Indiana Child Care Parent/Guardian Web Portal Training Guide

INDIANA E-CHILD CARE
Agenda

- Welcome Page
- Set Up New Account
- Change Password
- Read Messages from FSSA
- Review Your Case & Voucher Information
- Approve Late Attendance
- Review Voucher Payment Information
- How to Get Help by Phone
Welcome Page

PARENT WEB PORTAL TRAINING GUIDE
Welcome Page

- Login with User Name and Password
- Home Page includes Program Materials and Helpful Links, including:
  - Cardholder Brochure and Tips Sheet
  - Frequently Asked Questions
  - Xerox Help Desk Number
Welcome Page – First Visit

- Click “Register Now” to start a new account on the Client Web Portal

TIP!
Look for blue, underlined words. They are hyperlinks that take you to another screen.
Set Up a New Account

CLIENT WEB PORTAL TRAINING GUIDE
Set Up New Account – Step 1

1. Enter the primary cardholder’s:
   - First and Last Name
   - 5-digit mailing ZIP Code
   - Date of Birth (MM/DD/YYYY)
   - 16-digit Hoosier Works for Child Care Card Number
   - Card PIN (Personal Identification Number)
Set Up New Account – Steps 2 & 3

2. For your Web Account, you choose:
   - A User ID
     - User ID must be 5 to 11 characters
     - You can use any letters or numbers in your User ID
     - User ID is case-insensitive (letters can be upper case, “A,” or lower case, “a” when you type your User ID)
   - A Password
     - Password must be 8 to 10 characters
     - Password must have a number, an upper case letter, a lower case letter and a special character ( _ # or $ )
     - Password is case-sensitive
     - Password must be changed every 90 days

3. Read and accept Terms and Conditions, and click “Submit”
Set Up Security Questions

Set up 3 secret questions to answer if you forget your password

1. Click arrow for drop-down menu to choose a question
2. Type an answer for that question
   ▶ Answer must be 3 to 30 characters
   ▶ Answer can use a-z, A-Z, 0-9 or space
   ▶ No two answers can be the same
   ▶ Answer is not case sensitive
3. Choose two more questions and type answers
4. Click “Submit”

TIP!
Make sure your security questions and answers are things you will remember!
Change Password

CLIENT WEB PORTAL TRAINING GUIDE
Change Password – Every 90 Days

Password requirements:

- Password must be 8 to 10 characters
- Password must not be same as, or include, your User ID
- Password must have a number, an upper case letter, a lower case letter and a special character ( _ # or $ )
- Password is case-sensitive
- Password must be changed every 90 days
- Password cannot be same as one used last 24 times

To change password, click “Change Password” under your name (“My Account”)
Expiring or Expired Password

- You will see an “Expiring Password” message when you log in if your password will expire within 10 days.

- You will see the “Expired Password” message when:
  - You log in for first time
  - You log in after 90 days without changing your password

### Expiring Password

**Logon Message**

ℹ️ Your password will expire in 8 days. Do you want to change it now?

- Yes
- No

### Expired Password

**Logon Message**

❌ Your password has expired and must be changed.

- OK
Read Messages from FSSA

CLIENT WEB PORTAL TRAINING GUIDE
After logging in, if FSSA has a message for you (or families in your county), you can read it here.
Review Your Case & Voucher Information

CLIENT WEB PORTAL TRAINING GUIDE
Access the Child Care Case Profile screen by signing in to the portal with your User ID and Password.

Hit ‘Login’ and it will take you to the Case Profile screen.
Child Care Case Profile (cont.)

In order to change your contact information on record such as name or address, please contact Indiana's Family and Social Services Administration by email at DECCSSParentInquiry@csso.in.gov. Please be sure to include either your card number or case number and the information that requires update. Please note that the address needs to be a physical address, and not a P.O. Box.

Click "Attendance" to view Attendance Report

Click "Late Attendance Worklist" to view Late Attendance to be approved or denied

Click on Child Name for more details on voucher (Child Profile)

Click on Cardholder Name for Cardholder Profile

Primary Cardholder
**Attendance Report**

Report shows today’s approved attendance, or enter dates to search.

Approved check-in’s, checkouts, etc. for today or chosen dates.

See next screen for attendance type definitions.

Or, search by transaction type, such as IN, OUT, PERSONAL DAY, etc. (see next slide)

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### CASE TRANSACTION SEARCH

Report on data between (DD/MM/YYYY): 06/01/2015 - 07/14/2015

Search: CHECK IN, CHECK OUT, PF - Include Denied Transactions

### CASE TRANSACTION REPORT

<table>
<thead>
<tr>
<th>Attendance Date/Time</th>
<th>Child First Name</th>
<th>Child Last Name</th>
<th>Child #</th>
<th>Attendance Type</th>
<th>Duration</th>
<th>Transaction Date/Time</th>
<th>Cardholder Name</th>
<th>Response</th>
</tr>
</thead>
<tbody>
<tr>
<td>06/29/2015 11:36 AM</td>
<td>TRISTEN</td>
<td>TESTI</td>
<td>004</td>
<td>CHECK IN</td>
<td></td>
<td>06/29/2015 11:36 AM</td>
<td>TESTI</td>
<td>SUCCESS/APPROVED</td>
</tr>
<tr>
<td>06/29/2015 11:23 AM</td>
<td>TRISTEN</td>
<td>TESTI</td>
<td>004</td>
<td>CHECK IN</td>
<td></td>
<td>06/29/2015 11:23 AM</td>
<td>TESTI</td>
<td>SUCCESS/APPROVED</td>
</tr>
<tr>
<td>06/29/2015 10:45 AM</td>
<td>TRISTEN</td>
<td>TESTI</td>
<td>004</td>
<td>CHECK IN</td>
<td></td>
<td>06/29/2015 10:45 AM</td>
<td>TESTI</td>
<td>SUCCESS/APPROVED</td>
</tr>
<tr>
<td>06/29/2015 07:07 AM</td>
<td>TRISTEN</td>
<td>TESTI</td>
<td>004</td>
<td>CHECK IN</td>
<td></td>
<td>06/29/2015 07:07 AM</td>
<td>TESTI</td>
<td>SUCCESS/APPROVED</td>
</tr>
</tbody>
</table>
### Attendance Types

<table>
<thead>
<tr>
<th>Attendance Type – Code</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>IN or OUT</td>
<td>Check-in or Checkout</td>
</tr>
<tr>
<td>P/IN or OUT</td>
<td>Previous Check-in/out (checked in/out for time during last two weeks)</td>
</tr>
<tr>
<td>L/IN or L/OUT</td>
<td>Late Check-in/out (checked in/out for time during last 365 days)</td>
</tr>
<tr>
<td>SAF</td>
<td>Check-in or out that was saved and sent later (phone line/network down)</td>
</tr>
<tr>
<td>Void</td>
<td>Canceled activity</td>
</tr>
<tr>
<td>Provider Holiday</td>
<td>Provider closure for holiday</td>
</tr>
<tr>
<td>Inclement Weather Closure Day</td>
<td>Provider closure due to bad weather</td>
</tr>
</tbody>
</table>
Real-Time Transaction Matching

- Each Check-In or Check-out is “matched” real-time to the related Check-in or Check-Out

- Check-Out must be within 48 hours of Check-in

- Must Check-In first

- Must Check-Out first

<table>
<thead>
<tr>
<th>Check-In</th>
<th>Check-Out</th>
<th>Match</th>
<th>Check-Out</th>
<th>Check-In</th>
<th>Match</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mon., 8am</td>
<td>Mon., 5pm</td>
<td></td>
<td>Mon., 2pm</td>
<td>Mon., 8am</td>
<td></td>
</tr>
<tr>
<td>No Check-In</td>
<td>Tues., 5pm</td>
<td>&quot;Check In Not Found&quot; error</td>
<td>No Check-In</td>
<td>Mon., 8am</td>
<td>&quot;Check Out Missing&quot; error</td>
</tr>
</tbody>
</table>

NEW!
Real-Time Transaction Matching (cont.)

- Each Check-In or Check-out is “matched” real-time to the related Check-in or Check-Out

- If a Prev. Check-In is attempted in the middle of an approved (“matched”) Check-In/Out pair, transaction is rejected with “Overlapping Care” error message
Real-Time Transaction Matching (cont.)

- Additional Check-In/Check-Out Procedures
  - Check-In with “Pending” status means it is approved but unmatched and waiting for a Check-Out
  - If a correction needs to be made to a Check-In or Check-Out, either one or both of the transactions must be Voided
  - Check-In or Check-Out attendance is not allowed when there is a Provider Holiday or Inclement Weather Closure Day
  - Provider Holiday or Inclement Weather Closure Day cannot be submitted if an approved Check-In/Out entered for a child on the same date
TIP: To get to this screen click the blue hyperlink Provider Name on the Child Profile.

Click on Child Name for more details on voucher (Child Profile).
Cardholder Profile

TIP: To get to this screen click the blue hyperlink Cardholder Name on the Case Profile.

Cardholder Information

Secondary Cardholder

Click on Child Name for more details on voucher (Child Profile).
Child Profile

Child Information

Child Name: TASIA TESTBWW
Case Number: 10080
Child Number: 002
Address: 4227 N KITLEY AVE
Telephone: 715-118-2557
Personal Days Balance: 0
Anniversary Date: 08/06/2014

Cardholders

Cardholder Name: TENSHA TESTovic
Card Number: XXXXXXXX0004114
P/S: P

Voucher History

<table>
<thead>
<tr>
<th>Voucher Number</th>
<th>Rate Type</th>
<th>Provider Name</th>
<th>Provider ID</th>
<th>Start Date</th>
<th>End Date</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>3053498</td>
<td>WEEKLY</td>
<td>A GIFTED &amp; TALENTED CHILD DEVELOPMENT ACADEMY, INC.</td>
<td>3031</td>
<td>12/21/2014</td>
<td>05/20/2016</td>
<td>ACTIVE</td>
</tr>
<tr>
<td>2997497</td>
<td>WEEKLY</td>
<td>A GIFTED &amp; TALENTED CHILD DEVELOPMENT ACADEMY, INC.</td>
<td>3031</td>
<td>12/23/2012</td>
<td>06/22/2013</td>
<td>ACTIVE</td>
</tr>
<tr>
<td>2500508</td>
<td>WEEKLY</td>
<td>A GIFTED &amp; TALENTED CHILD DEVELOPMENT ACADEMY, INC.</td>
<td>3031</td>
<td>06/23/2013</td>
<td>12/21/2013</td>
<td>ACTIVE</td>
</tr>
<tr>
<td>2698765</td>
<td>WEEKLY</td>
<td>A GIFTED &amp; TALENTED CHILD DEVELOPMENT ACADEMY, INC.</td>
<td>3031</td>
<td>12/23/2012</td>
<td>05/10/2014</td>
<td>ACTIVE</td>
</tr>
<tr>
<td>1544215</td>
<td>WEEKLY</td>
<td>A GIFTED &amp; TALENTED CHILD DEVELOPMENT ACADEMY, INC.</td>
<td>3031</td>
<td>10/30/2011</td>
<td>04/25/2012</td>
<td>ACTIVE</td>
</tr>
</tbody>
</table>

Click “Details” to see more information about each voucher
Voucher Details

- See detailed information about the child’s voucher

- Click “Payments” to see payments for this voucher
Approve Late Attendance

CLIENT WEB PORTAL TRAINING GUIDE
Late Attendance Worklist

- Displays when “Late Attendance Worklist” button is selected on Case Profile screen.
- Lists voucher numbers and service weeks for late attendance (discrepancies) that needs to be approved or denied by the parent/guardian.
- Select “Details” button to view the details on that Late Attendance.
Voucher Late Attendance Details

- Displays Late Attendance when “Details” button is selected on Case Profile screen
- Lists voucher information for selected service week, and all late attendance transactions (whether “settled” or paid, or “unsettled” or unpaid)
- Parent/guardian can Approve or Deny late attendance
- NOTE: Late attendance must be approved by the parent/guardian, or the provider may not be paid
A Parent can also call into the IVR (automated phone menu), to approve or deny late attendance.

Callers will be automatically notified if they have late attendance entered by their provider that requires their approval or denial.

The phone line menu and detailed instructions will be covered on slides 38 to 40.
Review Voucher
Payment Information

CLIENT WEB PORTAL TRAINING GUIDE
Access the **Voucher Payment Search** screen by clicking the blue hyperlink on a child name on the Case Profile screen to view voucher details and payments.

Click the ‘Payments’ button at the bottom of the **Voucher Details Screen** to access the Voucher Payment Search screen.
1. Click arrow for drop-down menu to choose year
2. Click arrow for drop-down menu to choose Payment Period for your payment search
3. Click “Search”
TIP!

Click on blue payment amounts to see payment details.
## Payment Details

### Child Information
- **Child Name:** JORDAN TESTpi
- **Case Number:** 137485
- **Child Number:** 001
- **Address:** 10009 JOHN MARSHALL DRIVE, INDIANAPOLIS, IN 46259
- **Telephone:** 303-361-9436
- **Personal Days Balance:** 19
- **Anniversary Date:** 05/25/2014

### Voucher Information
- **Voucher Number:** 3097174
- **Rate Type:** WEEKLY
- **Rate Amount:** $199.00
- **Effective Date:** 03/22/2015
- **End Date:** 09/29/2015
- **Provider ID:** 3931
- **Provider Name:** A GIFTED & TALENTED CHILD DEVELOPMENT ACADEMY, INC
- **Provider Address:** 5023 North Shadeland Avenue, Indianapolis, IN 46228

### Attendance Payment Details for Week of 08/09/2015 to 08/15/2015

<table>
<thead>
<tr>
<th>Attendance Date</th>
<th>Attendance Time</th>
<th>Transaction Type</th>
<th>Duration</th>
<th>Status</th>
<th>Payment Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>08/16/2015</td>
<td></td>
<td>NO ATTENDANCE</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>08/17/2015</td>
<td></td>
<td>NO ATTENDANCE</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>08/18/2015</td>
<td></td>
<td>PERSONAL DAY CLAIM</td>
<td>09:00</td>
<td>SETTLED</td>
<td>09/08/2015</td>
</tr>
</tbody>
</table>
Payment Details (with Late Attendance)

Voucher Payment Details for Week of 08/09/2015 to 08/15/2015

<table>
<thead>
<tr>
<th>Attendance Date</th>
<th>Attendance Time</th>
<th>Transaction Type</th>
<th>Duration</th>
<th>Status</th>
<th>Payment Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>08/16/2015</td>
<td></td>
<td>NO ATTENDANCE</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>08/17/2015</td>
<td></td>
<td>NO ATTENDANCE</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>08/18/2015</td>
<td></td>
<td>PERSONAL DAY CLAIM</td>
<td>06:00</td>
<td>SETTLED</td>
<td>09/06/2015</td>
</tr>
<tr>
<td>08/19/2015</td>
<td>15:11</td>
<td>CHECK IN CHECK OUT</td>
<td>00:02</td>
<td>SETTLED</td>
<td>09/06/2015</td>
</tr>
<tr>
<td>08/20/2015</td>
<td></td>
<td>NO ATTENDANCE</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>08/21/2015</td>
<td></td>
<td>NO ATTENDANCE</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>08/22/2015</td>
<td></td>
<td>NO ATTENDANCE</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Late Attendance Payments

<table>
<thead>
<tr>
<th>Payment Date</th>
<th>Late Attendance Hours</th>
<th>Late Personal Day Hours</th>
<th>Total Hours</th>
<th>Payment Amount</th>
<th>Rate Applied</th>
<th>Subsidy Paid In Full</th>
</tr>
</thead>
<tbody>
<tr>
<td>08/23/2015</td>
<td>01:00</td>
<td>00:00</td>
<td>01:00</td>
<td>$99.50</td>
<td>1/2 Weekly Subsidy</td>
<td>No</td>
</tr>
</tbody>
</table>
How to Get Help by Phone

CLIENT WEB PORTAL TRAINING GUIDE
You can call 1-800-876-0487 for information and help with HoosierWorks for Child Care

- **Press “1”** for English, or **press “2”** for Spanish
- **Enter Hoosier Works Child Care Card Number, ZIP Code and DOB** (to access YOUR case)
- Next, you will hear the Main Menu *(unless you have attendance that needs your review before paying your child care provider)*
- If you have late attendance to approve or deny:
  - The automated system will ask you to approve or deny attendance that needs your attention (“pending”) – Press “2” to return to main menu
  - After all pending late attendance is approved or denied, you will hear the Main Menu
Hoosier Works for Child Care Parent Help Desk: Main Menu

- **Press “1”** to create a new 4-digit PIN number or change your PIN
- **Press “2”** to report your card lost or stolen
- **Press “3”** to approve or deny late attendance that requires your review
- **Press “4”** to transfer to a live operator, or Customer Service Representative
How to approve or deny late attendance for provider payment:

- The Help Line will automatically ask for your review of any past child care late attendance that has not been approved or denied
- Or, you can press Option “3” on the main menu
  - Automated phone line: “There is pending late attendance entered by your provider that requires your approval or denial...to approve or deny late attendance now, press ‘1.’ To go to the main menu, press ‘2.’”
  - Automated phone line: “Child number X has [attendance type] on [date] for [hours] and [minutes], press “1” to approve or “2” to deny
- You will be asked to confirm your approval or denial (press “1”) and will be asked to enter your PIN for additional case information.
Questions & Answers

Thank you for participating!