

# ***USE OF PELICAN CCW***

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## **104.1    GENERAL POLICY & REGULATION**

The subsidized child care program is maintained by the Child Care Information Services (CCIS) agencies through Pennsylvania’s Enterprise to Link Information for Children Across Networks (PELICAN) Child Care Works (CCW). The PELICAN platform is the Department’s integrated solution for supporting the delivery and management of child care and early learning programs under OCDEL. The CCW component of PELICAN helps track, qualify, and enroll clients who are receiving subsidized child care services.

The CCIS will use the Departmentally-issued software package, PELICAN CCW, to do the following:

1. Management of workloads (caseloads/providerloads/fiscal loads) and workload supervisory units.
2. Offer referral information to any parent/caretaker (p/c) needing help locating a child care provider or early learning program.
3. Process applications for subsidized child care.
4. Complete eligibility determinations and redeterminations.
5. Manage a waiting list for subsidized child care.
6. Track funding encumbered and expended for enrolled children, and project funds available for additional enrollments.
7. Maintain information on each eligible family.
8. Process reported changes and complete ongoing case maintenance activities.
9. Maintain provider files and calculate payment amounts for providers.
10. Generate correspondence and reports as set forth in [Manual “500 – Correspondence”](#) and [Manual “600 – Reports”](#).

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## **104.2    DEFINITIONS AND ACRONYMS**

See manual section [“101 – Definitions and Acronyms”](#) for a complete, alphabetical listing of definitions and an alphabetical table of acronyms.

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## **104.3    GOALS & OBJECTIVES**

See Manual Section [“104.26.1 – Goals”](#) and Manual Section [“104.26.2 – Objectives”](#)

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## 104.4 ACCESSING PELICAN CCW

PELICAN CCW is displayed in Internet Explorer, a Web browser. When using PELICAN CCW, the most important navigational tools in Internet Explorer are the “Address Toolbar” and “page hyperlinks”.

The “Address Toolbar” displays the Uniform Resource Locator (URL) address of the site the user is viewing. If the user knows the web page’s path, the user can go directly to the desired page by typing the URL in the “Address” field and either pressing “Enter” or clicking “Go”.

### Address Toolbar

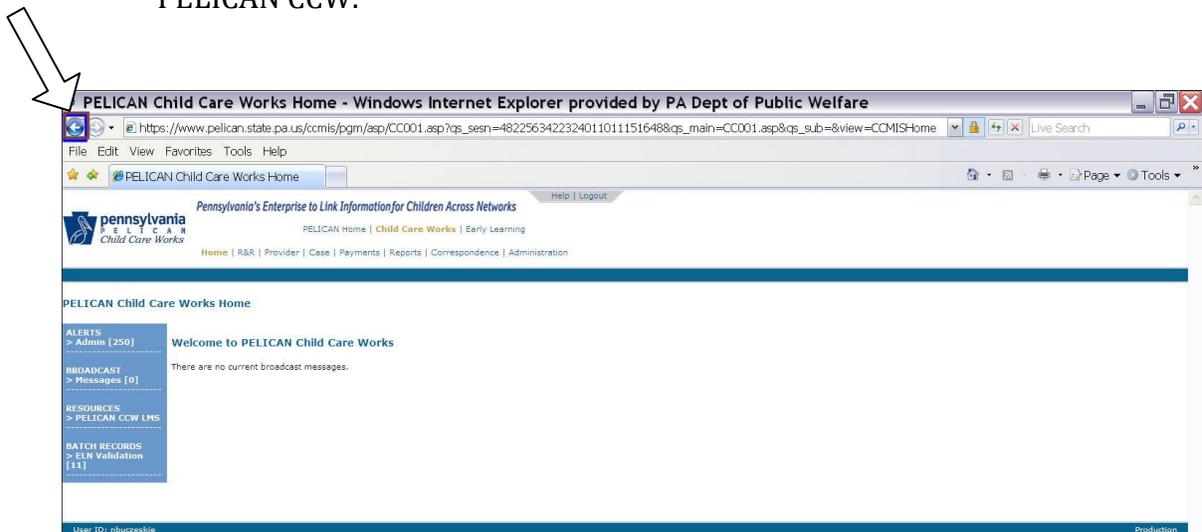


A hyperlink or link is an object, such as underlined text, that connects the user to another part of a web page or opens another web page altogether. A hyperlink may appear on a web page, as in PELICAN CCW, or in an application, in which case a web browser like Internet Explorer is launched. The user can identify a hyperlink by positioning the mouse over text the user suspect is a hyperlink.

If the pointer changes to a selection hand, , the text is a hyperlink and the user can simply click the hyperlink to access the linked information.

Only click on a hyperlink or button once when working in PELICAN CCW.

In addition, do NOT use the browser’s “Back” button, when working in PELICAN CCW.

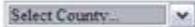


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## 104.5 WINDOWS PAGE ELEMENTS

“Page Elements” are parts of a page that enable the user to perform an activity within Windows and PELICAN CCW. The following table describes the Windows “Page Elements”.

<p>A Field is an object on a web page where you can enter or read data. Some fields require you to type or enter data; others display data that is automatically populated by PELICAN CCW. Fields can be “free form” enabling you to enter what you want, or restrictive, like the sample field at right which only lets you view or copy text. In PELICAN CCW, fields you are required to complete are indicated with an asterisk (*). A double asterisk (**) indicates conditionally required fields--fields that are only mandatory if you have selected the proper conditions on the page.</p>	<p>Select a word (or ID number in PELICAN CCW) by placing your cursor over the word and double-clicking your left mouse button. Then press &lt;Ctrl&gt; + &lt;C&gt; simultaneously on your keyboard to copy. Move the cursor to the blank field below, single-click and press &lt;Ctrl&gt; + &lt;V&gt; to paste it into the field.</p>
<p>A Button allows you to perform a function or task, such as saving a record, proceeding to another page, or logging out of the system.</p>	
<p>A Drop-Down Box contains a list of options used to complete a field. You can click the down arrow on a drop-down box to display a list of options for that field. Then, simply click, or type the first letter of your selection. Use the drop-down box to select a county.</p>	
<p>A Radio Button is used to select one choice from a list of mutually exclusive options. For instance, a form may contain a radio button used to enter a client's gender: Male or Female. You can click the radio button at right to select an option.</p>	<p><input type="radio"/> Male <input checked="" type="radio"/> Female</p>
<p>A Checkbox allows the user to select one or more choices from a list of options. Click a checkbox, or press the Space Bar when the checkbox is highlighted, to select an option. Selection is indicated by a checkmark.</p>	<p><input type="checkbox"/> Attending School <input type="checkbox"/> Apply Blended Rate</p>

**NOTE:** If the user is unable to use the mouse to navigate through PELICAN CCW, the “Tab” button on the keyboard can be used. Tab to the field to update, enter the data and then tab to the “Save” button. “Shift” + “Tab” will move the user backwards through the fields on the page.

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## 104.6 PELICAN CCW PAGE ELEMENTS

The most frequently used “Page Elements” in PELICAN CCW are buttons. The table below lists and describes these buttons.

	Use Save to record information on the page. When using PELICAN CCW, it is important to save the information on each page before navigating to a new area or logging out. Otherwise, any information you entered on the page is lost.
	Use Return to Summary to go back to the summary page from any detail page.
	Use Cancel to refresh the page form data to its initial state. Cancel withdraws any modifications made to the current page and moves you to the previous page.
	Use History to look at the details of a record on the page. If History is the only button available on a page, you only have read-only access to the information.
	Use the History icon to open a history of updates associated with that record only.
	Use Update to modify or add to existing page information.
	Use Reset to clear fields on a page.
	Use Delete to delete information on the page.
	Use Go to move to the desired page.
	Use Search to accept the parameters you entered and initiate the search.

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## 104.7 USERNAMES & PASSWORDS

In order to open PELICAN CCW, the user must enter a username and password. Users will receive the initial log in information from the Office of Child Development and Early Learning (OCDEL). Users can change their password at any time from the *Login* page by clicking “Change Password” and following the onscreen instructions provided.

All passwords must meet the following guidelines:

- ✓ Be at least seven characters long.
- ✓ **NOT** contain the username or any part of the user’s full name.
- ✓ Contain characters from at least three of the following categories:
  - Upper case (i.e., A, B, C...Z).
  - Lower case (i.e., a, b, c ...z).
  - Numeric (i.e., 0, 1, 2, 3, 4, 5, 6, 7, 8, 9).
  - Non-alphanumeric (i.e., ~ @ # \$ % ^ & \* ( ) - \_ + = { } [ ] < > , etc.)

Once the user has a username and password, the user is ready to use PELICAN CCW. To access PELICAN CCW, the user would double-click the PELICAN CCW icon on the desktop or enter the URL – <https://www.pelican.state.pa.us> in the Internet Explorer Address Toolbar.

CCIS users may **NOT** share any passwords issued by OCDEL.

The system will prompt the user to change the password periodically. Passwords are set to expire for security reasons. When the password expiration notification message opens, click “OK” and follow the directions to change the password. Remember to record the password and save it somewhere secure in case it is forgotten.

The user should have at least one non-alphanumeric character, one letter and one number in the new password to ensure security.

If the user is unable to login successfully, the user should verify the password is correct and the “Caps Lock” key is off.

To move quickly through text fields, press “Tab” to move to the next field or “Shift” + “Tab” to move backwards to the last field.

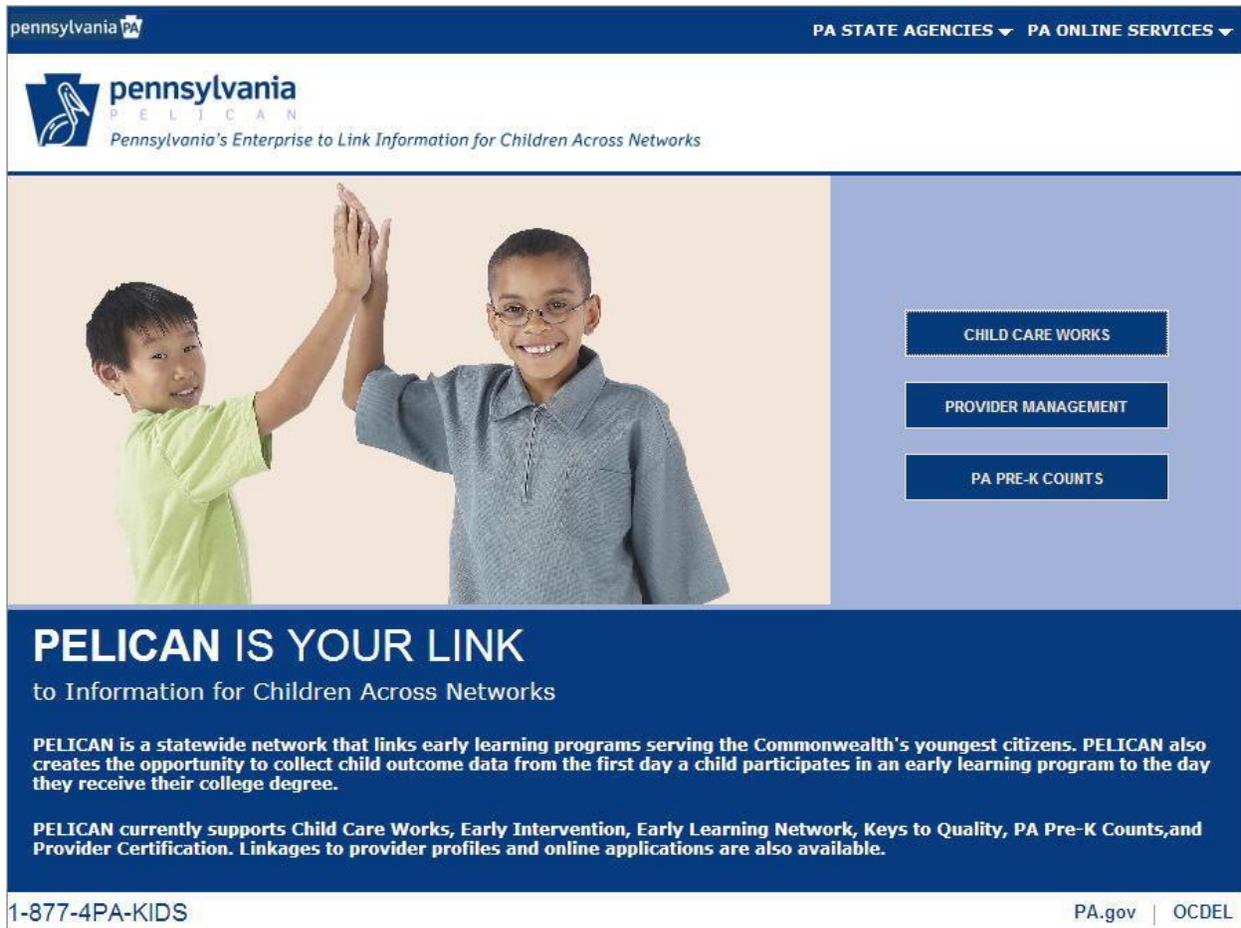
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[Return to Manual Section “104.26.3.1 - Questions - 104.7 - Usernames & Passwords”](#)

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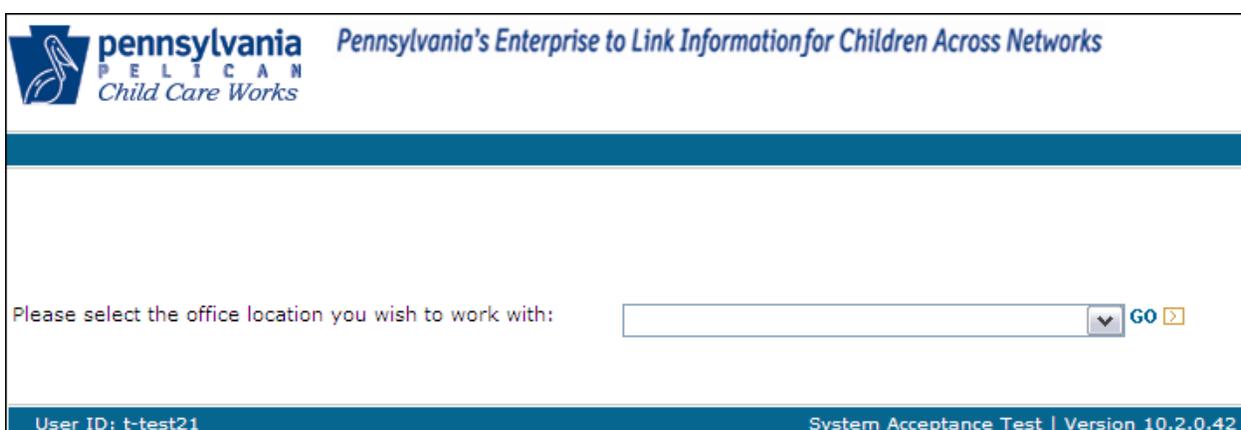
## 104.8 NAVIGATION

Depending upon the user's role in the CCIS, the user will see a variable view of the *PELICAN Launch* page when logging in.



The majority of CCIS users will see only one choice, Child Care Works, upon logging in.

If the user is associated with multiple offices, an additional page will appear upon logging in that contains only a drop-down box and a “Go” button. Simply use the drop-down box to select the county for which the user is working and click “Go” to access the desired office. The CCIS user may also access this page by clicking “Administration” on the *Main Navigational bar* and “Office Selection” on the *Sub Navigational bar*.



To exit PELICAN CCW, simply click “Logout” located at the top of every page.

If PELICAN CCW is open but the application is idle for 20 minutes, PELICAN CCW automatically logs the user out in case the user has left the application unattended.

# USE OF PELICAN CCW

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Any information not saved at the time PELICAN CCW automatically logs the user out, is not saved, so be sure to save entries periodically and before leaving the application. The user can easily log back in.

The CCIS may navigate in PELICAN CCW using the “Logout Menu”, navigation bars or the “Select...” drop-down box.

The navigation bars are comprised of hyperlinks. Clicking a hyperlink displays a new page. PELICAN CCW has two levels of navigation bar: the *Main Navigation bar* and the *Sub Navigation bar*. The *Main Navigation bar* appears at the top of every page. The CCIS may use the *Main Navigation bar* to access the following subsystems: *Home, R&R, Provider, Case, Payments, Reports, Correspondence* and *Administration*.

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### **104.8.1**    **Home**

Use “Home” to do the following:

1. View the number of active alerts and broadcast messages.
2. Jump to the page where alerts are processed.
3. View the latest broadcast message and jump to the page where other broadcast messages are stored.
4. Launch the PELICAN CCW Learning Management System (LMS).

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### **104.8.2**    **R&R**

Use “R&R” to do the following:

1. Access client and provider search pages and the *R&R Contact* page.
2. Access all other R&R pages.

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### **104.8.3**    **Provider**

Use “Provider” to do the following:

1. Access the *Provider Search page* and ChildLine information.
2. Jump to the Provider subsystem and provider-related pages.

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## **104.8.4 Case**

Use “Case” to do the following:

1. Access the page where the user may search for a client and/or a child’s enrollments.
2. View cases that have been referred or updated by the Client Information System (CIS).
3. Navigate to the appropriate pages where a county’s case information is stored.
4. Access the page where the user may enter a Local ID for an In-home child care provider.

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## **104.8.5 Payments**

Use “Payments” to do the following:

1. Access search pages for provider invoices, payments or providers.
2. Access search pages for CCIS invoices, invoices specific to a particular client or case, and provider invoices.

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## **104.8.6 Reports**

Use “Reports” to do the following:

1. Access the Report Inbox where the user’s office’s reports are available for printing.
2. Access the report parameter pages for each PELICAN CCW reporting subsystem (i.e., *R&R, Provider, Case, Payments, Funds and Comptroller*).

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## **104.8.7 Correspondence**

Use “Correspondence” to do the following:

1. Access search pages for case or provider correspondences by User ID or office, as well as default settings for correspondence.
2. Find case correspondence by Co/Record Number and/or provider correspondence by Provider ID.
3. Create new correspondence for a case or provider.

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## 104.8.8 Administration

Use "Administration" to do the following:

1. Access the office's caseload, providerload and fiscal load information.
2. Access options for "Workload", "Organization", System Broadcast Creation, "Office Selection", "Funds", "Reference Table Additions" and "Audit Trail".

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## 104.9 VIEWING PAGES

After choosing a subsystem from the *Main Navigation bar*, PELICAN CCW displays the *Sub Navigation bar* that is related to that subsystem. In other words, the *Sub Navigation bar* changes when moving to another PELICAN CCW subsystem.

pennsylvania PELICAN Child Care Works  
Pennsylvania's Enterprise to Link Information for Children Across Networks  
Help | Logout

Home | R&R | Provider | Case | Payments | Reports | Correspondence | Administration

**pennsylvania PELICAN Child Care Works Home**

**ALERTS**  
Admin [2]  
Workload [250]

**BROADCAST**  
Messages [0]

**RESOURCES**  
PENICAN CCW LMS

**BATCH RECORDS**  
ELN Validation [3950]

Welcome to PELICAN Child Care Works

There are no current broadcast messages.

User ID: t-test21 | Office: CCIS of Dauphin County System Acceptance Test | Version 10.2.0.42

pennsylvania PELICAN Child Care Works  
Pennsylvania's Enterprise to Link Information for Children Across Networks  
Help | Logout

Home | R&R | Provider | Case | Payments | Reports | Correspondence | Administration

Provider Search | ChildLine Inbox | ChildLine Search

**Provider Management Home**

Description	Vendor ID	Agency ID	Legal Entity ID	Location ID	
Agency Demographics Summary					GO
Legal Entity Demographics Summary					GO
Location Demographics Summary					GO
CareCheck Summary					GO
Agreement Summary					GO
Rates Summary					GO
Subsidy Profile Summary					GO
Provider Comments					GO

UserID: t-test21 | Office: CCIS of Dauphin County System Acceptance Test | Version 10.2.0

Home pages for each subsystem contain "Go" buttons, which enable the user to quickly move to pages within the subsystem. PELICAN CCW pages also contain

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hyperlinks that can be used to access detailed information about providers, case members and provider invoices.

The screenshot shows the 'Case Profile Summary' page in the PELICAN CCW system. A 'Select...' drop-down menu is open, displaying a list of navigation options such as 'Household Information', 'Individual Information', 'Relationships', 'Child Care Request', 'Disqualification', 'Employment and Wage', 'Self-Employment and Earned Income', 'Other Income', 'CAO Unearned Income', 'Teen Parent Education', 'Parent/Caretaker Training', 'Parent/Caretaker Disability', 'Child Disability', 'Support (Deductions)', 'Confidentiality', 'Determine Eligibility', 'Eligibility Results', 'Eligibility Override Summary', 'CAO Sanction/Disqualification Information', 'CAO Program Eligibility', 'Case Summary', 'Case Profile Summary', 'Case Comments', 'Tracking Dates', 'Appeals', 'Full Redetermination', and 'Case Reopen'. A red box highlights the 'Select...' drop-down, and another red box highlights the 'Hyperlinks' label at the bottom of the page. The page header includes the Pennsylvania PELICAN Child Care Works logo and navigation links like Home, R&R, Provider, Case, Payments, Reports, Correspondence, and Administration. The main content area shows a table with columns for County, Record, Office, Status, and Mode, and a list of hyperlinks for various case details.

Clicking a hyperlink moves the user to another page of PELICAN CCW. To return to the previous page, use the “Cancel”, or the button titled with the previous page name, generally located at the bottom of the page. Do **NOT** use the browser’s “Back” button. Some pages contain a “Select...” drop-down box, displayed with a “Go” button. This drop-down box is used to quickly access other pages related to the current page. The available options change as the user moves to new pages and/or PELICAN CCW subsystems.

There are two different “Views” available in PELICAN CCW. A “View” describes what the user can see and do on a page. The PELICAN CCW “Views” are: “Active” and “History”. “Active View” allows the user to enter data and save entries to a record. Most intake functionality is performed using the “Active View”. “History View” allows the user to review past changes to the record, but the user cannot change the information displayed. To view changes a specific user made, the user must click the “date hyperlink”. The user can access a history page for a selected record by clicking the record’s “History Icon”, located in the last column.

The screenshot shows the 'Employment and Wage Summary' page in the PELICAN CCW system. A red box highlights the 'History Icon' (a circular icon with a clock) in the last column of the table. The page header includes the Pennsylvania PELICAN Child Care Works logo and navigation links like Home, R&R, Provider, Case, Payments, Reports, Correspondence, and Administration. The main content area shows a table with columns for County, Record, Office, Status, Mode, Parent/Caretaker, and Caseload ID, and a list of hyperlinks for various case details.

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**Pennsylvania's Enterprise to Link Information for Children Across Networks**

Home | R&R | Provider | **Case** | Payments | Reports | Correspondence | Administration

[Help](#) | [Logout](#)

Client Search | **Enrollment Search** | [Inbox Home](#) | [OCDEL Policy](#)

### Employment and Wage History

County	Record	Office	Status	Mode	Parent/Caretaker	Caseload ID
22		CCIS of Dauphin County	Open	Ongoing	.S , DONNA	

380: Data has changed. Please reassess and confirm eligibility

Individual: .S , DONNA

#### Employment

Employment Begin Date	8/31/2004	Employment End Date	11/16/2004
Employer Name	LE	Reason for Termination	INV
Employer Address		Employer Phone Number	
City	MECHANICSBURG	State	Pennsylvania
New Hire	No	Zip	
Temporary / Seasonal / Landscape Worker	No	First Pay Date	
Receives Paystubs?	Yes	Estimated End Date	
V (Employment)	Verified	Date Change Reported	
Logically Deleted	No		

Employer Name	Last Updated Date	Last Updated By
LE	3/21/2005 2:02:19 PM	c-bguider
LE	<a href="#">3/5/2005 9:41:14 AM</a>	R3CONV

#### Employment Income

Effective Begin Date	8/31/2004	Hours per week	35.3
Income Frequency	Monthly		
Estimated Income	1319.24		

Last Updated Date	Last Updated By
3/21/2005 2:02:19 PM	c-bguider
<a href="#">3/5/2005 9:41:14 AM</a>	R3CONV

#### Paystubs

Pay Date	Pay Frequency
Hours Worked	Average Tips
Gross Amount Before Taxes and Deductions	
Verification	

Pay Date	Last Updated Date	Last Updated By
No Data Found		

#### Employment Information

Educational Institutions	Break Begin Date
Worker / Strike / Temporary Layoff	
Logically Deleted	Break End Date
Maternity Leave	Maternity Leave Begin Date
	Date Returned from Maternity Leave
V (Maternity Leave)	Logically Deleted

Last Updated Date	Last Updated By
No Data Found	

Individual	Employer Name	Phone	Employment Begin Date	First Pay Date
.S , DONNA	LE	733-564-2079 Ext.143456	08/31/2004	
	<a href="#">CLASSIC</a>	900-162-3042 Ext.500486	12/13/2004	
	<a href="#">CLASSIC</a>	420-645-7710 Ext.652044	12/13/2004	
	<a href="#">CLASSIC</a>	417-071-6445 Ext.763328	12/15/2004	
	<a href="#">CLASSIC</a>	543-962-0252 Ext.281767	12/15/2004	
	<a href="#">US ASSOC</a>	516-829-4692 Ext.942272	01/26/2006	
	<a href="#">CENTRAL</a>	981-622-6532 Ext.336435	04/03/2006	
	<a href="#">NRA</a>	615-861-9843 Ext.321313	09/25/2006	
	<a href="#">TORRES</a>	350-298-6454 Ext.265169	02/12/2007	
	<a href="#">THE</a>	351-439-2418 Ext.611291	05/22/2007	
	<a href="#">NATIONAL</a>	919-247-8472 Ext.628812	09/25/2006	
	<a href="#">THE</a>	571-590-6558 Ext.796892	05/22/2007	
	<a href="#">ADV</a>	901-072-9759 Ext.532005	05/08/2008	
	<a href="#">ADV</a>	502-550-4358 Ext.665719	05/08/2008	
	<a href="#">HARRISBURG</a>	918-129-9778 Ext.840702	06/05/2009	
<a href="#">A</a>		01/01/2010		

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UserID: t-test21 | Office: CCIS of Dauphin County | System Acceptance Test | Version 10.2.0.42

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## 104.10 BROADCAST MESSAGES

One of the more important features of PELICAN CCW is the system broadcast message. On occasion, headquarters staff may broadcast an important message to all CCIS and/or County Assistance Office (CAO) agencies. Users are able to view all active broadcast messages at any time during the session.

A portion of the message appears on the *PELICAN CCW Home* page.

The screenshot shows the PELICAN Child Care Works Home page. The header includes the logo and navigation links: Home, R&R, Provider, Case, Payments, Reports, Correspondence, Administration. A sidebar on the left contains sections for ALERTS (Admin [0], Workload [250]), BROADCAST (Messages [1]), and RESOURCES (PELICAN CCW LMS). The main content area displays a 'Welcome to PELICAN Child Care Works' message and a 'Broadcast Messages' table.

Delivery Date	Message Text
1/13/2011	PELICAN CCW will be down Saturday, 1/15/11, from 4 a.m. until 10 p.m. for an emergency maintenance release. Please plan your work schedules accordingly.

User ID: t-test221 | Office: CCIS of Dauphin County | System Acceptance Test | Version 10.2.0.44

To view the full text of the message, the user must click “Messages” in the “Broadcast” section of the page.

The screenshot shows the System Broadcast Summary page. The header includes the logo and navigation links: Home, R&R, Provider, Case, Payments, Reports, Correspondence, Administration. A secondary navigation bar includes Workload, Organization, System Broadcasts, Office Selection, Funds, Reference Tables, Audit Trail. The main content area displays a 'System Broadcast Summary' section with a table of broadcast messages.

Date Posted	Broadcast Message	Priority
1/13/2011	PELICAN CCW will be down Saturday, 1/15/11, from 4 a.m. until 10 p.m. for an emergency maintenance release. Please plan your work schedules accordingly.	High

NEW

User ID: t-test221 | Office: CCIS of Dauphin County | System Acceptance Test | Version 10.2.0.44

Alternatively, the user can access the *System Broadcast Summary* page by clicking “Administration” on the *Main Navigation bar* and then selecting “System Broadcasts” from the *Sub Navigation bar*.

Broadcast messages are listed reverse chronologically by date issued.

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## 104.11 OFFICE INFORMATION

PELICAN CCW provides current County, CCIS and CAO addresses and phone numbers. The CCIS may access this “Organization” information from any page in PELICAN CCW by selecting “Administration” from the *Main Navigation bar*. Then select “Organization” from the *Sub Navigation bar* or click “Go” next to “Organization” in the table.

Organization Home

Manage County, Office, and CCIS Information.

Description	
County Maintenance	<a href="#">GO</a>
CCIS Office Maintenance	<a href="#">GO</a>
Child Care Information Services Maintenance	<a href="#">GO</a>
CCIS Organization Relationship Maintenance	<a href="#">GO</a>
CAO Office Maintenance	<a href="#">GO</a>
CAO Organization Relationship Maintenance	<a href="#">GO</a>
Regional Key Maintenance	<a href="#">GO</a>
Municipality Maintenance	<a href="#">GO</a>
School District Maintenance	<a href="#">GO</a>
School District Relationship Maintenance	<a href="#">GO</a>
School Maintenance	<a href="#">GO</a>

User ID: t-test221 | Office: CCIS of Dauphin County | System Acceptance Test | Version 10.2.0.44

The CCIS may access contact information for the office by clicking “Go” in the “CCIS Office Maintenance” row. PELICAN CCW will navigate the user to the Office Summary page. From this page, the user must click the hyperlink associated with the user’s office. In the example below, “CCIS of Adams County” was selected.

Office Summary

[NEW](#) [RETURN TO SUMMARY](#)

Office Name	
<a href="#">CCIS of Adams County</a>	<a href="#">?</a>
<a href="#">CCIS of Allegheny County - City</a>	<a href="#">?</a>
<a href="#">CCIS of Allegheny County - North</a>	<a href="#">?</a>
<a href="#">CCIS of Allegheny County - South</a>	<a href="#">?</a>

Clicking the office hyperlink (i.e., “CCIS of \_\_\_\_\_”), navigates the user to the *Office Detail* page. The *Office Detail* page contains the CCIS “Office Code”, “Name”, “Address”, “Telephone”, “Fax”, and “Email”.

# USE OF PELICAN CCW

**Office Detail**

Office Code\* 01  
 Long Office Name\* CCIS of Adams County  
 Short Office Name\* Adams  
 Address 999 N. Stratton Street  
 Gettysburg, PA 17325-1824  
 Telephone 413-150-4872x940873  
 Fax 249-624-8726  
 Email\* RA-CCISADMS@state.pa.us  
 Open Effective Date\* 05/01/2002  
 Close Effective Date  
 Last Changed By brgrumbine  
 Last Changed Date 9/7/2007 12:16:24 PM  
 RETURN TO SUMMARY [↩](#)

UserID: t-test221 | Office: CCIS of Dauphin County System Acceptance Test | Version 10.2.0.44

The CCIS may access contact information for the CCIS by clicking “Go” in the “Child Care Information Services Maintenance” row. PELICAN CCW will navigate the user to the *CCIS Summary* page. From this page, the user must click the hyperlink associated with the CCIS. In the example below, “Adams/Franklin/Fulton” was selected.

**CCIS Summary**

NEW [+](#) RETURN TO SUMMARY [↩](#)

CCIS Name	
<a href="#">Adams/Franklin/Fulton</a>	
<a href="#">Allegheny - City</a>	
<a href="#">Allegheny - North</a>	
<a href="#">Allegheny - South</a>	

Clicking the office hyperlink (i.e., “Adams/Franklin/Fulton” in this example), navigates the user to the *CCIS Detail* page. The *CCIS Detail* page contains the “CCIS Code”, “CCIS Name”, “Region”, “Payment Method”, “Tax Status”, “FEIN”, “Contract Number”, “Contractor Name”, “SAP Account” information, “Address”, “Telephone”, and “Fax”.

**CCIS Detail**

CCIS Code\* 01  
 CCIS Name\* Adams/Franklin/Fulton  
 Region Central  
 Payment Method Direct Deposit  
 Tax Status Non-Profit  
 FEIN 232020123  
 Contract Number 019288  
 Contractor Name South Central Comm. Action Program  
 Federal SAP Account 6600700  
 State SAP Account 6600800  
 SAP Vendor 122615  
 Bank Partner ED01  
 Address CCIS Adams/Franklin/Fulton  
 153 N Stratton Street  
 Gettysburg, PA 17325-1822  
 Telephone 482-205-0420x795917  
 Fax 939-559-2452  
 Open Effective Date\* 05/01/2002  
 Close Effective Date  
 Last Changed By t-test21  
 Last Changed Date 12/5/2009 1:36:11 PM  
 RETURN TO SUMMARY [↩](#)

UserID: t-test221 | Office: CCIS of Dauphin County System Acceptance Test | Version 10.2.0.44

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# ***USE OF PELICAN CCW***

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## **104.12 DATA CORRUPTION**

Microsoft Windows has a built-in feature that allows users to create a new window through pressing and holding the “Ctrl” key, followed by pressing the “N” key. Similarly, a new window can be created through right clicking on a hyperlink and selecting “Open in New Window.”

While these functions might be useful to create a new window in other system applications, using these methods in PELICAN CCW results in irreparable data corruption to one or more cases.

Creation of a new window from a current session using these functions in PELICAN CCW does ***not*** result in a new session being made. Furthermore, if a worker starts processing a different case in the newly created window, the two cases may become “linked” together by PELICAN CCW.

Once multiple cases are linked, changes made in one record could then alter data in another.

**EXAMPLE:** Worker A is processing Julie Smith’s record, then uses “Ctrl N” to create a new window and starts working on Bob Tucker’s case. Ms. Smith’s and Mr. Tucker’s records are now linked by PELICAN CCW. If Worker A later enters wage information for the Smith record, the wages could impact the Tucker record.

Additionally, records that become linked using these functions stay that way. Any data corruption that results cannot be fixed through a data fix. The link cannot be broken and the worker cannot go back to the case and change the incorrect information. The only option to de-link the cases is to create new record numbers for the cases affected.

Workers who want to create a new PELICAN window should do so by double clicking on the PELICAN desktop icon. This is the only method that will ensure a new session is created.

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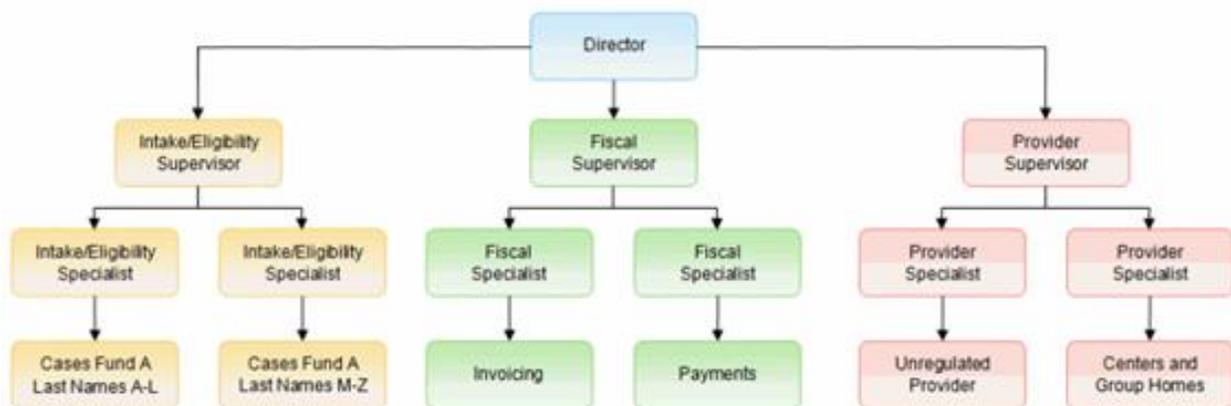
[Return to Manual Section “104.26.3.2 – Questions – 104.12 – Data Corruption”](#)

# USE OF PELICAN CCW

## 104.13 WORKLOAD MANAGEMENT

Workload management is used to assign cases and providers to primary workers. One benefit of the Workload subsystem is the assignment of alerts. While alerts are directed to the primary worker based on workload assignment, other CCIS office staff can view and act upon other worker's alerts.

Each CCIS has an existing workload structure. PELICAN CCW's workload design is flexible to accommodate variations across the state. Each office has a director and staff who work with cases and providers. Some offices have supervisors and managers controlling the workflow.



The “Director” is assigned to a county and can create “Supervisory Units”, “Caseloads”, “Providerloads” and can reassign all cases within the county. The “Director” can assign cases to other counties. The “Director” oversees the work of the supervisor and oversees the primary workers directly, in some offices.

The “Supervisor” is assigned to a “Supervisory Unit”. The “Supervisor” can create “Caseloads”, “Providerloads” and reassign all cases within their “Supervisory Unit”. The “Supervisor” cannot assign cases outside of their “Supervisory Unit”. The “Supervisor” oversees the work of the primary workers.

The “Primary Worker” oversees the day-to-day eligibility and management of cases or providers. The “Primary Worker” can transfer cases between their own caseloads, but cannot reassign cases to other “Primary Workers”. “Primary Workers” are also called eligibility specialists, primary case workers, primary provider workers and primary fiscal workers.

The *Workload Management Home* page enables the user to enter a Supervisory Unit and/or Workload code and quickly jump to a search for caseloads/providerloads/fiscal loads, or to an alert search for any of these workload types.

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# USE OF PELICAN CCW

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## 104.13.1 **Establishing a Caseload or Providerload**

The CCIS may establish a caseload or providerload by completing the following steps in PELICAN CCW:

1. From the Administration Home page, click “Workload”.
2. Click “Subsidy Caseload” or “Providerload” from the Sub Navigation bar.
3. Click the “Select...” drop down box and select “Supervisory Unit” from the list.
4. Click “Go”.
5. Click the “Supervisory Unit” hyperlink for the supervisor who oversees the caseloads or providerloads the user wishes to create or “update”.
6. Click “New” to create a new caseload or providerload; or click the radio button for the caseload or provider and click “Edit” to update a caseload or providerload.

**NOTE:** When creating a new caseload or providerload, the next available number is displayed. (The first two digits represent the Supervisory Unit; the last two can be used to represent a worker or fund.)

7. Enter a “Description” of the caseload or providerload that will appear after the caseload or providerload number throughout PELICAN CCW.
8. Enter the Primary Worker’s “User ID” and choose if this should be the “Default” caseload or providerload for this worker.
9. Click “Save”.

**NOTES:**

- a. Users with the appropriate security role may delete a “Supervisory Unit” once all caseloads or providerloads under it are empty or deleted.
- b. It is very important that the user make sure that any user ID, entered while setting up supervisors, caseload and providerload workers, exactly matches the user's PELICAN CCW “Login ID”. All fields of this type are case sensitive.

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# USE OF PELICAN CCW

## 104.13.2 Establishing a Fiscal Load

“Fiscal Loads” are organized within “Supervisory Units”. The *Fiscal Load Summary* page displays a list of all “Fiscal Loads” assigned to a selected “Supervisory Unit” and can be accessed from the *Supervisory Unit Summary* page. The *Fiscal Load Summary* page can be used to view, create, edit or delete “Fiscal Loads”.

The screenshot shows the 'Fiscal Load Summary' page in the PELICAN CCW system. The page header includes the logo for 'pennsylvania PELICAN Child Care Works' and the tagline 'Pennsylvania's Enterprise to Link Information for Children Across Networks'. A navigation menu is visible with links for Home, R&R, Provider, Case, Payments, Reports, Correspondence, and Administration. Below the navigation menu, there are links for Subsidy Caseload, R&R Caseload, Providerload, Provider Office, Fiscal Load, and Alerts. The main content area is titled 'Fiscal Load Summary' and features a dropdown menu for selecting a Supervisory Unit and a 'GO' button. A table displays the following data:

	Supervisory Unit	Fiscal Load	Primary Worker	Default
<input type="radio"/>	01	0001 Office Default	c-bbuehler	N/A

Below the table, there are buttons for 'NEW', 'EDIT', and 'DELETE'. The footer of the page shows 'UserID: t-test221 | Office: CCIS of Dauphin County' and 'Test For Production'.

A fiscal specialist is assigned to each “Fiscal Load” and each specialist has a default “Fiscal Load”. Providers are assigned to the default “Fiscal Load” and the specialist then transfers the providers to the correct “Fiscal Load”.

“Fiscal Loads” can only be updated by a user with the appropriate security role and if the “Fiscal Load” is not the “Office Default”. Unlike “Providerloads”, “Fiscal Loads” must be manually grouped. If a new “Fiscal Load” is created after deletion of a “Fiscal Load” within a series, the next available number in the series is assigned.

To create a new “Fiscal Load” within the newly created “Supervisory Unit”, the CCIS must select the appropriate radio button, click “Edit”, then select the “Supervisory Unit” link and click “New” on the *Fiscal Load Summary* page. A default “Fiscal Load” number and “Primary Worker” are automatically added by PELICAN CCW.

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# USE OF PELICAN CCW

## 104.14 ESTABLISHING A SUPERVISORY UNIT

“Supervisory Units” are used to organize the structure of workload management within the CCIS. They are only created and edited by directors and supervisors, consist of caseloads, providerloads or fiscal loads and can vary in size. Supervisors can transfer cases within their different “Supervisory Units”. Supervisors can also create caseloads within the “Supervisory Units” and assign them to caseworkers. Cases are then assigned to these caseloads.

The CCIS may establish a “Supervisory Unit” by completing the following steps in PELICAN CCW:

1. From the *Administration Home* page, click “Workload”.
2. Click “Subsidy Caseload” or “Providerload” from the Sub Navigation bar.
3. Click the “Select...” drop-down box and select “Supervisory Units” from the list.
4. Click “Go”.

The screenshot shows the 'Supervisory Unit Summary' page in the PELICAN CCW system. The page header includes the Pennsylvania PELICAN Child Care Works logo and the text 'Pennsylvania's Enterprise to Link Information for Children Across Networks'. Navigation links include Home, R&R, Provider, Case, Payments, Reports, Correspondence, and Administration. A secondary navigation bar includes Subsidy Caseload, R&R Caseload, Providerload, Provider Office, Fiscal Load, and Alerts. The main content area is titled 'Supervisory Unit Summary' and contains a table with the following data:

	Supervisory Unit (Case)	Supervisor	Senior Supervisor	Director
<input type="radio"/>	<a href="#">01 PRIMARY CASELOAD</a>	c-mziegler	c-marwilli	c-rlewis
<input type="radio"/>	<a href="#">02 TANF / FORMER TANF</a>	c-rlewis	c-wemurphy	c-mziegler
<input type="radio"/>	<a href="#">03 DOMESTIC VIOLENCE/EMPLOYEE</a>	c-kdengler	c-marwilli	c-mziegler
<input type="radio"/>	<a href="#">04 DOMESTIC VIOLENCE/EMPLOYEE</a>	c-rlewis	c-marwilli	c-mziegler

Below the table are buttons for 'NEW', 'EDIT', and 'DELETE'. The footer of the page shows 'UserID: t-test221 | Office: CCIS of Dauphin County' and 'Test For Production'.

5. Click “New” to create a new “Supervisory Unit”.
6. When creating a new unit, the “Supervisory Unit” field displays the next available level. Change the number only if necessary. Enter a “Description” of the supervisory unit that will appear after the “Supervisory Unit Number” throughout PELICAN CCW.
7. Enter a “User ID” for the Supervisor and the Director.  
**NOTE:** It is very important that the user make sure that any user ID, entered while setting up supervisors, caseload and providerload workers, **exactly** matches the user's “PELICAN CCW Login ID”. All fields of this type are case-sensitive.
8. Click “Save”.

Completion of the “Description”, “Supervisor” and “Director” fields are required to create a “Supervisory Unit”.

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# USE OF PELICAN CCW

## 104.15 EDITING A SUPERVISORY UNIT

The CCIS may edit a “Supervisory Unit” by completing the following steps in PELICAN CCW:

1. From the *Supervisory Unit Summary* page, click the radio button next to the “Supervisory Unit” and click “Edit”.
2. Make the necessary changes to the information.

The screenshot displays the 'Supervisory Unit Detail' page in the Pennsylvania Pelican Child Care Works system. The page header includes the logo and name 'pennsylvania PELICAN Child Care Works' and the tagline 'Pennsylvania's Enterprise to Link Information for Children Across Networks'. Navigation links include Home, R&R, Provider, Case, Payments, Reports, Correspondence, and Administration. A secondary navigation bar lists Subsidy Caseload, R&R Caseload, Providerload, Provider Office, Fiscal Load, and Alerts. The main content area shows the 'Supervisory Unit Detail' form with a search dropdown set to 'Select. . .' and a 'GO' button. The form fields are: Office (CCIS of Dauphin County), Case Supervisory Unit \* (04), Description (DOMESTIC VIOLENCE/EMPLOYEE), Supervisor (c-rlewis), Senior Supervisor (c-marwilli), and Director (c-mziegler). At the bottom of the form are 'SAVE' and 'CANCEL' buttons. The footer shows 'UserID: t-test221 | Office: CCIS of Dauphin County' and 'Test For Production'.

3. Click “Save”.

**NOTE:** Users with the appropriate security role may delete a “Supervisory Unit” once all “Caseloads” or “Providerloads” under it are empty or deleted.

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# USE OF PELICAN CCW

## 104.16 REASSIGNING A CASE/PROVIDER

The CCIS may reassign a case or provider by completing the following steps in PELICAN CCW:

1. From the *Administration Home* page, click “Workload”.
2. Click “SubsidyCaseload” or “Providerload” from the *Sub Navigation* bar.
3. Enter search criteria and click “Search”.



[Home](#) | [R&R](#) | [Provider](#) | [Case](#) | [Payments](#) | [Reports](#) | [Correspondence](#) | [Administration](#)

[Help](#) | [Logout](#)

---

**Subsidy Caseload**
[R&R Caseload](#)
[Providerload](#)
[Provider Office](#)
[Fiscal Load](#)
[Alerts](#)

### Caseload Search

Select . . . GO

**Search Criteria**

Office: CCIS of Dauphin County  
 Supervisory Unit: 02  
 User ID: c-rlewis  
 Case Status: All  
 Sort Options: Caseload Ascending

**Search Results**

<input type="checkbox"/>	Co/Record	Caretaker Name	Supervisory Unit	Caseload	Alerts User ID
<input type="checkbox"/>	<a href="#">22/029</a>	N , T	02 TANF / FORMER TANF	0205 TANF; N - Z	c-rlewis
<input type="checkbox"/>	<a href="#">22/018</a>	N , L	02 TANF / FORMER TANF	0205 TANF; N - Z	c-rlewis
<input type="checkbox"/>	<a href="#">22/023</a>	N , K	02 TANF / FORMER TANF	0205 TANF; N - Z	c-rlewis
<input type="checkbox"/>	<a href="#">22/027</a>	N , C	02 TANF / FORMER TANF	0205 TANF; N - Z	c-rlewis
<input type="checkbox"/>	<a href="#">22/020</a>	N , R	02 TANF / FORMER TANF	0205 TANF; N - Z	c-rlewis
<input type="checkbox"/>	<a href="#">22/0270</a>	O , S	02 TANF / FORMER TANF	0205 TANF; N - Z	c-rlewis
<input type="checkbox"/>	<a href="#">22/028</a>	O , V	02 TANF / FORMER TANF	0205 TANF; N - Z	c-rlewis
<input type="checkbox"/>	<a href="#">22/025</a>	O , L	02 TANF / FORMER TANF	0205 TANF; N - Z	c-rlewis
<input type="checkbox"/>	<a href="#">22/0291</a>	P , T	02 TANF / FORMER TANF	0205 TANF; N - Z	c-rlewis
<input type="checkbox"/>	<a href="#">22/0280</a>	P , J	02 TANF / FORMER TANF	0205 TANF; N - Z	c-rlewis

1 2 3 4 5 6 7 8 9 10 [NEXT](#)  
 Page 1 of 20 [GO](#)

[REASSIGN](#)

---

**Case Search**

Office: CCIS of Dauphin County  
 Supervisory Unit:   
 Caseload:   
 User ID:   
 Co/Record:  /   
 Case Status:

**Sort Options**

Co/Record   
  Caretaker Name   
  Supervisory Unit   
  Caseload   
  User ID  
 Ascending   
  Descending

[SEARCH](#)   [RESET](#)

UserID: t-test221 | Office: CCIS of Dauphin County
System Acceptance Test | Version 10.2.0.49

# USE OF PELICAN CCW

4. Select the checkbox next to the case(s) or provider(s) the user wishes to reassign.
5. Click "Reassign".



Pennsylvania's Enterprise to Link Information for Children Across Networks

Home | R&R | Provider | Case | Payments | Reports | Correspondence | **Administration**

**Subsidy Caseload** | R&R Caseload | Providerload | Provider Office | Fiscal Load | Alerts

### Workload Assignment

#### Current Caseload Assignment

Co/Record	Supervisory Unit	Caseload
22/029	02 TANF / FORMER TANF	0205 TANF; N - Z
22/018	02 TANF / FORMER TANF	0205 TANF; N - Z
22/023	02 TANF / FORMER TANF	0205 TANF; N - Z
22/027	02 TANF / FORMER TANF	0205 TANF; N - Z
22/020	02 TANF / FORMER TANF	0205 TANF; N - Z

#### New Caseload Assignment

New Supervisory Unit \*

New Caseload \*

SAVE  CANCEL

UserID: t-test221 | Office: CCIS of Dauphin County System Acceptance Test | Version 10.2.0.49

6. Enter the "New Supervisory Unit".
7. Enter the "New Caseload" or "Providerload".
8. Click "Save".

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# USE OF PELICAN CCW

## 104.17 REASSIGNING AN ENTIRE CASELOAD, PROVIDERLOAD OR FISCAL LOAD

The CCIS may reassign an entire “Caseload”, “Providerload” or “Fiscal Load” by completing the following steps in PELICAN CCW:

1. From the *Administration Home* page, click “Workload”.
2. Click “Subsidy Caseload” or “Providerload” from the *Sub Navigation* bar.
3. Click the “Select...” drop-down box and select “Supervisory Unit” from the list.
4. Click “Go”.
5. Click the “Supervisory Unit” hyperlink for the supervisor who oversees the “Caseloads” or “Providerloads” the user wishes to reassign.



**Pennsylvania** *Pennsylvania's Enterprise to Link Information for Children Across Networks*

Home | R&R | Provider | Case | Payments | Reports | Correspondence | **Administration**

[Help](#) | [Logout](#)

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[Subsidy Caseload](#) | [R&R Caseload](#) | [Providerload](#) | [Provider Office](#) | [Fiscal Load](#) | [Alerts](#)

### Caseload Summary

GO

	Supervisory Unit	Caseload	Primary Worker	Secondary Worker	Default
<input type="radio"/>	02 TANF / FORMER TANF	0201 TANF/FT [N-SL]	c-sjimenez		YES
<input type="radio"/>	02 TANF / FORMER TANF	0202 TANF/FT [F-J]	c-cknox		NO
<input type="radio"/>	02 TANF / FORMER TANF	0204 TANF WITHOUT PROVIDER	c-ebutler	c-rlewis	NO
<input type="radio"/>	02 TANF / FORMER TANF	0205 TANF/FT [K-Ma]	c-rlewis		YES
<input type="radio"/>	02 TANF / FORMER TANF	0206 TANF/FT - [Mc-Mz]	c-mziegler		YES
<input type="radio"/>	02 TANF / FORMER TANF	0207 TANF/FT [A-E]	c-jguity		YES
<input type="radio"/>	02 TANF / FORMER TANF	0208 TANF/FT [SM-Z]	c-damarodr		YES
<input type="radio"/>	02 TANF / FORMER TANF	0211 SPANISH [INACTIVE]	c-sjimenez		NO
<input type="radio"/>	02 TANF / FORMER TANF	0217 SPANISH TANF/FT [A-L]	c-jguity		NO
<input type="radio"/>	02 TANF / FORMER TANF	0218 SPANISH TANF/FT [M-Z]	c-damarodr		NO
<input type="radio"/>	02 TANF / FORMER TANF	0221 TANF/FT 1/2 COPAY [N-SL]	c-sjimenez		NO
<input type="radio"/>	02 TANF / FORMER TANF	0222 TANF/FT 1/2 COPAY [F-J]	c-cknox		YES
<input type="radio"/>	02 TANF / FORMER TANF	0224 TANF WITH PROVIDER	c-ebutler	c-rlewis	NO
<input type="radio"/>	02 TANF / FORMER TANF	0225 TANF/FT 1/2 COPAY [K-Ma]	c-rlewis		NO
<input type="radio"/>	02 TANF / FORMER TANF	0226 TANF/FT - 1/2 CO-PAY [Mc-Mz]	c-mziegler		NO
<input type="radio"/>	02 TANF / FORMER TANF	0227 TANF/FT 1/2 COPAY [A-E]	c-jguity		NO
<input type="radio"/>	02 TANF / FORMER TANF	0228 TANF/FT 1/2 COPAY [SM-Z]	c-damarodr		NO
<input type="radio"/>	02 TANF / FORMER TANF	0230 SHORT-TERM CARE/TANF	c-jmaietta	c-marwilli	NO
<input type="radio"/>	02 TANF / FORMER TANF	0231 SPANISH TANF/FT 1/2 COPAY [INACTIVE]	c-sjimenez		NO
<input type="radio"/>	02 TANF / FORMER TANF	0237 SPANISH TANF/FT 1/2 COPAY [A-L]	c-jguity		NO
<input type="radio"/>	02 TANF / FORMER TANF	0238 SPANISH TANF/FT 1/2 COPAY [M-Z]	c-damarodr		NO

NEW 
EDIT 
DELETE

UserID: t-test221 | Office: CCIS of Dauphin County
Test For Production

6. Click “New”.

# USE OF PELICAN CCW

The screenshot displays the 'Administration' section of the Pennsylvania Pelican Child Care Works system. The main heading is 'Caseload Detail'. The form includes the following fields and controls:

- Office: CCIS of Dauphin County
- Supervisory Unit: 02
- Caseload \*: 0239
- Description: (empty text box)
- Primary Worker: t-test221
- Secondary Worker: (empty text box)
- Default Caseload:

At the bottom of the form are 'SAVE' and 'CANCEL' buttons. A 'GO' button is located to the right of a dropdown menu labeled 'Select. . .'. The footer of the page shows 'UserID: t-test221 | Office: CCIS of Dauphin County' and 'Test For Production'.

7. Enter the “Primary Worker’s User ID” of the caseload the user wishes to reassign.
8. Select the “Default Caseload” checkbox.
9. Click “Save”.
10. Click the Radio Button next to the Caseload the user wishes to reassign and then click “Edit”.
11. Enter the new staff person’s “User ID” in the “Primary Worker” field.
12. Click “Save”.

**NOTE:** Users with the appropriate security role may delete a “Caseload” or “Providerload” once all cases/providers under the “Caseload” or “Providerload” are reassigned.

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# USE OF PELICAN CCW

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## 104.18 ALERTS

PELICAN CCW generates workload alerts for active cases (i.e., not closed) based on the individual's Master Client Index (MCI) Number, which is shared by all DPW programs (i.e., CIS, PELICAN CCW, PELICAN Pennsylvania Pre-K Counts (PA Pre-K Counts), Home and Community Services Information System (HCSIS), etc.). When PELICAN CCW generates an alert, it copies the alert to **ALL** users who share the same individuals in their caseloads (i.e., when one individual exists in multiple cases that are assigned to multiple users).

**EXAMPLE:** Mary Diaz currently exists in two active cases (i.e., not closed). One case is an open / ongoing Temporary Assistance for Needy Families (TANF) case and the other a pending / intake Former TANF case. The TANF case is assigned to c-jdoe and the FT case is assigned to c-mjane. Both c-jdoe and c-mjane will receive alerts when eligibility data is changed, indicating "380: Data has changed. Please reassess and confirm eligibility".

PELICAN CCW displays alerts on a page accessible from the *Home* page. The user can view alerts for any office the user serves. The user can also view alerts for the caseloads of co-workers and take action on, but not clear, the alerts of co-workers, if needed.

New alerts are accessible by clicking an "Alerts" section (i.e., "Workload" or "Admin" at the left of the *Home* page). The alert selection available to the user is based on the user's security class.

Provider and Eligibility Specialists will use the "Workload" selection exclusively to access alerts for their respective "Providerloads" or "Caseloads". Those with an "Admin" category will have access to both "Workloads" and/or fiscal alerts, depending upon their specific security class.

When the user clicks the "Workload" or "Admin" selection, the user's security class information serves as the default criteria for the *Alert Search* page.

The number of alerts available for viewing is provided next to the alert selection.

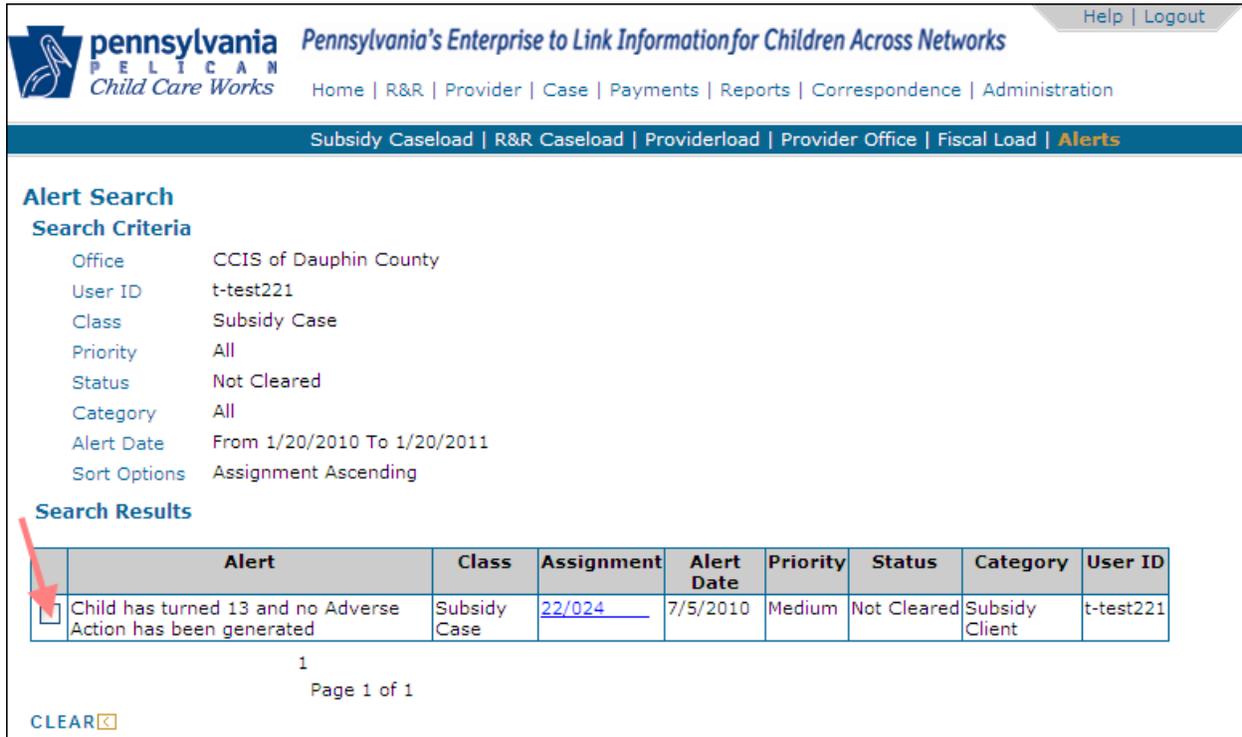
When the user clicks the "Alert" section hyperlink, PELICAN CCW displays the *Alert Search* page. Each alert is assigned a priority by PELICAN CCW and is displayed on this page by "Assignment". For "Caseload" alerts, the "Assignment" is the Co/Record Number. Other types of alerts contain the appropriate "Assignment" for the PELICAN CCW functional area with which the user works.

Click the "Assignment" hyperlink to advance to the corresponding information that has caused the generation of the alert, then take the appropriate action to clear the alert.

# USE OF PELICAN CCW

There are two types of alerts:

1. System-Cleared.
2. User-Cleared.



**pennsylvania PELICAN Child Care Works** Pennsylvania's Enterprise to Link Information for Children Across Networks

Home | R&R | Provider | Case | Payments | Reports | Correspondence | Administration

Subsidy Caseload | R&R Caseload | Providerload | Provider Office | Fiscal Load | **Alerts**

**Alert Search**

**Search Criteria**

Office: CCIS of Dauphin County  
User ID: t-test221  
Class: Subsidy Case  
Priority: All  
Status: Not Cleared  
Category: All  
Alert Date: From 1/20/2010 To 1/20/2011  
Sort Options: Assignment Ascending

**Search Results**

	Alert	Class	Assignment	Alert Date	Priority	Status	Category	User ID
<input type="checkbox"/>	Child has turned 13 and no Adverse Action has been generated	Subsidy Case	<a href="#">22/024</a>	7/5/2010	Medium	Not Cleared	Subsidy Client	t-test221

1  
Page 1 of 1

[CLEAR](#)

System-Cleared alerts, indicated by a blank white box to the left of the alert, require the user to make a change within PELICAN CCW to process the alert. Once the change is made, the alert is cleared by PELICAN CCW during the nightly batch process.

User-Cleared alerts, indicated by a checkbox, usually require an action outside of PELICAN CCW (i.e., sending a notice, etc.) to process the alert. To clear alerts of this type, the user must click the alert's checkbox and click "Clear". If the user does not do this, the alert remains in the queue.

PELICAN CCW generates alerts based on certain triggers. Alerts are either generated real-time or overnight.

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# USE OF PELICAN CCW

## 104.18.1 Alert Priority

“Alert Priority” is managed by a reference table in PELICAN CCW. The following screenshots display listings of the alerts generated by PELICAN CCW and the priority to which the alert is assigned.

KEYVALUE	DISPLAYVALUE	Priority
001	%1 %2 %3 %4 %5	MED
002	%5	MED
003	Child is turning age 13	MED
004	Child has turned age 13. Please modify child care request, if appropriate.	MED
005	Child is turning age 19	MED
006	Child has turned age 19	MED
007	Child not enrolled after 5 days of being determined eligible; contact the p/c to discuss enrollment.	MED
008	Child is ineligible - Suspended status exceeds 90 days	HIH
009	Suspended status expires in 13 days	HIH
010	Child is ineligible - Notified status exceeds 30 days	HIH
011	Notified status expires in 13 days	HIH
012	Co-pay is not assessed properly among individuals	MED
013	Child has turned 13 and no Adverse Action has been generated	MED
014	Child not enrolled after 16 days of being determined eligible; assess and confirm eligibility.	MED
015	Individual in Co/Rec %1 has no active enrollments	MED

## **USE OF PELICAN CCW**

<b>KEYVALUE</b>	<b>DISPLAYVALUE</b>	<b>Priority</b>
016	Individual in Co/Rec %1 changes to unsupported provider care level in 15 days	MED
017	Provider Agreement for Individual in Co/Rec %1 ends in 30 days	MED
018	Provider Agreement for Individual in Co/Rec %1 has Ended	HIH
019	Provider Subsidy Eligibility for Individual in Co/Rec %1 ends in 30 days	MED
020	Individual in Co/Rec %1 is Enrolled with an Ineligible Provider	HIH
021	Individual in Co/Rec %1 has active enrollment but is not eligible to receive care	HIH
022	Carecheck for R/N Provider in Co/Record %1 expires in 13 days	HIH
023	Enrollment Funding Mismatch for Individual in Co/Rec %1	MED
024	Individual %2 in Co/Rec %1 is not supported by provider care level	MED
025	Individual %2 in Co/Rec %1 is not supported by provider rates	MED
028	CCIS Provider Agreement created for Provider %2-%3 with active enrollments	MED
029	Individual in Co/Rec %1 enrolled with provider location %2-%3 which is closed as of %4	MED
030	Certificate for Provider %2-%3 expires on %4. Suspend enrollments for Co/Rec %1	MED

## USE OF PELICAN CCW

KEYVALUE	DISPLAYVALUE	Priority
031	Provider %2-%3 closed effective %4 for non renewal of Certificate	MED
032	Certificate renewed for Provider %2-%3	MED
040	Child %2 also participating in PA PRE-K Counts program in Location %5 with classroom time %3 to %4.	MED
041	Child %2 also participating in PA PRE-K Counts program in Location %5 with classroom time %3 to %4.	MED
050	Funds Available - Child in Co/Rec %1 authorized to enroll	MED
051	Child in Co/Rec %1 removed from the waitlist	MED
052	Child in Co/Rec %1 authorized to enroll	MED
053	Enrollment status changed to Removed for child in Co/Rec %1	MED
057	Co/Rec %1 has been marked as confidential	MED
059	Co/Rec %1 is no longer considered confidential	MED
060	Eligibility pending %4 days after application received	MED
061	%5 not immunized %4 days after enrollment	LOW
062	%5 disabled for more than %4 days	HIH
063	%5 has not submitted pay stubs for more than %4 days	HIH
064	%5 has not returned from maternity leave after %4 days	HIH
065	%5 not working for more than %4 days	HIH
066	Redetermination due on %4	MED
067	Intake/Closed case reopened continuous. Ensure eligibility date is correct.	MED
068	%1 has been transferred from %2 to %3	MED
069	Data has changed. Please rerun eligibility	MED
070	Co-pay delinquency entered. Please reassess eligibility	MED
071	Data has changed. Please rerun eligibility	HIH
072	Review %5's temporary/permanent disability	LOW
073	%5 is scheduled to go on a break. Please reassess eligibility	LOW

## **USE OF PELICAN CCW**

<b>KEYVALUE</b>	<b>DISPLAYVALUE</b>	<b>Priority</b>
074	%5's employment is scheduled to be ended. Please reassess eligibility	LOW
075	Confidential Co/Rec %1 has been transferred from CIS	MED
076	Eligibility results have been overridden for Co/Rec %1 by %5	MED
077	Verify first paydate. Update income and assess eligibility	MED
078	Re-Opened Case still in Reopen Non-continuous status. Please reassess and confirm eligibility	MED
079	One or more future co-pay segments have changed	MED
080	Disability Information for an individual in Co/Rec %1 has been updated from CIS	MED
081	Education Information for an individual in Co/Rec %1 has been updated from CIS	MED
082	Income Information for an individual in Co/Rec %1 has been updated from CIS	MED
083	Individual Relationships Information for an individual in Co/Rec %1 has been updated from CIS	MED
084	Employment Information for an individual in Co/Rec %1 has been updated in CIS	MED
085	Eligibility Status Code for an individual in Co/Rec %1 has been updated from CIS	MED
086	Program Status Code for an individual in Co/Rec %1 has been updated from CIS	MED
087	Individual(s) have been deleted from the Co/Rec %1	MED
088	Individual(s) have been added to Co/Rec %1	MED
089	Lower hierarchy budget group created when higher available	MED
090	Co/Rec %1 has been changed to the Re-determination mode	MED
091	Co/Rec %1 has been closed in CIS. Please assess eligibility on the case	MED
092	Co/Rec %1 has been reopened in CIS	MED

# USE OF PELICAN CCW

KEYVALUE	DISPLAYVALUE	Priority
093	Individual %2 in Co/Rec %1 has an employment that is self-declared for 30 days	MED
094	Individual %2 in Co/Rec %1 has been updated with data from CIS	MED
095	CIS C or U Budget for Co/Rec %1 has opened. Please review to determine if child care program should be changed.	MED
096	CIS Budget for Co/Rec %1 closed. Please validate the child care program.	MED
097	Please review the funding stream for the enrollments of Co/Rec %1	MED
098	Program Status code or activity type for Co/Rec number %1 has changed; please update Enrollments to the %5 Funding Program	HIH
099	Program Status code or activity type for Co/Rec number %1 is no longer valid. Please contact the CAO.	HIH
100	%5 Provider %1 Legal Entity Name changed	MED
101	%5 Provider %1 Legal Entity Address changed	MED
102	%5 Provider %1 change in Ownership Type	MED
103	%5 Provider %1 change in Profit/Non-Profit Status	MED
104	%5 Provider %1 IRS Name changed	MED
105	%5 Provider %1 IRS Tax Number changed	MED
150	%5 Provider %1-%2 change in Provider Type	MED
151	%5 R/N Provider %1-%2 Location Address changed	MED
152	%5 Provider %1-%2 change in Ownership Type	MED
153	%5 Provider %1-%2 made Subsidy Ineligible	MED
154	%5 Legal Entity %1 Closed	MED
155	%5 Provider %1-%2 Closed	MED
156	%5 Provider Agency %1 Closed	MED

## **USE OF PELICAN CCW**

<b>KEYVALUE</b>	<b>DISPLAYVALUE</b>	<b>Priority</b>
157	%5 Legal Entity %1 Re-opened	MED
158	%5 Provider %1-%2 Re-opened	MED
159	%5 Provider Agency %1 Re-opened	MED
160	%5 Provider %1-%2 Subsidy Eligible Needs OIM Agreement	HIH
161	%5 Provider New Location opened under LE %1	HIH
162	Provider %1-%2 Name changed	MED
200	%5 Funds Available For New Enrollment	MED
201	Funds Available At Headquarters	MED
210	Budget revision has been submitted.	MED
211	Budget revision has been reviewed and is ready for approval.	MED
212	Budget revision returned, changes are necessary.	MED
213	Budget revision returned, changes are necessary.	MED
214	Quarterly expenditure report has been submitted.	MED
215	Quarterly expenditure report due in 10 days.	MED
216	Quarterly expenditure report is 10 days past due.	MED
217	Quarterly expenditure report is 10 days past due.	MED
218	Final Expenditure report has been returned.	MED
219	Final Expenditure report has been returned.	MED
220	Final expenditure report is due in 10 days.	MED
221	Final expenditure report is 10 days past due.	MED
222	Final expenditure report is 10 days past due.	MED
223	%5 has been removed from the waiting list.	MED
224	Keystone STARS rating for Location %1 has dropped from %2 stars to %3 stars.	MED
225	Keystone STARS rating for Location %1 has dropped from %2 stars to %3 stars.	MED
226	Attendance is 5 days past due.	MED

# USE OF PELICAN CCW

KEYVALUE	DISPLAYVALUE	Priority
227	The Quarterly Narrative is 5 days past due.	MED
228	The Quarterly Narrative is 5 days past due.	MED
229	The Enrollment Plan is 5 days past due.	MED
230	The Enrollment Plan is 5 days past due.	MED
231	Enrollment Plan has been submitted.	MED
232	A new STAR 3/4 location with Site ID %1 has been created for provider %2 - %3	MED
236	A date of death of %5	MED
250	%5 Legal Entity %1 is Open without any Open Locations	MED
300	Regulated Legal Entity %1 created	MED
301	Provider %1 Legal Entity Address changed	MED
302	Legal Entity %1 is closed as of %3. All locations under this Legal Entity will also close.	MED
303	Legal Entity %1 Re-opened	MED
304	Legal Entity %1 is Open without any Open Locations	MED
305	Provider %1 Name changed	MED
306	Provider %1 Tax Number changed	MED
350	Regulated Location %1-%2 created	MED
351	Provider %1-%2 Location Address changed	MED
352	Provider %1-%2 made Subsidy Eligible	MED
353	Provider %1-%2 made Subsidy Ineligible	HIH
354	Carecheck will expire %5 for Provider %1-%2. Please contact provider to assure Adam Walsh Act is followed per policy.	HIH
355	Provider %1-%2 is closed as of %3	MED
356	Provider %1-%2 Re-opened	MED
357	Provider %1-%2 change in Provider Type	MED
358	Provider %1-%2 Name changed	MED
359	Provider %1-%2 Payee Level changed	MED
360	Enrollments exist for Care Level rate that was changed to zero	MED

## **USE OF PELICAN CCW**

<b>KEYVALUE</b>	<b>DISPLAYVALUE</b>	<b>Priority</b>
362	Closed Date for Provider Location %1-%2 was cancelled. Check Provider Agreement and affected Enrollments	MED
363	Closed Date for Legal Entity %1 was cancelled. Check for its locations and their Provider Agreements and affected Enrollments	MED
364	Provider STAR Level changed from %3 to %4 effective %5.	MED
365	There is a Managed Update Accreditation Request for the Location %1-%2.	MED
366	An update request is pending for the location %1-%2 which will expire on %5.	MED
367	There is a Managed Update Service Schedule Request for the Location %1-%2.	MED
368	Provider STAR Level changed from %3 to %4 effective %5.	MED
369	Carecheck will expire %5 for Provider %1-%2. Please contact provider to assure Adam Walsh Act is followed per policy.	HIH
370	Carecheck will expire %5 for provider %1-%2. Please renew Carecheck if provider continues to participate in the Subsidized Child Care Program.	HIH
394	Certificate for Provider %1-%2 will expire on %5	MED
395	Certificate for Provider %1-%2 expires on %5	MED
396	Provider %1-%2 closed effective %5 for non renewal of Certificate	MED
397	Certificate Renewed for Provider %1-%2	MED
400	Provider %2 CCIS Agreement End Dated	MED
402	R/N Provider %2 Address change	MED
450	Provider Agency %1 Closed	MED
451	Provider Agency %1 Re-opened	MED
475	Provider %1 Legal Entity Address changed	MED
476	Provider %1-%2 Location Address changed	MED

# USE OF PELICAN CCW

KEYVALUE	DISPLAYVALUE	Priority
477	Provider %1-%2 change in Provider Type	MED
500	Status of Invoice %3 Changed to Have Invoice due to an enrollment change	MED
501	Status of Invoice %3 Changed to Paid - Pending Adjustment due to an enrollment change	MED
502	Status of Invoice %3 Changed to Deleted	MED
503	Invoice %3 was split off from another invoice	MED
510	Status of Invoice %3 Changed to Have Invoice due to an enrollment change	MED
511	Status of Invoice %3 Changed to Paid - Pending Adjustment due to an enrollment change	MED
512	Status of Invoice %3 Changed to Deleted	MED
513	Invoice %3 was split off from another invoice	MED
514	CCIS Provider Agreement created for Provider %1-%2 with active enrollments	MED
515	A Payment Adjustment Fee - Reversal was preformed on Provider %1-%2.	MED
701	Co/Rec %1 has been marked as confidential in PELICAN CCW	MED
702	Developmental age for Client %5 in Co/Rec %1 updated in PELICAN CCW	MED
703	Client %5 in Co/Rec %1 Ineligible - 10 day consecutive absence	MED
704	Client %5 in Co/Rec %1 Ineligible - Co-pay delinquency	MED
705	Client %5 in Co/Rec %1 Ineligible - Child turning 13 years	MED
706	Client %5 in Co/Rec %1 Ineligible - Adverse Action	MED
707	Training record entered in PELICAN CCW for Co/Rec %1	MED
708	Employment record entered in PELICAN CCW for Co/Rec %1	MED
800	%4 days have passed since the request for TANF/GA/FS child care for Co/Rec %1.	HIH

## **USE OF PELICAN CCW**

<b>KEYVALUE</b>	<b>DISPLAYVALUE</b>	<b>Priority</b>
801	The CAO district code for Co/Rec %1 has changed.	MED
802	Co-pay for Co/Rec %1 must be waived from the 1st day of employment until the Monday following the last day of the month in which the 1st pay was received.	HIH
803	Co-pay for Co/Rec %1 must be waived from the 1st day of employment until the Monday following the date TANF benefits ended.	HIH
810	Application %5 has not yet been reviewed.	MED
811	Application %5 has not yet been reviewed.	MED
812	Application %5 has not yet been reviewed and eligibility must be assessed.	HIH
813	Application %5 has not yet been reviewed and eligibility must be assessed.	MED
814	Duplicate case created for Application %5.	MED
815	%5 not working/training for more than %4 days	HIH
816	TCA has opened in Co/Rec %1. Please close current TANF case and review CIS Inbox for the new TCA (C/U) budget that is associated with %5.	HIH
817	An Individual has been disqualified in Co/Rec %1, Please reassess and confirm the case eligibility.	HIH
818	Eligibility was overridden in Co/Rec %1 for a disqualified individual, %5.	HIH
819	Eligibility was overridden in Co/Rec %1 for a disqualified individual, %5.	HIH
820	%5 's employment is scheduled to start on %4. Please reassess and confirm the eligibility for Co/Rec %1.	HIH
821	A verification Request has been received from MCI for individual %2.	HIH
822	A verification Request has been received from MCI for individual %2.	HIH

# USE OF PELICAN CCW

KEYVALUE	DISPLAYVALUE	Priority
823	Information for individual %2 has been updated in MCI.	HIH
824	Information for individual %2 has been updated in MCI.	HIH
825	A CCW update has been rejected in MCI for individual %2.	HIH
826	A CCW update has been rejected in MCI for individual %2.	HIH
827	A date of death of %5	HIH
829	Child is turning age18	MED
900	Start with STARS %5 month inactivity warning letter generated	HIH
901	STAR 1-4 %5 days before expiration letter generated	HIH
902	Funds Returned Check is received	MED
903	Grant Check is sent	MED
904	DPW Standard Non-Compliance is set to 'Yes'	HIH
905	Provider location is closed	HIH
906	Grant Agreement has reached 90 day expiration time	HIH
911	Correspondence ID %5 failed generation	HIH
912	Headquarters has recorded a returned check.	MED
913	The Anticipated Completion Date of %3 has been reached for the individual %2 attending the %5. Please take action.	MED
914	The Anticipated Completion Date of %3 has been reached for the individual %2 attending the %5. Please take action.	MED
915	In 5 days this location will automatically be given a No STAR Rating effective %5	HIH
916	A STARS Technical Assistance contact has not been recorded in the Contact Log for %1 %2.	MED
917	A successful STARS Technical Assistance contact has not been recorded in the Contact Log for %1 %2.	MED
918	The STARS TA Request for this location is complete and ready to be closed.	MED
237	MPI ID %1-%2 requests accesstoELN.	MED
241	MPI ID (%2-%3) has been closed due to %5	MED

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# ***USE OF PELICAN CCW***

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## **104.18.2 Searching for an Alert**

The CCIS may search for an alert generated in a given time period using the *Alerts Search* page. The default search criteria appear at the top of the page.

“Class” automatically defaults based upon the user’s level of access.

“Class” reflects the type of alert. Valid “Classes” of alerts include:

1. All.
2. Subsidy Case.
3. Legal Entity.
4. Location.
5. Agency.
6. Administrative.
7. Fiscal.
8. Director.
9. Commonwealth.
10. Default Caseload.
11. Application.
12. Provider Profile Manager.
13. Specialist.
14. Headquarters.
15. Lead Agency.
16. Subsidy Case (MCI).

The CCIS may narrow the search results using additional search criteria, such as “Supervisory Unit (Caseload, Providerload or Fiscal Load)”, “Co/Record”, “Provider/Location”, “Invoice”, “Class”, “Priority”, “Status”, “Category” and “Alert Date”.

The alert history displays the date the alert was cleared, with the most recently cleared alerts displayed first. The CCIS may view the entire alert history list or filter by “Co/Record Number” or “Provider ID”.

# USE OF PELICAN CCW

The CCIS may search for an alert by completing the following steps in PELICAN CCW:

1. Navigate to the *Alerts Search* page using one of the following methods:
  - Click “Home” on the *Main Navigation* bar, then click “Alert” or “Workload” under “Admin” on the side bar; or

Help | Logout

Home | R&R | Provider | Case | Payments | Reports | Correspondence | Administration

PELICAN Child Care Works Home

ALERTS  
Admin [2]  
Workload [250]

BROADCAST  
Messages [0]

RESOURCES  
PELICAN CCW LMS

BATCH RECORDS  
ELN Validation [3950]

Welcome to PELICAN Child Care Works

There are no current broadcast messages.

User ID: t-test21 | Office: CCIS of Dauphin County

System Acceptance Test | Version 10.2.0.42

- Click “Administration” on the *Main Navigation* bar and click “Workload” on the *Sub Navigation* bar. Then click “Alerts” on the new version of the *Sub Navigation* bar.

Help | Logout

Home | R&R | Provider | Case | Payments | Reports | Correspondence | Administration

Workload | Organization | System Broadcasts | Office Selection | Funds | Reference Tables | Audit Trail

Administration Home

Manage office, user, and system information.

Description	
Workload	GO
Organization	GO
System Broadcast	GO
Office Selection	GO
Funds	GO
Reference Tables	GO
Audit Trail	GO

User ID: t-test221 | Office: CCIS of Dauphin County

System Acceptance Test | Version 10.2.0.49

# USE OF PELICAN CCW

[Home](#) | [R&R](#) | [Provider](#) | [Case](#) | [Payments](#) | [Reports](#) | [Correspondence](#) | [Administration](#)

[Subsidy Caseload](#) | [R&R Caseload](#) | [Providerload](#) | [Provider Office](#) | [Fiscal Load](#) | **Alerts**

### Workload Management Home

View and maintain office caseloads, providerloads, fiscal loads and alerts.

Description	Supervisory Unit	Workload	
Caseload Search	<input type="text"/>	<input type="text"/>	GO
Caseload Alerts	<input type="text"/>	<input type="text"/>	GO
Providerload Search	<input type="text"/>	<input type="text"/>	GO
Providerload Alerts	<input type="text"/>	<input type="text"/>	GO
Fiscal Load Search	<input type="text"/>	<input type="text"/>	GO
Fiscal Load Alerts	<input type="text"/>	<input type="text"/>	GO

UserID: t-test221 | Office: CCIS of Dauphin County | System Acceptance Test | Version 10.2.0.44

2. Enter or select search criteria on the *Alerts Search* page, then click “Search”.

### Alert Search

Office: CCIS of Dauphin County  
 Supervisory Unit/Caseload:  /   
 Supervisory Unit/Providerload:  /   
 Supervisory Unit/Fiscal Load:  /   
 User ID: t-test221  
 Co/Record:  /   
 Provider/Location:  /   
 Invoice:   
 Class:   
 All   
 Subsidy Case  
 Legal Entity  
 Location   
 Priority: All   
 Status: Not Cleared   
 Category: All   
 Alert Date From \*: 1/21/2010 To 1/21/2011

#### Sort Options

Assignment       User ID       Date       Priority  
 Ascending       Descending

[SEARCH](#)     [RESET](#)

### NOTES:

- Depending on the user's security role, “Workload” may not display under “Admin” on the *Home* page side bar.
- Click “RESET” to clear the default results and enter new search criteria, if desired.

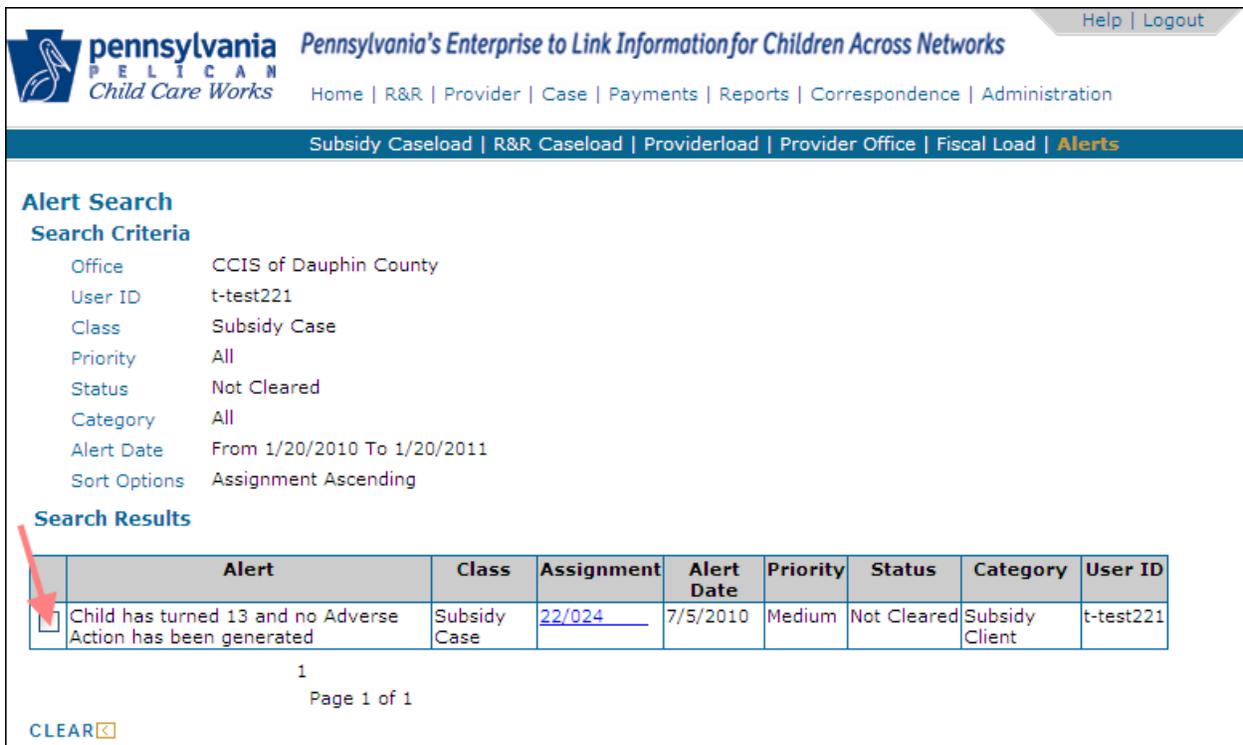
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# USE OF PELICAN CCW

## 104.18.3 Clearing an Alert

The CCIS may clear an alert by completing the following steps in PELICAN CCW:

1. Navigate to the *Alerts Search* page using one of the following methods:
  - Click “Home” on the *Main Navigation* bar, then click “Alerts” or “Workload” under “Admin” on the side bar; or
  - Click “Administration” on the *Main Navigation* bar, click “Workload” on the *Sub Navigation* bar, then click “Alerts” on the *Sub Navigation* bar.
2. Enter or select search criteria on the *Alerts Search* page, then click “Search”.



The screenshot displays the PELICAN CCW Alerts Search interface. At the top, there is a navigation bar with the logo for Pennsylvania's Enterprise to Link Information for Children Across Networks and a 'Help | Logout' link. Below the navigation bar, there are links for 'Home | R&R | Provider | Case | Payments | Reports | Correspondence | Administration'. A secondary navigation bar includes 'Subsidy Caseload | R&R Caseload | Providerload | Provider Office | Fiscal Load | Alerts'. The main content area is titled 'Alert Search' and contains 'Search Criteria' with the following values: Office (CCIS of Dauphin County), User ID (t-test221), Class (Subsidy Case), Priority (All), Status (Not Cleared), Category (All), Alert Date (From 1/20/2010 To 1/20/2011), and Sort Options (Assignment Ascending). Below the search criteria is a 'Search Results' section with a table. A red arrow points to the checkbox in the first row of the table. The table has the following data:

	Alert	Class	Assignment	Alert Date	Priority	Status	Category	User ID
<input type="checkbox"/>	Child has turned 13 and no Adverse Action has been generated	Subsidy Case	<a href="#">22/024</a>	7/5/2010	Medium	Not Cleared	Subsidy Client	t-test221

Below the table, it shows '1' and 'Page 1 of 1'. At the bottom left, there is a 'CLEAR' button with a dropdown arrow.

3. Select the checkbox for the alert, and then click “Clear”.

### NOTES:

- Clear an alert only when the task in the alert has been completed.
- System-cleared alerts do not have a checkbox and cannot be cleared by the user. Upon performing the necessary action, the alert will be cleared through nightly batch processing.

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# USE OF PELICAN CCW

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## 104.18.4 **Processing an MCI Alert**

When core Social Security Administration (SSA) verifiable demographics are updated, a request is sent to the SSA to validate the information. Upon verification, an update is made to the Master Client Index (MCI).

If the client for which the change has been made is known to CIS, MCI then sends an alert to CIS, the highest known verifying system. CIS is the highest ranking verifying system within the hierarchy. CCW is second, and the remaining Department of Public Welfare (DPW) systems follow.

PELICAN CCW receives an MCI alert ***ONLY*** if the client is active within PELICAN CCW.

The CCIS may clear an alert by completing the following steps in PELICAN CCW:

1. Navigate to the *Alerts Search* page using one of the following methods:
  - Click “Home” on the *Main Navigation* bar, then click “Alerts” or “Workload” under “Admin” on the side bar; or
  - Click “Administration” on the *Main Navigation* bar, click “Workload” on the *Sub Navigation* bar, then click “Alerts” on the *Sub Navigation* bar.
2. Enter or select search criteria on the *Alerts Search* page, select “Subsidy Case (MCI)” and then click “Search”.
3. Click the “Assignment” hyperlink which is comprised of the “Co/Record Number”.

**NOTE:** On the subsequent page which is displayed, to see the client information, click “Individual Number” in the CCW Information column to view the *Case Summary* page. If the individual is associated with multiple cases, the *Client Selection* page is displayed in a pop-up window. Select the radio button associated with the proper individual, then click “Continue”. Click “Back To MCI Notification” to return to the *MCI Alert* page.

4. Review the information for accuracy.

# ***USE OF PELICAN CCW***

---

5. Select the “No, I want to keep the information that is currently in CCW” or “Yes, I want to replace the current CCW individual information with the updated information” radio button, as appropriate.

**NOTE:** When information regarding a “Date of Death” is received, the information must be manually verified and entered on the *Individual Information* page. The “Date of Death” update is not automatically applied upon selecting the “YES” option.

6. Click “Submit” to accept the selection, or click “Close” to return to the *Alert Search* page.

There are three types of MCI alerts.

1. Verification Request Summary.
2. Client Update Summary.
3. CCW Rejection Summary.

The type of alert depends upon where the update originated.

The following subsections contain additional information regarding the types of MCI alerts.

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# USE OF PELICAN CCW

## 104.18.4.1 Verification Request Summary

The "Verification Request Summary" MCI alert occurs when PELICAN CCW receives a request from a DPW system lower in the hierarchy to validate new individual information sent to MCI from another system. This information is displayed on the *Verification Request Summary* page. By accepting the verification request, the information for MCI is updated and possibly used by other DPW systems.



*Pennsylvania's Enterprise to Link Information for Children Across Networks*

PELICAN Home | **Child Care Works** | Early Learning

Home | R&R | Provider | Case | Payments | Reports | Correspondence | Administration

[Help](#) | [Logout](#)

[Client Search](#) | [Provider Search](#) | [R&R Contact Log](#) | [Provider Profile Inbox](#)

### Verification Request Summary

**CCW has received a request to validate new individual information sent to MCI from another system. Please review the information below and take the appropriate action.**

Date Received : 1/20/2011 6:05:58 PM  
Status : Pending

Data Elements	CCW Information	MCI Information
Individual Number :	<u>7</u>	
First Name :	K	
Middle Initial :	J	
Last Name :	S	
Name Suffix :		
SSN :	***-**-9988	
Gender :	Female	
Marital Status :	Married - Living w/ Spouse	<b>Single - Never Married</b>
Date of Birth :	/ /2007	
Date of Death :		
Race :	Black or African American	
Ethnicity :	Non-Hispanic	
Citizenship Status :	Citizen	
MCI Verified? :	Yes	

**Do you want to accept the proposed changes and replace what is currently in CCW?**

No, I want to keep the information that is currently in CCW.

Yes, I want to replace the current CCW individual information with the updated information.

[SUBMIT](#)    [CLOSE](#)

UserID: nbuczeskieProduction

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# USE OF PELICAN CCW

## 104.18.4.2 Client Update Summary

The “Client Update Summary” MCI alert occurs when PELICAN CCW receives updated client information from CIS, the highest ranking system in the hierarchy. These changes have already been applied in MCI. The information is displayed on the *Client Update Summary* page. Accepting the change replaces the current individual information with the updated information and places PELICAN CCW in sync with MCI. Rejecting the change maintains the current individual information entered in PELICAN CCW, but causes PELICAN CCW to become out-of-sync with MCI.



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### Client Update Summary

**CCW has received updated client information. These changes have been applied in MCI. Please review the individual information below and take the appropriate action.**

Date Received : 1/12/2011 9:33:46 PM  
Status : Pending

Data Elements	CCW Information	MCI Information
Individual Number :	<u>1</u>	
First Name :	T	
Middle Initial :	M	
Last Name :	C	
Name Suffix :		
SSN :		- -9988
Gender :	Male	
Marital Status :	Single - Never Married	
Date of Birth :	/ /2010	
Date of Death :		
Race :	Black or African American	
Ethnicity :	Non-Hispanic	
Citizenship Status :	Citizen	
MCI Verified? :	No	

**Do you want to accept the changes and replace what is currently in CCW?**

No, I want to keep the information that is currently in CCW.

Yes, I want to replace the current CCW individual information with the updated information.

SUBMIT  CLOSE

UserID: nbuczskie Production

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# USE OF PELICAN CCW

## 104.18.4.3 CCW Rejection Summary

The “CCW Rejection Summary” MCI alert occurs when PELICAN CCW makes an update to client information that was rejected by CIS. This only occurs when the client is known to CIS. The information is displayed on the *CCW Rejection Summary* page. Accepting the change replaces the current individual information with the information maintained by CIS and places PELICAN CCW in sync with MCI. Rejecting the change maintains the current individual information entered in PELICAN CCW, but causes PELICAN CCW to become out-of-sync with MCI.



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### CCW Rejection Summary

**CCW made an update to individual information that was rejected by MCI. Please review the individual information below and take the appropriate action.**

Date Received : 12/14/2010 7:24:05 PM  
Status : Pending

Data Elements	CCW Information	MCI Information
Individual Number :	<u>S</u>	
First Name :	T	
Middle Initial :	L	
Last Name :	M	H
Name Suffix :		
SSN :	***-**-8920	
Gender :	Female	
Marital Status :	Married - Living w/ Spouse	Divorced
Date of Birth :	/ /1974	
Date of Death :		
Race :	White	
Ethnicity :	Non-Hispanic	
Citizenship Status :	Citizen	
MCI Verified? :	No	Yes

**Do you want to accept the MCI Information and replace what is currently in CCW?**

No, I want to keep the information that is currently in CCW.

Yes, I want to replace the current CCW individual information with the updated information.

[SUBMIT](#) [CLOSE](#)

UserID: nbuczskieProduction

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# USE OF PELICAN CCW

---

## 104.19 **CASE COMMENTS**

The following subsections include information regarding accessing, entering, viewing, updating and printing case comments, in addition to viewing history.

### 104.19.1 **Accessing Case Comments**

The CCIS may access case comments by navigating to the *Case Comments Summary* page using one of the following methods:

- Click “Case” on the *Main Navigation* bar, enter the “Case ID” in the “Case Comments” field and click “Go”;  
or
- From within the case, click the “Select...” drop-down box, select “Case Comments” from the list and click “Go”.
- On the *Case Profile Summary* page and click the “Case Comments” hyperlink.

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### 104.19.2 **Entering Case Comments**

The CCIS may enter case comments by completing the following steps in PELICAN CCW:

1. Click “New”.
2. Enter a “Contact Date”.
3. Enter a “Contact Time”. Use the drop-down box to select “AM” or “PM”.
4. Enter a “Subject”.
5. Enter “Comment Text”.
6. Click “Save”.

# USE OF PELICAN CCW

**pennsylvania**  
PELICAN  
Child Care Works

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### Case Comment Summary

**GO**

County	Record	Office	Status	Mode	Parent/Caretaker	Caseload ID
22		CCIS of Dauphin County	Open	Ongoing	S, A	

Show Last  Days **GO**

Show History From  To  **GO**

	Contact Date/Time	Subject	Created By	Date Last Updated	
<input type="checkbox"/>	<a href="#">08/28/2009 09:29:00 AM</a>	ENROLLMENT	c-ofarnwal	8/28/2009 9:32:30 AM	
<input type="checkbox"/>	<a href="#">08/27/2009 01:42:00 AM</a>	PROVIDER TRANSFER/NEW EMPLOYER	c-damarodr	8/27/2009 1:43:50 PM	
<input type="checkbox"/>	<a href="#">08/26/2009 12:38:00 PM</a>	NEW EMPLOYER	c-damarodr	8/26/2009 12:39:43 PM	
<input type="checkbox"/>	<a href="#">05/26/2009 10:43:00 AM</a>	REDE COMPLETED	c-damarodr	5/26/2009 10:44:52 AM	
<input type="checkbox"/>	<a href="#">05/21/2009 05:21:00 PM</a>	FAX A COPY OF REDE TO CLIENT	c-damarodr	5/21/2009 2:07:24 PM	
<input type="checkbox"/>	<a href="#">05/21/2009 02:22:00 PM</a>	MISSING INFO SENT	c-damarodr	5/21/2009 2:22:56 PM	
<input type="checkbox"/>	<a href="#">05/14/2009 08:30:00 AM</a>	REDETERMINATION	c-liskric	5/14/2009 8:27:08 AM	
<input type="checkbox"/>	<a href="#">12/24/2008 01:15:00 AM</a>	REDETERMINATION COMPLETED	c-lballard	12/24/2008 1:19:21 PM	
<input type="checkbox"/>	<a href="#">12/11/2008 11:59:00 AM</a>	AA FOR REDETERMINATION	c-lballard	12/11/2008 12:00:30 PM	
<input type="checkbox"/>	<a href="#">11/21/2008 10:33:00 AM</a>	VOL/WITH / ENROLLMENT	c-lballard	11/21/2008 10:42:24 AM	
<input type="checkbox"/>	<a href="#">11/10/2008 02:58:00 PM</a>	ENROLLMENT FOR 3 CHILDREN	c-lballard	11/10/2008 3:23:18 PM	
<input type="checkbox"/>	<a href="#">10/07/2008 03:15:00 PM</a>	R/N PROVIDER INFORMATION	c-lballard	10/8/2008 2:45:41 PM	
<input type="checkbox"/>	<a href="#">09/29/2008 02:48:00 PM</a>	SPOKE TO CLIENT RE: PROV TRANS	c-mziegler	9/29/2008 2:53:51 PM	
<input type="checkbox"/>	<a href="#">08/08/2008 09:09:00 AM</a>	AA 30 DAYS NOT ENROLLED	c-lballard	8/8/2008 9:10:41 AM	
<input type="checkbox"/>	<a href="#">07/17/2008 09:56:00 AM</a>	CO-PAY SWITCH	c-lballard	7/17/2008 9:57:40 AM	
<input type="checkbox"/>	<a href="#">07/16/2008 11:40:00 AM</a>	SUSPENSION	c-lballard	7/16/2008 11:43:59 AM	
<input type="checkbox"/>	<a href="#">07/10/2008 03:58:00 PM</a>	PROVIDER CALLED	c-acibelli	7/10/2008 4:03:09 PM	
<input type="checkbox"/>	<a href="#">06/24/2008 02:31:00 PM</a>	ENROLLMENT/ TYMIRE	c-lballard	6/24/2008 2:38:06 PM	
<input type="checkbox"/>	<a href="#">06/23/2008 10:32:00 AM</a>	AA 30 DAYS ONLY FOR TYMIRE	c-lballard	6/23/2008 10:34:28 AM	
<input type="checkbox"/>	<a href="#">06/12/2008 07:38:00 AM</a>	CLIENT CONTACT	c-jawest	6/12/2008 7:39:39 AM	
<input type="checkbox"/>	<a href="#">06/11/2008 08:57:00 AM</a>	INV - PROVIDER COMPLIANCE	c-bbuehler	6/11/2008 8:58:13 AM	
<input type="checkbox"/>	<a href="#">06/10/2008 11:55:00 AM</a>	ENROLLMENT FOR 3 KIDS	c-lballard	6/10/2008 11:57:26 AM	
<input type="checkbox"/>	<a href="#">06/10/2008 11:40:00 AM</a>	SWITCHED TO FORMER TANF	c-lballard	6/10/2008 11:48:05 AM	
<input type="checkbox"/>	<a href="#">06/10/2008 08:28:00 AM</a>	CLIENT/PROVIDER	c-jawest	6/11/2008 8:31:33 AM	
<input type="checkbox"/>	<a href="#">06/06/2008 01:25:00 PM</a>	PROVIDER INFO	c-jawest	6/6/2008 2:28:04 PM	
<input type="checkbox"/>	<a href="#">05/28/2008 08:13:00 AM</a>	PROVIDER OVER	c-jawest	5/28/2008 8:15:01 AM	
<input type="checkbox"/>	<a href="#">05/27/2008 11:07:00 AM</a>	FACE TO FACE	c-jawest	5/27/2008 11:11:15 AM	
<input type="checkbox"/>	<a href="#">05/23/2008 12:47:00 PM</a>	CLIENT CONTACT	c-jawest	5/23/2008 12:51:08 PM	
<input type="checkbox"/>	<a href="#">05/23/2008 08:00:00 AM</a>	LEFT MESSAGE	c-jawest	5/23/2008 8:01:05 AM	
<input type="checkbox"/>	<a href="#">05/22/2008 10:18:00 AM</a>	REC'D IN THE INBOX	c-lballard	5/22/2008 10:20:58 AM	
<input type="checkbox"/>	<a href="#">05/21/2008 03:29:00 PM</a>	REC'D IN THE INBOX	c-lballard	5/22/2008 10:21:50 AM	

[NEW](#) | [UPDATE](#) | [PRINT](#) | [HISTORY](#)

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# ***USE OF PELICAN CCW***

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## **104.19.3 Viewing Case Comments**

The CCIS may view case comments by completing the following steps in PELICAN CCW:

1. View comments using one of the following methods:
  - Enter a number of days (up to 90) in the “Show Last Days” field and click “Go”; or
  - Enter dates in the “Show History From” and “Show History To” fields and click, “Go”.
2. Click the hyperlink of the case comment to be viewed or click “Print” to display the full comment text for the dates requested.

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## **104.19.4 Updating Case Comments**

CCIS staff with the “Director” or “Supervisor” roles may update case comments by completing the following steps in PELICAN CCW:

1. Select the checkbox next to the comment requiring updating.
2. Click “Update”.
3. Update appropriate case comment information.
4. Click “Save”.

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## **104.19.5 Printing Case Comments**

The CCIS may print case comments by clicking “Print” on the page. This immediately generates the RE326 Case Comments Report that contains the most current version of each comment.

# USE OF PELICAN CCW

**RE326 - Case Comments Report**  
 From 01/01/1999 To 01/26/2011  
 Report Generated on 01/26/2011

**Report Parameters**  
 County/Rec No: 22/ Parent/Carotaker's Name: S .A  
 District/Office: CCIS of Dauphin County County: Dauphin

Contact Date/Time	Updated By	Subject	Comment
8/28/2009 9:29:00 AM	c-ofarwal	ENROLLMENT	ENROLLED J AND H AT # -1 MON-FRI SCHOOL AGE KIDS. COPAY WITH SIBLING, ENROLLED EFFECTIVE 08/31/2009. ENROLLMENT SUMMARIES SENT #5
8/27/2009 1:42:00 AM	c-damarodr	PROVIDER TRANSFER/NEW EMPLOYER	CALLED AND SPOKE WITH J . SHE VERIFIED CLIENT WORKS FROM 830-500PM M-F. CLIENT GETS PAID 2X A MONTH. CLIENT ALSO ENROLLED FOR BEFORE AND AFTER CARE
8/26/2009 12:38:00 PM	c-damarodr	NEW EMPLOYER	CLIENT CALLED TO REPORT A NEW JOB . FAXED OVER A EV
5/26/2009 10:43:00 AM	c-damarodr	REDE COMPLETED	REDE COMPLETED. CLIENT REMAINS ELIGIBLE. CO PAY REMAINS \$5.00. CORRESP # 5689963-
5/21/2009 5:21:00 PM	c-damarodr	FAX A COPY OF REDE TO CLIENT	FAXED A COPY OF REDE TO CLIENT # 2
5/21/2009 2:22:00 PM	c-damarodr	MISSING INFO SENT	RCV REDE BACK FROM POST OFFICE. SENT A MISSING INFO NOTICE REQUESTED PROOF OF ADDRESS.
5/14/2009 8:30:00 AM	c-liskric	REDETERMINATI ON	REDETERM MAILED. DUE BACK 6-25-09. CORRESP# -1
12/24/2008 1:15:00 AM	c-iballard	REDETERMINATI ON COMPLETED	REDETERMINATION HAS BEEN COMPLETED CO-PAY WILL DECREASE 20.00 TO 5.00 EFF. 12-29-2008 ENROLL. CONFIRMATION NOTICE SENT CORRESP. # 5 -1.
12/11/2008 11:59:00 AM	c-iballard	AA FOR REDETERMINATI ON	AA HAS BEEN GENERATED DUE TO CLIENT NOT HANDING IN HER REDETERMINATION PKT. AA EFF. 12-24-2008 CORRESP. # 5 -1
11/21/2008 10:33:00 AM	c-iballard	VOLWITH / ENROLLMENT	CLIENT HAS SUBMITTED A LETTER INFORMING ME THAT J NOLONGER NEEDS FUNDING . FUNDING DISCONTINUED EFF. 11-15-2008. T & T WILL BE TRANSFERING TO MAKAYLA'S PLACE 5 EFF. 11-17-2008. LAST DAY AT WAS 11-14-2008. ENROLL. SUMM. SENT CORRESP. # 4 -1 . VOLWITH NOTICE SENT CORRESP. # 4 -1
11/19/2008 2:58:00 PM	c-iballard	ENROLLMENT FOR 3 CHILDREN	ALL 3 CHILDREN ENROLL. SUMM. CORRESP. # 4 . HAVE BEEN ENROLLED W/ R/N PROVIDER 3 -1 EFF. 11-03-2008

RE326 - Case Comments Report

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# USE OF PELICAN CCW

## 104.19.6 Viewing Historical Case Comments

The CCIS may view historical case comments by completing the following steps in PELICAN CCW:

1. View historical comments using one of the following methods:
  - Click the “History Icon” (I) next to the comment to view a history of edits to that comment; or
  - Select the checkbox next to one or more comments and click “History” to view a history of edits to those comments. If more than one comment is selected, the topmost comment is displayed; click the hyperlinks to view the histories of the other comments; or
  - Click “History” to view all comments. By default, the topmost comment is listed. Click the hyperlinks to view the histories of the other comments.
2. Click “Return to Summary”.



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### Case Comment History

[GO](#)

County	Record	Office	Status	Mode	Parent/Caretaker	Caseload ID
22		CCIS of Dauphin County	Open	Ongoing	S , A	

380: Data has changed. Please reassess and confirm eligibility

Contact Date/Time	Subject	Created By	Last Updated By	Date Last Updated
<a href="#">8/28/2009 9:29:00 AM</a>	ENROLLMENT	c-ofarnwal	c-ofarnwal	8/28/2009 9:32:30 AM
<a href="#">8/27/2009 1:42:00 AM</a>	PROVIDER TRANSFER/NEW EMPLOYER	c-damarodr	c-damarodr	8/27/2009 1:43:50 PM
<a href="#">8/26/2009 12:38:00 PM</a>	NEW EMPLOYER	c-damarodr	c-damarodr	8/26/2009 12:39:43 PM
<a href="#">5/26/2009 10:43:00 AM</a>	REDE COMPLETED	c-damarodr	c-damarodr	5/26/2009 10:44:52 AM
<a href="#">5/21/2009 5:21:00 PM</a>	FAX A COPY OF REDE TO CLIENT	c-damarodr	c-damarodr	5/21/2009 2:07:24 PM
<a href="#">5/21/2009 2:22:00 PM</a>	MISSING INFO SENT	c-damarodr	c-damarodr	5/21/2009 2:22:56 PM
<a href="#">5/14/2009 8:30:00 AM</a>	REDETERMINATION	c-liskric	c-liskric	5/14/2009 8:27:08 AM

Contact Date/Time	Subject	Last Updated By	Date Last Updated	Comment Text
08/28/2009 09:29:00 AM	ENROLLMENT	c-ofarnwal	08/28/2009 09:32:30 AM	ENROLLED #6 AND AT -1 MON-FRI SCHOOL AGE KIDS, COPAY WITH SIBLING, ENROLLED EFFECTIVE 08/31/2009. ENROLLMENT SUMMARIES SENT #6 , 6 .

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# USE OF PELICAN CCW

## 104.20 PROVIDER COMMENTS

The following subsections include information regarding accessing, entering, viewing, updating and printing provider comments, in addition to viewing history.

### 104.20.1 Accessing Provider Comments

The CCIS may access provider comments by navigating to the *Provider Comment Summary* page using one of the following methods:

- From the *Location R&R Profile Summary* page, select the “Comments”.
- Click “Provider” on the *Main Navigation* bar, enter search criteria into fields on the “Provider Comments” row, then click “Go”; or
- From within a provider record, select “Comments” from the “Select...” drop-down list, then click “Go”.

**Provider Comment Summary** Select... GO

MPI Location ID	Legal Entity Name	Location Name	Provider Certification ID	Provider ID
1	-0001 C S	C S		6 -1

**Keystone STARS Quality Rating**

Show Last  Days GO

Show History From  To  GO

	Contact Date/Time	Subject	Created By	Date Last Updated	
<input type="checkbox"/>	<a href="#">01/30/2009 01:04:19 PM</a>	SATURDAY & SUNDAYS	c-bbuehler	1/30/2009 1:04:19 PM	<a href="#">?</a>
<input type="checkbox"/>	<a href="#">01/28/2009 03:59:23 PM</a>	CONTACT W/PROVIDER	c-cnash	1/28/2009 3:59:23 PM	<a href="#">?</a>
<input type="checkbox"/>	<a href="#">09/17/2008 07:19:23 AM</a>	ADD SCHOOL AGE RATES	c-bbuehler	9/17/2008 7:20:14 AM	<a href="#">?</a>
<input type="checkbox"/>	<a href="#">07/10/2008 01:45:24 PM</a>	07/01/08 RATES	c-bbuehler	7/10/2008 1:45:24 PM	<a href="#">?</a>
<input type="checkbox"/>	<a href="#">03/07/2008 08:59:09 AM</a>	RESENDING PROVIDER SURVEY	c-mburton	3/7/2008 8:59:09 AM	<a href="#">?</a>
<input type="checkbox"/>	<a href="#">01/18/2008 10:47:48 AM</a>	PROVIDER SURVEY	c-mburton	1/18/2008 10:47:48 AM	<a href="#">?</a>
<input type="checkbox"/>	<a href="#">01/15/2008 10:31:18 AM</a>	NEW	ddetoma	1/15/2008 10:31:18 AM	<a href="#">?</a>

**NEW** **UPDATE** **PRINT** **HISTORY** **RETURN TO SUMMARY**

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# ***USE OF PELICAN CCW***

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## **104.20.2 Entering Provider Comments**

The CCIS may enter provider comments by completing the following steps in PELICAN CCW:

1. Click “New”.
2. Enter the “Contact Date” and “Contact Time”.
3. Type a subject in the “Subject” field.
4. Type provider comments in the “Comment Text” field.
5. Click “Save”.

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## **104.20.3 Viewing Provider Comments**

The CCIS may view provider comments by completing the following steps in PELICAN CCW:

1. View comments using one of the following methods:
  - Enter a number of days (up to 90) in the “Show Last Days” field and click “Go”; or
  - Enter dates in the “Show History From” and “Show History To” fields and click, “Go”.
2. Click the hyperlink of the case comment to be viewed or click “Print” to display the full text of the comment for the dates requested.

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# ***USE OF PELICAN CCW***

---

## **104.20.4 Updating Provider Comments**

The CCIS may update provider comments by completing the following steps in PELICAN CCW:

1. Select the checkbox next to the comment which requires the update.
2. Click "Update".
3. Update appropriate provider comment information.
4. Click "Save".

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## **104.20.5 Printing Provider Comments**

The CCIS may print provider comments by clicking "Print".

This immediately generates the RE224 Provider Comments report that contains the most current version of each comment.

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# USE OF PELICAN CCW

## 104.20.6 Viewing Historical Provider Comments

The CCIS may view historical provider comments by completing the following steps in PELICAN CCW:

1. View historical comments using one of the following methods:
  - Click the “History Icon” (I) next to the comment to view a history of edits to the selected comment; or
  - Select the checkbox next to one or more comments and click “History” to view a history of edits to the selected comments. If more than one comment is selected, the topmost comment is displayed; click the links to view the histories of the other comments; or
  - Click “History” to view all comments. By default, the topmost comment is listed. Click the links to view the histories of the other comments; or
2. Click “Return to Summary”.



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### Provider Comment History

GO

MPI Location ID	Legal Entity Name	Location Name	Provider Certification ID	Provider ID
1	-0001 C S	C S		6 -1

**Keystone STARS Quality Rating**

Contact Date/Time	Subject	Created By	Last Updated By	Date Last Updated
<a href="#">1/30/2009 1:04:19 PM</a>	SATURDAY & SUNDAYS	c-bbuehler	c-bbuehler	1/30/2009 1:04:19 PM
<a href="#">1/28/2009 3:59:23 PM</a>	CONTACT W/PROVIDER	c-cnash	c-cnash	1/28/2009 3:59:23 PM
<a href="#">9/17/2008 7:19:23 AM</a>	ADD SCHOOL AGE RATES	c-bbuehler	c-bbuehler	9/17/2008 7:20:14 AM
<a href="#">7/10/2008 1:45:24 PM</a>	07/01/08 RATES	c-bbuehler	c-bbuehler	7/10/2008 1:45:24 PM
<a href="#">3/7/2008 8:59:09 AM</a>	RESENDING PROVIDER SURVEY	c-mburton	c-mburton	3/7/2008 8:59:09 AM
<a href="#">1/18/2008 10:47:48 AM</a>	PROVIDER SURVEY	c-mburton	c-mburton	1/18/2008 10:47:48 AM
<a href="#">1/15/2008 10:31:18 AM</a>	NEW	d-detoma	d-detoma	1/15/2008 10:31:18 AM

Contact Date/Time	Subject	Last Updated By	Date Last Updated	Comment Text
01/30/2009 01:04:19 PM	SATURDAY & SUNDAYS	c-bbuehler	01/30/2009 01:04:19 PM	PROVIDER IS NOW DOING CARE ON SATURDAYS & SUNDAYS. ENTERED HOURS FOR SATURDAY & SUNDAY FOR PROVIDERS LOCATION SERVICE SCHEDULE SUMMARY.

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# ***USE OF PELICAN CCW***

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## **104.21 BEST PRACTICES WHEN ENTERING COMMENTS**

In addition to “Case” and “Provider” comments, as discussed in this chapter, “R&R” comments are also captured in PELICAN CCW. Additional information regarding “R&R” comment is located in [Manual “200 – R&R”](#). The following are considered the best practices to be used by the CCIS when entering any type of comments (i.e., case, provider or R&R) in PELICAN CCW:

1. Comments should be entered into PELICAN CCW, or the family file if appropriate, to document case events and explain the rationale for the worker’s actions.
2. All comments should include, at a minimum, information that answers the main questions of who, what, when, where, how and why.
3. The primary reason for creating a comment is to provide the reader with information that supplements and explains case actions in PELICAN CCW.
4. Comments are used by persons in addition to the author, to interpret the status and actions taken in a case.(i.e. the p/c, the p/c’s representative, coworker, supervisor, administrator, coordinator, HQ staff or staff representing the Bureau of Hearings and Appeals, the Office of the Inspector General or the Office of Income Maintenance).
5. Comments should provide factual information and details used to make a decision regarding a case or to process provider information.
6. Comments should use relevant dates, timelines, details and data that narrates the actions taken and informs the reader.
7. Comments should reflect no bias, derogatory terms, opinions or assumptions.
8. Comments should demonstrate the logical thought process that went into decision making as briefly and concisely as possible.
9. Comments should provide enough information to allow the reader to understand the logic behind the action taken by the CCIS.
10. Comments should be professional, keeping in mind the p/c’s and other individuals’ right to view their file at any time and the potential to be used in court as evidence.

# ***USE OF PELICAN CCW***

---

When entering a comment, the CCIS should consider the following list of “DOs” and “DON’Ts”:

1. Do make factual statements and do not make personal comments or judgmental statements.
2. Do keep the use of acronyms to a minimum; use commonly understood acronyms when necessary.
3. Do use CCIS Staff Member’s correct titles and do not use CCIS Staff Members first names.
4. Do summarize statements unless absolutely necessary to directly quote someone.
5. Do identify the document to which the CCIS is referring in comments and do not refer to documents by the color paper they are printed on.
6. Do make comments that are clear and concise and not wordy and do not be redundant.
7. Do not include the Correspondence ID to which the CCIS is referring as correspondence can be viewed in PELICAN CCW by date and title.
8. Do cite appropriate regulatory language when necessary, in special circumstances, but do not do so for routine actions.
9. Do make comments as actions and/or events are taking place and not at a later time.
10. Do practice good grammar and use correct spelling. Comments can be created in Word, spell checked, then cut and pasted into PELICAN CCW.
11. Do record a phone number with the extension that might be needed at a later date if difficult to locate.
12. Do clearly indicate in the “Subject” of the comment the specific action/issue it addresses.
13. Do not use the term “fraud” unless it has been substantiated by the OIG or the court, and do use the phrase “referral made to OIG”.

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[Return to Manual Section “104.26.3.3 – Questions – 104.21 – Best Practices When Entering Comments”](#)

# USE OF PELICAN CCW

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## 104.22 CASE TRACKING DATES

Tracking date alerts are user-created alerts that help organize employee workloads and manage cases and providers. While alerts are mainly for individual primary worker use, the alert can be viewed and acted upon by other CCIS staff. In order to add or edit a tracking date alert, the case must be open.

The following subsections contain information regarding accessing, entering, updating and deleting case tracking date alerts.

### 104.22.1 Accessing a Case Tracking Date

The CCIS may access a tracking date alert by navigating to the *Tracking Date Summary* page using one of the following methods:

1. Click "Case" on the *Main Navigation* bar, enter the Co/Record Number in the "Tracking Dates" field and click "Go"; or
2. From within a case, click the "Select..." drop-down box, select "Tracking Dates" from the list and click "Go".

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### 104.22.2 Entering a Case Tracking Date

The CCIS may add a case tracking date alert by completing the following steps in PELICAN CCW:

1. Click "New".
2. Enter a Tracking Date.
3. Click the "Priority" drop-down box and select an option from the list.
4. Enter the alert text, to be displayed, specific to the circumstances of the case.
5. Indicate whether the Tracking Date Alert should also be sent to the CAO.
6. Click "Save".

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### 104.22.3 Updating a Case Tracking Date

The CCIS may update a case tracking date alert by completing the following steps in PELICAN CCW:

1. Select the "Select..." checkbox for the record to be updated.
2. Click "Update".
3. Update the information as necessary.
4. Click "Save".

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# USE OF PELICAN CCW

## 104.22.4 Deleting a Case Tracking Date

The CCIS may delete a case tracking date alert by completing the following steps in PELICAN CCW:

1. Select the “Select...” checkbox for the record to be updated.
2. Click “Update”.
3. Update “Delete”.
4. Click “Delete” again to confirm the action.

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## 104.23 PROVIDER TRACKING DATES

Tracking date alerts are user-created alerts that help organize employee workloads and manage cases and providers. While alerts are mainly for individual primary worker use, the alert can be viewed and acted upon by other CCIS staff.

The following subsections contain information regarding accessing, entering, updating and deleting provider tracking date alerts.

### 104.23.1 Accessing a Provider Tracking Date

The CCIS may access a provider tracking date alert by navigating to the Provider Tracking Date Summary page from the *Location Demographics Summary* page by choosing “Tracking Dates” from the “Select...” drop-down box and clicking “Go”.

The screenshot shows the Pennsylvania PELICAN Child Care Works web application. The page title is "Location Demographics Summary". A dropdown menu is open, showing a list of options including "R&R Profile", "Subsidy Profile", "Location Demographics", "Legal Entity Demographics", "Accreditations", "Additional Activities", "Additional Charges", "Affiliations", "Capacities", "Care Levels Served", "Closures", "Comments", "Discounts", "Environment", "Financial Program Participation", "General Schedules Served", "Languages", "Meals", "Other Early Learning Programs", "Provider Assistance Log", "Provider Cross reference", "Rates", "Referral History", "Service Schedule", "Special Accommodations Provided", "Staff Education", "Tracking Dates", and "Transportation". The "Tracking Dates" option is highlighted in red. A red arrow points to the "Select..." dropdown menu. A "GO" button is visible next to the dropdown menu.

MPI Location ID	Legal Entity Name	Location Name	Pro
1	-0038	INC.	

**Keystone STARS Quality Rating**  
No STAR Rating

**General Location Information**

Location Name	
Language	English
Total Licensed Capacity	153
Website	.com
Vendor Id	
CCIS Office Assignment	CCIS of Dauphin County
MCCA County	Dauphin
Municipality	SUSQUEHANNA TWP
School District	
Provider Load	0105
Fiscal Load	

[UPDATE](#) [HISTORY](#) [ENROLLMENT SEARCH](#) [LOCAL ID](#) [PRINT PROVIDER P](#)

**Additional Location Information**

Type	Value	
<a href="#">MCCA County</a>	Dauphin	08/03/2010
<a href="#">Keystone STARS Quality Rating</a>	No Star Rating	03/03/2010

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# USE OF PELICAN CCW

## 104.23.2 Entering a Provider Tracking Date

The CCIS may add a provider tracking date alert by completing the following steps in PELICAN CCW:

1. From the *Provider Tracking Date Summary* page, click “New”.

The screenshot shows the 'Provider Tracking Date Summary' page. At the top, there is a navigation bar with the Pennsylvania Pelican Child Care Works logo and the tagline 'Pennsylvania's Enterprise to Link Information for Children Across Networks'. Below the logo are links for Home, R&R, Provider, Case, Payments, Reports, Correspondence, and Administration. A secondary navigation bar includes Client Search, Provider Search, R&R Contact Log, and Provider Profile Inbox. The main content area features a 'Provider Tracking Date Summary' heading, a dropdown menu with 'Select...' and a 'GO' button. Below this is a table with columns: MPI Location ID, Legal Entity Name, Location Name, Provider Certification ID, and Provider ID. The table contains one row with values: 1, -0038, INC., 1, -0004, 7, -38. Underneath the table is the 'Keystone STARS Quality Rating' section, which displays 'No STAR Rating'. A table with columns 'Tracking Date', 'Alert Text', 'Priority', and 'User ID' shows 'No Data Found'. At the bottom of the main content area, there is a 'NEW' button and a 'RETURN TO SUMMARY' button. The footer of the page shows 'UserID: t-director | Office: CCIS of Dauphin County' and 'System Acceptance Test | Version 10.2.0.49'.

2. On the *Provider Tracking Date Detail* page, enter a Tracking Date.
3. Click the “Priority” drop-down box and select an option from the list.
4. Enter the alert text, to be displayed, specific to the circumstances of the case.
5. Click “Save”.

The screenshot shows the 'Provider Tracking Date Detail' page. It has the same header and navigation as the previous page. The main content area features a 'Provider Tracking Date Detail' heading, a dropdown menu with 'Select...' and a 'GO' button. Below this is a table with columns: MPI Location ID, Legal Entity Name, Location Name, Provider Certification ID, and Provider ID. The table contains one row with values: 1, -0038, INC., 1, -0004, 7, -38. Underneath the table is the 'Keystone STARS Quality Rating' section, which displays 'No STAR Rating'. Below this are form fields for 'Tracking Date\*', 'Priority\*' (with a dropdown menu), and 'Alert Text\*'. At the bottom of the main content area, there are 'SAVE' and 'CANCEL' buttons. The footer of the page shows 'UserID: t-director | Office: CCIS of Dauphin County' and 'System Acceptance Test | Version 10.2.0.49'.

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# USE OF PELICAN CCW

## 104.23.3 Updating a Case Tracking Date

The CCIS may update a provider tracking date alert by completing the following steps in PELICAN CCW:

1. Click the “Edit” hyperlink from the *Provider Tracking Date Summary* page.

MPI Location ID	Legal Entity Name	Location Name	Provider Certification ID	Provider ID		
1	-0038	INC.	1	-0004	7	-38

Keystone STARS Quality Rating  
No STAR Rating

Tracking Date	Alert Text	Priority	User ID
2/4/2011	Verify receipt of revised rates.	HIH	c-bbuehler

NEW RETURN TO SUMMARY

UserID: t-director | Office: CCIS of Dauphin County System Acceptance Test | Version 10.2.0.49

2. Update the information as necessary.

Tracking Date\* 02/04/2011

Priority\* High

Alert Text\* Verify receipt of revised rates.

SAVE CANCEL DELETE

To update, modify the information and click "Save".

To delete, click "Delete" only.

UserID: t-director | Office: CCIS of Dauphin County System Acceptance Test | Version 10.2.0.49

3. Click “Save”.

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## 104.23.4 Deleting a Case Tracking Date

The CCIS may delete a provider tracking date alert by completing the following steps in PELICAN CCW:

1. Click the “Edit” hyperlink for the alert to be updated from the *Provider Tracking Date Summary* page.
2. Click “Delete”.
3. Click “Delete” again to confirm the action.

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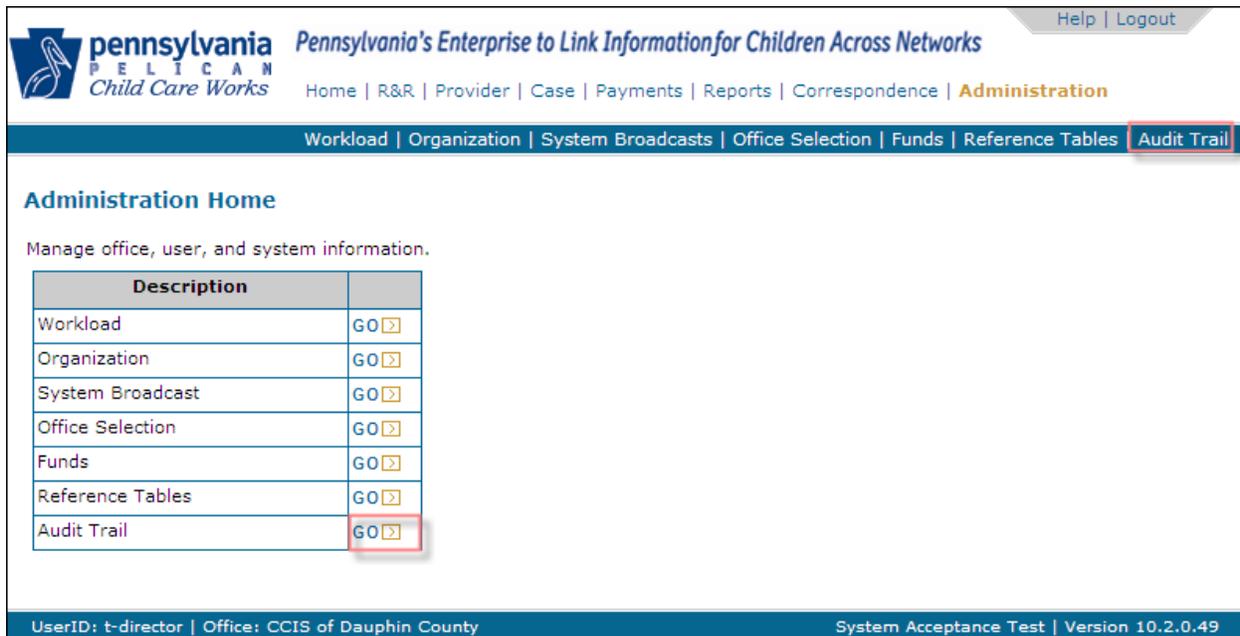
# USE OF PELICAN CCW

## 104.24 AUDIT TRAIL

The audit trail tracks when a record is updated or changed. The audit trail contains the page on which a change was made, the date and time of the change, and the user who made the change. Following review of the audit trail, the CCIS may navigate to the page on which a change was made and view the revised information as well as the original information that was changed (i.e., history).

The audit trail may also be used to quickly determine where staff left off upon returning to the workstation after stepping away for a period of time.

To view the audit trail, the CCIS must select “Administration” from the *Main Navigation* bar, then select “Audit Trail” on the *Sub Navigation* bar or click “Go” next to the “Audit Trail” field.



The screenshot shows the Pennsylvania Pelican Child Care Works Administration Home page. The page header includes the logo and the text "Pennsylvania's Enterprise to Link Information for Children Across Networks". The navigation bar shows "Administration" selected. Below the navigation bar, there is a table with the following data:

Description	
Workload	GO
Organization	GO
System Broadcast	GO
Office Selection	GO
Funds	GO
Reference Tables	GO
Audit Trail	GO

The only information the CCIS is required to enter in order to identify an audit trail is a date range. The date range is specified in the “From” and “To” fields. In addition, the CCIS may specify a User ID, Co/Record Number, RIN (used for R&R), Provider Legal Entity ID or Provider Location ID. Clicking “Search” initiates the search using the parameters the CCIS entered. Clicking “Reset” at any time will clear all search criteria the CCIS previously entered.

# USE OF PELICAN CCW



[Help](#) | [Logout](#)

**Pennsylvania's Enterprise to Link Information for Children Across Networks**  
[Home](#) | [R&R](#) | [Provider](#) | [Case](#) | [Payments](#) | [Reports](#) | [Correspondence](#) | **Administration**

[Workload](#) | [Organization](#) | [System Broadcasts](#) | [Office Selection](#) | [Funds](#) | [Reference Tables](#) | [Audit Trail](#)

### Audit Trail Search

**Audit Trail Search**

User ID

Record Number

RIN

Provider ID  -

\* From  To

**Sort Order**

Record Number  
  RIN  
  Provider ID  
  User ID  
  Date Descending

[SEARCH](#)   
 [RESET](#)

UserID: t-director | Office: CCIS of Dauphin County
System Acceptance Test | Version 10.2.0.49

The CCIS may organize search results by using the sort order radio buttons. Search results may be organized by Record Number, RIN, Provider ID, User ID or Date Descending. The audit trail search results provide the page and description of the page on which a change occurred. The action (update or create) is also listed, as well as the User ID, Type of ID, Co/Record Number, Date and Time the change was made.



[Help](#) | [Logout](#)

**Pennsylvania's Enterprise to Link Information for Children Across Networks**  
[Home](#) | [R&R](#) | [Provider](#) | [Case](#) | [Payments](#) | [Reports](#) | [Correspondence](#) | **Administration**

[Workload](#) | [Organization](#) | [System Broadcasts](#) | [Office Selection](#) | [Funds](#) | [Reference Tables](#) | [Audit Trail](#)

### Audit Trail Search

**Audit Trail Search Results**

Page	Description	Action	User ID	Type	ID	Last Updated
CL115	Enrollment Status Information	Create	t-test21	Enrollment		1/27/2011 12:01:52 PM
CL115	Enrollment Status Information	Create	t-test21	Enrollment		1/27/2011 11:59:52 AM
CL107	Standard Enrollment Schedule	Create	t-test21	Enrollment		1/27/2011 11:55:56 AM
CL112	Enrollment Detail	Create	t-test21	Enrollment		1/27/2011 11:55:52 AM
CL107	Standard Enrollment Schedule	Create	t-test21	Enrollment		1/27/2011 11:55:30 AM
CL112	Enrollment Detail	Create	t-test21	Enrollment		1/27/2011 11:55:02 AM
00019	Family Composition Eligibility Results	Update	t-test21	Case		1/27/2011 11:50:28 AM
00019	Family Composition Eligibility Results	Update	t-test21	Case		1/27/2011 11:50:21 AM
00023	Individual Eligibility Results	Update	t-test21	Case		1/27/2011 11:50:19 AM
00048	Child Care Program	Create	t-test21	Case		1/27/2011 11:50:11 AM
00029	Other Income Detail	Update	t-test21	Case		1/27/2011 11:50:01 AM

[1](#) [2](#) [3](#) [4](#) [5](#) [6](#) [7](#) [8](#) [9](#) [10](#) [NEXT](#)

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**Audit Trail Search**

User ID

Record Number

RIN

Provider ID  -

\* From  To

**Sort Order**

Record Number  
  RIN  
  Provider ID  
  User ID  
  Date Descending

[SEARCH](#)   
 [RESET](#)

UserID: t-director | Office: CCIS of Dauphin County
System Acceptance Test | Version 10.2.0.49

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# USE OF PELICAN CCW

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## 104.25 UPDATED INFORMATION & ADDITIONAL RESOURCES

This section contains a listing of updated information distributed following issuance of this manual section via Announcements, Updates and Communiqués, as well as additional resources available to the CCIS.

### 104.24.1 Announcements

DATE ISSUED	ANNOUNCEMENT NUMBER	TITLE

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# USE OF PELICAN CCW

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## 104.24.2 Updates

DATE ISSUED	UPDATE NUMBER	TITLE

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## ***USE OF PELICAN CCW***

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### 104.24.3 Communiqués

<b>DATE ISSUED</b>	<b>COMMUNIQUE NUMBER</b>	<b>TITLE</b>

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## ***USE OF PELICAN CCW***

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### 104.24.4 Additional Resources

<b>DATE ISSUED</b>	<b>COMMUNIQUE NUMBER</b>	<b>TITLE</b>

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## 104.26 TRAINING GUIDE

This section contains information pertinent to training the Use of PELICAN CCW Manual Section. The following subsections contain the goals and objectives of the manual section, as well as helpful question and answer checkpoints.

### 104.26.1 Goals

The information in this section contains the goals with regard to the use PELICAN CCW. The following are the goals of this manual section:

1. To use PELICAN CCW to manage caseloads, providerloads and fiscal loads.
2. To enter comments in PELICAN CCW using the best practices recommended by OCDEL.

[Return to Manual Section “104.3 – Goals & Objectives”](#)

### 104.26.2 Objectives

The information in this section contains the objectives with regard to the use of PELICAN CCW. The following are the objectives of this manual section:

1. To correctly access PELICAN CCW.
2. To correctly use Windows and PELICAN CCW page elements.
3. To create and maintain a strong password.
4. To understand how to navigate within PELICAN CCW subsystems.
5. To process cases without corrupting data.
6. To correctly establish a caseload, providerload or fiscal load, as needed.
7. To correctly establish and edit a supervisory unit, as needed.
8. To successfully reassign a case/provider or an entire caseload/providerload.
9. To successfully process alerts.
10. To create and maintain accurate case and provider comments.
11. To create and maintain tracking date alerts, when needed, to ensure timely action on case and/or provider information.
12. To understand how to use the audit trail.

[Return to Manual Section “104.4 – Accessing PELICAN CCW”](#)

# USE OF PELICAN CCW

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*Finalized X/XX/10*

## **104.26.3 Section Checkpoint Questions**

The Policy and Operations Divisions of the Bureau of Subsidized Child Care Services developed the following questions as a checkpoint to ensure comprehension of the information presented within this manual section. Upon review of the information within this section, CCIS staff should be able to answer all of the questions listed below.

### **104.26.3.1 Questions – 104.7 – Usernames & Passwords**

1. Passwords must meet which of the following guidelines?
  - a. Be at least seven characters long.
  - b. Not contain the user's username or any part of the user's full name.
  - c. Contain characters from three categories, such as upper case, lower case, numeric and/or non-alphanumeric.
  - d. All of the above.
2. TRUE or FALSE. The CCIS may not share any passwords issued by OCDEL.
3. TRUE or FALSE. The CCIS should have at least one non-alphanumeric character, one letter and one number when establishing a new password.

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[Return to Manual Section "104.7 – Usernames & Passwords"](#)

[See Answers](#)

## **104.26.3.2 Questions- 104.12 - Data Corruption**

4. TRUE or FALSE. Creation of a new window from a current session by pressing “Ctrl”, then “N”, does not result in a new session being made.
5. TRUE or FALSE. Pressing “Ctrl”, then “N” key, results in data corruption when a worker starts processing a different case in the newly created window.

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[Return to Manual Section “104.12 - Data Corruption”](#)

[See Answers](#)

## **104.26.3.3 Questions- 104.21 - Best Practices When Entering Comments**

6. TRUE or FALSE. All comments should include, at a minimum, information that answers the main questions of who, what, when, where, how and why.
7. TRUE or FALSE. Comments are used by persons in addition to the author, to interpret the status and actions taken in a case.(i.e. the p/c, the p/c’s representative, coworker, supervisor, administrator, coordinator, HQ staff or staff representing the Bureau of Hearings and Appeals, the Office of the Inspector General or the Office of Income Maintenance).
8. TRUE or FALSE. Comments should provide factual information and details used to make a decision regarding case or process provider information.
9. TRUE or FALSE. Comments should reflect no bias, derogatory terms, opinions or assumptions.
10. TRUE or FALSE. The CCIS should practice good grammar and use correct spelling.

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[Return to Manual Section “104.21 - Best Practices When Entering Comments”](#)

[See Answers](#)

## **104.26.4 Section Checkpoint Answers**

The Policy and Operations Divisions of the Bureau of Subsidized Child Care Services provided the answers to all of the questions asked in Manual Section “104.26.3 – Section Checkpoint Questions”.

### **104.26.4.1 Answers – 104.7 – Usernames & Passwords**

1. d. – All of the above.
2. TRUE.
3. TRUE.

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[Review Questions Again](#)

[Return to Manual Section “104.7 – Usernames & Passwords”](#)

[Return to Manual Section “104.8 – Navigation”](#)

### **104.26.4.2 Answers – 104.12 – Data Corruption**

4. TRUE.
5. TRUE.

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[Review Questions Again](#)

[Return to Manual Section “104.12 – Data Corruption”](#)

[Return to Manual Section “104.13 – Workload Management”](#)

### **104.26.4.3 Answers – 104.21 – Best Practices When Entering Comments**

6. TRUE.
7. TRUE.
8. TRUE.
9. TRUE.
10. TRUE.

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[Review Questions Again](#)

[Return to Manual Section “104.21 – Best Practices When Entering Comments”](#)

[Return to Manual Section “104.22 – Case Tracking Dates”](#)