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## Definitions

**Client to be Included in the Database**

Create a customer record only for families requesting child care referrals for a child(ren) or for an unborn child of expecting or adopting parents. Services to families not yet expecting children are consultations. Services to potential foster families are also consultations. Please only complete referrals for families and children who need child care in your Service Delivery Area (SDA). If a client contacts your CCR&R and does not need care in your SDA, please refer them on to the CCR&R which can assist that client.

**Regular Client**

A client requesting a referral directly from the CCR&R, either via telephone, walk-in, or by emailing the CCR&R with a referral request.

**Internet Client**

A client that registers through the Quality Counts Online Child Care Search system.

**Fiscal year**

Fiscal year for the CCR&R Statewide system is July 1st – June 30th.

**Definition of a Family**

Family means the customer child's biological, step or adoptive parent(s) (if living in the household), and the biological or adopted minor children living in the same household. Other persons related by blood or law may also be counted in family size if they are dependent on the family for more than 50% of their support.

Families seeking care for foster children and/or seeking care for children of their own, will be entered as **one record** in NACCRRA*ware*. When entering the child's data, check "**DCFS Vouchers**" under **Subsidy Sought**, and then check "**Foster Child**" and "**Has DCFS Voucher**" in **Subsidy Status** on the child screen. In entering the foster family (Client)'s information, select "**Foster Family**" and "**Has State Subsidy**" under **Eligibility Status**, and then check "**State Subsidy Eligible**" under **Subsidy Eligibility.**

## Client Reactivate in New Fiscal Year

Clients can call and receive referrals in more than one fiscal year. Our fiscal year is from July 1st through June 30th. On June 30, all regular clients are changed to "Inactive" status. If a client calls back in the new fiscal year, the record should be reactivated and all of their information should be updated.

**Status**
- Change from "Inactive" to "Active".

**Status Date**
- Leave Date as is.

**Client Status (Optional – Per SDA)**
- Field needs to be changed to "New Client"

**Number FY Repeats**
- Needs to be changed to "00"

**Date Last Request**
- Change this to the date of this referral

**Child Records**
- Enter and/or update only the child(ren) needing care in this fiscal year's referral call. If there are child(ren) in the record from last FY's call and the parent doesn't need care for them in this referral call, delete child from record.

**Follow Up Screen**
- Each fiscal year, INCCRRA globally replaces the Production database follow up fields with no data.

**Action Log**
- Indicate "Initial Call" in the Action Log since they have begun a new fiscal year.

## Internet Clients

Individuals who use the Quality Counts Online Child Care Search will have Internet Client records in the NACCRRAware database. Only the most basic of information is collected on Internet Clients and as such, these client records are excluded from any data checks.

### What do I do if a Regular Client wants to search online?

For follow-up and reporting purposes, it is important to keep Internet clients and regular client separate in the database. If a client begins by calling the CCR&R for a referral and later decides they would like to do some searching on their own online, the CCR&R should direct them to the appropriate Quality Counts Online Child Care Search website and allow them to create their own user. This individual will then have their regular client record as well as an Internet client record in NACCRRAware.

### What do I do if an Internet Client calls for more information or more referrals?

In this situation, it depends if the client is simply looking for additional consumer education, or if they are calling to request additional referral searches.

If the client is simply interested in technical assistance, bring up that Internet Client's record and enter an action into the Action Log, using the "TA on Online Search" action.

If the client would like the CCR&R to do a more specific or repeat search, the CCR&R should take care to enter a new regular client record and collect/enter all of the information one normally would for a regular client. Thus, the individual will have their original Internet client record and also a regular client record in NACCRRAware.

## General Data Entry for Regular Clients

### Entering a New Client

To open a new client record, go to Data Entry > Client. The Client Search page allows users to search for clients, or to add a new client. You can search by:

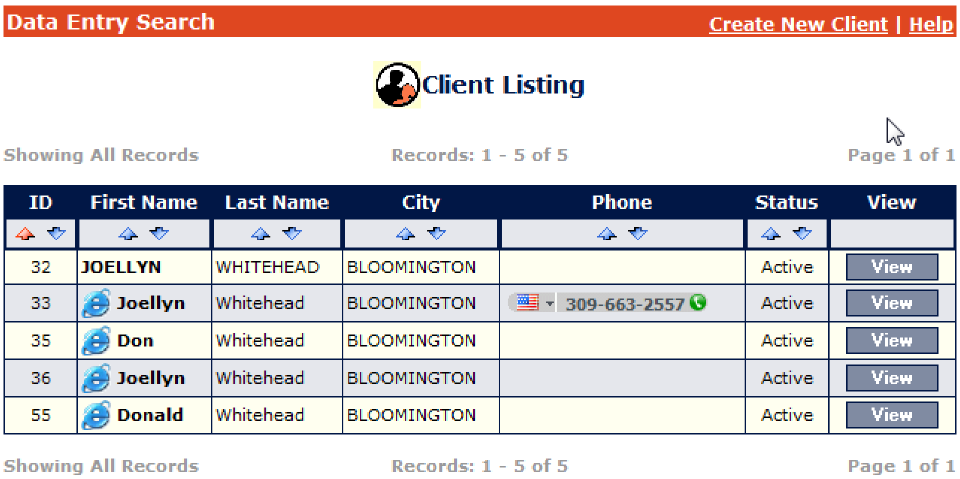
- Client ID
- First Name
- Last Name
- Area Code
- Phone Number


Left click on the **<Search>** button or simply press Enter to initiate the search.

Simply left clicking on the **<Search>** button will produce results of **all** clients *(both Active and Inactive)* in the database.

A results list with information on all matching clients will be produced after clicking the **<Search>** button. If the list includes the desired client, then select that client by clicking the "View" button in the right-hand column of the client's row. If the desired client does not appear in the results, then the parent is either a new client or the search criteria was entered incorrectly (i.e., perhaps a search for "*Kristina*" is done using a "*Ch*" when the client actually spells it with a "*K*." Searching using *"Ch"* will not return the correct result in this instance.)

If the user is certain the criteria is entered correctly, or that the client is new, then left click on the **Create a New Client** hyperlink above and to the right of the browse list. Below is an example of a search using ***Whi**** with multiple responses, including Internet clients and those clients who are listed as inactive in the database. Internet clients are denoted by the Internet Explorer "e" in the First Name column. Regular clients do not have that notation.



Data Entry Search — Create New Client | Help

Client Listing

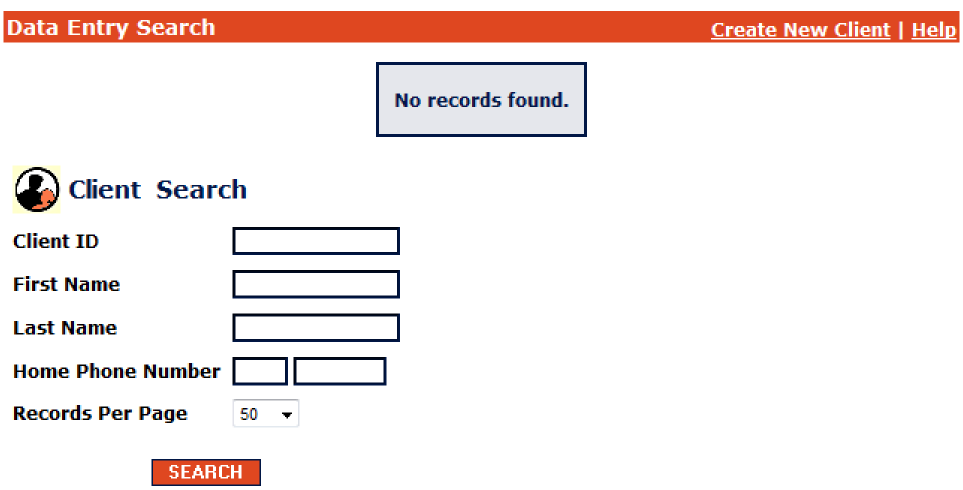
Showing All Records — Records: 1 - 5 of 5 — Page 1 of 1

| ID | First Name | Last Name | City | Phone | Status | View |
|---|---|---|---|---|---|---|
| 32 | JOELLYN | WHITEHEAD | BLOOMINGTON | | Active | View |
| 33 | Joellyn | Whitehead | BLOOMINGTON | 309-663-2557 | Active | View |
| 35 | Don | Whitehead | BLOOMINGTON | | Active | View |
| 36 | Joellyn | Whitehead | BLOOMINGTON | | Active | View |
| 55 | Donald | Whitehead | BLOOMINGTON | | Active | View |

Showing All Records — Records: 1 - 5 of 5 — Page 1 of 1

If no clients match the search criteria, the system will state, "there were no records found for your search criteria." To enter a new client left click on the **Create a New Client** hyperlink above and to the right of the browse list. This will open a new Client File.

**No Records Found Example:**

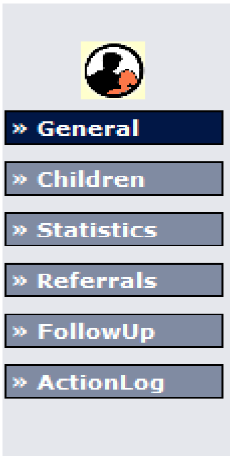



Once the correct record is opened, data entry can begin. There are six (6) pages in the client record: ***General, Children, Statistics, Referrals, Follow-up and Action Log***. The pages can be accessed by clicking, in any order, on the related buttons in the left margin.

## Client General

Client Data Entry - General > General Info

**General Information**


The "General" screen collects data about the caller, such as name, address, phone numbers, etc.
The "Children" screens collects specific data about the child, such as name, age, type of care needed, schedules requested, subsidy information, etc.
The "Statistics" screen collects specific data about the family, such as income, family composition, family size, subsidy information, etc.
The "Referrals" screen displays referrals previous given and allows Quick Searches and Custom Searches. It also is where profiles, summaries and lists can be printed.
The "Follow Up" screen is where follow up information is collected on the client.
The "Action Log" screen is where specific actions can be saved to show the history of the client.

**Client ID:** Unique computer-generated number assigned by the system.
**Create Date:** System-generated field; captures date client record was created.

**Status**

*<Select Active or Inactive from the drop-down list>*

The *Status* defaults to *"Active,"* indicating that the client is active in the database. The client stays "active" for the current fiscal year. Once a client is designated as inactive, change the *Status* by selecting "*Inactive*" from the drop-down list. An *"Inactive"* record **will not** be counted in statistical reports. The "as of" date indicates the date that the client's current Status took effect; it defaults to the system date of the server or to the date opened if the data was converted from another program. Only users with "Create, Modify, Reports & Delete" or "Administrator – Total Access" security can change Status.

**Active:** New client (Active for current fiscal year).
**Inactive:** All clients will be globally changed to inactive at the end of each fiscal year (on June 30th) by a NACCRRA Administrator (Both Community and Enhanced).
**As of:** Date of active/inactive status. Defaults to Date Added.
**First Name:** Enter the first name of client.
**Last Name:** Enter the last name of client.
**Caller First Name:** First name of caller if different than that of client.
**Caller Last Name:** Last name of caller if different.
**Katrina Home St:** If the family seeking child care is a family displaced by Hurricane Katrina, enter the two digit state abbreviation (in caps) for the state from which the family was displaced, e.g. for Louisiana enter LA; for Mississippi enter MS; and for Alabama enter AL.
**Date Start 12 Mo:** Do not use. This field may have data in it in cases of previous clients – you do not need to modify the date.

Client Data Entry - General > Location

**Location**

Please use the following guidelines in entering address information:

- Periods are ALMOST NEVER used; except when it is part of the street name, which is very unusual;
- Street numbers are not spelled out, e.g. 14th St; NOT Fourteenth St;
- The “W” for West and “E” for East, e.g. 215 W 118th St. However, “East” and “West” are spelled out when it’s a part of the street name, e.g. West Side Hwy;
- The “th” or “rd” or “st” contiguous with the street number, when appropriate, e.g. 215 W 118th St;
- “St” (without a period) for Street and for Saint; even when Saint is the first word in the street name;
- The “Pl” (without a period) for Place and
- The “Ave” (without a period) for Avenue, when the street name does not begin with the word avenue.

| | |
|---|---|
| **Street Address:** | Enter street address of client. |
| **Unit #:** | Enter number of the apartment, suite, townhouse, or trailer lot number of the client, if applicable. |
| **City:** | City in which client lives. |
| **State/Prov:** | Enter State in which client lives. |
| **Zip/Postal Code:** | Enter the five-digit code in which the provider/program business is located s*ince, this data will be used to “map” the location of the client, it is important to be accurate.* |
| **+4:** | Enter the last four digits of the nine-digit zip code in which the client is located. This field is **optional** if your area postal service does not require this extension. |
| **County:** | Enter the county in which client lives. It is important to spell out the county correctly and do not abbreviate in order to “map” correctly. If client is from out of state please enter OUT OF STATE. |
| **Country:** | Enter country of client (defaults to USA). |
| **Region:** | (Configurable 1) Enter your SDA number as a 2-digit number (01, 03, 13). DO NOT ENTER Roman numbers. For SDAs wishing to designate sub areas; e.g. neighborhoods, etc. Leave a space and enter an alpha abbreviation or numeric for the sub area; alpha abbreviations or numeric are designated at the local level. Use all capital letters. |

**Referral Delivery**

| | |
|---|---|
| (Configurable 2) | *<Check all that apply>* |
| **Phone:** | Client received referral over the phone. |
| **Fax:** | Client received referral by fax. |
| **E-mail:** | Client received referral by e-mail. |
| **Pick up:** | Referral picked-up by parent. |
| **Walk-In:** | Referral was conducted while parent was in office. |
| **Mail:** | Client received referral by mail. |
| **Internet:** | Client received referral via the Internet. |
| **Local Use:** | 8-18 fields are reserve for local use. |
| **Statewide Use:** | 19-20 fields are reserved statewide use. |

Client Data Entry - General > Location Continued

**Validate**

Do not click this button.  This uses the old Pepperwhite geocoding software which may produce inaccurate results.

**Get Lat Long**

Clicking on the **<Get Lat Long>** button allows you to "geocode" or "map" the client's location address, mailing address, a third address or a fourth address, by assigning a latitude and longitude to the client's selected location.  If the Latitude and Longitude fields below this button are empty, it means the record has not yet been geocoded.  Click the **<Get Lat Long>** button and the **"*Geocode Address Search*"** window will appear.

This window will show the *Street Address*, *City*, *State*, *Zip*, *Zip+4*, and *Country* of the client's location. Click the **<Submit>** button.

A window titled "Tele Atlas Eagle Geocoding Technology Results" will then appear.  The latitude and longitude of the client's address will appear highlighted in yellow.  To view the location using an online mapping tool, click either of the links below the Save Lat/Long button.  This will bring up Google Maps or MapQuest.

To save the geocoding information back to the client record, click the **<Save Lat/Long>** button.  Then, click the **<Close Window>** button to return to the Client General screen.

***Address 3 & 4***: These addresses are additional addresses that can be validated to assign a latitudinal and longitudinal code to the address and then allow for quick search on the additional address.  These addresses may hold a work, school or other location.  These addresses will **not** be available for reports or labels.  The latitudinal and longitudinal code for the addresses will be available on reports and exports.

***Note: The geocoding process generates and saves a FIPS code in the NACCRRAware database for that record.  This code can be searched using the Custom Search.***

**FIPS** Federal Information Processing Standards codes (FIPS codes) are a standardized set of numeric or alphabetic codes issued by the National Institute of Standards and Technology (NIST) to ensure uniform identification of geographic entities through all federal government agencies.  The entities covered include: states and statistically equivalent entities, counties and statistically equivalent entities, named populated and related location entities such as, places and county subdivisions, and American Indian and Alaska Native areas.

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Client Data Entry - General > Mailing

**Mailing**

**Street Address:** Enter only if mailing address is different than the location address in which the client resides.  If you enter a mailing address, you must enter the entire address (i.e. city, state and zip code), not just the street address.

**Unit #:** Enter unit number, such as apartment number, suite number, townhouse, trailer lot number, etc., where the client is to receive mailings.

**City:** Enter city where the client is to receive mailings.

**State/Prov:** Enter **s**tate where client lives (Administrator: set default to IL).

**Zip/Postal Code:** Enter the five-digit code where client is to receive mailings.

**+4:** Enter the last four digits of the nine-digit zip code where the client is to receive mailings.  This field is **optional** if your area postal service does not require these extensions.

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Client Data Entry - General > Address 3 and 4

**Address 3 and 4:** These addresses are additional addresses that can be geocoded and may be used for work, school or other locations that you can conduct a quick search. These addresses will NOT be available for reports or labels.

**Street Address:** Enter the street address of the additional address.

**Unit #:** Enter the unit number, such as the apartment number or suite number that the client uses for the additional address.

**City:** Enter the city for the additional address. The city will default to the city entered as the default in **Administration General** if any default has been assigned.

**State/Prov:** Select the state (USA) or province (Canada) for the additional address from the drop-down list. The state or province will default to the state or province entered as the default in A**dministration General** if any default has been assigned.

**Zip/Postal Code:** Enter the five-digit zip code (USA) or the six-character postal code (Canada) of the additional address. The zip code or postal code will default to the zip code or postal code entered as the default in **Administration General** if any has been assigned.

**+4: Optional:** Enter the last four digits of the nine-digit zip code (USA) of the additional address. Use capital Letters.

Client Data Entry - General > Contact

**Contact**

**Home Phone:** Home phone number of client.

**Work Ph & Ext:** Work phone number of client.

**Cell Phone:** Cell phone number of client.

**Fax:** Fax number of client.

**E-mail Address:** E-mail address of client.

**TIP**: If a default area code is set up in the Administration - General section, then that area code will be defaulted for all phone number fields in the client record, whether or not they actually have a phone number in a specific data field. For example, if a client does not have a cell phone number, but the area code default has been set up, then that area code will appear by default even though there is not a corresponding cell number. This could be unattractive on some reports. To avoid this, manually delete the area codes where there are no corresponding phone numbers.

Client Data Entry - General > Client Info

**Client Information**

**Employer:** Select the employer the client works for from the drop-down list. Once the page is saved, the employer name automatically moves to the field to the right of it (untitled field below). Anything typed in that field will be replaced with the selected Employer. If the employer's name is not found in the drop-down list, then select "*Other*" and you will be moved to the next box (untitled) to enter the name of the employer; in the empty box, type the name of the client’s employer. If you find yourself frequently entering the same employer names as "*Other*," then you should ask your N***ACCRRAware*** Administrator to enter that employer into the selections for the drop-down list (50 available fields).

**List of reasons why this field is important to collect on:**

- Data to present to funders showing that parents work for these employers and any change in child care funding affects the companies the parents work for;
- Help determine who to contact for corporate contracts;
- See trends (low income vs. employers);
- Employer assessing if they should have on-site child care;
- United Way statistics;
- Helps to know which employers to approach for funding; and
- Identify potential employers to do a CCAP training with.

**Untitled Field:** Name of client’s employer. Type in if not on Employer drop-down list.

**Employee ID:** **Optional**: Employee ID for client’s employer.

**Other Employer:** This field can be used either to record a client's second employer or the employer of their spouse or partner. Select the other employer from the drop-down list. Once the page is saved, the employer name automatically moves the field to the right of it (untitled field below). Anything typed in that field will be replaced with the selected Employer. If the employer's name is not found in the drop-down list, then select "*Other*" and you will be moved to the next box to enter the name of the employer; in the empty box, type the name of the employer. If you find yourself frequently entering the same employer names as "*Other*," then you should ask your ***NACCRRAware*** Administrator to enter that employer into the selections for the drop-down list.

**Untitled Field**: Name of spouses/partner employer. Type in if not on Other Employer drop-down list.

**Employee ID:** **Optional**: Employee ID for client’s other employer or spouse/partner employer.

Client Data Entry - General > Client Info Continued

**Case Type**

<Select one from drop-down list> (First four are fixed fields)

**Referral:** Did search and provided referral. Check for all community referrals.

**Enhanced Referral:** Did a search and provided an enhanced referral. Check for all enhanced referrals. Definition: A prearranged agreement between the CCR&R and another entity to provide referrals to a specific group of clients typically with compensation, e.g. Social Service based agencies and employers.

**Internet Referral:** Referral done by a client all on their own via the CCR&R internet referral system.

**Internet Referral-Approval Pending:** TBA.

**Publication:** **Do not Use**; Enhanced Only. Sent publications/info/non-referral (i.e. brochures).

**Consultation:** **Do not Use**; Enhanced Only. Client provided consultation.

**Tech Assistance:** **Do not Use**; Enhanced Only. Client provided technical assistance.

**Statewide Use:** 7-10 fields are reserved statewide use.

**Client Status**

**OPTIONAL field beginning 07/01/06.** Client Status is for community clients only.

**New Client:** First time user of CCR&R service.

**Previous Client:** Repeat request within current fiscal year.

**Previous Client/New Case:** Client was in previous fiscal year, no active case currently in database. Reactivate client case and update accordingly.

**Client Type**

***Effective 7/1/11 – Do not use the Client Type field. This field has traditionally been used for billing purposes and as of 7/1/11, all community-based referrals are free of charge. Enhanced referral cases should be documented using the Case Type field. Foster family cases are denoted on the Child screens and the Client Statistics screen.***

<Select one from drop-down list> Configuration note: First three fields are fixed.

**Fee Paying:** Client is billed for service. Refer to the CCR&R Parent Sliding Fee Chart to determine client income range and appropriate Fee Amount.

**Fee Waived:** Fee waived at discretion of referral counselor (refer to local SDA policy.) Also, type in Action Log, that the fee was waived and the reason. ***Note: In Fee Amount enter the amount waived. Do not check Initial Billing in addition to this field.***

**Corporate Contract:** Client's employer subscribes to the service and is paying for the referral. Note: In Fee Amount refer to your SDA's recommendation.

**No Fee Assessed:** Client qualifies for free service. Refer to the CCR&R Parent Sliding Fee Chart to determine client income range qualifies for free service. Fee Amount is 0.00. Do not check Initial Billing.

**No Data Available:** Client's income is not available. Fee Amount is 0.00.

**Paid Previous FY:** Client paid fee during previous fiscal year for current 12 months of service. ***Note: In Fee Amount enter the amount paid previous fiscal year. Do not check Initial Billing in addition to this field.***

**No Fee/Foster:** Client is a foster family and qualifies for free service. Fee Amount is 0.00. Do not check Initial Billing.

**Special Fee:** Client is assessed a fee other than the statewide CCR&R Parent Sliding Fee Scale, e.g. Nanny packet.

**Paid Another SDA:** Client paid fee to another SDA during current fiscal year. Fee Amount is 0.00. Do not check Initial Billing.

**Statewide Use:** **(**10) field is reserved statewide use.

**Fee Amount**
Enter 0.00 as the amount charged for community-based referrals. For enhanced referrals, enter what your SDA charges. This field must have an amount in it for DHS reporting; do not leave blank.

**Payment Method**
***Effective 7/1/11, do not use this field.***
<Select one from drop-down list> (**Optional**)
**Cash:** Client paid cash for referral service.
**Check:** Client paid with a check for referral service.
**Credit Card:** Client paid for referral service with a credit card.
**Local Use:** 4 – 7 fields are reserved local use.
**Statewide Use:** 8 -10 fields are reserved statewide use.

**Payment Received Date**
***Effective 7/1/11, do not use this field.***
Date the referral fee is paid, if fee paying client.

**Number of Children**
Document the number of children in the family needing care. System enters number based on number of times you click "Add Child" button.

**Financial Assistance Client**
Does the client currently use any type of subsidy? Select Yes/No.

**Number FY Repeats:**
Enter the number of repeat requests per fiscal year as a two-digit number, e.g. 03 or 11. Enter "00" for a customer calling for the first time in the current fiscal year. Increase this number by one for each additional call.

**Date Last Request:**
Each time the customer calls for referrals, enter the current date.

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Client Data Entry - General > Billing
**Billing**
***Effective 7/1/11, do not use this field.***
**Initial Billing:** Client sent initial bill for services.
**2nd Billing:** Client sent second billing notification.
**3rd Billing:** Client sent third billing notification.
**Local Use** 4 – 10 fields are reserved local use.

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Client Data Entry - General > Mask Information
**Mask Info**
**Available Profiles:** System will fill in based on IMM configuration.
**Selected Profile:** System will fill in based on IMM configuration.
**IMM Account Created Date:** System will fill in when the user created their account in the Quality Counts Online Child Care Search.
**IMM Account Expiration Date:** This field should remain blank as accounts do not expire.
**Max IMM Searches Allowed:** This field should remain blank as there is no max IMM search limit.
**IMM Password:** This is the user's IMM password – do not change.

Client Data Entry - General > Comments

**Comments**

May input cities to be searched.  Also list information related to phone number and caller (i.e. hours to call, identity of caller if not parent).

Client Data Entry - General > Button at the bottom of webpage

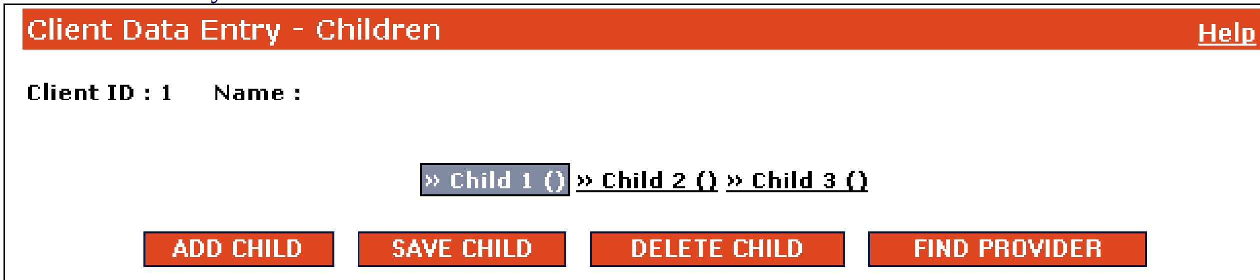
**Deleting Records**

**There is a <DELETE CLIENT> button at the bottom of this screen.  A verification box will pop up to confirm the deletion.  Note: Only users with a higher security level will be able to see the <DELETE CLIENT> button.**

DO NOT delete a record unless you know for sure it needs to be deleted, e.g. **a junk record.  If you are unsure, please check with your NACCRRA*ware* Administrator.**

## Client - Children

Client Data Entry - Children >




The Client Data Entry screen for Children will display the Client ID number at the top of page along with the Client's name. Also at the top of the page you will find a link or button for each of the children associated with this client's record. Each child will have its own separate page and can be accessed by clicking the corresponding button for the child.

Across the top and bottom of the child(ren) page(s) are buttons **<Add Child>, <Save Child>, <Delete Child>**and **<Find Provider>** (*The* ***<Delete Child>*** *button will appear once a child has been entered and saved and if you have the security level allowing deletions.*) The **<Add Child>** button generates the fields to enter the information on an additional child; you can add as many children as required. **Information entered about the first child will be defaulted** for the next child, with the exception of ***Name*** and ***Birth Date***; this saves data entry time and allows you to simply go in and make any changes in care requirements for the second child. Additional children default to the care requirements of the child just previously entered. *It is important to complete all information on the first child to ensure all data is replicated.*

**<Save Child>** button saves the information on current child. If more than one child, after saving the system will take you to the next child. After you have saved all children who have been entered, the system will take you to the Statistics page or simple select the **"Statistics"** button on the left side of the screen.


**<Delete Child>** button deletes the information on the current child who has been entered. A warning message appears, "*Are you sure you want to delete Child*?" Once yes is chosen, the child's data is deleted and cannot be restored. You must have appropriate rights in order to delete a child.

**<Find Provider>** function provides a simple way to find providers for one or more children, using a number of commonly used criteria to match the client's requirements with the provider's offerings. Clicking the **<Find Provider>** button will allow you to perform this search.

Client Data Entry - Children >

**Adding Additional Children**

If the client has multiple children, once the first child is entered, the information can automatically be repeated for additional children. It is important to complete all information on the first child to ensure all data is replicated.

1. Left click on **<Add Child>.**
2. All data except name and birth date is repeated from Child 1.
3. Enter Child's Name (if desired) and birth date.
4. Make any needed changes in additional child (for instance special needs, different type of care, etc).
5. Click **<Save Child>** at the END of the new child record.
6. As needed, repeat steps 1 through 5 until all children needing care are entered.
7. If your access level allows you to delete records, there is also a **<Delete Child>** button at the END of each child's information.

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Client Data Entry - Children > Child General Information

**Child #**

**Name:** Name of child. **For unborn children use "UNBORN"; If the parent calls back later, enter name and date of birth.**

**Gender**

**Male:** Child is male.

**Female:** Child is female.

**Unknown:** Child not born yet (expectant parents).

**Birth Date:** Birth date of child needing care or due date of unborn child. **Note: Children over the age of 12 years can be entered in the database. Do not refuse any children over the age of 12 years old. All families are entitled to referral services. Keep in mind referral searches through Quick Search will be affected by the age entered. The best approach is to do a Custom Search without an age. Be sure to provide the parent with consumer education materials appropriate to their needs.**

**Current Age:** This field is calculated by the system, using the *Birth Date* and the current system date. The date will only be shown on the page after the child record has been saved. **Note: The system will not be able to calculate an actual age when the Birth Date entered is a future date. It will put a "?" in this field.**

> NOTE: A full date must be entered for the current age, and age care needed, to be computed upon saving the child record. Organizations that do not ask actual birth dates may ask clients for year and month of birth & enter a random date for the actual date (such as all children being born on the 15th of the month) or ask how old the child is and enter the date based on manual computations of a possible birth date.

**Date Care Needed:** Enter the date on which care is needed. If the client gives no specific date, enter an anticipated date, as this date, together with the birth date, are used to generate the *Age Care Needed* entry. The date will only be shown on the page after the child record has been saved. **Note: This field, auto-fills with the date the child record was created. If this is a reactivated client from a previous fiscal year, you can manually change the date.**

**Age Care Needed:** This field is calculated by the system, using the *Birth Date* and the *Date Care Needed*.

> WARNING: It is very important to enter the Date Care Needed field at least 1 week past the child's Birth Date or the NACCRRAware program will not be able to calculate an Age Care Needed. It is preferable to enter a date 6 weeks in advance for a newborn or unborn child. This is due to the way NACCRRAware searches providers. The majority of providers begin care at 6 weeks of age. If this date is not entered correctly, the A*ge Care Needed* will not show on some reports.

Client Data Entry - Children > Child General Information Continued

**Care Needed**

(Select one from drop-down list.)

**Full-Time:** Client needs care 35 hours or more per week.
**Part-Time:** Client needs less than 35 hours per week.
**Both:** Child needs both full-time and part-time care.

**NOTE:** When doing a Quick Search or Custom Search, you will need to enter criteria to search on. You will need to enter either 'Full-Time or Both' for full-time care or you will need to enter 'Part-Time or Both' when searching for part-time care.

**Year Schedule**

(Select one from drop-down list).

**Full-Year:** Client needs care year round, less scheduled vacations/holidays.
**School-Year:** Client needs care during the school year **only**; typically, late August through May.
**Summer Only:** Client needs care during the summer **only**; typically June through August.

**CHD CFG 1 Text Fld & CHD CFG 2 Date Fld** displays on each child screen. Do not use at this time.

---

Client Data Entry - Children > Days Care Needed

**Days Care Needed**

(Check all that apply.)

Days Care Needed

| Day | Start Time | End Time |
|---|---|---|
| ☑ Monday | 7:00 AM | 5:30 PM |
| ☑ Tuesday | 7:00 AM | 5:30 PM |
| ☑ Wednesday | 7:00 AM | 5:30 PM |
| ☑ Thursday | 7:00 AM | 5:30 PM |
| ☑ Friday | 7:00 AM | 5:30 PM |
| ☐ Saturday | | |
| ☐ Sunday | | |

**Start Time:** Earliest time a child will need to start care.
**End Time:** Latest time a child will need to end care.

*Days of the Week and Start and End Times* indicates the days of the week and start and end times for each day the client needs care for this child.

***To enter this information:***

1. Left click on check box beside the first day the client needs care for.
2. Enter the time the client to needs to drop off the child for care (*Start Time*) and the time the client is able to pick up the child from care (*End Time*) for that day. Enter times with an "AM" or "PM" after the time in either upper or lower case. If the time is not an even hour, enter a colon and then the part of the hour (i.e. 3:00 PM could be entered as 3 PM or 3pm, however 3:30 PM would be entered as 3:30 PM or 3:30 pm).
3. After entering the times for the first day, click on the next day that the client needs care. The *Start* and *End Times* will auto-fill.
4. If the client needs care for different hours on a specific day, it is possible to edit the Start and End Times to reflect the correct hours.
5. Repeat for each day the client needs care.
6. If the client needs 24-hour care, enter the time as 12:00 AM - 11:59 PM.

**NOTE**: The *Start* and *End Times* will only be saved for the days of the week that has been checked. If the hours change, make the change on the first day of the week, then click twice on the other days of the week to change times on other days. ***On Start Time and End Time, be sure to enter AM or PM. Defaults to AM if AM/PM is not entered.***

---

Client Data Entry - Children > Extra Care Services

**Extra Care Services**

| | |
|---|---|
| **Drop-In:** | A predetermined relationship between a provider/program and a family for occasional consistent use. |
| **Temp/Emergency:** | Client needs short-term care, space permitting, back up for other providers, etc. |
| **Before School:** | Client needs care before school hours. |
| **After School:** | Client needs care after school hours. |
| **Rotating:** | Client needs varying schedules, e.g. Monday, Thursday one week; Tuesday, Thursday and Friday next week). |
| **24-Hour:** | Client needs a program or provider who offers care 24 hours a day. |

Client Data Entry - Children > Type of Care

**Type of Care**

Choose the type of child care setting preferred for child.

| | |
|---|---|
| **Child Care Center:** | Programs defined as "centers" by DCFS licensing. |
| **Family Child Care:** | Program that is located in provider's home, including Group Family Child Care. |
| **Preschool Program:** | Part-day programs for toddler/preschool children as defined by DCFS licensing. |
| **School Age Program (CCC):** | Program serving kindergarten and/or older children only. May be licensed or license-exempt program in a public or non-public school or a licensed community-based program. Program may or may not provide teacher institute days. |
| **(CCC) Park/ Recreation Only:** | Program classified as park/recreation program. |
| **(CCC) Head Start/ Early Head Start Only:** | Program is a Head Start and/or Early Head Start Early Childhood Special Education Program. |
| **(CCC) Preschool For All Only:** | Formerly ISBE Pre-K Only. Voluntary preschool for 3 and 4year olds that typically operates on a school calendar, but it may vary from program to program depending on where it is offered. Classes are typically 2.5 hours long, 3 to 5 days a week. Programs may be located in schools, child care centers, community organizations, private preschools, faith-based organizations, community colleges and other settings. These programs are funded by Illinois State Board of Education (ISBE) and there is no cost to the parents. Don't enter Preschool For All for birth to 3 year olds, such as Mom and Tots, into NACCRRAware. These can be entered in your community database. |
| **(CCC) Special Needs Care Only:** | Program only provides services for children with special needs. |
| **(CCC) Before/After School Only:** | Program only provides before/after school age care. May or may not have teacher institute days. |
| **(FCC) In-home Care:** | Program provides in-home child care**. ONLY USED ON CLIENT SIDE, e.g. Nanny or Au Pair services.** |

Client Data Entry - Children > Environment

**Environment**

Child/parent has need or preference for any of the following. ***(Check all that apply)***

| | |
|---|---|
| **Smoke Free:** | Smoking is never allowed in provider home/facility. |
| **No Pets:** | No animals in or outside of the home/facility. |
| **Indoor Pets:** | Provider has indoor pets. |
| **Outdoor Pets:** | Provider has outdoor pets. |
| **Fenced in Yard**: | Home or facility has fenced in child care play area. |
| **Wheelchair Accessible:** | Home/facility is wheelchair accessible. |
| **Pool:** | Home/facility has an indoor/outdoor pool. |
| **Waterfront:** | Home/facility is located on waterfront property. |
| **Local Use:** | 9 – 15 fields are reserved local use. |
| **Statewide Use:** | 16 -20 fields are reserved statewide use. |

Client Data Entry - Children > Languages

**Languages**

Child/parent has need or preference for a setting where caregiver(s) speak the following languages (Check all that apply).

| | |
|---|---|
| **English:** | Parent needs provider/staff to speak fluent English. ***Default if language is unknown.*** |
| **Spanish:** | Parent needs provider/staff to speak fluent Spanish. |
| **Native American:** | Parent needs provider/staff to speak Native American, e.g. Ojibwe, Lakota, etc. |
| **African:** | Parent needs provider/staff to speak an African language (state in comment section). |
| **Asian:** | Parent needs provider/staff to speak an Asian language (state in comment section). |
| **European:** | Parent needs provider/staff to speak a European language (state in comment section). |
| **Other:** | Parent needs provider/staff to speak a language not listed above (state in comment section). Includes **Local 8-20** for local use for languages in your SDA. |

Client Data Entry - Children > Special Needs

**Special Needs**

*Check any of the following health conditions that may apply to the child:*

| | |
|---|---|
| **Emotional/ Behavioral:** | Parent seeking provider/staff that have experience or training in caring for a child with special emotional needs and/or behaviors such as ADD, ADHD, withdrawn, anxious, impulsive, aggressive, etc. |
| **Physical:** | Parent seeking provider/staff that have experience or training with caring for a child with physical needs such as Spinal Bifida, Cerebral Palsy, etc. |
| **Developmental Delays:** | Parent seeking provider/staff that have experience or training caring for a child with developmental delays such as speech, motor delay, etc. |
| **Sign Language:** | Parent seeking provider/staff who can sign fluently to communicate on a daily basis. |
| **Asthma/Severe Allergies:** | Parent seeking provider/staff that have experience or training in caring for a child who has asthma and uses a nebulizer or inhaler or has life threatening allergies. |
| **Visual/Hearing:** | Parent seeking provider/staff that have experience or training in working with a child with visual/hearing impairments such as blindness, deafness, hearing aids, etc. |
| **Sensory:** | Parent seeking provider/staff that have experience or training in working with children who have sensory disabilities such as tactile deficiency, over-stimulation due to environment. |
| **Special Health Needs:** | Parent seeking provider/staff that have experience or training for a condition, which requires medical procedure to be performed by the provider such as tube feedings, diabetes, monitor or seizures. |
| **Autism:** | Parent seeking provider/staff that have experience or training for a child diagnosed with autism. |
| **Gifted:** | Parent seeking provider/staff with experience or training in caring for a child who is gifted. |
| **Premature Infants:** | Parent seeking provider/staff who have experience or training in caring for premature infant(s). |
| **Other:** | Parent seeking provider/staff that have experience caring for a child with other types of special needs. |
| **Statewide Use:** | 13 -30 fields are reserved statewide use. |

Client Data Entry - Children > Transport Q Search

**Transport Q Search**

(Choose type of transportation needed for parent/child)

*LOCAL 1 (Configurable title and fields, fields viewed in both provider/client screens. Shows up on Client Referral Quick Search screen.)*

**Near Public:** Provider/program is near public transportation such as bus line, train, etc.

**Will Consider:** Provider/program willing to negotiate transportation arrangements on a family-to-family basis.

**To/From Home:** Provider/program will provide transport to/from child's home.

**To/From School:** Provider/program will provide transport to/from school(s).

**To/From Preschool:** Provider/program will provide transport to/from preschool.

**To/From Activity:** Provider/program will provide transport to/from activities.

**To/From Other:** Provider/program will provide transport to/from other places requested by the parent.

**Local Use** 8-9 fields are reserve for local use.

**Statewide Use:** 10-20 fields are reserve for statewide use.

Client Data Entry - Children > Program Information

**Program Information**

*LOCAL 2 (Fields viewed in both provider/client screen)*

**Montessori:** Parent seeking provider/program who has a Montessori Teacher Training Certificate from an organization affiliated with Montessori Accreditation Council (MACTE), American Montessori Society (AMS) or Association Montessori International (AMI).

**Religious Content:** Parent seeking provider/program, which incorporates religious curriculum or practices into setting.

**Kindergarten On-site:** Parent seeking care with Kindergarten component.

**Grade School On-site:** Parent seeking care with grade school on-site.

**Parent Co-op:** Parent seeking care of a provider/program that provide either service singly or as a part of other services.

**Preschool Program (FCC):** Parent seeking a family child care program, which provides or incorporates a structured preschool component such as learning readiness.

**PFA Programming:** Any client looking for a provider that gets funding directly from Illinois State Board of Education (ISBE) to provide Preschool for All services.

**Statewide Use:** 8 -10 fields are reserved statewide use.

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Client Data Entry - Children > Local Three

**Local Three**

Statewide Use *(20 Fields viewed on both provider/client screens).*

**Option 1:** Currently not for use

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Client Data Entry - Children > Subsidy Sought

**Subsidy Sought**

**IDHS Certificate:** Check if parent is seeking provider/program who are willing to accept IL DHS certificate payment, administered by CCR&R subsidy unit, to serve children eligible for IL DHS subsidized care. IL DHS certificate subsidy is a subsidy connected to a particular child.

**IDHS Contract Site:** Check if parent is seeking provider/program has annual IL DHS contract to serve a specified number of children eligible for DHS subsidized care. “Contract” means that the site has a set number of subsidized spaces. The subsidy is connected to a particular site.

**DCFS Vouchers:** Check if parent is seeking a provider who is willing to accept IL DCFS Vouchers for foster children, protective services, or special needs with no employed parent. DCFS vouchers subsidy is a subsidy connected to a particular child. DCFS vouchers for foster children, protective services come from DCFS regional offices.

**Head Start:** Check if parent is looking for a Head Start program funded by the Department of Health and Human Services.

**Preschool For All Program:** Check for parent seeking a Preschool for All program funded by Illinois State Board of Education (ISBE).

**Scholarship/ Sliding Fee:** Parent is seeking a program that offers scholarships to assist parents cover the cost of care or has a sliding fee based on parent income to determine cost of care.

**Employer Discount:** Check for parent who is seeking care by their employer sponsored program, which offers some form of financial assistance to employees of designated employers.

**FCC w/ Negotiable Rates:** Check for parents seeking a FCC provider who is willing to negotiate rates with families.

**Multi-Child Discount:** Check for parent seeking a provider/program, which offers a discounted fee for additional children in one family.

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Client Data Entry - Children > Subsidy Status

**Subsidy Status**

*LOCAL 5*

**Has IL DHS Certificate:** Check if the child has IL DHS certificate (previously called a client-based voucher) administered by the CCR&R's subsidy unit; typically, this will be a parent changing providers. When eligibility was determined, parents gave the application and pay stubs to the CCR&R.

**In IL DHS Site Program:** Check if the child is enrolled in a program with an IL DHS contract (previously called site-based). When eligibility was determined, parents gave the application and pay stubs directly to the child care program.

**Has DCFS Voucher:** Check if the child has a DCFS voucher as a foster child, part of protective service case, or a special needs case with no employed parent.

**Foster Child:** Check if the child is a DCFS foster child. All foster children should also have "has DCFS voucher" checked above.

**Has Head Start:** Check if the child is currently enrolled in a Head Start program.

**Has Preschool For All:** Check if the child is currently enrolled in a Preschool for All program.

**Has Other Subsidy:** Check if the child has a subsidy from an organization other than those listed above, e.g. employer, United Way, etc.

---

Client Data Entry - Children > Elementary Schools

**Elementary Schools**

(**Optional**) Select name(s) of school(s) to be included in search. To select additional elementary schools, press the <**Ctrl**> key on the keyboard while left clicking the mouse on each additional elementary you wish to select.

---

Client Data Entry - Children > Transportation

**Transportation**

***(Optional** Use)*

***(Heading Name is fixed/can't be changed)*** *First three field names are fixed and can't be changed.*

**Transportation Provided:** Client needs a provider who will provide transportation (i.e. to/from activities)

**Walking Distance To School:** Client needs a provider that is within walking distance to child's school.

**Near Public Transportation:** Client needs a provider who is near some type of public transportation, e.g. bus, train, subway, etc.

**Local Use:** 4-10 fields are reserved local use.

---

Client Data Entry - Children > Comments

**Comments:** Enter any relevant comments in this box. Space for comments is very large, although only the first few lines will be available for viewing without scrolling.

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## Client - Statistics

Client Data Entry – Statistics> Statistics General

**Client's Age**

*(Choose one from drop-down list)*

**19 & Under:** Client is 19 years of age or younger.
**20 & Over:** Client is 20 years or older.
**No Data:** No data was collected on client's age.
**Statewide Use:** 4-10 fields are reserved statewide use.

**Relation to Child**

**Father:** The client calling is the father of the child(ren) or foster child(ren).
**Mother:** The client calling is the mother of the child(ren) or foster child(ren).
**Grandparent:** The client calling is a grandparent of the child(ren) or foster child(ren).
**Guardian:** The client calling is the guardian of the child(ren) or foster child(ren).
**Relative:** The client calling is a relative (*other than parent or grandparent*) of the child(ren) or foster child(ren).
**Other:** The client is family advocate, interpreter, social worker or other caller, e.g. *any non-relative and non-foster relative*.
**Local Use:** 8-10 fields are reserved local use.

**Employment Status**

**Employed:** Client calling is employed.
**Seeking Employment:** Client calling is seeking employment.
**At Home:** Client calling is not employed and not attending school.
**Student:** Client calling is attending school or participating in a job-training program.
**Employed/ Student:** Client calling is employed and attending school or participating in a job training program.
**Local Use:** 6-10 fields are reserved local use.

**Income Category**

*(Check only one) Refer to the CCR&R Income Category Chart below to determine Income category.*

**200% and Under:** Client income is 200% and under of the Federal Poverty Level. No fee (**subsidy eligible**).
**201 - 350%:** Client income is between 201 - 350% of Federal Poverty Level.
**351 - 400%:** Client income is between 351 - 400% of Federal Poverty Level.
**Over 400%:** Client income is over 400% of Federal Poverty Level.
**No Data:** No income data is available for client or client is a foster family.
**Statewide Use:** 6-20 fields are reserved statewide use.

**CCR&R Income Category Chart (Effective October 1, 2009)**

| | Percent of 2009 Federal Poverty Level / Gross Annual Income | | | | |
|---|---|---|---|---|---|
| Family Size | 200% & under | 201 - 300% | 301 - 350% | 351 - 400 % | Over 400% |
| 2 | $29,140 | $43,710 | $50,995 | $58,280 | ↑ |
| 3 | $36,620 | $54,930 | $64,085 | $73,240 | ↑ |
| 4 | $44,100 | $66,150 | $77,175 | $88,200 | ↑ |
| 5 | $51,580 | $77,370 | $90,265 | $103,160 | ↑ |

| | | | | | |
|---|---|---|---|---|---|
| 6 | $59,060 | $88,590 | $103,355 | $118,120 | ↑ |
| 7 | $66,540 | $99,810 | $116,445 | $133,080 | ↑ |
| 8 | $74,020 | $111,030 | $129,535 | $148,040 | ↑ |

## Family Size

Enter the number of people in the client's family. "Family" means the client, his or her spouse, and the biological or adoptive children or stepchildren of the client or his or her spouse under age 21 living in the same household. Family must also include the child for whom care is requested, the child's dependent blood-related and adoptive siblings, and the child's and sibling's parents living in the same household. The client may include in his or her family other persons related by blood or law to the client or his or her spouse living in the same household if they are dependent upon the family for more than 50 percent of their support. The client may include in his or her family a child of the client or his or her spouse under age 21 who is dependent upon the family for more than 50 percent of his or her support and who is a full-time student away at school, provided he or she has not established legal residence outside the family household. Include any unborn children for whom their pregnant or adopting parents are seeking care. *Note: Do not create a separate record for foster families. In NACCRRAware, foster families will not be entered as a family size of 01, but will include all family members.*

## Adults

**Single Adult in Household:** Check when client reports one adult in household. **For searches, use "single" as the criteria.**

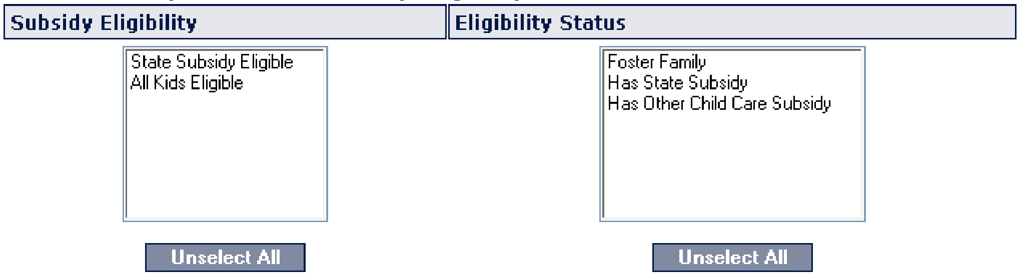
**Two or More Adults In Household:** Check when client reports two or more adults in household. **For searches, use "not single" as the criteria.**

**NOTE: For Searches - use "single" or "not single" in the Query Builder.**

**CLI CFG 5 Text Fld** & **CLI CFG 6 Date Fld:** Do not use at this time.

---

Client Data Entry – Statistics> Subsidy Eligibility




**<u>Subsidy Eligibility</u>**

**(50 total fields available) (***These fields were established to track the "potential" subsidy for the family.)*
Use the <**Ctrl key**> and your Mouse to select multiple choices. Choice(s) stays highlighted and data will save**.**

**State Subsidy Eligible:** Check if the client's family size and income falls within a range where they could potentially be eligible for a state subsidy (e.g. IL DHS Certificate, IL DHS Site, etc.) and wishes to consider referrals from providers willing to accept families using those subsidies. Note: If it is determined the family may be eligible for these subsidies, the family needs to be referred to the CCR&R CCAP Unit. A subsidy application should be sent and the family given information on their child care subsidy options. **Please refer these families to the CCR&R CCAP Unit.**

**All Kids Eligible:** All Kids is a state program that offers health care coverage to children, pregnant women and their babies or helps in paying premiums of employer or private health insurance plans. **Please refer these families to the All Kids Hotline 1-866-ALL-KIDS (1-866-255-5437) ATTY: 1-877-204-1012 or to the All Kids web site: <u>http://www.allkidscovered.com/</u>**

Client Data Entry – Statistics> Subsidy Status

**<u>Eligibility Status</u>**

**(50 total fields available)***(These fields were established to track the "current" subsidy of the family.)*
Use the **Ctrl key** and mouse to select multiple choices. Choice(s) stays highlighted and data is saved.

**Foster Family:** Check if the client is a foster parent and may or may not be seeking care for the foster child.

**Has State Subsidy:** Check if client is using a state subsidy such as the IL DHS Certificate, IL DHS Site or DCFS Vouchers.

**Has Other Child Care Subsidy:** Check if the client has a subsidy from an organization other than those listed above. *Please indicate type of subsidy in the "Comments" section.*

Client Data Entry – Statistics> Child Health

**<u>Child Health</u>**

*(Fixed fields) (***Optional***)*

| | |
|---|---|
| **Did Not Want Info On:** | Client was asked and did not want information on child health related issues. |
| **Child is Fully Immunized:** | Client indicated child is fully immunized. |
| **Send Immunization Info:** | Client requested information on immunization. |
| **Has Health Care Provider for Child:** | Client indicated they have a health care provider. |
| **Has Health Insurance For Child:** | Client indicated they have health care coverage for the child(ren). |
| **No Insurance:** | Client indicated they do not have health care coverage. |
| **Not Aware of Options:** | Client was not aware of available programs. |
| **Referred to Hotline 877-KIDS-NOW:** | Client referred to All Kids Hotline. |
| **Refer to Mental Health Consultation:** | Client referred to Mental Health consultation. |
| **Refer to Nursing Consultation:** | Client referred to Healthy Child Care Nurse Consultant. |
| **Refer to Special Needs Consultation:** | Client referred to special needs consultation. |

Client Data Entry – Statistics> Referred By

**<u>Referred By</u>**

***(Must complete; check only one for 1-14)***

| | |
|---|---|
| **Phone Directory:** | Client heard about CCR&R service by calling directory assistance or consulting the white/yellow pages. |
| **Provider:** | Client heard about CCR&R service through a child care provider. |
| **Agency:** | Client heard about CCR&R services through public/private agency/organization. |
| **Subsidy Unit:** | Client heard about CCR&R services through the subsidy unit. |
| **CCR&R System:** | Heard about service through another CCR&R, Network advertisement or statewide 1-800 number. |
| **Employer:** | Client heard about service through employer, flyer, poster, or human resource department at place of employment. |
| **Internet site:** | Client heard about CCR&R services from the Internet and/or CCR&R web site. |
| **Friend/relative:** | Client heard about CCR&R service through friend or relative. |
| **Radio:** | Client heard about service through radio. |
| **TV:** | Client heard about service through television, e.g. paid or unpaid. |
| **Newspaper:** | Client heard about service through newspaper, e.g. paid or unpaid. |
| **Previous User:** | Client previously used CCR&R service for referral. |
| **Public Event:** | State or County fair; includes Farm Progress Show, Agriculture Open House, etc. |
| **Other:** | Other or none of the above. |
| **Local Use:** | 15-35 fields are reserved local use. |
| **Statewide Use:** | 36-40 fields are reserved statewide use. |

Client Data Entry – Statistics> Reason for Seeking

**Reason for Seeking**

*(Check field(s) that apply).*

**Employment:** Client is entering the work force for first time, re-entering work force, or returning to work after parental leave.

**Training/ Education:** Client is enrolled in school or training.

**Relocation:** Client has recently moved to the area or has moved locally and needs to switch child care.

**Work Related:** Parent needs care arrangement due to work travel, change in schedule and or extended work schedule.

**Parent Needs:** Parent does not work but needs care for personal reasons.

**Child Needs:** Child needs care for social interaction, etc.

**Special Needs:** Parent needs care for special circumstances.

**Dissatisfied:** Client is not satisfied with the present child care arrangement due to cost, quality, or location.

**No Provider Available:** Client's current arrangement is no longer available, e.g. caregiver moved or quit provider un-enrolled child, etc.

**Other:** Client seeking care other than those reasons listed above.

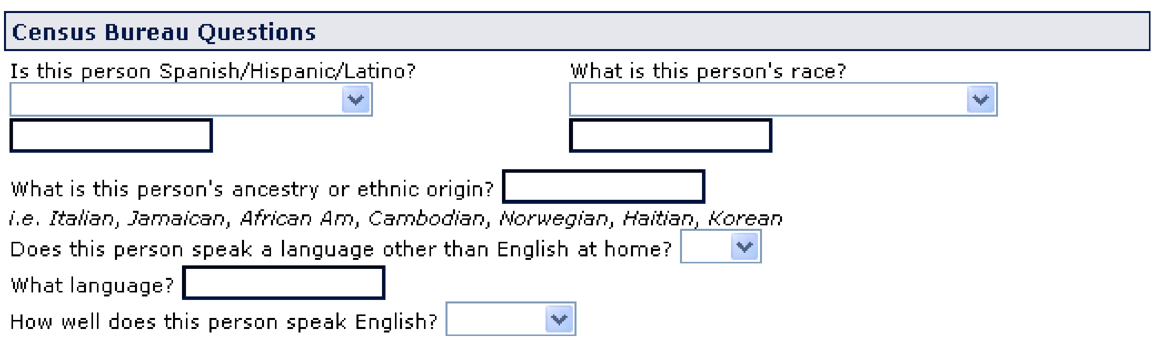
**Local Use:** 11-20 fields are reserved local use.

**Statewide Use:** 21-30 fields are reserved statewide use.

Client Data Entry – Statistics> Census Bureau Questions

**Census Bureau Questions**

***(Optional) This section is hard coded into the program and cannot be hidden.***



## Client Referrals

### Client Data Entry – Referral > Quick Search

This section contains information on referral searches, printing referrals, adding additional referrals and viewing previous referrals made to a client.

A referral search can be performed for a child by either clicking the <**Find Provider**> button on the child screen or by entering this section of the client. Searches can be performed for one or multiple children by using the Quick Search or Custom Search. A Quick Search has pre-defined fields which are common to a referral search. Having these fields readily available can make the referral search process much quicker. To perform a quick search, follow the instructions below:

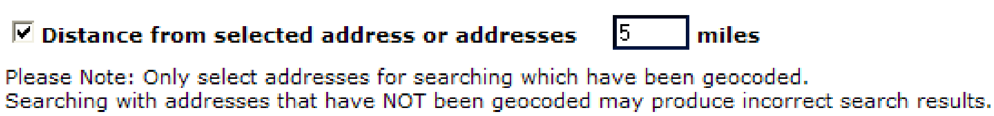
**<u>Select Children for Provider Quick Search</u>**

To select the child or children for whom the search is to be conducted, left click on the box or boxes for the child or children for which a search is being initiated.


If more than one child is selected, the search will look for providers matching the selected search criteria for all of the children selected (i.e., if an infant, a three-year-old and a twelve-year old are selected, then search by *Age of Child*, the <**Find Provider**> function will look for providers who accept children in all three of these age groups). At least one child must be selected or a search cannot be conducted.

**Distance**

If the client address has been validated, enter the number of miles to search a radial (i.e. circular) distance from the client's address(es). See example of distance area below:




If the client's address was not successfully geocoded, under Distance, the text will read **"*There are no map coordinates for this Client. Search by Location is not available.*"**
To disable the radial search, remove the check from the initial Distance from address box. Searching by multiple addresses (for instance Location and Address 3) will result in options matching the designated distance from ***either*** of the two locations.

## Client Data Entry – Referral > Quick Search Continued

**Select Standard Search Criteria**

**Select** Standard Search Criteria

| | | |
|---|---|---|
| ☑ Location | ☐ Mailing | ☐ Address3 |
| ☐ Address4 | ☑ Age of Child | ☐ Total Vacancies |
| ☑ Days of Week | ☐ Hours of day | ☐ FT/PT Schedule |
| ☐ Year Schedule | ☑ City | ☐ Zip |
| ☐ Elementary Schools | ☐ Languages | ☐ Environment |
| ☐ Special Needs | ☐ Local R&R | ☐ Local Two |
| ☐ Local Three | ☐ Type Of Care | |

REMOVE CHECKS | FIND PROVIDERS | CUSTOM SEARCH

**NOTE : FIND PROVIDERS & CUSTOM SEARCH** Button Opens a new Browser Window.

**Select the criteria on which the search is to be conducted**.

1. A check in the box to the left of the search criteria indicates that the criterion has been selected. When the user reaches this page, check marks appear based on defaults set by Total Administrator in Administration-Referrals.
2. Location is only checked if the client's address was successfully geocoded, if the box in front of Distance from address has been checked and a distance entered in the miles box.
3. Left click to remove checks on any boxes representing criteria that should be excluded from the search process.
4. The more criteria selected in the search, the smaller the number of likely matches.
5. At least one box must be checked in order for the search to function.
6. If only a few fields are needed, use the <**Remove Checks**> button to clear all the selected criteria and begin from scratch (defaults can be set for these fields in the Administration-Referrals section).
7. Once all desired selection criteria are finalized, left click on the **<Find Providers>** button below the search criteria to proceed with the search.
8. When the search is complete, the Quick Search Matching Providers window opens.

**Search Statistics**

| Item Description | Count of Items |
|---|---|
| Providers Available for Referral | 62 |
| Failed Because Of Age of Child | 32 |
| Failed Because Of Type Of Care | 1 |
| Matching Providers | 29 |

CLOSE WINDOW | REFINE SEARCH

9. If too few or no results are found, click **<Refine Search>** to return to the previous page and remove selected criteria to increase Matching Provider Entries. If too many results are found, click <**Refine Search**> to return to the previous page and add selected criteria to decrease the number of Matching Provider Entries. Custom search criteria can be added to further customize the search for the client.

Client Data Entry – Referral > Quick Search Continued

10. The items on the Quick Search Results page indicate which fields are causing the search failure. **NOTE:** Removing one search criteria will not necessarily result in additional matches equal to the original number that failed, as another search criteria may now cause the search to fail. For instance, if Age of Child (originally 5 failures) is removed, the number failed because of Hours increases by 4, and the Matching Provider entries only increases by one. By showing the failures, counselors quickly develop inherent knowledge on availability and can use this to help users to understand community needs. By showing how a change in hours affects a particular neighborhood, the counselor begins to develop a sense of what types of information to provide in counseling to the client to increase the understanding of the impact on the search.
11. Once the desired number of providers is located, scroll down the page to view the Matching Providers.

| Matching Providers | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| ID | First Name | Last Name | Business Name | City | Street Address | Phone | Distance | Refer | View |
| 8 | **Test** | Provider | | Normal | 1441 Lincoln Ave | 309 | | ☑ | View |

**Adding Custom Search Criteria to the Quick Search**

The Quick Search fields are based on the most common fields utilized by R&Rs. If a specific field, or fields, needs to be added to further customize the search for a client, fields can be added using the Custom Search Integration process. For instance, if the client wants to locate an accredited program, or a provider who does not offer driving field trips, and this data is not collected in the quick search fields, the user may add criteria for a Custom Search.

**To add custom search criteria:**

1. Click Find Provider button on the Child Page and move to the Referral page or move directly to the Quick Search by choosing the Referrals hyperlink along the left of the page.
2. At least one child and one field in the Quick Search section must be selected.
3. It is suggested to use a base of Type of Care, Age of Child and Hours of Day from the Quick Search for Provider page.
4. Click on the **<Custom Search>** button.
5. On the Provider Custom Search Field Selection page, select the field names for the desired additional search criteria , e.g. *Accreditation*.
6. Click the **<Next>** button.
7. On the Provider Query Builder page, detail the query. For more information on using the Custom Search Function and on constructing queries, see the manual chapter on Custom Searches.
8. Once the query is complete, click **<Add Query and Continue>**
9. The Quick Search Results window will open and present the results. The number of records that fail due to any one or more of the custom search criteria will show on the Quick Search Results page. *See example below*.

Client Data Entry – Referral > Quick Search Continued

## NACCRRA*ware* - Quick Search Results

| Search Statistics | |
|---|---|
| **Item Description** | **Count of Items** |
| Providers Available for Referral | 62 |
| Failed due to Custom Search | 43 |
| Matching Providers | 19 |

CLOSE WINDOW　REFINE SEARCH

NOTE: Fields that were chosen in Quick Search should not be chosen in Custom Search as well, e.g. if Type of Care was chosen in Quick Search, it should not be chosen in Custom Search because it is already a part of the search.

**TIP:** ***Use the following tips for adding custom search criteria to the quick search:***

- Everything added from the custom search criteria is added as an AND onto the quick search criteria. For instance, if Hours of Day is included and Type of Care, then custom search criteria of "Respite Care equals yes" is added, the search is:
- Hours of day equals the Hours in the child page AND Type of Care is equal to selection in child record AND Respite Care is equal to yes.
- If adding multiple cities or zip codes, remove the check mark for these fields on the Quick Search for Providers page. If checks are not removed, the program will look for records that have the City or Zip Code listed on the client record AND the city or zip code listed on custom search criteria. Since no records have multiple cities or zip codes, the search will produce no results.
- If searching in multiple areas such as city, zip or county, use OR between the multiple selections and use parenthesis at the beginning and end of the search criteria.
- To modify custom search criteria, on the Quick Search Results page, click **<Refine Search>** and return to the Quick Search for Provider page. Click on Custom Search again and build a new custom search.
- To remove custom search criteria, on the Quick Search Results page, click **<Refine Search>** and return to the Quick Search for Provider page. Click on **<Find Providers>** to complete a search without the Custom search criteria.
- Once the desired number of providers is located, scroll down the page to the Quick Search Matching Providers section.

Client Data Entry – Referral > Quick Search Continued

**Quick Search Matching Providers – Quick Search Results**

The quick search results table lists basic information about providers that matched the search criteria. The following information is listed:

| | | |
|---|---|---|
| **Provider ID** | **Business Name** | **Distance** |
| **First Name** | **Street Address** | **Refer** |
| **Last Name** | **City** | **Phone** |

For distance to be displayed, the following options must be met.

1. Both the client and the provider records were successfully geocoded.
2. The box to the left of the text “distance from address” is checked.
3. The number of miles is entered in the box to the right of the text “distance from address”
4. One or more of the address fields is selected in the search criteria, e.g. location, mailing, address3 and address4

**NOTE**: If only one address is selected, this distance is from the searched address. If multiple addresses are searched, the mileage is from the closest address to each specific provider record. For instance, if multiple addresses are searched, the first provider’s mileage may be 3 miles from Location and the second provider’s mileage may be 2 miles from Mailing. Since mailing is closest, the distance will show as 2 miles.

**Refer** is marked to indicate the record should be referred to this client. All displayed providers are selected by default. To remove all checks, scroll to the bottom of the provider list and click **<Remove Checks>**.

***Selecting Referrals***

1. To view a provider record in detail to determine if they are suitable to refer to the client, move the cursor to the view button and left click.
2. The Provider information will open in separate window. The file is read only; therefore no changes can be made to the record.
3. Review the provider’s information and decide if a referral to this provider is desired. It is possible to move to different pages of the provider's record by scrolling down the page using the scroll bar found at the far right of the browser or the user can choose the desired provider database screen/section on the floating menu box at the left of the screen by moving the mouse over the desired screen and left clicking. The user can return to the top of the page by moving the mouse to the floating **<Top>** button and left clicking.
4. When viewing of the record is complete, click **<Close Window>** to return to the Quick Search Matching Providers page.
5. If none of the results meet the needs of the client, return to the previous page by clicking the **<Refine Search>** and change the search criteria.
6. Once all the appropriate referrals are checked Make Referral, left click the **<Save Referrals>** button.

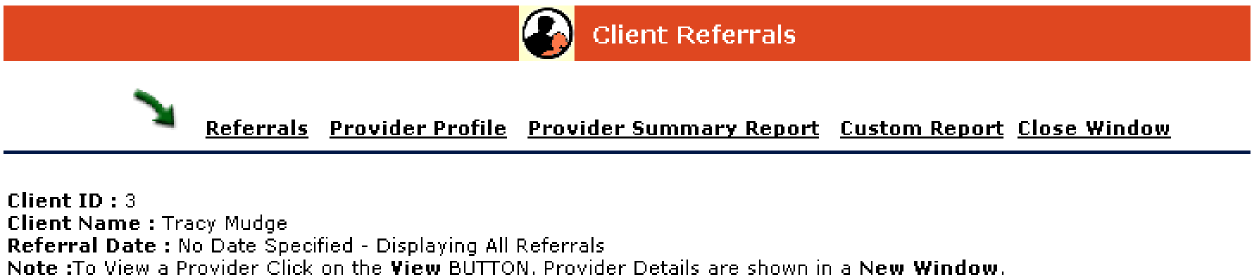
**NOTE**: Only click Save Referrals when the provider is definitely going to be referred to the client.
A NACCRRA*ware* Application Message will display the number of referrals that have been saved.
Click on the Return button to return to the previous page.
Saving referrals will enter the provider and date referred on the Referral page of the client's record; referrals must be saved in order to print a Provider Summary Report or Provider Profiles from the client record.
*Once a provider is referred, the referral may only be edited or deleted by a user with Create, Modify, Reports and Delete security level or higher.*

Client Data Entry – Referral > Print Referrals

***Printing Referral Printouts***

Once a list of referrals is saved, it is possible to print a Provider Summary report, a Provider Profile or a Custom Report for the client using the selected referrals, instructions on printing these reports are provided below.

On the Referrals page, go to the Print Referrals section. To print all providers ever referred to the client, click List Referrals. To print only those providers referred on a specific date, enter the data in the Referral Date box and click<**List Referrals**>. The NACCRRAware Client Referrals window will open, providing 3 options for printing provider information for clients.




This new browser window also displays the Client ID, the Client Name, Referral Date and all the referrals saved for this client. To exit this window click <**Close Window**>

**<u>Provider Profiles</u>**

To print Provider Profiles, choose the Provider Profile section of the page. Providers Profiles are more detailed listings of information about the providers referred, and are generally printed one provider to a page. If many rates and long comments are printed, the profile may run to two pages. See next pages for options of Provider Summary

**Provider Name Option**

*First* and *Last Names* (default) or only their *First Name* on the Provider Profiles; select the preferred option by left clicking the down arrow on the right of the Provider Name Option box, highlighting the selection with the cursor, and left clicking.

**Street Address Option**

*Complete Street Address* (default) or only the *Street Name* on the Provider Profiles; select the preferred option by left clicking the down arrow on the right of the Provider Name Option box, highlighting your selection with the cursor, and left clicking.

**Contact 1 through Contact 4**

Select up to four Contacts to print on the profile printout. The contact fields include two configurable text fields, a configurable date field, a configurable check field, phone numbers with area codes, email and website.

**Care Type 1 through Care Type 8**

Select up to eight Care Type fields to print on the profile printout. The care type fields include all but the EIN/SSN field in the License section on the provider general screen, Type of Care, Quality Indicators and Ages Served.

## Client Data Entry – Referral > Print Referrals Continued

**Shift Type 1 through Shift Type 4**

Select up to four shift related fields to print on the profile printout. The shift fields include rates, days and hours, child/adult ratio, the two configurable text and two configurable date fields and care schedules such as full time and part time. On the Provider Profile, information will appear on all shifts with data.

**Print the following Rates**

If rates are selected in one of the Shift Type fields, place a check mark to the left of the age group(s) which match the age(s) of the client's child(ren) to print the corresponding rates. The selected age group rates will print on the Provider Profile report. If no rates are selected, no rates will print on the profile. In addition, if no rates are present or the provider does not have "Yes" selected on Print rates, the statement "Please call for rates" will appear on the printout.

| **Age Group:** | **Age Range:** |
|---|---|
| Infant 1 Age Group: | 6 (defaults to 1 month 2 weeks) weeks up to and not including 15 months. |
| Infant 2 Age Group: | **Do not use**. Leave field blank. |
| Toddler 1 Age Group: | 15 months up to and not including 2 years. |
| Toddler 2 Age Group: | 2 Years (24 months up to and not including 36 months) |
| Preschool 1 Age Group: | 3-4 Years (36 months up to not including 60 months) |
| Preschool 2 Age Group: | 5 Years & Kindergarten (60 months up to not including 72 months) |
| School-Age 1 Group: (B/A only) | School-Age B/A (Before and After School Rates Only). *Note: Field tracks all providers which offer before/after school care not just ONLY.* |

**Attribute 1 through Attribute 10**

Select up to 10 additional fields of information to print on the summary. The selection list includes fields on the attributes screen as well as other fields in the provider record.

**Comment**

If desired, select a *Comment* field to print on the Provider Profile by left clicking the mouse in the circle of radio button of the desired *Comment* field, if it is not already selected.

**Add Additional Comments Text box**

Users can add additional comments at the bottom of each Profile; the same lines will appear on each Profile that is printed at the same time. This may be used to thank the client or provide the counselor phone number and contact information.

Once the desired field options are selected, click on the **<Print Profile(s)>** button at the bottom of the Provider Profile section. The providers referred will be displayed on screen with the title **"Provider Profile."**

## Client Data Entry – Referral > Print Referrals Continued

***Printing the Provider Profile***

1. Click on the File menu at the top of the browser to pull down the menu
2. Click on the Print selection on the menu. A Print window will appear.
3. Left click the <**OK**> button to print the report, or the <**Cancel**> button to cancel this window.
4. Close the window to return to the Client Data Entry Referral screen.
5. Copying the Provider Profile to another application or an email message.
6. Click on the Edit menu at the top of the browser to pull down the menu.
7. Click on the Select All selection on the menu.
8. The Provider Profile will be highlighted.
9. Click on the Copy selection on the menu.
10. Open a window for the desired application or an email.
11. Place the cursor in the document or in the email window.
12. Click on the Edit menu at the top of the program.
13. Click on the Paste menu item.
14. The Provider Profile will now appear in the document or email message. If needed, modify margins in document.

**Provider Summary Report**

A Provider Summary Report is a basic listing of information about the providers referred sent to clients. This report prints approximately four provider summaries on a page, but the number ultimately depends on the amount of data chosen to print, the amount of data each provider has in the record and the number of records chosen to print on the summary. When the report is displayed, the header will include the name of the client, the date the referral was made, the name of the person who printed the report and the date the report was printed. Users choose the appropriate fields needed to meet the client's requests for information. Defaults may be set for Provider Summary in Administration Referral.

**Provider Name Option**

*First* and *Last Names* (default) or *First Name Only*: select the preferred option by left clicking the down arrow on the right of the Provider Name Option box, highlighting the selection with the cursor, and left clicking. The selection will appear in the Provider Name Option.

**Street Address Option**

*Complete Street Address* or just the *Street Name*. Choose which the preferred option by left clicking the down arrow to the right of the Street Address Option, highlighting the selection with the cursor, and left clicking.

**Contact 1, Contact 2, and Contact 3**

Select up to three Contact sections to print on the summary printout. The contact fields include two configurable text fields, a configurable date field, a configurable check field, phone numbers with area codes, email and website.

**Care Type 1 through Care Type 4**

Select up to four Care Type fields to print on the summary printout. The care type fields include all but the EIN/SSN field in the License section on the provider general screen, Type of Care, Quality Indicators and Ages Served.

Client Data Entry – Referral > Print Referrals Continued

**Shift Type 1, Shift Type 2, and Shift Name**

Select up to two Shifts related fields to print on the summary printout. The shift fields include rates, days and hours, child/adult ratio, the two configurable text and two configurable date fields and care schedules such as full time and part time. On the Provider Summary Printout, information for only one Shift appears. Use the Shift Name to choose the desired shift. To print information for additional shifts, please use the Provider Profile.

**Print the following Rates**

If rates are selected in Shift Type 1 or 2, place a check mark to the left of the age group(s) which match the age(s) of the client's child(ren) to print the corresponding rates. The selected age group rate(s) will print on the Provider Summary report.

| Age Group | Age Range |
|---|---|
| Infant 1 Age Group: | 6 (defaults to 1 month 2 weeks) weeks up to and not including 15 months. |
| Infant 2 Age Group: | **Do not use**. Leave field blank. |
| Toddler 1 Age Group: | 15 months up to and not including 2 years. |
| Toddler 2 Age Group: | 2 Years (24 months up to and not including 36 months) |
| Preschool 1 Age Group: | 3-4 Years (36 months up to not including 60 months) |
| Preschool 2 Age Group: | 5 Years & Kindergarten (60 months up to not including 72 months) |
| School-Age 1 Group: (B/A only) | School-Age B/A (Before and After School Rates Only). |

If no rates are selected, no rates will print on the Summary report. In addition, if no rates are present or the provider does not have "Yes" selected on Print rates, the statement "Please call for rates" will appear on the printout

**Attributes**

Select one additional field of information to print on the summary. The selection list includes fields on the attributes screen as well as other fields in the provider record.

**Number per Page**

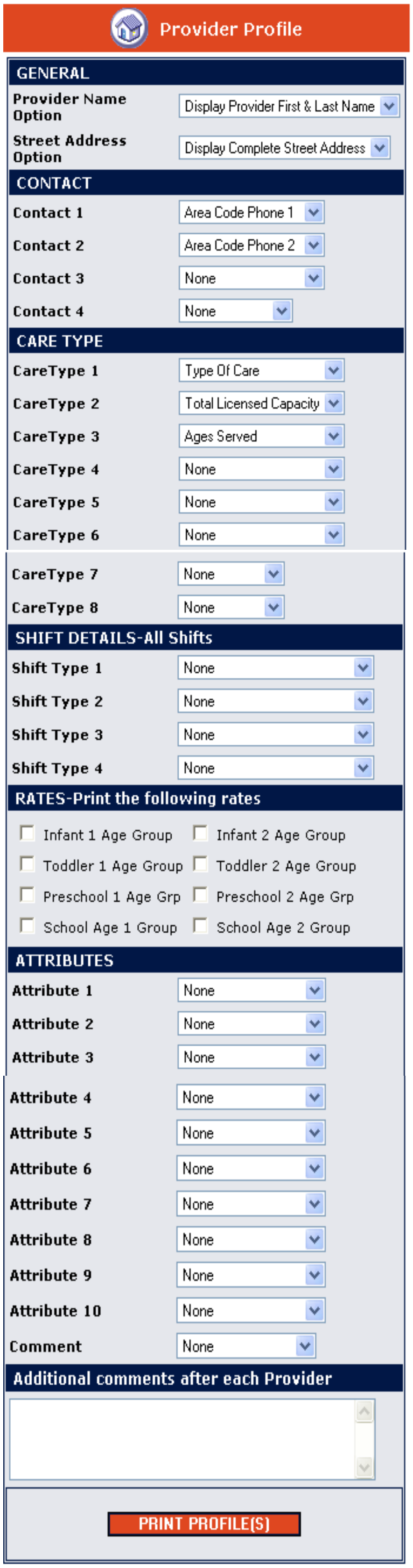
Defaults for the number of summary printouts per page may be set in Administration-Referral. The number of summary printouts per page is affected by the number of fields chosen on the Printout Summary Printout section. If a user chooses all of the possible options and all 8 age group options, only 2 printouts may fit on a page, even if 6 is chosen as the number per page. Once the desired field options are selected, click on the <**Print Referrals**> button at the bottom of the Provider Summary Report section. The providers referred will be displayed in a window with a header that contains the Client Name, Referral Date, the name of the person that printed the referral, and the date the referral was printed.

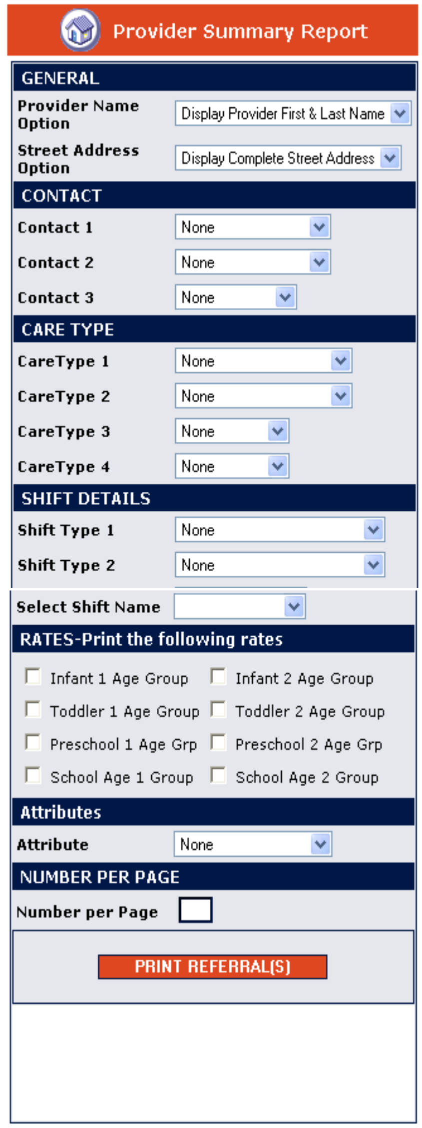
## Client Data Entry – Referral > Print Referrals Continued

***Printing the Provider Summary Report***

1. Click on the File menu at the top of the browser to pull down the menu.
2. Click on the Print selection on the menu. A Print window will appear.
3. Left click the <**OK**> button to print the report, or the <**Cancel**> button to cancel this window.
4. Close the Provider Summary Report window to return to the Custom Search Screen.
5. Copying the Provider Summary Report to Another Application or an Email Message.
6. Click on the Edit menu at the top of the browser to pull down the menu.
7. Click on the Select All selection on the menu.
8. The entire Provider Summary Report will be highlighted.
9. Click on the Copy selection on the menu.
10. Open a window for the desired application or an email.
11. Place the cursor in the document or in the email window.
12. Click on the Edit menu at the top of the program.
13. Click on the Paste menu item.
14. Once the first page of the report has been printed, scroll to the bottom and click Next to copy the next page of the Provider Summary Report.
15. The Provider Summary Report will now appear in the document or email message. If needed, modify margins in document.
16. Return to NACCRRA*ware* and close the Provider Summary List window to return to the Client Data Entry Referrals screen.

## Client Data Entry – Referral > Print Referrals Continued



## Client Data Entry – Referral > Print Referrals Continued

**Custom Printout**

To create a custom printout, scroll to the bottom of the Quick Search Matching Providers Screen to locate the Custom Report printout option as shown below.

**Custom Report**


1. Click Print Custom Report button and choose the fields desired for the custom report. The user may retrieve a previously saved report by choosing the report from the View an Existing Report box and clicking the **<Retrieve Report>** button.
2. Once fields are chosen, scroll to the bottom and click next. Choose the column order for the report and click Run Custom Report.
3. The report will appear in the window named Custom Search-Custom Reports Results.

***Printing the Custom Report***

1. Click on the File menu at the top of the browser to pull down the menu.
2. Click on the Print selection on the menu. A Print window will appear.
3. Left click the <**OK**> button to print the report, or the <**Cancel**> button to cancel this window.
4. Close the window to return to the Client Data Entry Referral screen.
5. Copying the Custom Report to another application or an email message.
6. Click on the Edit menu at the top of the browser to pull down the menu.
7. Click on the Select All selection on the menu.
8. The Provider Custom Report will be highlighted.
9. Click on the Copy selection on the menu.
10. Open a window for the desired application or an email.
11. Place the cursor in the document or in the email window.
12. Click on the Edit menu at the top of the program.
13. Click on the Paste menu item.
14. The Provider Custom Report will now appear in the document or email message. If needed, modify margins in document.
15. Return to NACCRRA*ware* and close the window to return to the Client Data Entry Referrals screen.

---

## Client Data Entry – Referral > Add Referral


NACCRRA*ware* has the ability to add referrals to the existing saved referral list in the client record. If you want to add a referral that was not automatically saved through the Quick Search process, you can add it through Add Referral. To add the referral, simply type in the Provider's ID number and click <**Add Referral**>. NACCRRA*ware* will add it to your existing referral list.

---

## Client Data Entry – Referral > Previous Referral

**Previous Referrals**

| Provider ID | Provider Name | Date Referred | Referred By | Edit/Delete |
|---|---|---|---|---|
| 177 | Lorrie's Day Care | 10/31/2001 | BA | ☐ |
| 296 | Julie Trimble | 09/19/2001 | BJ | ☐ |
| 105 | Judy Able | 09/19/2001 | BJ | ☐ |

UPDATE REFERRAL | DELETE REFERRAL

Once you have saved the referrals found for the client, NACCRRA*ware* places the referred providers in the Previous Referrals section on the Referrals Page. The referrals will be listed with the most recent referrals at the top of the list. The other information on the referred providers include: Provider ID, Provider Name, Date Referred, Referred By (UserId of counselor) and Edit/Delete. Only users with security levels for Editing and Deleting will have the capability to edit or Delete.

To edit the date of a previous referral, place a check in the Edit/Delete box of the provider you wish to edit and then enter new date. Click the <**Update Referral**> button to save the change.

To delete a previous referral, place a check in the Edit/Delete box of the provider you wish to delete and then click the <**Delete Referral**> button. A pop up box will appear asking you "Are you sure you want to delete the records? To continue, click <**OK**> or <**Cancel**> to cancel without deleting.

## Client Follow Up

Client Data Entry – Follow Up > General Follow-up

***According to the IDHS Purchase of Service Standards, CCR&Rs are required to make follow up contact with at least 20% of parents/guardians within 4-6 weeks following an initial referral to measure parents/guardians success in their child care search and satisfaction with education and referral service. Follow up contact attempted with 100% of parents/guardians of children with special needs within 4-6 weeks with at least 50% actual contact achieved is required.***

***Beginning FY06, NACCRRAware users will only need to enter Follow Ups in the PRODUCTION database for Quarters 1, 2 and 3. For QUARTER 4, Follow Ups need to be entered into the PRODUCTION DATABASE through June 30th. After the June 30th date, follow ups need to be entered in the QA database only. Once all data is cleaned in the QA database and INCCRRA says no more changes allowed in the QA database, no more Follow Ups will be entered and counted for that fiscal year. The quarter's end on these dates: (Sept 30th – Quarter 1; Dec 31st – Quarter 2; March 31st – Quarter 3; June 30th – Quarter 4).***

**Beginning FY08 Follow Ups will only be done on clients who have had an initial call in the current fiscal year.**

**Incomplete Survey:** Client returned an incomplete follow up survey. Enter a "YES" in this field if the follow up survey was returned with incomplete or missing information.

**CLI CFG 8 Date Fld:** Do not use at this time.
**Follow Up Date:** Date of follow-up.

**Time Spent (in minutes)**
*All of these fields are* **optional** *use.*
Initial call
Preparing Referral
Check-In Call
Additional Calls
Follow-Up Call
Time Saved For Client
Total Time

**Quality of Options** (fixed heading) **HIDE**
**Quality of Care Chosen** (fixed heading) **HIDE**
**Quality of CCR&R Services** (fixed heading) **HIDE**

Client Data Entry – Follow Up > Follow-up Contact

**Follow Up Contact**

(Follow Up – Questions 1-2 not including 2A-2D)

**Used Referral List:** Parent used the referral list they received.
**Used Child Care Materials:** Parent used the written materials about child care.
**Found Care:** Parent found care, new arrangement.
**Keeping Former Care:** Parent is keeping former care arrangement.
**Decided No Child Care:** Parent has decided not to use child care at this time.
**No Decision:** Parent has not yet made a decision on child care.
**Still Looking:** Parent has not found care and is still looking.
**Contacted CCR&R Again:** Parent has contacted the CCR&R office for additional referrals.
**Statewide Use:** **9-20:** Save fields for future statewide use.

Client Data Entry – Follow Up > How Found Care

**How Found Care**

(Follow Up – *Question 2A*)

**From Referral List:** Parent found care from referral information provided.
**From Friend/Relative/ Co-worker:** Parent found care from a friend, relative or co-worker.
**From Provider:** A child care provider referred parent to another provider.
**From Newspaper Ad:** Parent found care through a newspaper advertisement.
**From Other:** Parent found care through other source.
**Statewide Use:** **7-20:** Save fields for future statewide use.

Client Data Entry – Follow Up > Arrangement Chosen

**Arrangement Chosen**

***(Check all that apply)*** (Follow Up – Question 2B)

**Licensed Center:** Client chose licensed center as their child care arrangements.
**Exempt Center:** Client chose license exempt center as their child care arrangements.
**Licensed Preschool/Nursery:** Client chose licensed preschool or nursery school program as their child care arrangements.
**Exempt Preschool/Nursery:** Client chose licensed exempt preschool or nursery school program as their child care arrangements.
**Licensed Schoolage or B/A:** Client chose licensed schoolage or before/after school program as their child care arrangements.
**Exempt Schoolage or B/A:** Client chose license exempt schoolage or before/after school program as their child care arrangements.
**Licensed Family Child Care:** Client chose licensed family day care home as their child care arrangements.
**Exempt Family Child Care:** Client chose license exempt family day care home as their child care arrangements.
**Relative Outside My Home:** Client chose a relative/friend/neighbor as their child care arrangements outside of client's home.
**In Home Care by Relative:** Client chose a relative to provide child care in client's home.
**In Home Care by Non-Relative:** Client chose a non relative in-home provider as their child care arrangements.
**Statewide Use: 11-20:** Save field for statewide use.

---

### Client Data Entry – Follow Up > Satisfaction Four

**Satisfaction Four**

Reserved for Statewide use. ***(HIDE)***

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### Client Data Entry – Follow Up > Satisfaction Five

**Satisfaction Five**

Reserved for Statewide use. ***(HIDE)***

---

### Client Data Entry – Follow Up > Satisfaction Six

**Satisfaction Six**

Reserved for Statewide use. ***(HIDE)***

---

### Client Data Entry – Follow Up > Reason Care Chosen

**Reason Care Chosen**

(Follow Up – *Question 2 C*)

Check the three most important factors that the parent was looking for in a child care arrangement.

**Reason Care Chosen**

- [ ] Affordability/Cost
- [ ] Educational environment
- [ ] Safe and clean environment
- [ ] Caregiver education/training
- [ ] Experienced caregiver
- [ ] Schedule
- [ ] Caring/Warm environment
- [ ] Location
- [ ] Small group size
- [ ] Other

*Please note in comments the Question Number and reason for Other*.

---

### Client Data Entry – Follow Up > CCR&R Informed Choice

**CCR&R Informed Choice**

| | |
|---|---|
| **Yes:** | Parent was able to make a more informed child care choice as a result of their contact with the CCR&R. |
| **No:** | Parent was not able to make a more informed child care choice as a result of their contact with the CCR&R. |

---

### Client Data Entry – Follow Up > Problem Finding Care

**Problem Finding Care**

(Follow Up – *Question 3*)

| | |
|---|---|
| **None:** | Parent did not encounter any problems in their search for care. |
| **Cost:** | Parent had problems finding care due to cost. |
| **Curriculum:** | Parent had problems finding program with desired curriculum. |
| **Location:** | Parent had problems finding care in the desired location (ex*: distance/ transportation/undesirable area).* |
| **No Openings:** | Parent found no opening(s) for age of child(ren). |
| **Quality:** | Parent felt referrals provided did not meet their standard of quality. |
| **Schedule:** | Parent did not find care available during hours/days needed. |
| **Type of Care:** | Type of care parent wanted not available. |

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### Client Data Entry – Follow Up > Problem Continued

**Problem Continued**

(Follow Up – *Question 3*)

| | |
|---|---|
| **Not Trained:** | Parent indicated provider was not trained to meet child's particular needs. |
| **Not Experienced:** | Parent indicated provider was not experienced in dealing with child's particular needs. |

**Could Not Accommodate:** Parent indicated provider could not accommodate child.
**Does Not Accept CCAP:** Parent had problems finding a provider who accepts Child Care Assistance Program payments from the state.
**Other:** Parent encountered other problems finding care not listed above. *Please note in comments the Question Number and reason for other.*

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Client Data Entry – Follow Up > CCR&R Service 4A&B
**CCR&R Service 4A&B** (Follow Up – *Questions 4 A & B*)
***Question A: The referral specialist I spoke with was polite and courteous?***
**A) Strongly Agree:** Parent strongly agreed counselor was polite and courteous.
**A) Somewhat Agree:** Parent somewhat agreed counselor was polite and courteous.
**A) Somewhat Disagree:** Parent somewhat disagreed counselor was polite and courteous.
**A) Strongly Disagree:** Parent strongly disagreed counselor was polite and courteous.
***Question B: The referral specialist I spoke with understood my child care needs?***
**B) Strongly Agree:** Parent strongly agreed counselor understood child care needs.
**B) Somewhat Agree:** Parent somewhat agreed counselor understood child care needs.
**B) Somewhat Disagree:** Parent somewhat disagreed counselor understood child care needs.
**B) Strongly Disagree:** Parent strongly disagreed counselor understood child care needs.

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Client Data Entry – Follow Up > CCR&R Service 4C
**CCR&R Service 4C** (Follow Up – *Question 4C*)
***Question C: The overall quality of the service was helpful?***
**C) Strongly Agree:** Parent strongly agreed overall quality of service was helpful.
**C) Somewhat Agree:** Parent somewhat agreed overall quality of service was helpful.
**C) Somewhat Disagree:** Parent somewhat disagreed overall quality of service was helpful.
**C) Strongly Disagree:** Parent strongly disagreed overall quality of service was helpful.

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Client Data Entry – Follow Up > CCR&R Service 5-7
**CCR&R Service 5-7** (Follow Up – *Questions 5, 6 & 7*)
**Question 5:** ***Did you know what next steps to take in searching for child care after contacting [CCR&R]?***
**Yes:** Parent understood next steps.
**No:** Parent did not understand next steps; *if reason for "no", indicate reason in comments and reference the question number.*
**Question 6:** ***Did the written materials about child care help you learn more about how to select a child care program?***
**Yes:** Written materials helped to learn more about how to select a child care program.
**No:** Written materials did not help to learn more about how to select a child care program; *if reason for "no", indicate reason in comments and reference the question number.*
**Question 7**: ***How would you rate your understanding of what factors to consider in choosing high quality child care?***
**7A:** ***Before you contacted the [CCR&R]***
**High:** Parent would rate understanding high.
**Medium:** Parent would rate understanding medium.
**Low:** Parent would rate understanding low.
**7B:** ***After you contacted the [CCR&R]***
**High:** Parent would rate understanding high.
**Medium:** Parent would rate understanding medium.
**Low:** Parent would rate understanding low.

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Client Data Entry – Follow Up > Recommend Service

**Recommend Service**

**(**Follow Up – *Questions 8 & 9*)

**Question 8: *If needed, would you contact [CCR&R] again for referrals?***

**Yes:** Parent would contact [CCR&R] again.

**No:** Parent would not contact [CCR&R] again; *if reason for "no", indicate reason in comments and reference the question number.*

**Question 9: *Would you recommend this service to a friend?***

**Yes:** Parent would recommend service to a friend.

**No:** Parent would not recommend service to a friend; *if reason for "no", indicate reason in comments and reference the question number.*

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Client Data Entry – Follow Up > Follow-up Delivery

**Follow Up Delivery**

**Optional**: This field is used to record how a survey is obtained. *(Choose one from list)*

**Fax:** Follow-up completed via Fax.

**Website:** Follow-up completed online.

**E-mail:** Follow-up completed via E-mail.

**Client Initiated**

**Call:** Follow-up completed with a call initiated by the client.

**In-person:** Follow-up completed in person.

**Mail:** Follow-up completed via mail.

**CCR&R Initiated**

**Call:** Follow-up completed with a call initiated by the CCR&R.

**Local Use:** **8-10:** Save fields for local use.

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Client Data Entry – Follow Up > Comments

**Comments:**

Please record any additional comments from follow up survey. Record comments from questions stated as "Other". Also record #10 & #11.

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## Client Action Log

Client Data Entry – Action Log > New Action

The Action Log is intended to track the "history" of the client-CCR&R relationship, especially any updates to the NACCRRA*ware* record for that client. This is a critical advancement in NACCRRA*ware* for better case management by CCR&R staff. Any time that the client is updated, the user goes to the Action Log, selects an action from the list, and saves the Action Log. Even if no other changes are made to the client's NACCRRA*ware* record, it is still possible to record interactions with the client in the Action Log, e.g. record a consultation phone call or a referral to another social service agency.

**New Action**

**Date:** Date of action. Defaults to today's date.

**Counselor:** Defaults to counselor logged into session.

*Note: To be able to search on this, the Counselor's Log On ID (same that is used to log in to NACCRRAware) must be used for the criteria. It will not search on first and last name.*

**Action List**

***(fixed field) (Select one action from drop down list.) If an action falls within one of the following categories, it is REQUIRED to list and save action. It is important for statewide reporting.***

**Initial Call (Local 8):** Parents first time call or if another SDA did a recent referral on a family and referred them to your agency for additional referrals or a parent has reactivated in a new fiscal year.

**Less Than 3 Referrals:** Unable to provide at least 3 referrals. State in comments the rationale. Counselor needs to type reason, e.g. location, no openings, schedule.

**2nd Search:** Client called CCR&R back for 2nd search. State in comments the rationale, e.g. location, type of care, quality.

**3 or More Searches:** Client called CCR&R back more than 3 times or more for search.

**Complaint:** Client reported complaint of licensing violation. Refer on to DCFS.

**Successful Follow Up Contact:** Parent was successfully contacted for follow up.

**Unsuccessful Follow Up Contact:** A follow up contact was attempted by phone or mail.

**Cross SDA Search:** **(OPTIONAL)** Referral spans more than one SDA. Either parent was referred on to another SDA or the parent was from another SDA; this can include crossover searching using NACCRRAware.

**Other:** Other types of Client contact; any contact that doesn't fit one of the other options in the drop down list.

**Local Use:** 10-28 Local use fields.

**TA on Online Search:** Client called CCR&R for consumer education related to finding quality care as result of the Quality Counts Online Child Care Search. If additional referrals were requested, create a new client instead.

**Statewide Use:** 30-50 fields are reserved for statewide use.

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Client Data Entry – Action Log > Previous Action

**Previous Action**

The **Previous Action** section provides you with a record of the previous actions for the client. Once you have saved an action, you will immediately see it recorded as a Previous Action. The Previous Actions will sort with the most recent action at the top of the list. Previous Actions can be modified with a security level that allows edits and deletions.

## Client Data Entry – Action Log > Previous Action Continued

**Deleting or Modifying Actions**

Users with Create, Modify, Reports and Delete security level or higher may modify or delete previous actions.

1. Put a check mark in the Edit/Delete box to the right of all actions needing modification or deletion.
2. To modify the date, action or comments, make the appropriate changes in the correct area.
3. Once modifications are complete, click <**Update Log**>.
4. To delete an action or actions, place a check mark in the Edit/Delete box to the right of the appropriate actions.
5. Once all actions needing deletion are marked, click on <**Delete Log**>.
6. A warning message will appear asking "*Are sure you want to delete the record(s)?*"
7. If yes, click <**OK**>. If no, click <**Cancel**>.

**Comments:**

**Ideas for Action Log Comments:**

Can track how your site received a follow up. A user can enter "Mail", "Fax" or "Phone" in comments. A Custom Search can be done later using the ***Contains*** "**@**" operator in the Search Query to find one or more of these entries.