

# Commonwealth of Massachusetts Department of Early Education and Care

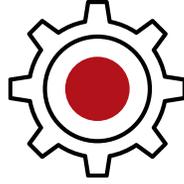
## Contracted Provider Core Services Training Financial Assistance – Systems

**THIS TRAINING WAS OFFERED IN A DEMO  
STYLE – PLEASE SEE VIRTUAL RECORDING FOR  
SYSTEMS SCENARIOS AND WALK-THROUGH**



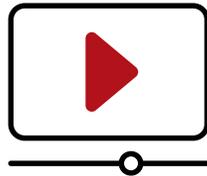
# Welcome!

While waiting for others to join, check your Zoom settings and drop your full name, role and organization in the chat.



## Update Your Name

- In meeting controls, click “Participants”
- Hover over your name, click “...”
- Click "rename" to update to your First Name & Last Name



## Technical Trouble?

- Send a message to the EEC Hosts through Zoom

# Housekeeping



**Please feel welcome to place questions in the chat**

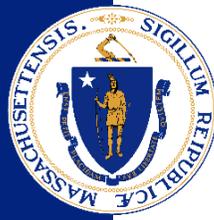
Questions will be answered as possible, and EEC will gather questions and respond to questions after the conclusion of this training



**When asked for feedback or comments by facilitators throughout the session, please “raise your hand” to be called on**



**Please keep your microphone on mute to reduce feedback until you are looking to make a statement or ask a question**



# Today's Agenda

## Financial Assistance – Systems

- Welcome, Introduction & Goals
- KinderWait System

### Lunch Break 12:00-1:00

- CCFA System
- Discussion & Questions

# EEC Introductions

## Program Team

- **Bethanie Glass**, Director of Child Care Financial Assistance
- **Elyse Tibbetts**, Priority Access Manager
- **Alicia Siryon-Wells**, Sr. Associate Commissioner, Program Integrity and Internal Controls
- **Carmen Quiñones**, Subsidy Policy & Technical Assistance Specialist
- **Johanna Gonzalez**, Financial Assistance Specialist
- **Brenda Hodziewich**, Financial Assistance Specialist

## Product & Systems Team

- **Kristyn Berry**, Family Experience Product Owner
- **Mohair Shetty Kodavoor**, CCFA Technical Trainer
- **Bala Yarramsetti**, Senior Business Analyst
- **Agustin Llona**, Provider Experience Product Owner

# Training Goals

## For Providers



- Understand the current systems EEC uses to administer Child Care Financial Assistance and how you use them
- Connect Child Care Financial Assistance policy to how it is operationalized in the KinderWait and CCFA Systems

## For EEC



- Demonstrate the use of EEC Systems during a family's journey through Child Care Financial Assistance
- Understand and discuss where providers may need additional support

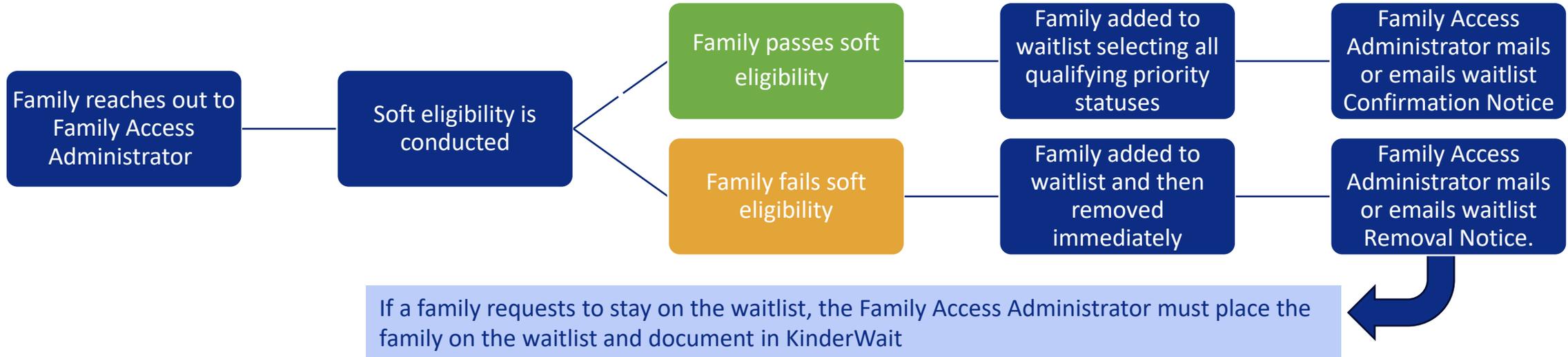
# EEC Systems Overview

- The Department of Early Education and Care uses a number of systems to administer Child Care Financial Assistance across the Commonwealth through Family Access Administrators to support access for families, efficient processes and program integrity.
- Currently, EEC uses **KinderWait** Systems to manage the front door into applying for Child Care Financial Assistance and managing families waiting for funding
- Once families are offered funding, their household details are transferred from KinderWait into CCFA.
- The **CCFA** system allows Family Access Administrators to fully manage Child Care Financial Assistance administered through their organization, including both contracts and vouchers
- Many of EEC's other applications feed information into CCFA to allow accuracy and efficiency to Family Access Administrators' workloads, like Licensing Manager.

# Waitlist Overview

# Placement on Waitlist: Process Flow

The EEC centralized waitlist for Child Care Financial Assistance is the first step in the process for families to access Child Care Financial Assistance. Families may be added to the waitlist by a Child Care Resource and Referral Agency (CCRR), a Contracted Provider or by calling Mass 211 (dial "2-1-1" from a phone).



**Important: Families must not be determined ineligible due to citizenship status alone.**

# Current Waitlist: How It Works

The waitlist process consists of three stages. Every stage of the process is connected to a status.

## Waitlist Intake

1

The screening of a family looking for and in need of financial help who is then added to the waitlist by Mass211, CCRRs or a contracted provider.

Status: Active

## Family Outreach/Offering Funding

2

When funding is available, CCRRs and/or Contracted Providers will:

- Perform a query of the waitlist based on region and/or city and town, priority status, and date the family was added to the waitlist
- Contact family via email, mail or phone to inform of funding availability
- Families need to reply to notice within 15 days.

Status: "Pending"

## Eligibility Determination

3

Family responds to funding availability notice (FAN), completes application, submits necessary documentation to verify eligibility (income, residency, citizenship and service need).

Eligibility is determined and child care financial assistance is approved.

Status: "Pending/Pre-Enrollment"

# Waitlist: Soft Eligibility Screening

Before getting into soft eligibility:

- Ask the family their preferred language and preferred method of communication
- Ask if they will need any special accommodation before proceeding with the call
- Ask if you are speaking to the parent or guardian (in some instances, a family member or agency may be calling on behalf of the family)

Soft eligibility screening must be done with each family before adding them to the waitlist to determine the following:

## Contact Information

- Name
- Residency
- Citizenship status of the child(ren)

1

## Status

- Immediate
- Priority
- General

2

## Income/Household

- Average monthly income
- Household composition

3

Soft eligibility screening should be done while entering a family's information into KinderWait

# Placing Families on the Waitlist

All families who seek a contracted seat must be placed on the EEC waitlist to access Child Care Financial Assistance

Exceptions to the waitlist placement requirement are:

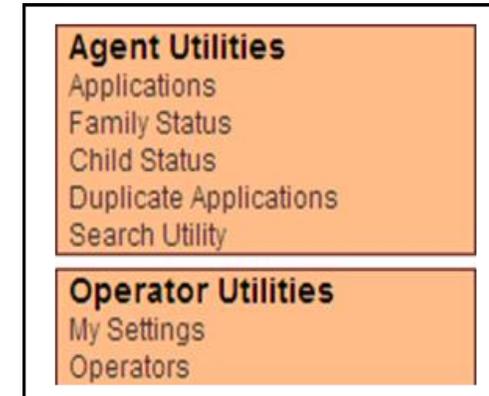
1. Families who have received a DTA Referral for a DTA Voucher;
2. Families who have received a DCF Referral for Supportive Child Care;



# KinderWait Agent Utilities

Each search option offers different functions- the ability to change the status for everyone in the results or for just a selected group.

- Application: Use this section to locate a specific Family. You can also find the most recent Families viewed/edited in the dropdown section.
- Family Search: This search is for finding groups of Families based on Family characteristics/criteria. It is commonly used for Renewal Letters, Mailing Labels and Family verses Child specific notifications.
- Child Search: You can use the Child Status Search to find eligible Children and to run funding letters.
- Search Utility: This search is for finding groups based on criteria not specific to an individual such as Application Date, Active Since Date, and Last Modified Date.



# Scenario A – Fred Flinstone

**Fred Flinstone** calls in to get on the waitlist for Child Care Financial Assistance.

He has 2-year-old twins and a new baby on the way.

He needs child care as soon as possible, his wife is pregnant and due soon.



# Adding Family to the Waitlist

# Demo 1 - Adding a Family to the Waitlist

- Search for a family
- Add a new family
- Enter in Priority Codes
- Generate and send a Confirmation Notice
- Enter Notes

# Offering Funding

# Demo 1: Offering Funding to a Family

- Navigate to “Child Status”
- Search for a family
- Review notes (for families who have come up from the search)
- Generate and Send the Funding Availability Notice (FAN)
- Enter notes as needed
- Change the status to “Pending”

# Processing Funding

## Demo 2 – Family Does Not Want Funding Offered

- Enter the family’s household record #
- Bring up the family’s record
- Review notes
- Change the status back to “Active” and enter a note in the family’s record of the communication.
  - Parent should be reminded that when they are ready for child care, it may not be available at the time. The family will remain on the waitlist with their original application date.
- Process the FAN in the record under the section Refused/Denied Care, include why the family refused

## Demo 3 – Family Is No Longer Interested in Care

- Enter the family's household record #
- Bring up the family's record
- Review notes
- Change the status to “Terminated” and enter a note in the family's record of the communication.
- Send the family a Removal Notice with a Request for Review
- Process the FAN in the record under the section Refused/Denied Care, include why the family refused

# Demo 4 – Family Does Not Respond to FAN

- Enter the family's household record #
- Bring up the family's record
- Review notes
- Change the status to “Terminated” and enter a note in the family's record of the communication.
- Send the family a Removal Notice with a Request for Review
- Process the FAN in the record under the section Refused/Denied Care

# Demo 5– Family Said They Want Funding

- Enter the family’s household record #
- Bring up the family’s record
- Review notes
- Change the status to “Pending pre-enrolled” and enter a note in the family’s record of the communication.

# Managing the Waitlist

# Demo 6 - Family on Waitlist (But Not Active)

- Search for family
- Review Status to see if family is active
- Review Notes to see what happened
- Reactivate family
- Update their information
- Generate and send a Confirmation Notice
- Enter Notes

# Demo 7- Family Calls To Check on Status

- Bring up the family's record (ask for household record #)
- Verify the family's information
  - Family members
  - Priority Codes
  - Activity/income
  - Address
  - Telephone numbers
  - Email address
- Review notes
- Add a note ALWAYS click "Update Last Modified Date" on the household page, even if no changes were made to the record.

# Demo 8– Family Calls To Remove Waitlist Record

- Bring up the family's record (as for household record #)
- Verify the family's information to ensure you have the right person
  - Family members
  - Priority Codes
  - Activity/income
  - Address
  - Telephone numbers
  - Email address
- Review notes
- Understand request and counsel family
- Generate and Send Removal Notice with Request for Review

# CCFA System

# CCFA Process Flow through Authorization



FAA initiates application and requests documents  
Reviews documents

Family returns verifications and FAA enters info into CCFA

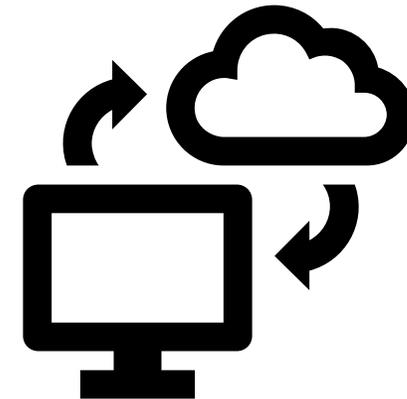
Secondary Approver reviews

Family + FAA meet to sign

If accessing Child Care Financial Assistance through a contracted provider, the placement must begin with that program when authorized

# CCFA System Demos

- Overview of CCFA Features
  - CCFA Dashboard
- Adding Families to CCFA
  - Importing a Family from KinderWait
  - Adding a Family with Referral
- Processing Initial Authorization
  - Authorization with Income & Service Need
  - Secondary Approval Process
  - Adding Placements
- Reporting Change during Provisional
- Reauthorizations
- Termination
- Billing, Closures & Attendance



# Overview of CCFA/CCFA Dashboard

**LUNCH BREAK**  
**Be back at 1:10pm**

# Adding Family to CCFA

# Scenario A – Fred Flinstone

**Fred Flinstone** has received a Funding Availability Notice (FAN) from KinderWait and is waiting to be imported to CCFA.

He has 2-year-old twins and a new baby on the way.

He needs childcare as soon as possible, his wife is pregnant and due soon.



# Demo 1: Import an Income Eligible Family from KinderWait to CCFA

- Searching for family
- Importing from Kinderwait

# Demo 2: Authorization with Income and Service Need

- How to enter income
- How to enter authorization
- Entering dates

# Processing Initial Authorization

# Demo 3: Secondary Approval Process

- Finding pending authorization
- Review of information
- How to approve

# Demo 4: Entering a Placement

- How to enter in the placement
- How to enter the transportation information

# Scenario A – Borges-Da Silva (Change Reporting)

Dionn needs to report a change to his family situation, since his wife just had their new baby 8 days ago.



# Demo 5: Change Reporting: Non-Temporary Change

- How to add the change to the record

# Scenario B – Lydia Smith

**Lydia** has been referred to you from a local homeless shelter.

She would like to enroll her child into childcare because she has found a job. She has a 4-year old child with special needs.



# Demo 1: Adding a Family who comes in through a Referral

- Adding a family into CCFA from referral
- Entering family Information
- Entering the referral
- Entering income information

# Demo 1: Processing Initial Authorization with a referral and Placement

- How to enter Authorization
- Start date the day after and not today's date.
- Service need
- Referral
- Income information
- Secondary Approval
- Placement (location of care)

# Scenario C – Richard Clohecy

Richard and his wife have 2 children enrolled in your program. Both parents were employed full-time.

His authorization is ending in 60 days so he will need to be reauthorized.



# Demo 1: Generating a Reassessment Letter

- How to get to letter section
- Downloading Letter

# Scenario C – Richard Clohecy (Pathway to Full-time)

Richard has reduced his hours and is now working 15 hours a week.



# Demo 2: Reauthorization- Pathway to Full Time Employment

- Reauthorization
- Entering Service Need
- Entering Placement

# Scenario D – Tracie Smith

Tracie is a mother of two children.

She was employed full-time but is now working 10 hours per week due to a chronic health issue that doesn't allow her to work more than that.



# Demo 1: Change Reporting-Temporary Changes

- Change the placement end date
- Select Temporary Change from sub authorization
- Add appropriate reason (Service Need)
- Add Income Details

# Scenario E – Joseph, Suzan, & Jason

Joseph and Suzan have a 7-year-old son, Jason. Akwasi is getting ready to move in with another guardian, and the family works with DCF to open a case. DCF provides a referral for Jason, who will need child care during the day.



# Demo 2: Change Reporting-Moving a Child to a different FID

- Search for New Family in CCFA
- Move child
- Determine if child remains in current family
- Add DCF Referral in new family
- Adding a DCF Authorization in new family

# Terminations

# Scenario F – Mathew and Ann Marie

Mathew and Ann Marie have 2 children who are enrolled in your program.

Their placement ends in July. You learn that they are moving out of state before their authorization end date.



# Demo 1: Notice of Termination and CCFA coding

- Enter the information into CCFA
- Check the end dates
- Enter in notes

# BREAK

# Adding closures to provider schedule

# Demo 1: Center Based Provider Approved Closure:

## *Professional Development Day*

- Manage Schedule on Provider details page
- Adding a date
- Adding the type of Day
- Review Provider Schedule

# Demo 2: Family Child Care Provider Approved Closure:

## *Flexible Closure Day with Sub Care*

- Subcare Closure Request Page
- Adding a date
- Adding the type of Day
- How to add subcare
- Review Provider Schedule

# Demo 3 : Family Child Care Provider Approved Closure:

## *Emergency Closure: Extreme Weather with Sub Care*

- Subcare Closure Request page – Licensing/EEC  
Approved
- Adding a date
- Adding the type of closure
- How to add subcare
- Review provider schedule

# Demo 4: Center Based Provider Approved Closure:

## *No-Transportation Day*

- Manage Schedule – Partial Closure
- Adding a date
- Adding closure type
- Review Provider Schedule

# Completing Attendance

# Scenario A – Katerina Marrero Ortiz

*Two (2) Toddler Children*

Placement Type:

- Center Based Program
- Regular placement



# Attendance Demo

**Enrolled with no Transportation**  
**Two (2) Explained Absences**  
**One (1) Unexplained Absence**

# Scenario B – Lydia Smith

*One (1) Preschool Child*

Placement Type:

- Center Based Program
- Flexible placement 4 days a week



# Attendance Demo

## Enrolled with no Transportation

# Scenario C – Patrica Smith

*Two (2) School Age Children*

Placement Type:

- Center based Provider
- School Age Intermittent
- Before and After School



# Attendance Demo

Enrolled two-way transportation

One (1) Early Release Day

Three (3) Unexplained absences After School

Approved Closure: No-Transportation Day

# Scenario D – Richard Clohecy

*Two (2) School Age Children*

Placement Type:

- FCC Provider
- Intermittent placements
- After School Only



# Attendance Demo

**Enrolled with 1 way Transportation  
1 Emergency Closure Day  
Children placed in Sub Care**

# Scenario E – Barbara Cadet

*Two School Age Children*

Placement Type:

- FCC Provider
- School Closure Only



# Attendance Demo: Enrolled with no Transportation

# Attendance Submission and Billing

# Demo

## Approval of Attendance

# Demo

## Attendance Rejections Notification Screen

Demo

Generating ledgers

# Demo

## Billing Certification Process & Review of Reports

# Resources and Support for CCFA System

## CCFA Training Resources

<https://www.mass.gov/lists/ccfa-training-resources>

## Monthly CCFA Training Sessions

- The monthly CCFA training schedules are posted in CCFA under the EEC notifications section

## Help with CCFA

- If you have a question about CCFA or need assistance using the system, you may submit a request to [EEC's Help Desk](#)
- Please close your web browser after submitting the request.
- If you have not received a response to a previously submitted request, please check your email junk folder before opening a new ticket