



# Early Learning Coalition OF PINELLAS COUNTY

DEPARTMENT: <b>Eligibility</b>	SUBJECT: MOD Procedures for “ <b>Placements</b> ”
REVISED: 10-21	AUTHORIZATION APPROVAL: Manager, Family Services

1. Search for the client and child under WL, VPK, and EV to ensure no duplicate records. If no duplicate files are found, pull the client by the existing EV#.
2. Click on the EV# to the left to open file.

Eligibility Verification Number	Child Name	Assigned Counselor	Date of Birth	Age	Parent Name	SR Process
Filter	Filter	Filter	Filter	Filter	Filter	Filter
EV 000076551	ELYSIA SOUSA	<a href="#">Assign Counselor</a>	09/10/2020	0	NANCY SOUSA FLELEY	Eligibility Verification

Eligibility Verification Submitted - Eligibility Verification EV\_000076551

[Assign Counselor](#) [Change Household Status](#) [Case Notes](#) [Add Note](#)

Household at a Glance

Children Needing Care: ELYSIA SOUSA (child, female, age 0)

Parents: NANCY SOUSA-FLELEY (adult, female)

Other Household Members

Total Household Income Calculations:

- Employment income: \$0.00
- Alimony and child support income: \$0.00
- Other income: \$6,000.00
- Alimony and child support deductions: \$0.00
- Total annual gross income: \$6,000.00

3. Check ALL ID document sections (**Contact Information, Children Needing Care, Parents, and Other Household Members**) and make any necessary adjustments.
  - a. Press Edit on the right side of each section.

Contact Information

**Primary Address**  
2506 COUNTRYSIDE BLVD  
S1L 300  
CLEARWATER, Florida 33763  
Pinellas County  
RCMA Family: No

**Primary Parent**  
Email: nleley@gmail.com  
Primary phone: (727) 400-4429

**Family Portal Account**  
nleley@gmail.com

History [Edit](#)

- b. Ensure that spellings of names and dates (Ex. date of birth) match documents provided.

c. Verify ALL documents.

The screenshot shows two document verification panels. The top panel is titled 'Proof of Age' and contains a document named 'MK birth certificate.jpeg' with buttons for 'View', 'Verify', and 'Delete', and an 'Upload Document...' button. The bottom panel is titled 'Proof of U.S. Citizenship Or Qualified Alien' and contains the same document name and buttons.

- ✓ View-Open each document to ensure that it's accurate, legible, and **unexpired**.
- ✓ Verify-Select for all documents that need to stay in the record to support transaction.
- ✓ Delete-ONLY use to remove any documents that need to be deleted PERMANENTLY.
- ✓ Archive-If additional slots are needed, use to send older documents to "Household Documents" library if needed for monitoring purposes. (NOTE: Archive button only appears after a document is "Verified".)

d. For **Children Needing Care** Screens:

- ✓ Answer additional Citizenship and Age Verification questions.

The screenshot shows two required fields. The first is 'Citizenship' with the question 'Is the child a U.S. Citizen or Qualified Alien?' and radio buttons for 'Yes' and 'No'. Below it is a red error message: 'The U.S. Citizen or Qualified Alien field is required.' The second is 'Age Verification' with the question 'Has the child's age been verified?' and radio buttons for 'Yes' and 'No'. Below it is a red error message: 'The Verification of Age field is required.'

- ✓ If any child's status is Terminated, add the child's supporting ID documentation under **Additional Documents**.

e. Press Save.

f. Repeat steps a-e for each applicable section that contains ID documentation.

4. Review ALL income sections (**Employment, Alimony and Child Support Income, Other Income, and Deductions**):

- a. Update all applicable screens to match income calculator and supporting documentation.
- b. Upload income calculator in employment screen.
  - NOTE: If the client is not employed, add calculator to the appropriate **Other Income** screen.
- c. Press Verify to save calculator and all supporting documentation.
- d. Reference "How to Verify Calculations" Guidance.

5. Change Household Status:

a. On the top left of screen, click on Change Household Status.

The screenshot shows the 'Change Household Status' screen. At the top, there's a navigation bar with 'Eligibility Verification' and 'Submitted - Eligibility Verification'. Below that, there's a 'Counselor' field with a 'Change Household Status' button. The main content area is titled 'Change Household Eligibility Status' and contains two dropdown menus: 'Current Status' (set to 'Submitted') and 'New Status' (set to 'Active'). At the bottom right, there are 'Save' and 'Cancel' buttons.

b. **New Status:** Active

c. Save.

6. TIP: Locate the youngest eligible child in the record to process first.
7. The child's **Eligibility Status** should reflect Pending Eligibility. Click on the Eligibility button.

Children Needing Care

<p>ELYSIA SOUSA (child, female, age 0)  <b>Eligibility status:</b> Pending Eligibility  <b>Enrollment status:</b> Not Limited  <b>Date of birth:</b> 06/10/2020  <b>Ethnicity:</b> Prefer not to answer  <b>Races:</b> Prefer not to answer  <b>Case Status:</b> Member List...</p>	<p>History  Clearpage &gt; Details  <b>Eligibility</b>  1 of 1</p>
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8. Click Add Eligibility Assignment...

**Eligibility**

Eligibility Assignments for ELYSIA SOUSA

Eligibility Code	Billing Group	Begin Date	End Date	Funding Agency ID (code, type, name)
There are no eligibility assignments for this child.				
<a href="#">Add Eligibility Assignment</a>				

9. Complete the eligibility information as follows, review for accuracy, and click OK.

**Edit Eligibility Assignment**

Funding Details

**Funder Type**  
 SR    Local    E-TAPP    P-TAPP

**Billing Group**: BG8   **Eligibility Code**: ECON   **Match Funder**: BG8 0% Match

**Eligibility Begin Date**: 06/30/2021   **Eligibility End Date**: 06/29/2022   **Purpose-for-Care Review Date**

Care Information

**Priority**: 04   **Level of Care**: < 12 Months   **Purpose for Care**: EMPLOYED

Rilya Wilson Reporting Requirements   **Copay in Effect**: FULL TIME DAILY RATE

Co-Payment

**Total Household Members**: 2   **Full time Co-payment Amount**: \$ 1.20   **Part time Co-payment Amount**: \$ 0.60

 

- a. **Billing Group/Eligibility Code**: See Funding Chart
- b. **Match Funder**:
  - ✓ BG8-ECON-BG8 0% Match
  - ✓ BG8-SRMT-JWB SRMT Match
- c. **Eligibility Begin Date**: Date of processing  
**Eligibility End Date**: One year later minus a day
  - ✓ Reminder: BG3 referrals from CSP follow the referral dates.
  - ✓ Reference "Processing BG1 Referrals" for BG1 date clarification.

- d. **Purpose-for-Care Review Date:** ONLY used if the client has a review date, typically associated with an agency referral
- e. **Priority:** See Funding Chart
- f. **Level of Care:** See Level of Care Chart
- g. **Purpose for Care:** Select applicable option from drop down menu
- h. **Copay in Effect:**
  - ✓ Full Time Daily Rate-Preschool children (0-Pre-Kindergarten)
    - NOTE: Any school age child using FT evening care will need FT Copay (Reference “Process for Special Enrollments Schedule” for more information.)
  - ✓ Part Time Daily Rate-School Age children (K-8<sup>th</sup> grade) or if client is deemed eligible for PT care ONLY
- i. **Rilya Wilson Reporting Requirements:** Select if the box is marked on a PS referral for children 0-5 years old
- j. **Copayment Waiver or Reduction:** Reference “Sibling Discounts and Copayment Waivers” and “How to Correct Fees” Guidance

10. Review all levels of the **Eligibility** Screen for accuracy. Click **SAVE**.

11. Click **Enroll** button.

12. Click on **Add Enrollment...**

13. If the client has not selected a provider, contact client to determine selected provider and start date. Then, verify enrollment with selected provider.

The screenshot shows the 'Add Enrollment' header in blue. Below it, the text 'Select a Provider for ELYSIA SOUSA' is followed by a red error message: 'There are no provider selections for this child.' Below the message is a search bar with a 'Browse...' button on the right. A 'Details of Selected Provider' section is visible at the bottom.

14. If the client has selected a provider, contact the provider to confirm enrollment and start date.

The screenshot shows the 'Add Enrollment' header. Below it, the text 'Select a Provider for ELYSIA SOUSA' is followed by a dropdown menu with 'MAIN STREET EARLY LEARNING CENTER' selected. A 'Browse...' button to the right of the dropdown is circled in red.

- ✓ TIP: Click Browse on the right and select the appropriate provider from the menu to ensure accuracy.
- ✓ Reference “Enrollment Schedules” and “Process for Special Enrollment Schedules”.

15. Repeat Steps 7-13 for the placement of any additional children.

16. At the top of the Parent Screen, click on **Add Note** to enter full details regarding this placement.

The screenshot shows the 'Eligibility Verification' parent screen. The 'Add Note' button at the top right is circled in red. The main content area displays 'Household at a Glance...' with details for children (Jane Doe II, Jane Doe, Jill Doe), parents (Nancy Thelma TEST), and household income information.

17. Enter Case Note:
- a. **Description:** Miscellaneous
  - b. **Custom Code Type:** Parent
  - c. **Custom Code:** PLACEMENT
  - d. **Note:** Indicate funding, name of the child(ren), what provider child(ren) are enrolling in, effective date, person at site who verified the enrollment, FT/PT highest daily fees for the youngest child in the family, fee effective date, eligibility dates, referring agency’s worker name and phone# (for all referral programs), include any client contact, client will sign payment cert for client and provider records.
  - e. **Save.**

The screenshot shows the 'Add Case Note' form. It has a blue header. Below it are three dropdown menus: 'Description' (set to 'Miscellaneous'), 'Custom Code Type' (set to 'Parent'), and 'Custom Code' (set to 'PLACEMENT'). Below these is a text area for the 'Note' containing the text: 'BG8-ECON, Enrolled Elysia at Main Street Early Learning Center eff 6/30/21, confirmed enrollment with Debbie at Main Street Early Learning Center, FT 1.20 PT .60, elijg 6/30/21-6/29/22, client will sign payment cert for client and provider records.' At the bottom right are 'Save' and 'Cancel' buttons.

18. Assign Counselor per caseload distribution.

The screenshot shows a web interface for 'Eligibility Verification' with an 'Active' status. At the top, there are two buttons: 'Assign Counselor' and 'Change Household Status'. Below this is a modal window titled 'Assign Eligibility Counselor'. Inside the modal, there is a light blue box that says 'Assign Counselor to: ELYSIA SOUSA DOB: 08/18/2020'. Below this is a dropdown menu labeled 'Counselor' with a red asterisk, currently showing '-- Select Counselor --'. Underneath is a text area labeled 'Note' with a character count at the bottom: 'You have 500 characters remaining.' At the bottom of the modal are two buttons: 'Assign' and 'Cancel'.

**Note:** The information listed in these guidelines are not all inclusive and staff are responsible for ensuring that all applicable rules, policies and procedures are adhered to in the execution of their duties and responsibilities as it relates to their position. These guidelines can be modified and exceptions may be made upon justification within program policy and with management approval. This procedure will be reviewed periodically or as needed for updates or revisions as approved by management.