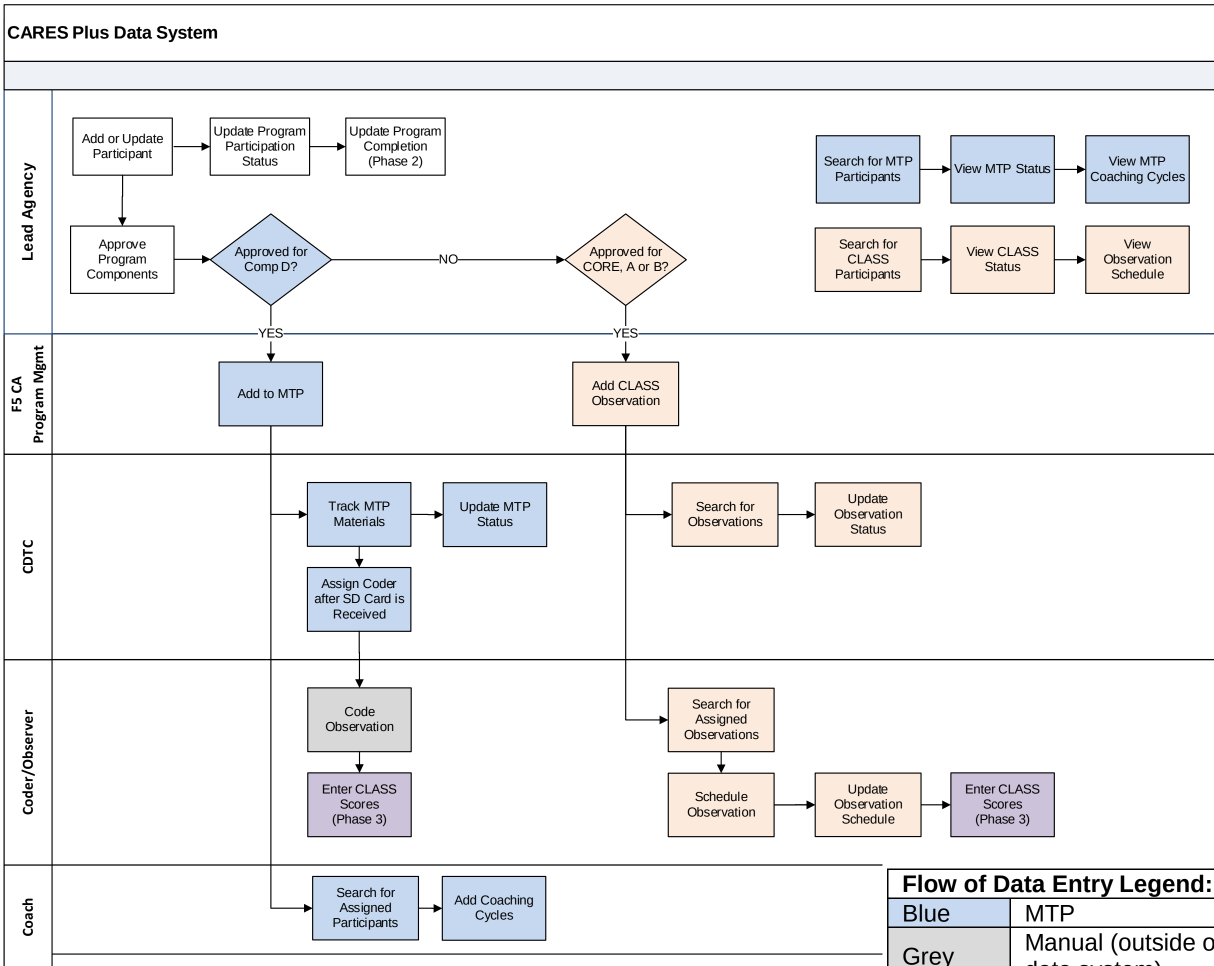


CARES PLUS HOME

- The top menu bar options vary depending on the user's security role. The top menu bar options are:
    - **Home**: Navigate back to the CARES Plus home page.
    - **Participant**: Search for a participant or add a participant.
    - **MTP & CLASS**: Search for observations or track MTP materials.
    - **Reports**: Displays available reports.
    - **Help**: Features training materials.
- **Recent Participants**: Displays the name and participant ID for participant records most recently accessed in the data system. The names and participant ID numbers are displayed as hyperlinks that allow the user to easily access a participant's record.
- **CARES Plus Dashboard**: An information center used to communicate CARES Plus program information, system announcements, due dates, and reminders.



FLOW OF DATA ENTRY



Flow of Data Entry Legend:	
Blue	MTP
Grey	Manual (outside of the data system)
Purple	Future Phase
Peach	CLASS

STATUS VALUES

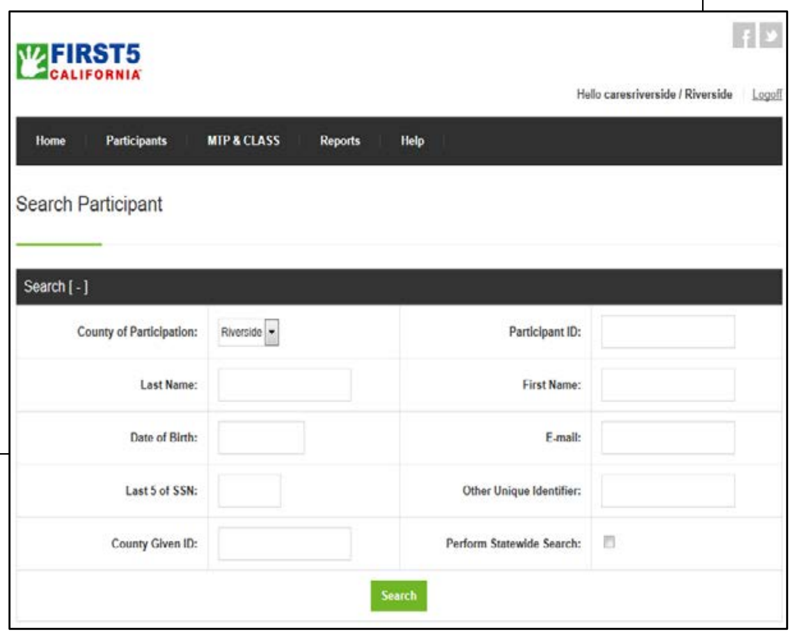
Field Name	Updated By	Status Values	Description
Program Participation Status	Lead Agency	Pending Enrollment Complete Program Complete (Phase 2)	These status values are set by the system.
		Not Approved Withdrawn	The *Program Participation Status* should be changed to "Withdrawn" if the participant will not complete the current *Period of Participation*.
Component Status	Lead Agency	Applied For	This value is set by the system.
		Approved Not Approved Withdrawn	The Lead Agency may change the Component Status to "Approved," "Not Approved," or "Withdrawn."

SEARCH PARTICIPANT

Users may search for a participant by using any of the following search criteria: *Participant ID*, *Last Name* (or participant's previous last name), *First Name*, *Date of Birth*, *E-mail*, *Last 5 Digits of SSN*, *Other Unique Identifier*, or *County Given ID*. Partial names can be entered to improve the likelihood of finding the correct participant.

By default, the search is limited to participants within the user's county. Ten records are displayed on each page. If there are more than 10 records that meet the search criteria, the page numbers will be displayed at the bottom of the search page.

If the participant is found:	**If the participant is not found:**
The system displays a list of matching record(s) and the user may choose: o *Program Summary:* Displays the County of Participation, Period of Participation, Status, and Component Status. The user may close the Program Summary window or choose *Select* to go directly to Participant Details. Or o *Select*: Choose this to navigate directly to the Participant Details page.	The system displays a message that no record was found. If the participant is not found, and the user believes the participant has participated in another county, the user can select the *Perform Statewide Search* checkbox and perform the search again.



Note:

If a user selects the Perform Statewide Search option, the search results will only include the Program Summary option (not the Select). If the user selects the Program Summary, the following warning message is displayed if the participant has any program records from a different county.

> *"Please review the participant name, date of birth, and other identifying information to validate that you've selected the correct participant. If it is the same participant, contact the participant's current/previous county prior to updating the participant's information."*

ADD PARTICIPANT

A four-step wizard guides users through the process of entering personal information for participants. The participant's data will be added to the system once all of the required information is entered and the record is saved during the final step of the wizard.

Step 1: Add Personal Information	– *Race/Ethnicity*: Select all that apply. – *Primary Language*: Select one. – *Number of Years the Participant has been employed in the ECE field*: Use integers only, rounding to the nearest year.
Step 2: Add Program Information	– *County of Participation*: List is limited to counties associated with the user's account. – The *Program Participation Status* defaults to "Pending" and the *Program Participation Status Date* is set to the current system date. – The *CARES Plus Application Date* must be less than or equal to the current date.
Step 3: Select Program Components	– Select all that apply. – *Program Components Applied For* is limited to the components associated with the selected *County of Participation* and *Period of Participation*.
Step 4: Save and Confirm Participant	– Confirm the participant information. – Select *Save* to add the participant. – *Participant ID* is assigned when the participant is saved.

MAINTAIN PARTICIPANT INFORMATION

- Lead Agencies are required to maintain accurate and current information for participants. Following initial enrollment, Lead Agencies must update participant and program participation information by the last day of each calendar month. This includes updating the *Program Participation Status* for participants who have withdrawn from the program and updating the participant's contact information.
- When a Participant is selected, the system displays the *Participant Details* including the participant's date of birth, highest level of education, current e-mail address, current mailing address, current phone numbers, and participant applications.

MAINTAIN PROGRAM PARTICIPATION

- Select *Program Summary* from the *Participant Details* page. The participant's program participation records are displayed. A program participation record is created for each period of participation.
- Users have the ability to *Add a Program Participation Record*, *View,* or *Update* a program record, and maintain *Components*.

Program Participation

+ Add Program Participation Record

County	Period	Current Status	Status Date
El Dorado	2013-14	Pending	7/25/2013
Actions: Update | Components | CLASS Observations			

County	Period	Current Status	Status Date
El Dorado	2011-12	Program Complete	8/2/2011
Actions: View | Components			

- The *Program Participation* page includes a *CLASS*™ Observation hyperlink if the participant was selected for a CLASS observation. If the participant was selected for the *My Teaching Partner*™ (*MTP*) program, the *MTP* Participation hyperlink is displayed.
- The *Program Participation Status* can be changed to "Withdrawn" by selecting the *Update* hyperlink and then selecting the *Update Status* hyperlink on the *CARES Plus Application* page.

CARES Plus Application

*County of Participation	El Dorado
*Period of Participation (Fiscal Year)	2013-14
*CARES Plus Application Date	9/12/2013
Program Participation Status History	Enrollment Complete on 12/2/2013 Pending on 12/2/2013 Update Status

Notes:

– Lead Agency users can only update a program participation record if the *County of Participation* is associated to the user's account (only county collaborations such as Yuba/Sutter have access to multiple counties).

– If a county collaboration user selects the wrong county when the program participation record is first added, the user must set the *Program Participation Status* to "Withdrawn" and add a new program record for the correct county.

– The *Components* hyperlink is used to identify missing requirements, if any.

MAINTAIN PERSONAL INFORMATION

- Select *Personal Information* hyperlink on the left-hand side on the *Personal Details* page.
- Users are able to view or update a participant's personal information.

MAINTAIN CONTACT INFORMATION

- Select *Contact Details* hyperlink on the left-hand side of the *Participant Details* page.
- The system displays existing address, phone number, and e-mail address information for the selected participant.
- The participant's mailing address, phone number, and e-mail are required prior to approving the application components.
- Lead Agencies are required to update the participant contact information on a monthly basis.

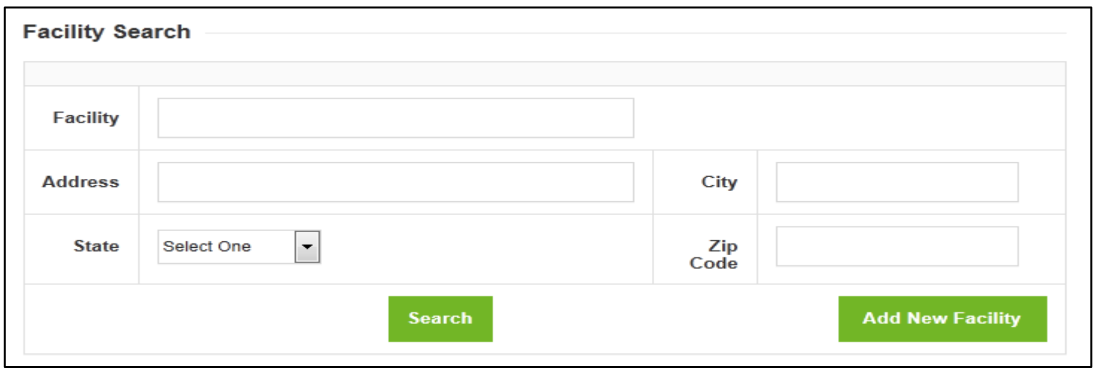
Address: Add a new address or *Inactivate* an existing address. If an address was entered incorrectly, it should be changed to *Inactive* and the correct record should be added so the system maintains an accurate address history. When a new address is entered, the system automatically inactivates the prior address if it has the same address type.	
• Mailing address is required for initial enrollment. • Address Type will default to mailing. • Address start date is set to the system date when the record is added.	*Notes:* – If the status of an existing address is changed to "*Inactive,*" the end date is automatically set to the current date. – If any returned mail or shipments are received by First 5 CA or CDTC, the Lead Agency will be notified that the participant's address is invalid.
Phone Number: Add a new phone number or *Inactivate* an existing phone number.	
• At least one phone number is required for initial enrollment. • The phone number start date is set to the system date when the record is added.	*Note:* – If the status of an existing phone number is changed to "*Inactive,*" the end date is automatically set to the current date.
E-mail: Add a new e-mail address or *Inactivate* an existing e-mail address.	
• An e-mail address is required for initial enrollment. • The participant's e-mail address start date is set to the system date when the record is added.	*Note:* – If the status of an existing e-mail address is changed to "*Inactive,*" the end date is automatically set to the current date.

MAINTAIN EMPLOYMENT HISTORY

The system displays the participant's current and previous employment records. The user may update an existing employment record or add a new employment record. The employment record must be updated as new information becomes available.

To enter the participant's place of employment, the user must either select an existing facility within the system or add a new facility.

- Search Facility: Enter the facility name or address, and click *Search* to determine if the facility already exists within the system. If the system finds one or more work facilities matching the selection criteria, the system displays the matching record(s). The list is sorted by facility name and the user has the ability to select one work facility.
- Add New Facility: If the facility is not found, the user may add a new work facility. Once the new facility is saved, search for the facility again using the search button and then select the newly added facility.



Notes:

– Partial name and address information can be entered (without wildcards) when searching for facilities to improve the likelihood of finding the correct facility.

– A value is required for each age group of children served by the participant, but zero is allowed.

– For some existing facilities, the *Program Type* and/or *Funding Source* have not been entered. If these two items are not updated, the participant will fail to meet the program requirements for approval. To update this information for the facility, search the facility, select *Edit* and update the *Program Type* and/or *Funding Source*.

– The *Annual Salary* will need to be updated if it was converted as zero. The Annual Salary must be greater than zero and less than or equal to $60,000.

– The *Number of Dual Language Learners* converts as zero and may need to be updated.

– The *Primary Language Spoken with Children in the Classroom* may need to be updated. If there were multiple languages selected, they will be listed in the *Classroom Notes* field.

– If the participant is no longer working at the facility, select *Update* and change the *Is the Current Employer* to "No." The employment record will be listed under the previous employment section. Add a new employment record for the current work facility.

MAINTAIN EDUCATION

The system displays existing education data for the selected participant, if any. The user may add, update, or delete education data for the participant.

Notes:

- The participant must have at least a Bachelor's degree in an ECE/CD or Related Field to be approved for Component C.
- If a participant attains a degree, a new record must be added so the system can track the progression.
- Records should be deleted only if they were entered in error.

MAINTAIN CORE TRAINING

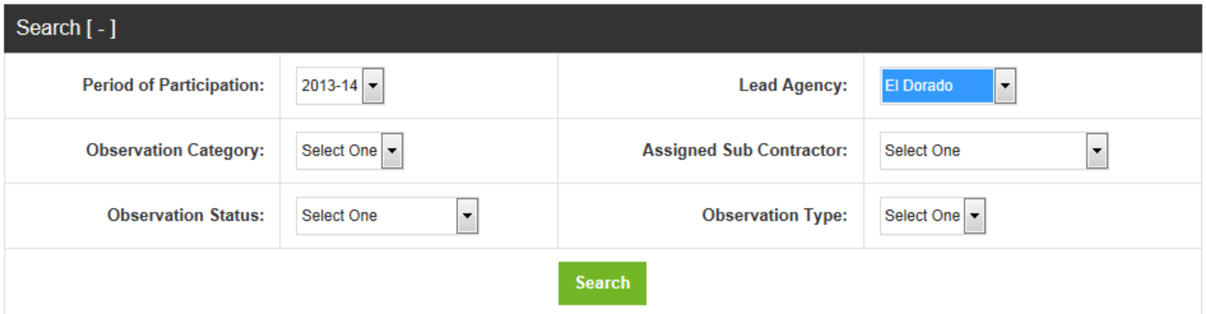
The system displays existing CORE Training data for the selected participant, if any. The user may add, update, or delete a CORE Training record.

Notes:

- CORE Training should be updated as the participant completes each course.
- CORE Training should be updated for all participants, even those who withdraw from CARES Plus.
- Records should be deleted only if they were entered in error.
- The Funding Source identifies which program funded the training course.

SEARCH OBSERVATIONS

Lead Agencies have the ability to view a list of participants selected for a *CLASS* or *MTP* observation and monitor the observation status. Users may enter a variety of search criteria to locate participants who are selected for an observation.



Notes:

– If CDTC changes the observation status to Incomplete, the Lead Agency should follow up with the participant to determine if they are withdrawing from the CARES Plus program.

– If the participant withdraws from the program, the Program Participation Status should be updated accordingly.

TRACK *MTP* EQUIPMENT

The system enables Lead Agencies to update the status and maintain the location of a camera between CDTC and *MTP* participants. Lead Agencies may record the receipt of cameras from CDTC, and send and receive cameras to and from *MTP* participants. This functionality applies only to Lead Agencies that requested to distribute the cameras directly to their participants.

- Receive Cameras: Select *Receive Cameras* and enter search criteria. The system displays camera distribution records that have been sent from CDTC to the Lead Agency. The user enters the *Date Camera Received* and selects Receive to update the camera distribution information.
- Assign Cameras to *MTP* Participants: The Lead Agency has the ability to assign cameras to their *MTP* participants. The user searches for participants who were selected for the *MTP* program. Once the system retrieves the list of participants, the user will be able to assign a camera to the participant by entering the *Camera ID* and *Date Camera Sent to Participant*. Select *Assign* to update the camera distribution information.

REPORTS

All system users have the ability to generate reports. Reports can be used to verify participant information and review the status of the county's *MTP* and *CLASS* participants. Users are able to enter specific report criteria such as the Fiscal Year, Component, Program Participation Status, Component Status, and County. Reports can be exported to a CSV (comma delimited), PDF, or Excel file. There are currently several available reports. Additional reports will be added after implementation.

F5 SYSTEM SUPPORT HELP DESK

Please contact the F5System Support Help Desk if you have questions or need assistance with the CARES Plus Data System.

E-mail address: F5SystemSupport@ccfc.ca.gov
Phone: 916-263-1323
Hours: 8 am to 5 pm (PST), Monday-Friday (unavailable on California State holidays)