ELMS Tips – July 28, 2017

Early Childhood Education & Assistance Program

Washington State Department of Early Learning

> **For Assistance with ELMS, email elms@del.wa.gov.**
> - This is the only way to get in the queue for assistance.
> - Send a description of your problem, what screen it happened on, and the steps you took just before it happened.
> - In some cases, it may be helpful to send a screen shot.

Access to ELMS for Health Professionals
Some staff with Health Professional, Mental Health Professional or Dietitian roles in ELMS, who also have another ELMS role, are unable to access parts of ELMS that they need. To fix this, do these steps:
1. Remove their Health Professional, Mental Health Professional or Dietitian role.
2. Then remove their ELMS access for all remaining roles.
3. Next, re-add their ELMS access for all appropriate roles.
4. Then, add back their Health Professional, Mental Health Professional or Dietitian role (which never has ELMS access.)

Adult:Child Ratio and Assigning Teaching Staff
The adult to child ratio is now a minimum of 1:10 in ELMS. The adult-to-child ratio is determined by the teaching positions allocated to a class, rather than individual teachers. If teaching staff are in class simultaneously, they must have separate positions in ELMS. If multiple teachers "tag team" over the course of a day, they share a position in ELMS. The checkbox "Is Primary Lead Teacher" must be checked for one staff person in each class. Carefully read the instructions on the Class>Staff position in ELMS for details.

Application Errors
DEL ECEAP staff can correct errors in locked applications for enrolled children. Send requests to elms@del.wa.gov. You can change applications before they are locked. If an application is changed after the parent and staff signed it, it is very important to print the revised version for signatures. The signed application is your protection that you did everything possible to prove the child is legally eligible for ECEAP. This maintains a clear paper trail in case there is a fraud allegation.

Browser Choices
 For best results with ELMS, use the most recent versions of:
* Internet Explorer, with Windows 8.1 or higher
* Chrome
* Firefox
* Safari

If you use Windows 8.0 or older, we recommend using Firefox or Chrome as your browser.
The *Microsoft Edge browser is not fully compatible* with ELMS.
* For example, users may not be able to save family support or parent-teacher conference notes.
* If you are using the new Microsoft Edge browser, you have the option to revert to Internet Explorer 11 for specific sites. We recommend that you do this for ELMS.
    o Click the More Actions icon (the three dots on the right edge of the address line)
    o Select Open with Internet Explorer.

Bulk Enroll, Exit or Transfer
In Child Search, you may transfer, enroll, or exit a number of children at once using Batch Operations. To start a batch operation click the Batch Operations button on the child search page and then follow the on-screen instructions.

Bulk Updates
In the Bulk Updates section of the Child tab, you can:
- Change names of family support specialists.
- Enter children's actual first days of class. This triggers the 90 day countdown for screenings.
  - Format dates in Bulk Updates as MM/DD/YYYY. If there is an error in the date, you may lose your data when you click Save.
- Enter health screening information for a whole class at once. This includes vision screening and height/weight screening.
  - Bulk Updates will retain the last data entered, in italics just above the data entry fields, for your reference. This occurs if you entered the data through Child & Family Updates or through Bulk Updates.

Family Support staff who have no other role in ELMS do not have access to Bulk Updates. ELMS may show "No children found" when these staff attempt to access.

Child Name Correction
If there is a typo in ELMS or you learn their legal name, you can always correct a child's name in ELMS:
- For children who only have a prescreen, click Create Application and change the child's name there.
- For children with an application, but not yet enrolled, change the child's name on their application.
- For enrolled children, change it on the Household page of Child/Family Updates.

You sometimes have to Save then leave the page, then the name change will apply everywhere in the child's ELMS record.

Child Status Search
When you perform a child search using status, remember that the results will show children who have all of the selected statuses. You can search for children who are on a waiting list and either complete prescreen, incomplete application, or complete application. In all other cases only one status can be searched for at a time, otherwise the search will return no results.

Child at a Different Contractor
When a child transfers from your contractor to another contractor, you will continue to see that child in the ELMS child search with the status "Transferred to other contractor." Contact your ELMS administrator to Request Records Transfer if you'd like to waitlist or enroll the child again.

Changing Waiting List Preferences
If a child is on more than one waiting list, you can rank them first, second or third choice. You can later change the preferences in one of these locations:
- On the Child Search page, open the child's "On Waiting List" status and select new preferences.
- On the site Waiting List, click on the preference link.

Cloning application for siblings
You can clone parts of the child application for age-eligible siblings who are applying and will begin attending ECEAP during the same school year. While completing the first child's application, be sure to enter the sibling's name as part of the household in Step 3. Finish the first application, and click on the sibling's name on Step 8 of the application to start the second application.
You cannot clone between years; once a new school year opens in ELMS you cannot clone for a sibling that will start in the new year. You must start a new prescreen for the sibling.

Custom Priority Points
Your contractor may elect to use custom risk-factor based priority points. These are managed by your administrator and affect all children at the contractor. Custom points are locked each year on September 15th. Remember that the total risk factor points for a child are capped at 25 at the time their application is completed.

Child Data Extract
In the Admin Tab, the Child Data Extract allows ELMS Administrators to see many important details about children who enrolled in your program. See the Administrator's Manual for more information.

Duplicate Child Records
We are working to eliminate duplicate child records in ELMS. You receive an alert whenever you start a prescreen with a similar name and/or birthdate to a child already in ELMS. If ELMS asks you to check with your ELMS Administrator or elms@del.wa.gov, it is important to do this. We are working to reduce the number of false alarm duplicate warnings.

DEL ELMS support staff can delete a duplicate record for a child. Send the child ID for the record that should be deleted to elms@del.wa.gov.

ELMS Help/Definitions
Do you know that ELMS has definitions and instructions embedded throughout? Anywhere you see a dotted underline in ELMS, you can hover and click. Then you'll see a popup with more information. For example:
- On the first page of any child's Application in ELMS, you can see the definition of foster care, Family Assessment Response (FAR), or a child-only TANF cash grant.
- On the Health Info page of the Application, you can learn details about medical or dental homes, well-child (EPSDT exam), or the meanings of each immunization status.

Email Child Notes from ELMS
When entering critical Parent-Teacher conference, child development note, or family support contact in ELMS, you can check a box "Send teacher & family support staff an email that a critical/urgent note was entered." ELMS will send an email to the child's assigned teacher and family support staff alerting them to enter ELMS to read the note.

Enrolling children who are already in ELMS
When you start a prescreen for a child in ELMS, you may learn that the child is already in ELMS. Follow the guidance in the message on your screen when this happens. Take the time to request the older version and do not continue with a second prescreen for a child already in ELMS. DEL staff delete the latest duplicate record entered for a child and retain the older version.

We've been asked if you can just start a new child record when you are in a time crunch. Please do not do this. ELMS is built to have one prescreen and application per child, regardless of year or location. If your ELMS Administrator is not readily available to help, please email elms@del.wa.gov and we will help. Thanks for keeping ELMS accurate!

Enrollment – Class Full
If you attempt to enroll a child, and the class already has 20 children, you will see "Class Full." You must exit children from this class before you will be able to enroll more.

Enrollment - Out-of-Ratio
If you attempt to enroll a child, and there are not enough teaching staff to maintain a 1:10 adult-to-child ratio, you will see "Out of Ratio." Click on that link and follow directions to add staff or check "Position is filled" before enrolling the child (or ask your supervisor to do so).

Enrollment - Transferring Children Before Classes Begin
Only children enrolled in class with an <u>actual</u> start date can be <u>transferred</u>. If the child has not yet started class, use "Exit" instead of "Transfer." Exit the child as "never attended" then add them back to the waiting list. From the waiting list you can re-enroll them in the new class.

Exit a Child
You can exit a child who is enrolled in a class, whether or not the class has started or the child ever attended. Start the process from the Child Search page, the Monthly Report class page, or the Class>Class Roster page.
- Find the child in any of the locations mentioned above.
- Select Exit.
- Enter a reason, which can be "never attended."
  - If you select "never attended" and the child already had an actual start date then their actual start date is deleted. If the actual start date was during the previous month, email elms@del.wa.gov to request a correction to the monthly report.
- Select whether you want the child returned to a waiting list.
  - If you do not put them on a waiting list, the child will be listed in Child Search with a Completed Application status, as if they had never been enrolled in a class.
- If the child <u>never attended</u>, click "Exit Child" and you will be done.
- If the child attended, enter their first and last day attending class.
- If the child was in class for a period of 30 calendar days or more, you must review their Child and Family Updates before the exit is completed. Use the instructions on that page.

<u>End-of-year Child Exits</u> - As each of your classes end for the school year, exit each child from their class in ELMS. All classes must end and children must exit by June 30, though you can re-enroll continuing children immediately in the new year. Exiting all children is required before you can submit your monthly report for the final month of classes.
- You can complete bulk exits from the following locations:
  - Child Search – select the child names you want to exit, then click the "Exit" button at the top of the search results.
  - Exit Child link – on the child tab, select the Exit Child menu item. Select the child names you want to exit and click the "Select Checked Children" button.
  - Locations & Classes> Class>Class Roster page – Click the "Bulk Exit" button at the top of the class roster. This button will only be visible after classes end.
  - Monthly Report class pages – for the month when the class ended, click the "Bulk Exit" button on Step 2. This button will only be visible for the month classes end.

Exit Message – There are Unsaved Changes
While completing a child's exit, you may see a red message "Are you sure you want to leave this page? There are unsaved changes." Once you finish and click Exit Child, it will disappear.

Family Support Notes

Family support notes are entered in ELMS in the Child and Family Updates section. To get there:

1. Find the child, using the Child Search tab.
2. To the right of the child's name, select Child and Family Updates. Choose the Family tab.
3. Click the button "Add Family Support Notes."
4. If you are recording a formal family support visit of 30 or more minutes, check the box and complete the page. Formal visits are those that that meet the requirements of ECEAP Performance Standard F-1, whether or not they were scheduled in advance.
5. The total number of Family support visits will appear on the Monthly Reports, once children's classes begin.
6. Enter each family support contact separately. Please do not lump several dates together.
7. It is OK if you had visits before classes began; they will show in the accumulated count all year if they occurred July 1 or later.

After classes have started, you can also enter family support notes from the Monthly Report class page for the previous month. Click the blue number in the Family Support Visits column to begin.

Foster Care and Guardian Changes in the Child Application

If the child's foster or guardianship status changed between the time of the prescreen and the application, you can change the answers to foster care or "Is this child living with a guardian, who is not a parent or licensed foster parent, who receives a TANF grant on behalf of the child?" on Step 1 of the application. Then you must go to Step 3 and:

- Change Household Situation.
- Change Family Size.
- Change Work/Training.

Health Alerts

On the Child Search page, there is a red exclamation mark icon next to the names of some children. These children either need follow-up on a health issue or are approaching the date at which they will need follow-up.

- You can click on this icon and see the subject of the Health Alert.
- You can also see this information on the Child and Family Updates pages for Medical Status, Dental Status or Health Screening, if you click on **YES**, next to "Follow-Up?"

Health Screenings – entering multiple screenings

In each school year, ELMS allows you to enter a maximum of three well-child exams, three dental screenings, and three height/weight/BMI measurements for each child. If a child has more than three in a single school year, you should overwrite the most recent one in ELMS with information about the screening that just occurred.

Monthly Report – How to Use

ECEAP Contractors complete a Monthly Report within ELMS each month before they are paid. Depending on your role and employer, you may be required to complete a section of this. See this brief presentation for details.

Monthly Report - View Parent- Teacher Conference and Family Support Visit Minutes
The Class page of the Monthly Report shows the <u>cumulative</u> Parent-Teacher Conferences and Family Support visits minutes for each child from the beginning of the school year through the end of the report month. Minutes added for months after the report month will show up on later reports. For example, if you enter minutes for April and the monthly report is for March, those minutes won't show up until the April monthly report.

    To review total minutes per child for the year, go to the Reports tab. Select the report: Family Support and Parent-Teacher Conference Minutes.

Notes Sections of Child/Family Updates
Copying text from ChildPlus or other places, then pasting into the notes section of ELMS does not work. It imports HTML code and formatting information that can break that child's ELMS pages. Please type notes into ELMS instead.

Overlapping Enrollment Dates
A child cannot have overlapping enrollment of more than one class day in ELMS. If you enroll a child who is attending one class in the morning and starting their new class in the afternoon on the same day, ELMS will ask you to confirm this. Please be sure that the child was physically present in both classes on the same day.

Parent-Teacher Conferences
To enter Parent-Teacher conference time:
1. Find the child, using the Child Search tab.
2. To the right of the child's name, select Child and Family Updates.
3. Choose the Child Development tab.
4. Click the button "Add Parent/Teacher Conference."
5. If you are recording a formal parent teacher conference check the box and three more required fields will appear. Formal conferences are those that that meet the requirements of ECEAP Performance Standard E-12
6. Parent-teacher conference minutes will automatically appear on the monthly reports, once children's classes begin, and they will accumulate each month. It is OK if you had conferences before classes began; they will show in the accumulated count all year.
7. Record any notes and follow-up notes and save.

After classes have started, you can also enter parent-teacher conferences from the Monthly Report class page for the previous month. Click the blue number in the Parent-Teacher Conference Minutes column to begin.

Priority Points – Prescreen
The priority points generated by a child prescreen do not count an IEP. For the 2, 3, or 4 points for an IEP, and for points for other risk factors, please complete the application.

Priority Points – Returning Child
For children who were enrolled in 2015-16 and re-enrolling in 2016-17, you may see their 2015-16 application has a different number of priority points than is on their 2016-17 waiting lists. In 2016-17, they receive either:
*   100 points if they were enrolled on April 1, 2016,
*   Or, if they were not enrolled on April 1, 35 additional points for being 4-years old this year.
For children with incomplete applications, their points may change when their applications are completed.

Reports That Only Display Currently Enrolled Children
If you'd like to view Class Roster, Enrollment by Child, Health Status by Child, or Health Monitoring reports between April 1 and June 30 – make sure ELMS is in the school year desired before you go to the Reports tab.

Roles without ELMS access
You can enter names of staff with the following roles in ELMS, but they will not have access to ELMS:
- Dietitian
- ECEAP Staff – Other   - This role cannot be combined with any other ELMS role.
- Health Professional
- Mental Health Professional
- Other Classroom Staff

If a person in in one of these roles needs access to ELMS, please assign them an ELMS role with the needed access. For example, a Health Professional may need the ELMS role of Health Direct Service Staff, if they need to view or enter health data for children or view health reports.

Site Address Changes
The site address is locked in ELMS. If the children and teachers and supplies move to a new address, you will create a new site in ELMS. To start a new ECEAP site, see **Adding a Site** on page 26 of this document. If a site address was entered incorrectly into ELMS, and has not moved, email elms@del.wa.gov to request the correction.

Site Contact Person – How to change in ELMS
It is important to have the correct on-site contact person listed in ELMS. This should be a person who works at the site daily, since DEL shares this info with state Emergency Management to use in case of emergency. To set the contact person, go to Locations & Classes > Sites > Staff and check the box by their name.

STARS ID Numbers
Staff with an ELMS role of Lead Teacher, Assistant Teacher, or Family Support Staff should have a STARS ID displayed on their ELMS Edit Staff page. This allows ELMS to retrieve staff qualification and background check information from MERIT. If the STARS ID is not displayed in ELMS, try these options:
- If they do not yet have a STARS ID, apply for one in MERIT.
- If they have ELMS access and they have a STARS ID: Contact elms@del.wa.gov. The problem may be that the person has multiple MERIT accounts that need to be merged.
- If they do not have ELMS access but they have a STARS ID: Search for them on the ELMS Staff page, click Edit, then click the "Associate MERIT STARS ID" button.

Starting the New Year in ELMS
The next school year becomes available in ELMS on April 1. Between April 1 and July 10 it is possible to work on both the current year and the next year in ELMS. For more information see Starting the New Year in ELMS.

Subcontractor Funds Per Slot
On the Subcontractor Funding and Slots page of ELMS, the Contractor enters the Funds Per Slot. This must match the amount per slot in the actual subcontract. The Over-income Limits section of this page is optional.

Subcontractor Over-Income Limit
If you are an ECEAP contractor with subcontractors, you can now set an over-income limit for each subcontractor in ELMS on the subcontractor funding and slots page. ELMS will limit the number of over-income children the subcontractor can enroll to the amount entered in the limit. This is optional.

Swapping Teacher Roles
You can swap a pair of teachers who are in the same class so that the person who was entered as the Lead Teacher becomes the Assistant Teacher and vice-versa.
1. Open the class Staff, Slots and Ratio page.
2. Click the "Swap Staff" link next to one of the people that you would like to swap.
3. Then check the name of the person that you would like to swap them with in the pop-up.Save

Teachers – Adding Teaching Staff to Classes
Carefully read the instructions on the ELMS Class>Staff, Slots and Ratio page about how to add teachers. It is critical to set up the "positions" correctly. If you have problems, please contact elms@del.wa.gov.
- Each staff person who is present for all class hours must have their own "position." Two teachers can be in one position if they tag-team; for example, one is there in the morning and one in the afternoon.
- First add all the positions you need, then add the teacher names.
- Make sure each "position" has a check mark for "filled for all ECEAP hours" if true. This is necessary to correctly count the adult:child ratio.
- Make sure you've checked "Is primary lead teacher?" for one lead teacher per class. This teacher is automatically loaded into GOLD.
- If a teacher leaves a class that has started, you must add the new teacher before removing the teacher who left. This is because ELMS needs to maintain the adult:child ratio.
- Each staff person can only have one role in a class. They can't be a lead teacher and assistant teacher at the same time.

Transfer Between Contractors
To request a transfer of a child's ELMS record to you from another ECEAP contractor:
- Have the parent or guardian sign the parent consent form granting permission to move the child's ELMS records from their prior ECEAP contractor to you.
  - Keep this form with your records. Do not send it to DEL.
  - In the rare case when the parent does not want all of the record transferred, and they want to keep some of their notes you made in Child/Family Updates private, email elms@del.wa.gov with the details.
- Ask your ELMS Administrator to "Request Records Transfer" from the ELMS Child tab.
  - Complete the popup form with the child's legal name, nickname if any, parent name who signed consent, staff name who obtained signature, date of signature, and the site waiting list you want the child to be on.
- DEL staff may contact the child's former location before the transfer of records.
- Once we have received exit information from the previous contractor, we will notify you within 24 hours that the child record is ready for you.

View Your ELMS Roles
To quickly see the user roles and locations you have access to in ELMS, click on your email address in the upper right corner of the screen.

Waiting Lists
DEL collects waiting list statistics through ELMS and reports these to researchers, legislators and other policy makers. These statistics count all children who have been placed on the Waiting List within ELMS and measures ECEAP waiting lists in a consistent manner statewide. Please take the time to assign children with a completed prescreen to a site Waiting List in ELMS.

Work/Training Hours Updates for Extended Day Each Year
The work and training information necessary to quality a child for Extended Day services must be updated between school years. On the waiting list, returning ECEAP children will start the year with an additional button called "Update Work/Training". This must be reviewed before any returning child may enroll into Extended Day ECEAP.