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This presentation was offered to Osceola County Providers on July 12, 2018 and though the statewide data system (EFS Modernization) is the same, the helpdesk and other information may not be representative of training and assistance offered by other Coalitions. To find information about other Coalitions, [click here](#).

Open this presentation in Notes view or use the handouts to see the information covered in more detail.

PROVIDER INTRODUCTION TO EFS MODERNIZATION (EFS MOD)

Presented to Osceola County Providers July 12, 2018



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AGENDA

- Introduction to the changes
- How it impacts you
- Training
- Available Help

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PORTAL USER ROLES

Provider Portal User Guide
Version 2.1.1 Page 20

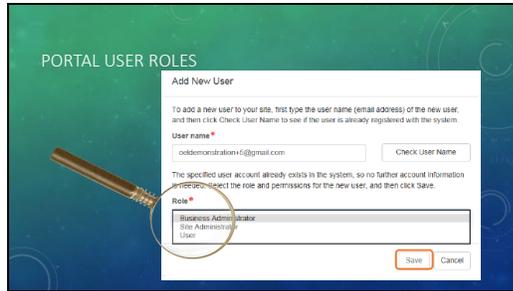
Could be the same for single-site businesses

- **Business Administrator** – Able to edit the provider profile and principal business information that is shared among associated provider sites; able to add provider sites and users; submit profiles and profile updates; and create contracts. This role would typically be assigned to an owner.
- **Site Administrator** – Able to edit the provider profile associated to their site add provider users for a site, but cannot create a new site. This role would typically be assigned to a principal or director.
- **User** – Able to perform administrative tasks based on permissions granted by the Business Administrator or Site Administrator. This role would typically be assigned to teachers and aides.

CAUTION Consider Carefully
This now impacts payments

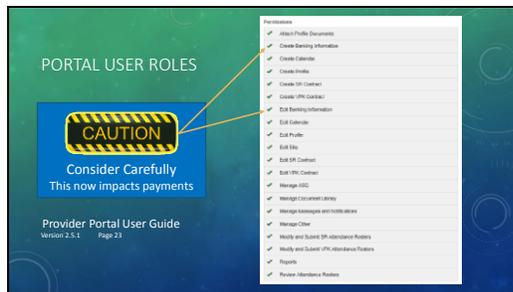
Now that EFS Mod v3 has the ability to accept enrollments and make payments, you'll want to revisit the portal user roles setup in the past to ensure they match to your current needs. For a single site location, the business administrator and site administrator may be the same. For multi-site locations, they could be the same or different. Users would typically be teachers or aides and not in an administrative role.

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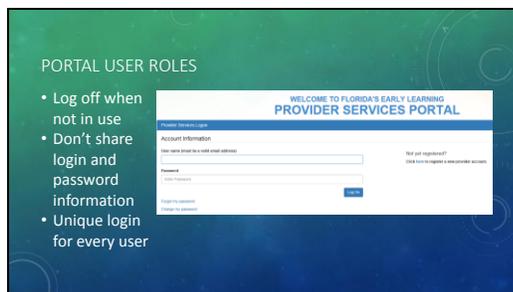
When adding a new user, you're asked to select the role. You can also edit roles to ensure they align as you want.

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In addition to roles, you can give specific permissions. You want to be very careful when granting “create banking information” or “edit banking information” as these roles can impact where payments are transferred.

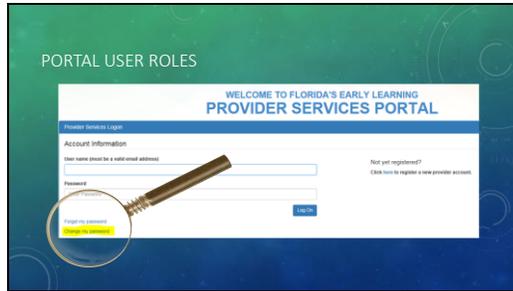
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When considering users roles, you want to be sure that you:

- Log off when not actively using the system. The system has an audit trail of every transaction, so you want to ensure only you have access under your log in.
- Be sure that no one is sharing login and password information. For example, there shouldn't be a classroom login.
- Each user should have an use their own unique login.

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If you think that a log in has been compromised, you can change your password.

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DIFFERENCES

EFS Legacy (Old System)	EFS Mod (New System)
Services in office during business hours	Online services without an appointment, available 24/7 – depending on service, with approval during business hours
Email requested but not required	Consistently active email required for Provider Portal account – check dashboard daily
Providers drop off attendance and sign in/out sheets	Attendance is recorded and submitted online, sign in/out sheets are uploaded
Use of fax server to submit documents	Use of Provider Portal Document Library to submit documents
Use of EPPS for payment reports	Use of Provider Portal Document Library for payment reports

The next 3 slides are a comparison of processes before and after the deployment of the new system. Ultimately, you will have more information, more readily available and that will make your work easier. It will also change some of your business practices. Most importantly, because many notifications will come to you via the provider portal, it's important that you check the portal at least once per day.

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DIFFERENCES

EFS Legacy (Old System)	EFS Mod (New System)
Attendance submitted by 3 rd calendar day by 12:30 pm	Attendance submitted by 3 rd business day by 11:59 pm
Attendance recording independent of enrollment dates	Attendance for child unable to be recorded prior to contract certified date or enrollment accepted date or after contract expiration or enrollment termination date
Late payment approved at discretion of the Coalition	Late payment of up to 30 days processed with the next open payment period

The new system has attendance tied to enrollments so you'll be unable to mark attendance for before or after a child's enrollment dates with your location. The new system also enforces state rules. One of those allows late payment processing but only up to 30 days following the payment period. In the past, the Coalition had more leeway at a local level but the new system now makes the practices consistent statewide.

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DIFFERENCES

EFS Legacy (Old System)	EFS Mod (New System)
Notices by email or phone	Notices via the Provider Portal Dashboard which should be checked daily, 5 day limit on acceptance/rejection of enrollments for provider approval
Check status by phone or in-person	Check status online 24/7
VPK Providers submit certificates for enrollment in person, by fax or mail	VPK Providers enroll child in Provider Portal individually or through a bulk enrollment process

When a parent enrolls a School Readiness (SR) child, they have the option of selecting up to three providers in order of preference. Once the SR enrollment is approved by 4C, you'll receive a notice of the desired enrollment and will have up to five days to approve or reject the enrollment. If you're not checking your provider portal regularly, you could miss SR enrollment opportunities.

For VPK, you enroll through the certificate of enrollment. Providers may choose to enroll children individually or through a bulk enrollment process.

With either program, while the child is enrolled at your site, you'll have access to the parent and child information.

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TRANSITION

- OEL is working out system bugs – most critical issues first
- Confirmation of migrated records
- Training for all system users
- Everything is new – to Everyone!

As with any data transition, there are system bugs to be worked out. The Office of Early Learning (OEL) is focusing on the most critical issues first. Each Coalition has been asked to review their migrated records to confirm accuracy. Until that work is completed, you may find some "missing" records. They are in the database but not visible until confirmed.

This is a new system for everyone and training is needed for all. Be patient as everything will take longer in the beginning while news processes are being learned.

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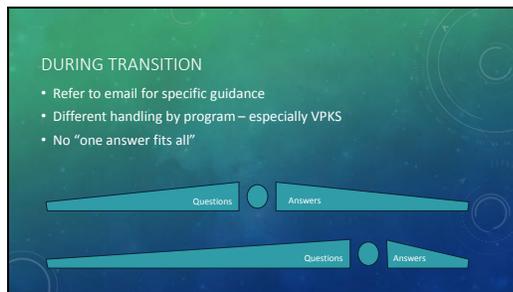
In the meantime, we've setup some easy ways to obtain the help you need.

- On the 4C website at www.4cflorida.org, look for the "Change is Good" banner. Clicking on that leads to the location for all available training materials for parents and providers. This site currently hold 2 videos for parents and 5 videos for providers. More materials will be added as they are received from OEL>
- We have a dedicated phone line for Provider Technical Assistance. You will reach a voice mail but your message will be screened and relayed to the person most able to answer your question. All incoming calls are logged. If we don't currently know the answer to your question, we will get the information for you but due to the volume of questions and OEL working in priority order, it may take awhile to get all answers, especially to less critical issues.
- A revised Provider Portal User Guide will be coming soon. As with the current version, the User

Guide has a short narrative and then the corresponding screenshot to take you through the steps needed. This User Guide is currently being updated to incorporate all the new functionality of the new system.

- And finally, throughout the system you will find Tool Tips indicated by the “I” in a circle. These give more information about items in the system. They open by hovering over the symbol and will include things such as the Florida Statute covering a requirement, tips on data completion, or other similar helpful information.

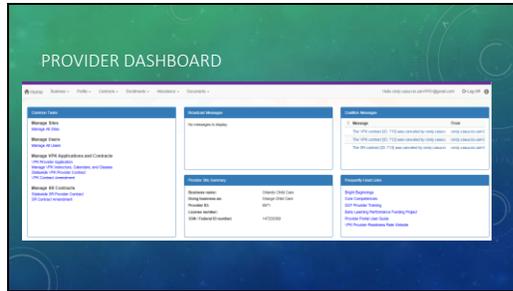
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During the transition:

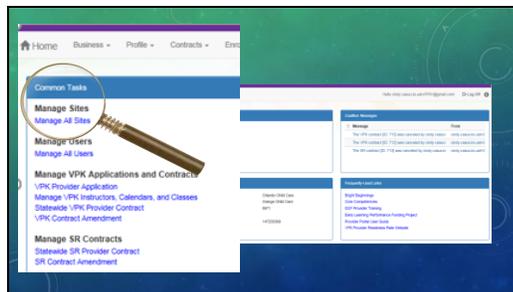
- Refer to the email sent out with specific guidance.
- It's important when asking your question or leaving a message on the helpline to specify which program as handling for each could differ.
- Unfortunately, there's no “one answer fits all”.
- Our goal is when you have a question, we have an answer. However, currently due to the newness of the system, bug fixes, and training, we have more questions than answers but you will see that chance over the next few weeks.

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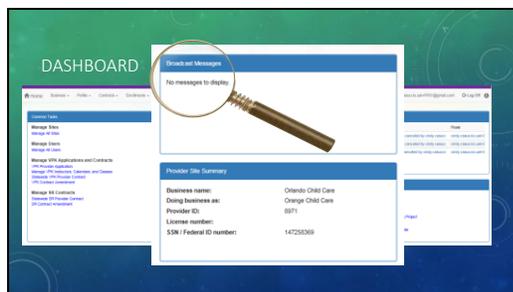
Let's look at the Provider Dashboard. You will see this every time you login to the Provider Portal.

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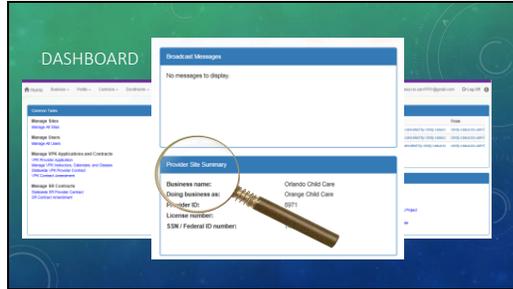
On the left side of the Provider Portal are shortcuts to all of the common functions. Here you can manage sites, users, and contracts.

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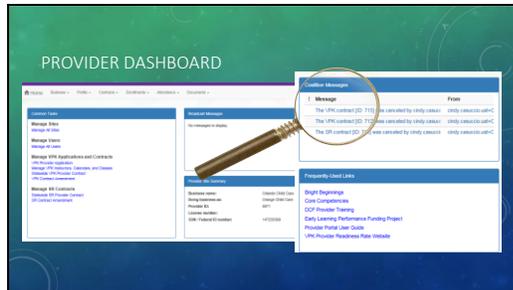
In the top middle are Broadcast Messages. These are messages that go out to every provider. They may be things such as provider meeting reminders, notice of upcoming events, or similar news of interest to you.

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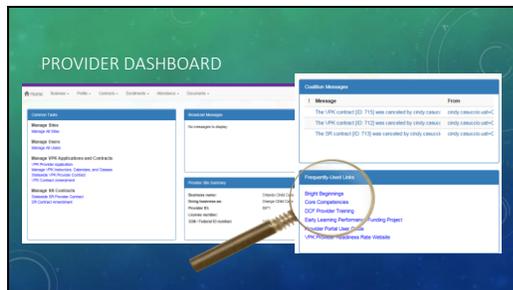
The bottom middle section has a brief provider site summary of information you've entered about your business.

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On the top right are Coalition Messages. These notices are specific to one provider and are where you will see notice of enrollment start and end dates.

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The bottom right section are some links that are helpful to providers.

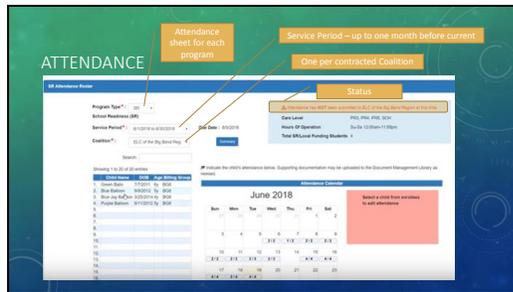
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With enrollments, you have options:

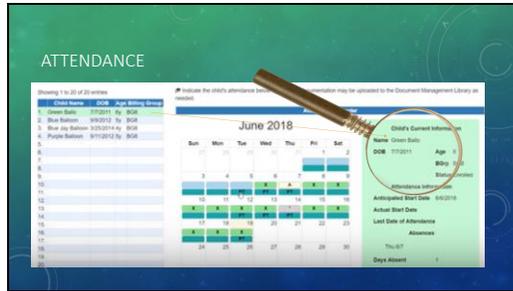
- For School Readiness, you can only enroll children individually. You do this by accepting the enrollment notification in the Coalition Messages section of your Provider Dashboard.
- For VPK, you accept the Certificate of Enrollment from the parent and then you can use information from that certificate to enroll individually or use a bulk enrollment process for groups of children.

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In the new system, you will have an attendance sheet for each program and each Coalition contract. Shown is an example of an attendance roster. Starting at the top, you select the program, the service period, and the Coalition. Just under that, you see a list of the children applicable to that roster. On the top right, is text on the current status of the attendance roster. In this case, the attendance has not been submitted. To change your attendance roster, follow the instructions in the pink box and select a child.

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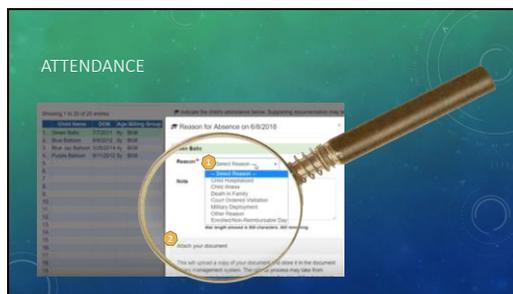


When a child is selected, the calendar changes colors to reflect the child's schedule. In this case, the child was not enrolled June 1-5 so the first date that attendance can be claimed is June 6. The child was present on the 6th but absent on the 7th. Attendance was also claimed for June 8-13 and June 15-19. Though not shown here, a key to the coding and colors will appear on the screen.

In the green box on the right, is information on the child selected, giving the name, date of birth, age, billing group, status and attendance information.

When a new child is selected, the information in the green box will update to that child.

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In the event of an absence, you will see a menu to select the reason and if a note is required, you will be able to attach the document.

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The screenshot shows a table titled "ATTENDANCE". The columns represent days of the week from Monday to Sunday. The rows list individual children with their names and IDs. At the end of each row, there are two summary columns: "Absent" and "Present", each with a numerical value and a small icon (a minus sign for absent, a plus sign for present).

Here’s a look at the summary after attendance has been claimed for each child. You can see that the provider site was closed on Thursday, June 14. At the end of each line, you see a summary of the total days absent and present per child.

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The screenshot shows a table titled "CHILD INFORMATION AND TRANSACTIONS". The columns include fields like "Child Information", "Transaction", "Date", "Type", "Status", "Amount", "Payment", "Enrollment Start", "Redetermination", "Developmental", "Enrollment End", "Status", "Action". A magnifying glass is positioned over the "Action" column, highlighting options like "View Payment Certificate" and "End Enrollment".

You also have access to child information and other transactions. In this view you see a summary of schedules, the co-payment, and dates such as redetermination, developmental screening, and enrollment start. At the end of each line, you have options to view the payment certificate or end enrollment. You can use this to communicate the end of enrollment when the child is not attending and the parent has indicated they won’t be returning.

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RATE CHANGES

- Requires a contract amendment – currently paper process
 - Will be added to EFS Modernization
- Contract has to be reviewed and certified before enrollments and attendance processed

The slide also features an illustration of a calendar and a yellow thinking emoji with a hand on its chin.

One word of caution while we’re in this transition. Everyone has completed their 2018-19 contracts and at that time you had an opportunity to update your rates. Currently contracting is done electronically but rate changes require a contract amendment which remains as a paper process for a few more months. In the event you want to make a rate change, you may want to consider time carefully. Once you submit the rate change, a contract amendment has to be started. However from the time you submit to

the time the paper amendment process can be signed by both parties, approved and uploaded to the Provider Portal, you may find that you are locked out of transactions until this completed. You'll want to be cautious about reimbursement process dates. If you're okay with not requesting rate changes until the amendment is electronic, that may be even better to ensure there are no holds to processing. Either way, we can help you but you may find it easier to wait for a short time before a rate change.

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Still have questions?

Refer to the training material, user guides and videos found at www.4cflorida.org

Call the Provider Technical Assistance line at 321-219-6018 to leave a message. Someone will return your call soon.