EARLY LEARNING SF USER GUIDE FOR PROGRAMS

Updated November, 2023

Contents

1 Home Page

This is the web address where you can access your log in.

Click "sign in" then "program partners" to log into the system

Should English not be your preferred language, you can switch the language setting at the top right corner of the website:

2 Login Account

2.1 Sign Up

All programs joining ELS will receive an invite via email or SMS, depending on the communication method provided to the R&R agencies. Below are the steps a new ELS program would take to sign up.

1. Open your invitation email or SMS
2. Click on the invitation link to access the Sign Up Page
3. Enter your business name and create a password (at least 8 characters long, including at least one uppercase letter, lowercase letter, number and symbol)

4. Upon completion, you will be able to view your program on the Early Learning SF website.

2.2   Connect with an Existing CarePortal or CareCloud Account

If you already have a CarePortal or CareCloud account that you use to download your timesheets and check payment status, you may sign-in with your existing login and password.

1.   Open your invitation email or SMS
2.   Click on the invitation link to access the Sign Up Page
3.   Click on "Have an Account? Sign In" at the bottom of the Sign Up page and use your existing account name and password

4.   Upon completion, you will be able to view your program on the Early Learning SF website.

2.3   Add a New Site

If your organization has multiple sites and you would like to manage all sites through one single log in:

1.   Log into your existing account
2.   Open invitation email or SMS to get the invitation code
3.   Sign in to Early Learning SF and click "I have an Invitation Code"

4. Enter the invitation code and the new site name to add it to your existing list.
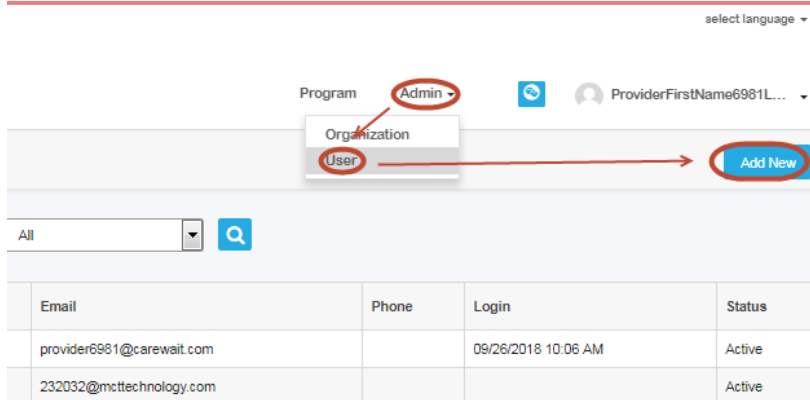
Add New ✕

Please enter your invitation code

Cancel   **Done**

2.4 Change Your Account

If you would like to manage your sites you must submit a request to the Helpdesk to change your sign in information.   They will unlink the current sign in information to your managed site(s), and send a new invite to your requested email address. You will repeat the sign up steps as specified in the Sign Up section.

2.5 Add Additional Users

You can manage your organization users in the Admin/User section. It is located on the top right of the page:

select language ▾

Program Admin ▾   ProviderFirstName6981L… ▾

Organization
User   Add New

All ▾ 🔍

Email	Phone	Login	Status
provider6981@carewait.com		09/26/2018 10:06 AM	Active
232032@mcttechnology.com			Active

Click on "Add New" to add a new user : You can select to add the user's email or cell # as the account name and complete the information; set the initial password for them (they can change the password after their initial log in), click "Save" and the person's access will be ready to go.

If you want to change the user's information (the account name cannot be changed after it is created), or inactivate the user because the person is no longer with the organization, simply click on the person's name in the user list view, and update the info or change the Status to "Inactive". Click "Save" the user will be updated.

2.5.1 Site and Role Management

Make sure that you check the site that the user should access. It is at the bottom of the User Info page.

And assign the role(s) to the user, so they can operate as you see fit.

3 Vacancy Enrollment Management

Through your account, you can report vacancies and manage your enrollment process to fill Title V or Early Learning Scholarship vacancies. The system will automatically match you with eligible children that meet your vacancy profile criteria.

3.1 Vacancy Profile Statuses

Each vacancy profile will have a status to track progress from creating a vacancy through enrollment.

1. **Created**: You added a new vacancy profile draft but have not submitted it for match. You can still edit the vacancy profile before submitting.
2. **Submitted**: You submitted a vacancy profile for match. You cannot modify it anymore.
3. **Closed**: You closed the vacancy because the vacancy has been filled.
4. **Voided**: You added the vacancy profile by mistake. You can only void a vacancy when there are no child(ren) in the queue. If there are children in the queue, you must close the vacancy profile.

3.2 Vacancy List

If you have multiple sites in the same account, you will see all your sites listed. Each site in the list is hyperlinked to report a new vacancy profile or to open the vacancy lists for that site.

Site Name	Address	Phone	Email	Status	Action
Eloise Mathes	1563 Shafter Ave, San Francisco, CA94124	(415) 822-9484		Active	
Little School, The	1520 Lyon Street, San Francisco, CA94115	(415) 567-0430	info@littleschool.org	Active	

Click on the site to view that site's vacancy list. If you have only one site, you will go to the site vacancy list directly.

1. **Search for a specific vacancy:** You can search for an existing vacancy profile by its name (enter partial name in the Search box), the created date and status.

Vacancy Name	Vacancy Id	Subsidy	Date Vacancy is Available	Homeless	DOB Range	Gender	Hours of Care	# of Vacancies	# of Referrals	# of Enrolled	Created Date	Status	Actions
Angela Child Care	V0000036	Voucher	07/02/2019		07/03/2018 - 06/02/2019	Male, Female	Sunday - Saturday, 8:00 AM - 6:00 PM	1	0	0	07/02/2019	Submitted	
CAPP-09/29/2018	V0000001	CAPP	09/29/2018		01/01/2010 - 12/31/2015	Male, Female	Monday - Friday, 7:00 AM - 6:00 PM	5	15	0	07/01/2019	Submitted	
Vacancy-CSPP Part day	V0000040	CSPP Part Day	07/01/2019		07/02/2013 - 10/01/2016	Male, Female	Sunday - Saturday, 0:00 AM - 11:59 PM	1	4	0	07/05/2019	Submitted	
Vacancy-Resolved0705	V0000041	ELS-Reserved	07/05/2019		07/06/2012 - 07/05/2019	Male, Female	Sunday - Saturday, 0:00 AM - 11:59 PM	1	5	0	07/05/2019	Submitted	
Vacancy-Resolved0705	V0000039	ELS-Reserved	07/13/2019		07/14/2012 - 07/13/2019	Male, Female	Sunday - Saturday, 0:00 AM - 11:59 PM	2	0	0	07/05/2019	Submitted	
Vacancy-capp	V0000042	CAPP	07/05/2019		07/06/1998 - 07/05/2019	Male, Female	Sunday - Saturday, 0:00 AM - 11:59 PM	1	0	0	07/05/2019	Void	

3.3 Report Vacancy

1. Click "Add New" in Vacancy List to open a new vacancy profile

Vacancy Name

* Subsidy

* Date Vacancy is avaliable

07/05/2019

* Number of Vacancies

Gender ☑ Male ☑ Female

* Please enter the DOB or Age Range of the child you want to take care of

● DOB Range

DOB   DOB

○ Age Range

| 0 | Years | 0 | Months | - | 0 | Years | 0 | Months |

☐ I only want to enroll homeless children

* Hours of Care

Select Days

☑ Sunday ☑ Monday ☑ Tuesday ☑ Wednesday ☑ Thursday ☑ Friday ☑ Saturday

Enter Hours

12:00 AM   11:59 PM

a. **Vacancy Name:** This is an optional field to change the name of your vacancy as it will appear on the vacancy list. If you do not enter anything, the system will automatically create the name with the subsidy and vacancy available date for easy reference.

b. **Subsidy:** This is a drop down list. You must select only one subsidy for each vacancy.

c. **Date Vacancy is available:** This is the date you want the vacancy to be filled. If you need it right away, you should enter today's date.

d. **Number of Vacancies:** This is the number of children you need to enroll. The system will match you with 3 children per vacancy. If you would like to adjust the max number of matches you receive per reported vacancy, please contact HelpDesk.

e. **Gender:** By default, both Male and Female are selected, but you may specify a particular gender based on the specific needs of your classroom, if desired.

f. **DOB Range or Age Range:** Select the range of the child's DOB (Date of Birth) or age. The system will automatically calculate and display the age range when a DOB range is entered and vice versa when the Date Vacancy is available.

g. **I only want to enroll homeless children**: Check this box if you will only enroll homeless children into these vacancies. Homeless families will never be excluded from referrals, and there is no requirement that this box be checked.

h. **Hours of Care:** This includes the start and end time and days of the week that you offer for this vacancy.
i. **Distance Learning:** If you are a licensed childcare center, you will see an distance learning option. If the vacancy is offered as a distance learning opportunity, please check the box

2. You can click "Cancel" during the process should you decide to not report a vacancy or click "Save" to hold the vacancy for further edits or a later submission date. Once you click "Submit" the vacancy profile cannot be edited and the system will match your vacancy profile to eligible children nightly. See "Vacancy Queue Management" for next steps in contacting a family that has been referred to your vacancy profile.
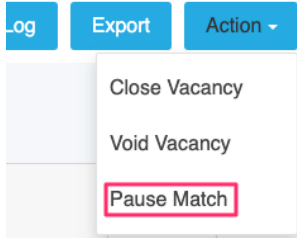
3.4 Void a Vacancy Profile

On the vacancy list, click on the Actions button and select "Void Vacancy." You can only void a vacancy before it has any child(ren) enrolled. After the vacancy has enrolled child(ren), you must select "Close Vacancy"
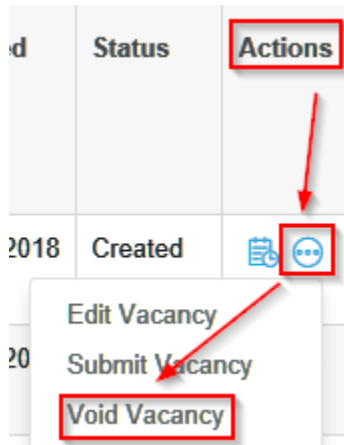
3.5 Pause Vacancy Match

When you are busy managing the existing enrollment, and do not have capacity to deal with more referrals, you can choose to pause the match. This will give you time to complete the enrollment eligibility process with the existing referrals. Simply click "Pause Match" under the action button, the system referral will be stopped. However, ISA will still be able to use Manural Referral to add new child(ren) into your vacancy queue

3.6   Vacancy Queue Management

After you have submitted a vacancy profile, the system will match your vacancy profile to eligible children nightly, and notify families of the match. The children will appear in the referral queue.

If you have reported a high number of vacancies, you may get a long list of referred children in the queue. To narrow down the list to the find a specific child, type in the child's full or partial name in the search box, combined with the referral date and/or statuses.

The default sorting order is: Ranking # (Ascending), Status (Active, Enrolled, Not Interested, Unavailable), Referral Date (Ascending)

The first nine columns give you a brief description of the child and the "Note" and "Action" columns will be used by you to manage the vacancy

1. **Note:** This column allows you to type a quick note regarding the vacancy, such as: "left a voicemail for the parent on 11/1/2018.

2. **Action:** There are 4 actions you may take for each child in your enrollment queue:
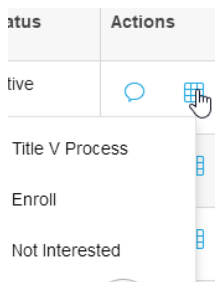
a. **Message:** ⬭ The message box provides you with a quick pop up to send the parents an online message or review a message they have sent to you.

b. **Title V Processing:** This feature is located under the grid icon and should be used by Title V contractors when in the process of verifying need and income eligibility of the child with the intent to enroll.

c. **Enroll:** This feature is located under the grid icon and should be used after both you and the family have agreed to enroll this child to fill the vacancy. Once completed, the child's status will change to "Enrolled." You may fill in the start date and the agreed upon schedule to complete the enrollment process.

d. **Not Interested:** This feature is located under the grid icon. Select this in the event that a parent is not responding to your outreach, or the child will not enroll in your program. If you click on this feature, you will be asked to provide the reason child should be removed from your vacancy queue. Check the box or type in your reason to complete this action. If you have vacancies remaining, the system will match more children nightly.

Please select the reason for not interest the child(ren)

- [ ] Family is unresponsive
- [ ] Site is too far away/No transportation to site
- [ ] Schedule doesn't work
- [ ] Child is not potty trained
- [ ] Program and family are not a good fit
- [ ] Child is already enrolled somewhere else
- [ ] Family moved out of San Francisco and is no longer interested in a program in San Francisco
- [ ] Change of plans
- [ ] Other

> Enter Reason

Confirm the chid(ren) that you want to remove from the queue

Child	DOB	Gender
Agnes Yee	10/12/2017	Female

3. **Monitoring your messages:** You will receive notifications if parents send you online messages. The appearance of a red dot in the top right-hand corner means you received a new message(s).

Click on the message icon to open the message window.

3.7 Report

The report section provides you a quick search if you have communicated with the parents about the same child previously. Just select the site(s), vacancy status and enter the child's name (only one word, can be partial name), system will give you the list of child's name contains the word you entered, in all the vacancy queues under the site(s) you selected.

Child Search

	Application ID	Application Name	Child Name	Child's DOB	Site Name	Vacancy Name	Vacancy Status	Referral Date	Comments
	A0000849	CareWaitTestParent LN1Test	CareWaitTestChild1 LN11	01/13/2016	CareWait Test Program	shtest vacancy	Closed	08/10/2020	
	A0000849	CareWaitTestParent LN1Test	CareWaitTestChild1 LN11	01/13/2016	CareWait Test Program	shtest vacancy	Closed	08/17/2020	
	A0000849	CareWaitTestParent LN1Test	CareWaitTestChild1 LN11	01/13/2016	CareWait Test Program	shtest vacancy	Closed	03/01/2020	0810
	A0000849	CareWaitTestParent LN1Test	CareWaitTestChild1 LN11	01/13/2016	CareWait Test Program	shtest vacancy	Closed	03/01/2020	Msign
	A0000849	CareWaitTestParent LN1Test	CareWaitTestChild1 LN11	01/13/2016	CareWait Test Program	shtest vacancy	Closed	08/17/2020	
	A0000849	CareWaitTestParent LN1Test	CareWaitTestChild1 LN11	01/13/2016	CareWait Test Program	shtest vacancy	Closed	08/03/2020	yy
	A0000849	CareWaitTestParent LN1Test	CareWaitTestChild2 LN12	01/01/2018	CareWait Test Program	shtest vacancy	Closed	08/17/2020	
	A0007671	Aurelia Mis	Damian Martinez	04/05/2017	CareWait Test Program	shtest_vacnay116	Closed	12/21/2020	
	A0000849	CareWaitTestParent LN1Test	CareWaitTestChild1 LN11	01/13/2016	CareWait Test Program	shtest_vacnay116	Closed	11/15/2020	Test Noteshdj
	A0000849	CareWaitTestParent LN1Test	CareWaitTestChild1 LN11	01/13/2016	CareWait Test Program	shtest_vacnay116	Closed	12/20/2020	