Indiana Provider Web (IPW) Training Guide

INDIANA E-CHILD CARE

Agenda

- Indiana Provider Web (IPW) User Set-up
  - IPW User Login, Profile Setup, Passwords
  - After Login: Select Provider Profile & Broadcast Messages
- IPW Provider Home & Detailed Information
- Create & Manage Staff Users
  - Search, Create, Update Staff Users
  - Staff Roles and Setup

Indiana Provider Web User Set-up

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IPW User Login

▶ Login with User Name and Password

▶ Home Page includes Program Materials and Helpful Links, including:

  ▶ Provider Operations Manual (English/Spanish)

  ▶ Frequently Asked Questions

  ▶ Payment Schedule

▶ Provider Help Desk toll-free number at bottom of each screen

User Profile Set-up

- Screen displays when:
  - New user logins for the first time
  - New user enters initial login ID and password that are the same (e.g., u12345/u12345)
- Provider must provide facility zip code AND Employer ID Number (EIN) to access the Provider Web Portal

- A provider must also change their Provider Web Portal password on this screen, by entering and confirming the new password.

Profile Set-up

- Screen displayed when:
  - Existing users login for first time after go-live
  - After new user logins for first time
  - Existing user selects change security question in User Profile
- Choose and answer **3 of 5** available security questions in the drop-down menu
- Security questions are used to recover your password if you forget it

EPPIC™

- *User Profile*

Setup your forgotten password responses. These secret questions will allow you to recover your password if you forget it.

Security Question: In what city were you born? ⌄

Security Answer:

Confirm Security Answer:

Security Question: What is your mother's maiden name? ⌄

Security Answer:

Confirm Security Answer:

Security Question: What high school did you attend? ⌄
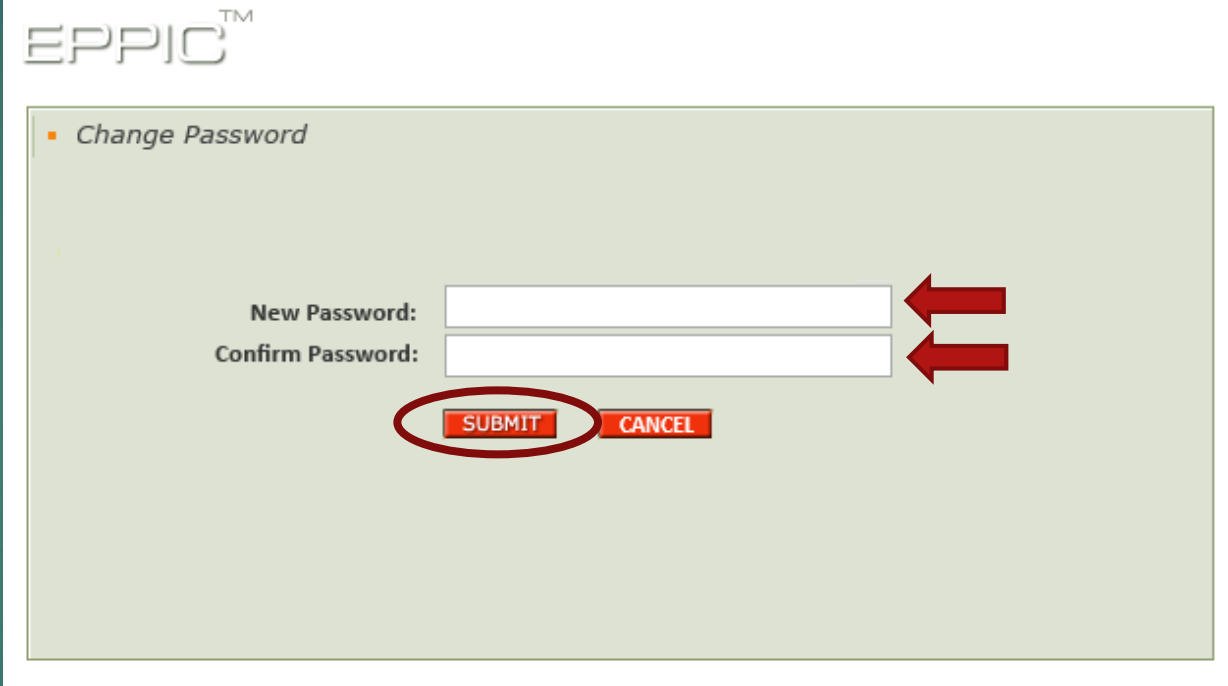
Security Answer:

Confirm Security Answer:

SUBMIT

Change Password

- Password requirements:
  - 8 – 10 characters
  - Minimum 1 lower case alpha & 1 upper case alpha & 1 number
  - Minimum 1 special character, which MUST be: _ or # or $
  - Must not contain Login ID
- A new password cannot repeat user's 24 previous passwords

Forgot Password

Expiring or Expired Password

- Expiring Password message displayed when password will expire within 10 days
- Expired Password message displays if/when:
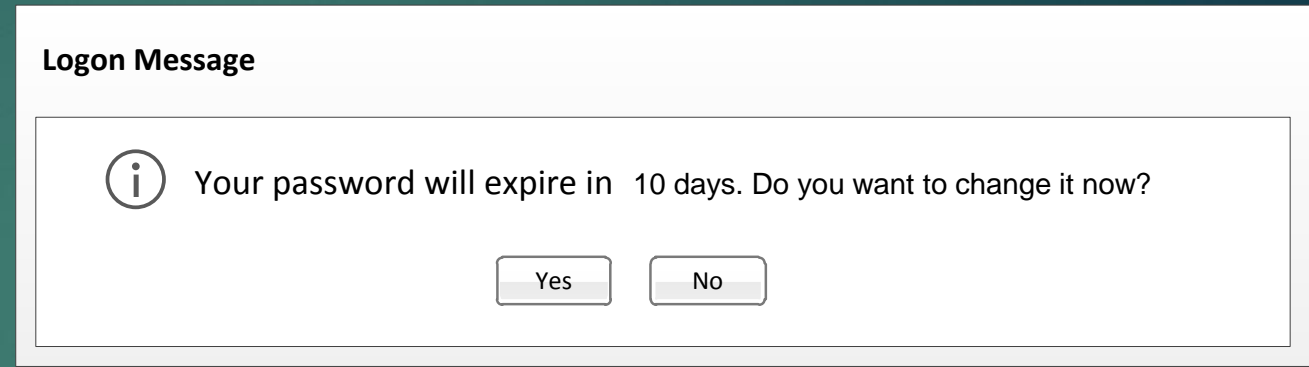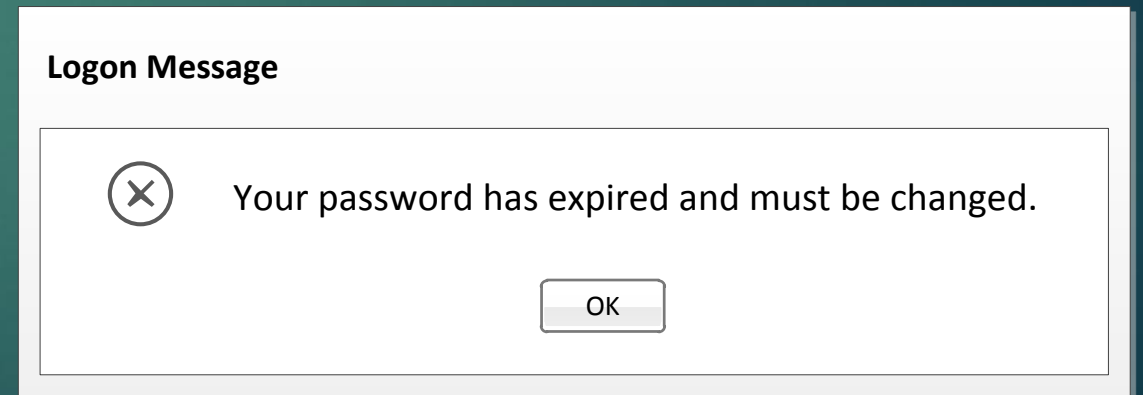 - New user logins for first time
  - First login following administrative password change
  - First login after 90 days without password change
  - Existing user's password does not meet new password requirements
- Existing Users with a password that meets new requirements can log in with existing password, but will need to change in 90 days

Expiring Password

Logon Message

ⓘ Your password will expire in 10 days. Do you want to change it now?

Yes   No

Expired Password

Logon Message

✕ Your password has expired and must be changed.

OK

Broadcast Messages

- After login, if a broadcast message(s) exists for a provider, the list of broadcast messages is displayed

- Click Home to view the Provider Profile screen

IPW Provider Home & Detailed Information

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Provider Home

- Displays basic provider and recent payment information

- Starting page to access additional information, including:

  - Provider profile information

  - My Payments

  - My Vouchers

  - My Attendance/Late Attendance Entry
    (formerly known as Discrepancies)

  - My Holidays

  - My Inclement Weather Closure Days

  - My 1099 Form

  - My POS Device Service Request Status

  - My Late Attendance Summary

Provider Profile Info

My Payments:
Provider Payment History

- Select payment date *OR* payment period from drop-down menus

- Displays provider payment history for selected payment day or payment period

  - **Includes late attendance payments** and **provider adjustment payments** made to provider for dates selected

My Payments:
Voucher Payment Attendance

▶ Select payment date OR payment period from drop-down menus

▶ Displays settled attendance for selected child

  ▶ Includes breakdown of Total Payable Hours by Attendance, Personal Day, Holiday, and Inclement Weather Closure Day hours.

My Payments:
Voucher Payment Attendance

► **WITH LATE ATTENDANCE PAID FOR THE WEEK**

► Displays **Late Attendance payment** for selected child

My Vouchers:
Active Voucher Report

- List of all Active Vouchers (up to 20 vouchers per page), *or* Other Vouchers

- Includes personal days balance and effective/end dates
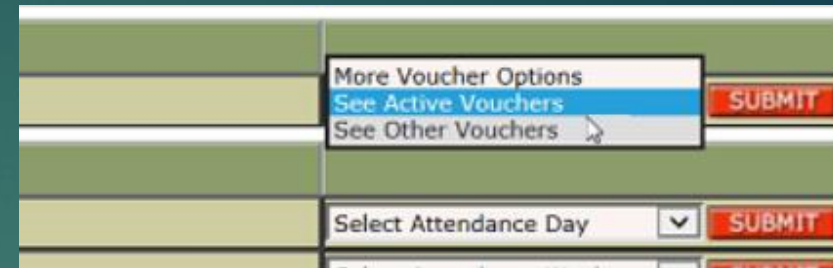
- Click the blue (hyperlink) Child Name to view Child Voucher Details screen

My Vouchers:
Other Voucher Report

- List of all inactive or expired vouchers

- Includes personal days balance and effective/end dates

| Contract End | 06/30/2014 |
| PROV AGMT Received Date | 01/30/2006 |

MY VOUCHERS

Other Voucher Report   6 Total Vouchers   More Voucher Options ▾ SUBMIT

	▲ Parent	Child Name	Child #	Voucher #	Personal Days Balance*	Effective Date	End Date
1	TESTHFs, KINDRA A	TESTFE, DEANDRE	001	2597052	10	09/01/2013	12/21/2013
2	TESTnzd, TEHELIA N	TESTnzd, AKEILAH	002	2060314	20	08/18/2013	10/12/2013
3	TESTdepMO, RACHEL A	TESTBu, DESIRAE	002	2604780	20	09/08/2013	03/01/2014
4	TESTmkU, JOYCE D	TESTJWy, BRAELYN	001	2579738	20	08/11/2013	12/21/2013
5	TESTri, ADRIANNA	TESTIpL, MYLAH	002	2484762	17	05/05/2013	11/02/2013
6	TESTri, ADRIANNA	TESTwHetD, TILFORD	001	2574881	17	08/11/2013	11/02/2013

Voucher information is subject to change in the event a parent chooses to make changes according to CCDF policies and procedures.
*Parents may not record personal days for children with hourly or daily vouchers.

MY PAYMENTS

My Vouchers:
Child Voucher Details

▶ Displays detailed voucher information for selected child, including:

  ▶ Voucher information (case number, DOB, personal days balance)

  ▶ Benefit information (status, effective dates, service need)

  ▶ Rate information (provider rate, market rate, co-pay)

My Attendance:
Attendance Summary

► Displays approved attendance transactions for each child in a selected date range

► The dates can be selected or date range entered to view active vouchers in the past 365 days

► Provider can void transactions in current backswipe period on this screen

My Attendance:
Weekly Attendance Summary

Displays weekly attendance transaction totals for each voucher for selected week

MY ATTENDANCE / LATE ATTENDANCE ENTRY

Weekly Summary Attendance for Week Ending 10/18/2014 (6 Total Vouchers)

Select Date ▦ - Select Date ▦ **SUBMIT**
2014 ▼ 10/12/14 ~ 10/18/14 ▼ **SUBMIT**

	Parent	Child Name	Child #	Voucher #	Personal Days Balance *	Effective Date	End Date	Total Hours
1	DOE, JOHN	DOE, STEVEN	002	2961975	15	09/28/2014	03/28/2015	41:27
2	DOE, JOHN	DOE, BRYAN	001	2961984	15	09/28/2014	03/28/2015	41:27
3	SMITH, WILL	SMITH, MARK	002	2963878	15	09/07/2014	10/25/2014	24:00
4	SMITH, WILL	SMITH, LARRY	001	2963879	15	09/07/2014	10/25/2014	24:00
5	JONES, DAVID	JONES, FRANK	001	2984773	20	10/05/2014	11/15/2014	36:52
6	MILLER, RICHARD	MILLER, SCOTT	003	2979581	20	10/12/2014	04/11/2015	41:52

Click on total hours to view attendance details and add late attendance.

Information presented here is subject to change.
Any attendance recorded in your POS machine following this web session will alter the report you are currently viewing.
*Parents may not record personal days for children with hourly or daily vouchers.

Click the blue Child Name to link to Child Voucher Details screen

Click the blue Total Hours to view attendance details and add late attendance

My Attendance:
Voucher Weekly Attendance Detail

▶ Displays attendance transaction totals for each child/voucher for selected week

▶ Click 'Add Late Attendance' Button to create late attendance

Real-Time Transaction Matching

▶ Each Check-In or Check-out is "matched" real-time to the related Check-in or Check-Out

Check-In Mon., 8am	→ Check-Out Mon., 5pm	→ Match
Check-In Mon., 8am	→ Check-In Mon., 2pm	→ "Check Out Missing" error
No Check-In	→ Check-Out Tues., 5pm	→ "Check In Not Found" error
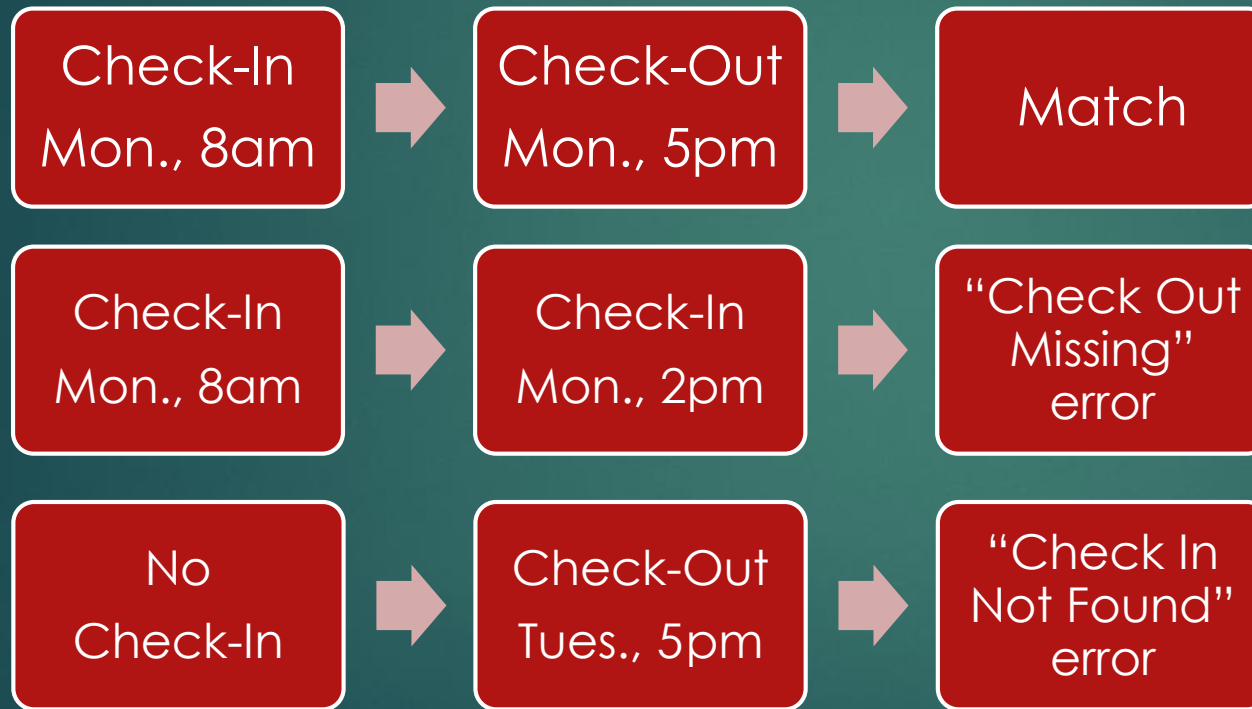
▶ Check-Out must be within 48 hours of Check-in *NEW!*

▶ Must Check-Out first

▶ Must Check-In first

Real-Time Transaction Matching (cont.)

▶ Each Check-In or Check-out is "matched" real-time to the related Check-in or Check-Out

| Check-In 5/1, 8am | → | Check-Out 5/1, 5pm | → | Prev. Check-In 5/1, 2pm | → | "Overlapping Care" error |

NEW!
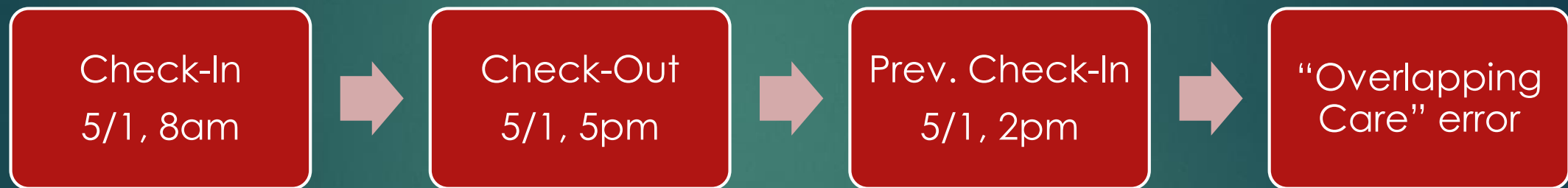
▶ If a Prev. Check-In is attempted in the middle of an approved ("matched") Check-In/Out pair, transaction is rejected with "Overlapping Care" error message

Real-Time Transaction Matching (cont.)

- Additional Check-In/Check-Out Procedures
  - Check-In with "Pending" status means it is approved but <u>unmatched</u> 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

My Attendance:
Create Late Attendance *(formerly known as Discrepancies)*

1. Click arrow for drop-down menu to choose a reason for late entry:
   - POS Device not installed/or not working
   - Card Not Working
   - Payment/Additional Payment
   - Approved Appeal
   - Parent No Longer Attends
   - Other

2. Click arrow for drop-down menu to choose the cardholder

3. Type short Description of why attendance was reported late

Continue to next slide

My Attendance:
Late Attendance (cont.)

4. Enter or select date from calendar for attendance entry

5. Check "Personal Day" box if you are reporting an absence for a child

6. Enter time of Check In and Check Out (HH:MM or 8:00) (**NOTE:** No times needed for Personal Day)

7. Click **"Submit"** when done

ADD LATE ATTENDANCE

Reason: POS Device not installed/or not working   Description: POS Device wasn't accepting swipes

Cardholder: FIRST LAST   Enter By: u3931

Is child still attending the facility?   yes

Date when the child last attended the facility:

	Date	Personal Day	Check In	Check Out
Date 1	07-03-2015	☐	08:00	18:00
Date 2	09-07-2015	☐	09:00	18:00
Date 3	11-26-2015	✓		
Date 4		☐		
Date 5		☐		
Date 6		☐		
		☐		

SUBMIT   CANCEL

My Attendance:
Late Attendance (cont.)

▶ OECOSL will no longer accept paper discrepancies as of March 6, 2016.

▶ Your POS machine has been provided to you by the state to capture accurate time and attendance for payment.

My Holidays:
Modify Provider Holidays

- Displays holidays observed by selected provider for selected year
- Provider can update (add, edit, remove) holidays for future dates
- Maximum of 6 holidays can be added per calendar year

My Inclement Weather Closure Days:

Modify Provider Inclement Weather Closure Days

- ▶ Select Year from drop-down menu
- ▶ Update closure days
  - ▶ Enter date to add a new closure day
  - ▶ Enter date, AND check Remove box, to delete a day
- ▶ Click "Update"

NOTE: Only dates within the current backswipe period can be added or removed; closure days within settled payment period cannot be removed

My POS Device Service Requests

- ▶ Displays list of all service requests in the order of date opened

My Late Attendance Summary

▶ Displays late attendance transactions that are not settled (paid) with child voucher number and service week

Click "Details" to view voucher's late attendance details

Click the blue Child Name to link to Child Voucher Details screen

MY LATE ATTENDANCE SUMMARY

Late Attendance Summary

Voucher #	Child Name	Parent Name	Period Start	Period End	
169220	Doe, John	Doe, Bob	02/09/2014	02/15/2014	DETAILS
3662824	Williams, Robert	Williams, Charlie	03/16/2014	03/22/2014	DETAILS
62364372	Miller, Craig	Miller, David	05/11/2014	05/17/2014	DETAILS
255272	Smith, Jim	Smith, Frank	01/12/2014	01/18/2014	DETAILS

Late Attendance Details

- Displays settled (paid) as well as unsettled (unpaid) late attendance transactions for selected service week

- Approved late attendance includes name of parent/guardian approver and method (Parent Web or IVR)

LATE ATTENDANCE DETAILS (02/09/2014 – 02/15/2014)

Date	Time	Attendance Type	Duration	Transaction Date/Time	Status	Action Taken By	Action Taken On
02/09/2014	15:00 23:00	IN (299744890011) OUT (299744908011)	8:00	02/09/2014 15:00	SETTLED SETTLED		
		Total Hours for 02/09/2014: 8:00					
02/10/2014	12:00 20:00	L/IN (298677348027) L/OUT (298790858021)	8:00	05/01/2014 09:00	PENDING		
		Total Hours for 02/10/2014: 8:00					
02/11/2014		No Attendance			-		
02/12/2014		L/PERSONAL DAY (298791722624)	5:00	05/01/2014 09:02	APPROVED	JSmith	Parent Web
		Total Hours for 02/12/2014: 5:00					
02/13/2014		No Attendance			-		
02/14/2014		No Attendance			-		
02/15/2014		PERSONAL DAY (217737428237)	5:00		SETTLED		
		Total Hours for 02/15/2014: 5:00					

Attendance Payment

Payment Date	Attendance Hours	Personal Day Hours	Holiday Hours	Inclement Weather Closure Day Hours	Rate Applied	Payment Amount
03/12/2014	8:00	5:00	-	-	1/2 Weekly Subsidy	$150.00

Late Attendance Payments

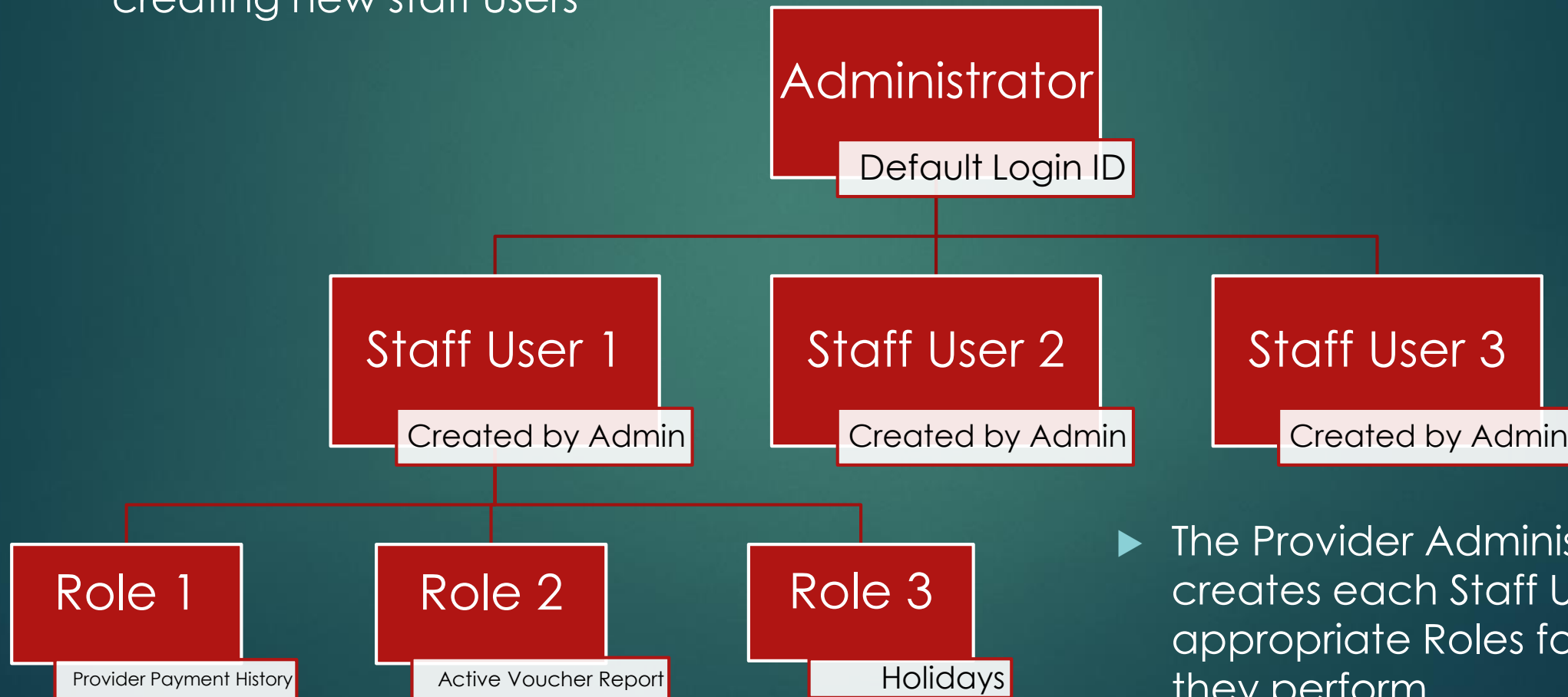| Payment Date	Attendance Hours	Personal Day Hours	Rate Applied	Payment Amount
05/07/2014	8:00	5:00	1/2 Weekly Subsidy	$150.00

Create & Manage Staff Users

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Provider Administrator

▶ Each Provider is assigned a default Login ID that is an "Administrator" who can perform all functions on the Provider Web Portal, including creating new staff users

Administrator

Default Login ID

Staff User 1

Created by Admin

Staff User 2

Created by Admin

Staff User 3

Created by Admin

Role 1

Provider Payment History

Role 2

Active Voucher Report

Role 3

Holidays

▶ The Provider Administrator creates each Staff User with appropriate Roles for tasks they perform

Manage Staff Users: Search

1. Displays when provider selects "Manage Staff Users" from More Profile

2. Search for Staff Users by Login ID or Name

3. Click "Submit" button to search for staff

4. If there are no Staff Users for the entered Provider, an error message will display. The User can reset the search and try again, or click "New" to create a New Staff user

Create New Staff User

► Displays when Provider selects '**New**' from Staff User Search screen or Staff User Search Results screen to create a new user

► Enter the staff user information and select all **Role Names** that you would like to assign to the user

NOTE: Staff users cannot access this screen

► Hold the 'CTRL' keyboard button and click on multiple roles to assign more than one role to a person

Manage Staff Users: Search Results

- Results displayed from Staff User Search screen
- Sort order can be changed by clicking on any field header
- Click "details" button for more information

Update Staff User Login

- Displays when Provider clicks on user details on the Staff User Search Results screen

REMEMBER: When staff leave the Provider, disable the user account by clicking on the 'disable' circle

NOTE: Staff users cannot access this screen

Staff User Roles

- Staff Roles include the following:
  - Provider Payment History (and Details, etc.)
  - Active Voucher Report
  - Child Voucher Details Report
  - Other Voucher Report
  - Attendance Summary
  - Weekly Attendance Summary (and Voucher Weekly Attendance Details, etc.)
  - Inclement Weather Closure Days
  - Holidays
  - Late Attendance (Summary & Details)

- All Staff Users will have access to:
  - Broadcast Messages
  - User Profile/Security Questions
  - Change Password
  - Home

- The Provider Administrator has all of these Role permissions, **plus** Create/Update Staff User

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IPW User Logout

► User session will time out after 15 minutes of inactivity

Select Login Profile

- With State Approval a provider can be associated with more than one site

  - If a provider is associated with more than one site, user must select desired Provider Login Profile

Questions & Answers

Thank you
for participating!