PELICAN: ELN
New Provider Training Guide

Office of Child Development and Early Learning (OCDEL).
COMMONWEALTH OF PENNSYLVANIA

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1.0 OVERVIEW

Pennsylvania’s Enterprise to Link Information for Children Across Networks (PELICAN) is the over-arching system that supports the Office of Child Development and Early Learning (OCDEL). PELICAN integrates OCDEL’s child care programs under a single management information system. All early learning services information is managed within PELICAN.

The purpose of this New Provider User Training Guide is to provide a step by step reference for entering data into the PELICAN system for the following users:

- Pre-K Counts (PKC) Lead Agencies (LA)
- Head Start (HS) Lead Agency (LA)
- Early Learning Network (ELN) STARS Providers – Legal Entities (LE)
- Location Users (LU):
  - STARS ELN LU
  - PKC LU
  - HS LU

The goal of this reference is to minimize the amount of time you spend entering data so that you will have more time to devote to your children.
2.0 GETTING ACCESS TO PELICAN ELN FOR PA PRE-K COUNTS, HEAD START, AND STARS PROVIDERS

2.1 Provider Self-Service (PSS)

All providers accessing PELICAN systems will log in via Provider Self-Service (PSS) as the sole access point for all PELICAN providers.

New providers can create a PSS account from the PELICAN PSS homepage at https://www.pelican.state.pa.us/provider/ by clicking on the [CREATE ACCOUNT] link.

![Figure 1 PSS-Create Account](image-url)

NOTE: Providers with ELN/Pre-K Counts access will be granted access to PSS automatically. Once the PSS account and username are created, the User Registration Confirmation screen is displayed.

This screen confirms the registration was successful and provides next steps to complete the new user registration process.
Contact the PELICAN Help Desk at 877-491-3818 or by email at ra-eln@pa.gov to address any questions or concerns about the PELICAN system. There are knowledgeable people to answer questions, resolve technical problems, and above all, help providers become independent users of the PELICAN system.

2.2 Link to Organization

To get started, providers must link to an organization using their MPI and Tax IDs. Linking to an organization will allow users to connect to their affiliated Early Childhood or Early Learning Program and utilize the online services available through PSS.

Click the [RETURN TO PSS LOGIN PAGE] button to log in to PSS using the new User ID and link to the appropriate organization.
From the *PSS Home Page*, click the **[Link to your Organization]** link in the top left corner of the screen.

![Figure 4 PSS Home Page - Link to Organization](image)

The *Link to your Organization* screen is displayed.
### Figure 5 Link to Organization

#### Steps:

1. Complete the required fields:

   **MPI ID**
   - Enter the provider’s Master Provider Index number

   **Tax ID**
   - Enter the provider’s Tax Identification number

   **What do you need to access?**
   - Select the appropriate radio button to set up access to specific functions. If more than one function is required, submit a separate request for each.

2. Click **[SUBMIT]**.

   The *Early Learning Network Access* screen is displayed. To request access for the Early Learning Network and specific functionality, select the desired access level and programs and click the **[CONTINUE]** button.
If approved, this access will be granted to the specific username and reflected in the Early Learning Network.

The *Early Learning Network Access – Locations* screen will be displayed for Location Users.
Location Users should select the checkbox(es) that corresponds to the location(s) they will need to access and click the [CONTINUE] button.

Legal Entity/Lead Agencies will automatically have access to all locations.

The **Organization Information** screen is displayed and allows users to verify that the access level and program(s) for the requested organization are correct.
Complete the required fields indicating approval of the user’s management for the access and program(s) being requested and click the [CONTINUE] button.

The Thank You screen is displayed and confirms the request for access has been submitted.
Figure 9 ELN Link to Your Organization - Thank You

Click [CONTINUE TO PSS HOME PAGE] to proceed.
3.0 LOGGING INTO PELICAN

Once your PELICAN Account Request Form has been processed and your Username and Password have been established, you are ready to log in to PELICAN.

Remember that user names are case sensitive. For example, user names b-uatslds007 and B-UATSLDS007 are different user names. Those logging into PELICAN should make note of the case (lower or upper case) being used in the user name assigned.

Steps:

1. Click the PELICAN link [https://www.pelicant.net/](https://www.pelicant.net/) and click the [Business Partner Login] button.

![The login screen is displayed.](image1)

![The login screen is displayed.](image2)
2. Enter the user credentials on the login screen.
3. Click [LOGIN].
4. Enter the Multi-Factor Authentication (MFA) security code that was sent to the user's registered email address. (The MFA code will be sent from the following send only address automatedemailDONOTREPLY@pa.gov.
5. Click [NEXT].

6. Select either public or private based on the criteria below:
   i. Select **Private** if logging in from a personal laptop. (You will not be prompted for an MFA security code again for 12 hours.)
   ii. Select **Public** if logging in from any public computer, such as a library or a hotel business center.
7. Click [CONTINUE].
3.1 Multi-Factor Authentication (MFA)

DHS has recently instituted additional security measures to ensure the safety of child, provider, financial, and other data. Included in these additional security measures are the Multi-Factor Authentication, or MFA.

3.1.1 What is MFA?

MFA is an advanced security feature to protect the user’s and client’s data. An additional layer of security has been added using a MFA solution to enhance secure access mechanisms to users’ and clients’ personal information.

3.1.2 How Does MFA Work?

MFA is based on multiple factors such as something user knows, something user has, and something user is. The solution uses more than one factor to authenticate the user’s identity.

3.1.3 How Does the User Login Experience Change?

The process is very simple, quick, and intuitive. Provider users will be required to enter a 6-digit security code that is sent to the user’s registered email account daily. Users will be required to enter a security code daily on first login attempt and will not be required to enter a security code for a duration of 12 hours when the computer type selected is “Private.” If the computer type is “Public,” a security code must be entered at each login attempt.

3.1.4 Additional Assistance

For additional assistance, please call the Department of Human Services (DHS) Help Desk at 1-800-296-5335, or email them at RA-PWDHSMFAHELPDESK@pa.gov for additional support.

3.2 Provider Self-Service (PSS) Home Page

Users can access ELN functionality from the PSS home page by clicking on the [+] next to the Early Learning Network field to expand and view additional options.

Users will be able to perform actions affiliated with their user access permissions.
3.2.1 PSS Header and Footer

PSS displays a consistent header and footer on every page in the PSS system after navigating past the PSS Home Page.
3.3 Early Learning Network (ELN) Landing Page

The ELN header has two layers of navigation, the main menu and the sub-menu.

![Figure 16 ELN Header](image)

The ELN footer will only appear when ELN is accessed from PSS.

![Figure 17 ELN Footer](image)

Users can navigate to the ELN landing page from all screens on the ELN system.

**NOTE:** Users selecting the Pennsylvania PELICAN Early Learning Network on the Provider Self-Service home page will be redirected to ELN, based on the PELICAN user type assigned.

1. **Location users** navigating to the *PA Pre-K Counts Home* page may not see links to *Financial Management* and *Quality Management* tool menu options in the ELN header.
2. **Lead Agency/Legal Entity users** will be re-directed to the *Lead Agency/Legal Entity Home* page. (The Lead Agency/Legal Entity screen allows users to select a Lead Agency/Legal Entity to view. This screen can be navigated to by logging in to ELN with a user linked to multiple Lead Agencies/Legal Entities.)
3. **ELN Stars Provider – Legal Entities users** will not see *Financial Management* and *Quality Management* menu options in the ELN header.
4. **PKC/HS/ELN Location users** will be re-directed to the *Location Home* page upon logging in. (Location Users are required to select a location when logging in to the system. All Locations associated with a User ID will be displayed. To continue, click on the desired [Location ID] link.)
Location users are directed to the Location Home page upon initial login.

To continue, click on the desired **[Location ID]** link. User will be redirected to the PA Pre-K Counts Home page.

Click the **[LOCATION]** main menu option to navigate to the Location Information page.

Lead Agency/Legal Entity users with access to multiple Lead Agencies are directed to the Lead Agency/Legal Entity Home page.
To continue, click on [Lead Agency/Legal Entity] hyperlink and navigate to the PA Pre-K Counts Home page.

Lead Agency/Legal Entity users with access to a single Lead Agency are directed to the PA Pre-K Counts Home page upon initial login.

![PA Pre-K Counts Home](image1)

Figure 21 PA Pre-K Counts Home-LA User

Click [MY DETAILS] from the main menu option to navigate to the Provider Detail page.

![Provider Detail](image2)

Figure 22 Provider Detail

Click [VIEW LOCATIONS] to navigate to the Location Home page.
3.4 Location Information

When a user selects a [Location ID] hyperlink from the Location Home screen, the user accesses ELN as the selected Location and the Location Information page is displayed.

The Location Information screen displays information for the selected location, which includes physical rooms and classroom sessions.

NOTE: For the remainder of this User Guide, screens displayed will be based on the PKC Lead Agency user access unless otherwise noted.
4.0 CREATING STAFF RECORDS

All classrooms must have at least one teacher assigned. Users can create records for staff and identify the classrooms they are assigned to from the Location Home page.

To create staff records, navigate to the Staff Summary page.

From the Location Information page select [STAFF] from the sub menu header or the navigation menu.

![Figure 24 Navigate to Staff Summary from Location Information](image)

The Staff Summary page is displayed.
4.1 Staff Summary

The Staff Summary page will list all active staff members currently in the system. Users may apply the [Inactive] filter to view both active and inactive staff members.

NOTE: New providers will not have staff members visible until they have been entered.

![Staff Summary](image-url)

**Figure 25 Staff Summary - Active vs. Inactive Staff**
4.2 Entering New Staff Records

From the *Staff Summary* page, click [CREATE NEW STAFF] to begin the process of adding a new staff member. New staff members may include Teachers, Aides, Assistant Group Supervisors, Group Supervisors, Directors, and Home Visitors.

![Staff Summary - Adding Staff](image)

*Figure 26 Staff Summary - Adding Staff*
The *Create New Staff* page is displayed.

![Create New Staff](image)

**Create New Staff**

Please enter the information below to create a new staff member.

- **First Name**: (required)
- **Middle Initial**:
- **Last Name**: (required)
- **Suffix**:
  - [Select...](dropdown)
- **Gender**: (required)
  - [Select...](dropdown)
- **Date of Birth**: (required)
  - [Select all that apply](dropdown)
- **Race**:
- **Ethnicity**: (required)
  - [Select...](dropdown)
- **SSN**: (required)
  - [Search for SSN](link)
- **Years of Early Childhood Teaching Experience (Birth-8 years)**: (required)
- **Total Number of Years of Experience**: (required)

**Location Specific Information**

- **Location Start Date**: (required)
- **Staff Type**: (required)
  - [Select...](dropdown)
- **Staff Category**: (required)
  - [Select...](dropdown)

**Figure 27 Staff General Information - Entering Staff Information**

On the *Create New Staff* page, all required fields must be entered. Only the Middle Initial, Suffix fields, and PPID may be omitted.

Fields include the following:

- **Last Name**: Enter the last name.
- **First Name**: Enter the first name.
- **Middle Initial**: Enter the middle initial if desired. Not a required field.
- **Suffix**: Use the dropdown list to select a suffix if desired. Not a required field.
- **Date of Birth**: Enter the date the staff member was born in the format MM/DD/YYYY.
- **Gender**: Use the dropdown list to select the gender of the staff member.
- **SSN**: Enter the Social Security Number (SSN) in the boxes provided. Only the last 5 digits are required if the staff member prefers to not provide the complete SSN.
Race: Use the dropdown list to select the staff member’s race. The available options are:

- Black or African American
- American Indian or Alaskan
- Asian
- White
- Other
- Native Hawaiian or Pacific
- Unknown

Ethnicity: Use the dropdown list to indicate if the staff member’s ethnicity is Hispanic, Non-Hispanic, or Unknown.

Years of Early Childhood Teaching Experience (Birth – 8 years):

Enter the number of years the staff member has worked at the Early Childhood level (Children from Birth – 8 years of age).

Total Number of Years of Experience:

Enter the number of total years of educational work experience.

Email: Enter a valid email address.

Location Start Date: Enter the date this staff member will begin with the organization at the location selected.

Staff Type: Use the dropdown list to indicate the type of staff you are entering. The following staff types are available:

- Teacher
- Aide
- Assistant Group Supervisor
- Group Supervisor
- Director
- Home Visitor

NOTE: PKC providers must accurately reflect the roles of the staff member in the classroom, i.e., Teacher or Aide.

Staff Category: Use the dropdown list to indicate if the staff member will be Full-time, Part-time, or Unknown.

Click [SAVE] to submit and create the staff record or,
Click [CANCEL] to return to the Staff Summary page. Note, the process is canceled, all unsaved information entered will be lost.

By clicking [SAVE] on the Create New Staff page, PELICAN will initiate a search for a possible match on the staff member information entered against existing staff members’ records.

If a possible match is found, the Staff Clearance page will be displayed. If no matches are found, the Staff Information Summary page will be displayed.

### 4.3 Staff Information Summary

Once the staff record has been created and submitted, the Staff Information Summary page is displayed with the new staff member’s information.

If this information needs to be corrected, click the dropdown arrow on the right side of each section to edit the information in that section. Otherwise Click [BACK TO STAFF SUMMARY].
4.4 Staff Clearance

The Staff Clearance page occurs when the staff member information entered is a possible match to an existing staff member record that has been previously entered in to PELICAN. It is important to review the potential matches and determine if the new staff member record is in fact a match to an existing record.

If the match is true, follow these steps:

Steps:

1. Select the Match record for your staff member, for example, Nanny McPhee.

2. Click [SAVE].
NOTE: If there is no valid match, do not select an entry.

In the example below, the entries are only slightly different. In this case, the birth year is different for Kristen Winkeler. It is a potential match but not the same person as the staff member entered. Therefore, a match is not found.

Steps:

1. To continue, select [Create New Staff].
2. Click [SAVE].
Whether a match is found on the *Staff Clearance page* or a new staff member is created, the *Staff Information Summary* page is loaded to continue updating the staff member information.

The page displays the data previously entered as well as sections to add Credential Information, Qualification Information, and Professional Development Information.

Click on the [ADD CREDENTIAL INFORMATION], [ADD QUALIFICATION], and the [ADD PROFESSIONAL DEVELOPMENT] links to update this information.
Once information has been entered in the Qualification and Professional Development sections, click [BACK TO STAFF SUMMARY].

The Staff Summary page will display showing a new row for the staff member just entered.
4.5 Editing Existing Staff Records

From the Staff Summary page (see Figure 26), click on the staff member’s name to be edited.

The Staff Information Summary page is displayed with the current information for the selected staff member presented.

Steps:

1. Click the dropdown arrow on the right side of the desired section to edit the information in that section,
2. Update the fields with the correct information.
3. Click [SAVE].
The **Staff Information Summary** page is loaded with the information being updated.

**NOTE:** To view a history of changes made to a Staff Demographic Information record, select the [HISTORY] hyperlink within the Staff Demographic Information Action dropdown on the **Staff Information Summary** page. Remember that for new providers, initially there will be no history records available.
4.6 Creating Physical Rooms

A physical room(s) and classroom session(s) are required to enroll children at a specific location. To create the physical room, navigate to the *Location Information* screen.

The *Location Information* screen can be navigated to by selecting [LOCATION] from the ELN header menu, then *Location Information* from the sub-navigation menu.

![ELN Header - Location](image)

*Figure 35 ELN Header - Location*

The *Location Information* page is displayed.
Steps:

1. Select [ADD PHYSICAL CLASSROOM]

![Location Information]

**Figure 36 Location Information - Add Physical Room**

2. The *Physical Room* screen displays.

![Physical Room]

**Figure 37 Physical Room - Room Name**

3. Enter the name of the physical room into the *Physical Room* field.

4. Click [SAVE]
Note: The Physical Room names should identify an actual physical space within your location (e.g., a room, trailer, annex building, etc.).

The Location Information page is displayed with the Physical Room section updated.
4.7 Creating Classroom Sessions

Steps:

1. To add a Classroom Session, click [ADD CLASSROOM SESSION] from the Location Information page.

   ![Figure 39 Location Information - Add Classroom Session]

2. If this is the first classroom session being added, the General Information page will display. Enter the required fields and click [SAVE] to continue.

   ![Figure 40 General Information - Enter New Classroom Session]

Complete the General Information for the classroom session as described below by typing or selecting data from the available text fields or dropdown lists:
**Classroom Session Name:** Enter a unique Classroom Session name.

**Classroom Session Start Date:** Enter July 1st of the fiscal year.

**Classroom Session End Date:** Do **NOT** enter a Classroom Session End Date.

**Physical Room:** Use the dropdown list to select an available physical room.

**Approved Assessment:** Select one of the approved from the list box. The assessments available are:

- Curriculum Associates – BRIGANCE
- High Reach – GRO (Pre-K)
- Pearson – Ounce Scale
- Pearson – Work Sampling System
- Teaching Strategies – GOLD

For more information on the assessment process, please see the Early Learning Outcomes section of this guide.

3. The **General Information** page closes when the [SAVE] button is clicked and the **Classroom Session Summary** page is displayed with the **General Information** updated with the information entered.

![Classroom Session Summary - General Information Updated](image)
4.8 Additional Classroom Information

From the Classroom Session Summary page enter the following additional classroom session information to continue.

Steps:

1. School Year Information – must be entered annually.
   a. Use July 1st of the current fiscal year in the format MM/DD/YYYY.

![School Year Information](Figure 42 Classroom Session Information - Classroom Session School Year Information)

The School Year Information screen is displayed and allows the user to capture school year information for a new classroom or edit an existing School Year.

2. Complete the required School Year Information fields as described below by typing or selecting data from the available text fields or dropdown lists:

   **School Year:** Use the dropdown list to select the current school year.
   **School Year Start Date:** Enter July 1st as the start of the fiscal year.
   **Schedule:** Enter Full Time, Part-Time, Both, or Home-Visiting.
   **Operational Days Per Year:** Enter # of days the center will be open during the school year.
   **Instructional Hours Per Day:** Enter # of hours of instruction for each day.
   **Hours of Operation:** Enter the daily starting and ending times for the facility.
   **Total Active Children:** Enter the number of active children
   **Class Size:** Enter the number of spaces available for this class.
   **Primary Curriculum:** Enter an approved curriculum.
   **Screening Tool:** Enter an approved screening tool.
3. Click [SAVE] once all required information has been entered.

Classroom sessions must have staff assigned to enroll children. Staff can be added from the Classroom Session Summary page, which is displayed when the School Year Information is saved.

![School Year Information](image)

**Figure 43 Classroom Session School Year Information - Save**

### 4.9 Adding Staff Member(s) to Classroom Session

The Classroom Session Summary page is displayed when the [SAVE] button is clicked on the School Year Information.

![Staff Information](image)

**Figure 44 Classroom Session Summary - Add Staff Member**
Steps:

1. Click [ADD STAFF MEMBER TO SESSION] to assign staff members that are in the system.

The Staff Member Information screen is displayed.

![Staff Member Information](image)

Figure 45 Staff Information - Assigning Staff to Session

2. Enter the required fields as described below by typing in the text fields or selecting data from the dropdown lists:

- **Classroom Session Lead:** Select the Classroom Session Lead checkbox to indicate if the staff member being added to the session is the Lead Teacher.

  NOTE: Each classroom must have a Lead Teacher.

- **Staff Name:** Use the dropdown to select available staff.

- **Classroom Session Role:** Use the dropdown to select the staff role.

  Available roles:
  - Teacher
  - PA Pre-K Counts Aide
  - Teaching Assistant / Aide
  - Home Visitor
**Staff Classroom Session Begin Date:** Enter the date the staff member starts.

NOTE: The start date for a lead teacher must be the same as the class start date.

**Staff Classroom Session End Date:** Leave blank.

3. Click **[SAVE AND ADD ANOTHER]** to add another staff member to a classroom session – OR - Click **[SAVE]** to return to the *Classroom Session Summary*.

The *Classroom Session Summary* page is displayed with the Staff Member Information section updated with the entered information.

To view *Staff Member Information History*:

4. Select the **[HISTORY]** button within the *Staff Member Information Action Dropdown* on the *Classroom Session Summary* page.

![Figure 46 Classroom Session Summary - Staff Member Information Action Dropdown](image)

The *Staff Member Information History* screen is displayed.

![Figure 47 Staff Member Information History - View Staff History](image)

5. Click **[BACK TO CLASSROOM SESSION SUMMARY]** to continue.

6. The *Classroom Session Summary* page is displayed.
7. Click [ADD ERS SCORE] to update the Environmental Rating Scale (ERS) Score

![Environmental Rating Scale (ERS) Score](image)

Figure 48 Classroom Session Summary - Add ERS Score

The Environmental Rating Scale (ERS) Score screen is displayed.

![Environmental Rating Scale (ERS) Score](image)

Figure 49 Environmental Rating Scale (ERS) - Add ERS Score

8. Enter information for the required fields.
9. Click [SAVE AND ADD ANOTHER] to add another ERS score to a classroom session – OR - Click [SAVE] to return to the Classroom Session Summary.
5.0 ENROLLING CHILDREN

Children can be enrolled once the staff member(s), physical room(s), and at least one classroom session have been created. There are two ways to initiate the enrollment process in PELICAN:

1. Automatic Upload

5.1 Automatic Upload

The automatic upload process allows providers to upload key child and parent/legal guardian information into PELICAN.

To begin the automatic upload process, navigate to the Child Information Upload Summary screen to download the latest Child Information Template.

![Child Information Template](image.png)

**Figure 50 Child Information Upload - Template**

**Automatic Upload Steps:**

1. Access the Child Information template via the Child Information Upload Summary screen.
2. Enable and complete the Child Information template.
3. Create a .CSV file for upload by clicking the [SAVE] button on the template.
4. Upload the Child Information template by clicking the [Child Information Upload] button and browsing for the .CSV file.
5. Confirm the Child Information Upload.
5.1.1 Child Information Upload Summary

Navigate to the Child Information Upload Summary screen to:

- Access the latest Child Information Template or
- View a summary for all children that were successfully uploaded from a Child Information Template, but not processed.

To navigate to the Child Information Upload Summary:

Steps:

1. Select the [CHILD INFORMATION] link in the ELN header menu, and then the [CHILD INFORMATION UPLOAD] link in the sub-header, OR,

2. Select the [GO] button for the Child Information Upload on the Upload Child Data Home page.
The Child Information Upload Summary page displays.

For a tour of the child information upload process, click here.
Welcome to the Child Information Upload Summary page! Here, you can view all of the child data that you have uploaded or updated within the past 90 days.
To upload children, download the latest Child Information Template here.
To learn more about the child information upload process, View More.
5.1.2 Child Information Template Upload

**Child Information Template.** This template allows a user to enter Child Demographic and Parent/Legal Guardian Information for upload into ELN. The user can also save their progress and create an upload file (.CSV).

NOTE: If uploading children for multiple locations, use a separate *Child Information Template* for each location. Saving each location’s *Child Information Template* in a separate folder on the user’s computer will make managing the information easier.

**Steps to navigate to the template:**

1. Select Download the latest *Child Information Template* here hyperlink located on the *Child Information Upload Summary*.

![Child Information Upload Summary](image)

2. Select the [*Child Information Template*] hyperlink on the *Child Information Upload* screen.

![Child Information Template](image)
5.1.3 Child Information Upload Template

The Child Information Template will open with macro functionality supported for Microsoft Excel 2010 and later. This template allows the user to enter Child Demographic and Parent/Legal Guardian Information for multiple children.

Note: Click on the [ENABLE CONTENT] button to enter data.
The data fields that can be completed for each child are listed below. NOTE: The following fields are required and must be completed on the template to successfully upload the child data.

**Last Name:** Enter child’s last name.

**First Name:** Enter child’s first name.

**Date of Birth:** Enter the date the child was born in the format MM/DD/YYYY.

**Gender:** Use the dropdown list to select child’s gender.

**Ethnicity:** Use the dropdown list to select child’s ethnicity.

**Race:** Use the dropdown list to select the child’s race. The available options are:

- Black or African American
- American Indian or Alaskan
- Asian
- White
- Other
- Native Hawaiian or Pacific
- Unknown

**Program Information:** Use the dropdown list to select the programs the child is enrolled in for the specified location.
5.1.4 Save Child Information Upload Template

The macro functionality enabled on the template will prevent the user from editing row one and two, columns A through AE.

To save the file to upload to ELN, or to continue working on the file later, click the [SAVE] button at the top of the template.

- A file explorer is launched to browse for a folder.
- Click [OK] to save the template.
  - Two files will be created when the user clicks [OK]:
    - Child Information Template (Child_Info_Template.xlsm)
    - Upload File (Upload_Child_Info.csv)
- The Child Information Template will close after saving.

HELPFUL TIP! If uploading children for multiple locations, consider saving the template in location specific folders to make managing the information easier.

5.1.5 Child Information Upload

To navigate to the Child Information Upload screen, select the [UPLOAD CHILD INFORMATION] button on the Child Information Upload Summary screen.

The Child Information Upload screen allows users to browse for and upload a Child Upload file (.csv) on their local machines.
Steps:

1. Browse and select the *Upload_Child_Info.csv* file saved previously.
2. Click the [CONTINUE] button to upload the .csv file to ELN.
3. The file will be scanned for viruses. Once the file is determined to be safe, click [CONTINUE].
4. The *Child Information Upload Confirmation* screen displays.

### 5.1.6 Child Information Upload - Confirmation

The *Child Information Upload Confirmation* page is loaded when the [CONTINUE] button is selected from the *Child Information Upload* screen.

The confirmation page displays the number of children uploaded from the *Child Information Template*. 
Click [CONTINUE] to navigate to the Child Information Upload Summary page to complete the enrollment process.

To access the records that have been uploaded, but not yet processed:

- Select the [CHILD RECORD(S)] by clicking on the checkbox(es).
- Click [CONTINUE].

The Child Information Summary - Uploading screen is displayed for the first record selected. This completes the upload process. To continue enrolling children, access the Child Information Summary screen.
5.1.7 Child Information Summary - Uploading

The Child Information Summary screen displays the Child Demographic Information, Parent/Legal Guardian Information, Income Information, and Risk Factor Information for the record selected from the Child Information Upload Summary.

![Child Information Summary](image)

5.2 Child Demographic Information

The Child Demographic Information screen includes all the required information pertaining to a child. Users can enter this information when creating the child or update the information if the child already exists.

To navigate to the Child Demographic Information screen,

- Select the [CREATE NEW CHILD] button on the Child Roster screen, OR,
- Select the [ACTION DROPDOWN ARROW] to the right of the Child Demographic Information section and click [EDIT].
The *Child Demographic Information* screen opens.

1. Enter child demographics information as described below and then click [SAVE] to continue.

   **Last Name:** Enter child’s last name.

   **First Name:** Enter child’s first name.

   **Middle Initial:** Not required. Enter a middle initial for the child if known.

   **Suffix:** Not required. Enter a suffix if the child has one.

   **Date of Birth:** Enter the date the child was born in the format MM/DD/YYYY.

   **Gender:** Use the dropdown list to select child’s gender.
Ethnicity: Use the dropdown list to select child’s ethnicity.

Race: Use the dropdown list to select the child’s race. The available options are:

- Black or African American
- American Indian or Alaskan
- Asian
- White
- Other
- Native Hawaiian or Pacific
- Unknown

SSN: Not Required. Enter the Social Security Number in the boxes provided. NOTE: The last five digits of the SSN are acceptable if the parent or legal guardian does not wish to provide the entire SSN.

English the 1st language: Click the appropriate radio button to indicate if English is or is not the child’s first language.

Program Information: Use the dropdown list to select the programs the child is enrolled in for the specified location.

5.3 Child Clearance

The Child Clearance screen allows users to view and validate an entered child against the Master Client Index (MCI) for creation in the system.

Navigate to the Child Clearance page by selecting [SUBMIT] on the Child Information Summary when creating an uploaded child from the Child Information Upload Summary screen.
The Child Clearance page occurs when the new child information entered is a possible match to an existing child record that has been previously entered into PELICAN. It is important to review the potential matches and determine if the new child record is in fact a match to an existing record.

If the match is true, select the correct match and click [SAVE].

Match is found.

Step 1 – Click on the [radio button] for the record that matches the new child entered.

Step 2 – Click [SAVE].
**Child Clearance**

The information you have entered is similar to a child record on file in our database. The child may have a record on file because they participated in other child services programs or have a prior enrollment.

Based on this information, we have performed a comparison and calculated a Match Score. The higher the percentage, the more likely it is that the child you entered matches one of the records already on file. A Match Score of 90 or above is considered a likely match. Match Scores will be 100 only if there are matching Social Security Numbers on each child’s record.

Please review the possible matches below and determine if the records match the child you are attempting to create. By selecting an existing record, you will overwrite the information entered with the information on file. If none of the records below are a match, please select the Create New Child button.

<table>
<thead>
<tr>
<th>Last</th>
<th>First</th>
<th>MI</th>
<th>Suffix</th>
<th>DOB</th>
<th>Gender</th>
<th>SSN</th>
<th>Match Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Winkler</td>
<td>Kristen</td>
<td>M</td>
<td></td>
<td>11/20/2012</td>
<td>F</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

If a child listed below matches the entered child above, click the Select radio button associated with the match and click SAVE.

- Select
- Winkler Kristen 08/14/2014 F xxx-xx-4573 90
- Winkler Kiersten M 11/20/2012 F xxx-xx-4738 80
- Winkler Kristen S 09/14/2014 F 70

- Create New Child

**Figure 65 Child Clearance - Match Found**

Match is NOT found.

Step 1 – Select the [Create New Child].

Step 2 – Click [SAVE].
5.4 Child Demographic Information History

The Child Demographic Information History page displays a history of changes made to the Child Demographic Information record.

To navigate to the Child Demographic Information History page,

- Select the [HISTORY] hyperlink within the Child Demographic Information Action Dropdown on the Child Information Summary screen.
Child Demographic Information History

<table>
<thead>
<tr>
<th>First Name</th>
<th>Middle Initial</th>
<th>Last Name</th>
<th>Suffix</th>
<th>Date of Birth</th>
<th>Gender</th>
<th>Race</th>
<th>Ethnicity</th>
<th>SSN</th>
<th>Programs this child is enrolled in for this location</th>
<th>Last Update By</th>
<th>Last Update On</th>
</tr>
</thead>
<tbody>
<tr>
<td>Leslie</td>
<td>O</td>
<td>Bohn</td>
<td></td>
<td>10/31/2014</td>
<td>Female</td>
<td>Asian</td>
<td>Non-Hispanic</td>
<td></td>
<td>Head Start/Keystone STARS</td>
<td>01/19/2018</td>
<td>12:22:14 pm</td>
</tr>
<tr>
<td>Leslie</td>
<td>O</td>
<td>Bohn</td>
<td></td>
<td>10/31/2014</td>
<td>Female</td>
<td>Asian</td>
<td>Non-Hispanic</td>
<td></td>
<td>Head Start</td>
<td>01/19/2018</td>
<td>12:21:47 pm</td>
</tr>
<tr>
<td>Leslie</td>
<td></td>
<td>Bohn</td>
<td></td>
<td>10/31/2014</td>
<td>Female</td>
<td>Asian</td>
<td>Non-Hispanic</td>
<td></td>
<td>Head Start</td>
<td>09/29/2017</td>
<td>09:47:11 am</td>
</tr>
</tbody>
</table>

Figure 67 Child Demographic Information History - Review Child History

- Click [BACK TO CHILD INFORMATION SUMMARY] to continue the enrollment process and to review / edit the child information for submission.

5.5 Parent/Legal Guardian Information

The Parent/Legal Guardian Information page is used to capture or update parent/legal guardian information pertaining to a child.

To navigate to the Parent/Legal Guardian Information page,

- Select [EDIT] or [ADD PARENT/LEGAL GUARDIAN] on the Child Information Summary when creating a new child or editing an existing child.
Enter all required information for the child. Additional Parent/Legal Guardian Information may be added by clicking [SAVE AND ADD ANOTHER] or from the Child Information Summary page.

**First Name:** Enter parent or legal guardian’s first name.

**Middle Initial:** Not required. Enter a middle initial for the parent or legal guardian.
Last Name: Enter parent or legal guardian’s last name.

Suffix: Not required. Enter suffix, as needed, for the parent or legal guardian.

Gender: Use the dropdown list to select the parent or legal guardian’s gender.

Date of Birth: Enter date of birth for the parent or legal guardian.

Relationship to Child (field 1): Select from dropdown list.
- Father
- Mother
- Grandparent
- Guardian
- Other

Relationship to Child (field 2): Select from dropdown list.
- Biological
- Foster
- Adoptive
- Step Parent
- Other

Role: Select from dropdown list.
- Primary Guardian
- Secondary Guardian
- Legal Guardian
- Caregiver
- Support Team Member
- Power of Attorney
- Living Will
- Fiscal Guardianship
- Representative Payee
- Personal Guardianship
- Substitute Decision Maker
- Child Care Worker
- Case Worker
- Primary Care Physician
- Specialist

Address Line 1: Enter parent or legal guardian’s street address.
Address Line 2: Not Required. Enter additional address information if needed.

City: Enter parent or legal guardian’s city.

State: Use the dropdown list to select the parent or legal guardian’s state.

Zip: Enter parent or legal guardian’s zip code.

County: Enter parent or legal guardian’s county.

School District of Residence: Use the dropdown list to select the school district based on the residence of the parent or legal guardian. NOTE - if State is not PA, please select Provider’s School District.

Primary Address: Click on the [CHECK BOX] to indicate the address entered is the primary address for the child.

Phone: Not Required. Enter parent or legal guardian’s phone number.

Email: Not Required. Enter parent or legal guardian’s email address.

Send Correspondence: Click on the [CHECK BOX] to indicate correspondence should be sent to the parent or legal guardian being entered.

Highest level of education: Use the dropdown list to select the parent or legal guardian’s highest level of education completed.

Birth Mother – education: Use the dropdown list to select the birth mother’s highest level of education completed.

Employment Status: Use the dropdown list to select the parent or legal guardian’s employment status.

Select [SAVE AND ADD ANOTHER] to save the Parent/Legal Guardian Information and perform Address Clearance.

Select [SAVE] to add new parent / legal guardian information and perform Address Clearance.
5.6 Parent/Legal Guardian Information History

The *Parent/Legal Guardian Information History* screen displays a history of changes made to a Parent/Legal Guardian Information record.

To navigate to the *Parent/Legal Guardian Information History* screen,

- Select the [HISTORY] hyperlink within the *Parent/Legal Guardian Information Action Dropdown* on the *Child Information Summary* screen.

![Child Information Summary - Parent/Legal Guardian Information Action Dropdown](image)

The *Parent/Legal Guardian Information History* screen is displayed. To view the complete historic data for a parent / legal guardian:

- Select the radio button for the parent/legal guardian
- Click [VIEW]
- Click [BACK TO CHILD INFORMATION SUMMARY] to continue
### Parent/Legal Guardian Information History

Please select a radio button for a historic Parent/Legal Guardian information record and click **VIEW** to see the complete data.

<table>
<thead>
<tr>
<th>Select</th>
<th>First Name</th>
<th>Last Name</th>
<th>Last Update By</th>
<th>Last Update On</th>
</tr>
</thead>
<tbody>
<tr>
<td>☑</td>
<td>Bohn</td>
<td>Parker</td>
<td>b-wuthakes</td>
<td>10/24/2017 11:46:29 AM</td>
</tr>
<tr>
<td></td>
<td>Bohn</td>
<td>Parker</td>
<td>b-wuthakes</td>
<td>10/16/2017 05:10:27 PM</td>
</tr>
<tr>
<td></td>
<td>Bohn</td>
<td>Parker</td>
<td>b-wuthakes</td>
<td>09/29/2017 09:50:49 AM</td>
</tr>
</tbody>
</table>

#### Demographic Information

- **First Name:** Bohn
- **Middle Initial:** Parker
- **Last Name:** Bohn
- **Gender:** Female
- **Date of Birth:** 07/30/1979
- **Relationship to Child:** Mother
- **Secondary Relationship to Child:**
- **Role:** Primary Guardian
- **Biological:**

#### Address

- **Address Line 1:** 27 oak lane
- **City:** HBG
- **State:** Pennsylvania
- **County:** Dauphin
- **Zip Code:** 17231
- **School District of Residence:** Central Dauphin

#### Contact Information

- **Phone:**
- **Email:**
- **Send correspondence to this person:**

#### Other Information

- **Highest level of education completed:**
- **Employment Status:**

---

*Figure 70 Parent/Legal Guardian Information History - View History*
5.7 Address Clearance

The Address Clearance screen allows users to review and validate the appropriate mailing address when creating a new child.

To navigate to the Address Clearance screen,

- Select [SAVE] on the Parent/Legal Guardian Information screen after entering or editing address information

The Address Clearance page occurs when the new address information entered is a possible match to an existing address record that has been previously entered into PELICAN. It is important to review the potential matches and determine if the new address record is in fact a match to an existing record.

![Address Clearance - Verification](image)

If the match is true, select the correct match and click [SAVE].

Match is found.

Step 1 – Click on the [radio button] for the record that matches the new address entered.

Step 2 – Click [SAVE].
If there is no valid match, do not select an entry. To continue, select [CONTINUE WITH UNVERIFIED ADDRESS].

Match is NOT found.

Step 1 – Select the [CONTINUE WITH UNVERIFIED ADDRESS]

Step 2 – Click [SAVE]

The Child Information Summary screen is displayed with the Parent/Legal Guardian Information section updated.
5.8 Income Information

The Income Information page is used to capture or update income information pertaining to a child’s household.

Navigate to the Income Information page by selecting [EDIT] or [ADD INCOME INFORMATION] on the Child Information Summary when creating a new child or editing an existing child.
Figure 75 Income Information - Updating Income Information

Steps:

1. Enter the required income information.
2. Click [CALCULATE] to determine the Federal Poverty Level Percentage.
3. Click [SAVE] to return to the Child Information Summary screen with the Income Information section being updated.
4. [CANCEL] will close the Income Information page and return to the Child Information Summary screen without the Income Information section being updated.

5.9 Risk Factors

The Risk Factors page allows users to enter risk factor information for children.

To navigate to the Risk Factors page, select [EDIT] or [ADD RISK FACTOR] on the Child Information Summary when creating a new child or editing an existing child.
Steps:

1. Enter the risk factor information by typing a response or selecting from the dropdown list.
2. Click [SAVE AND ADD ANOTHER] to enter additional risk factor(s).
3. Click [SAVE] to return to the Child Information Summary page with the risk factor section updated.
4. [CANCEL] will close the Risk Factors page and return to the Child Information Summary page without the risk factor section being updated.

5.10 Risk Factors History

The Risk Factors History screen displays a history of changes made to a Risk Factor record.

Navigate to the Risk Factors History screen by selecting the [HISTORY] hyperlink within the Risk Factors Information Action Dropdown arrow.

Click [BACK TO CHILD INFORMATION SUMMARY] to continue.
5.11 Child Information Upload Summary – Additional Functions

For a tour of the child information upload process, click here.

Welcome to the Child Information Upload Summary page! Here, you can view all of the child data that you have uploaded or updated within the past 90 days.

To upload children, download the latest Child Information Template here.

To learn more about the child information upload process, View tutorial.

Download a Child Information Template, add data, and use the SAVE button to save your progress and create a file for upload (CSV).

Up to 200 Children can be uploaded in a single file. Also, additional rows can be added to upload while processing after you have uploaded your file.

If you are uploading children for multiple locations, please use a separate Child Information Template for each location. Storing each location's Child Information Template in a separate folder on your local machine can help you manage this information.

Please note that the Child Information Template is designed for Microsoft Excel on desktop computers and may not work on mobile devices.

Figure 78 Child Information Upload Summary – Additional Functions
5.11.1 Child Information Upload History

The Child Information Upload History screen shows a history of all children that were submitted from the Child Information Upload Summary screen. Users can review the children that were successfully added to a specified location.

Navigate to the Child Information Upload History screen by selecting the [VIEW UPLOAD HISTORY] button on the Child Information Upload Summary screen.

![Child Information Upload History](image)

Select [BACK TO CHILD INFORMATION UPLOAD SUMMARY] to continue.
5.12 Manual – Child Enrollment

The manual child enrollment process allows users to capture and display the Child Demographic Information, Parent/Legal Guardian Information, Income Information, Risk Factor Information, Enrollment Information for a specified Location, and All Enrollments when creating or editing a child record.

To begin the manual child enrollment process, navigate to the Child Roster for a specific location.

**5.12.1 Child Roster**

The Child Roster screen shows enrollment records at the location the user is currently viewing.

To navigate to the Child Roster screen, select the [CHILD INFORMATION] link in the ELN header main menu and then select the [CHILD ROSTER] in the sub-header.
The *Child Roster* screen is displayed and shows enrollment records at the location the user is currently viewing.

![Child Roster Screen](image)

**Figure 81 Child Roster**

The *Child Roster* screen shows results for **ACTIVE** enrollment status. To view **INACTIVE** enrollments from the previous two years, click the **[INACTIVE]** radio button.

Users can perform the following enrollment actions from the *Child Roster*:

1. Create Enrollment
2. End-Date Enrollment
3. Create New Child
5.12.2 Create Enrollment

To create new enrollment, the user must select one or more ACTIVE records displayed on the Child Roster.

1. Select the radio button next to the desired ACTIVE child record(s).
   a. Once records are selected, the CREATE ENROLLMENT button is activated.
2. Select the [CREATE ENROLLMENT] button.

![Child Roster - Create Enrollment](image)

Number of Results: 19  Page 1 of 1  Children Selected: 3

The Create Enrollments screen is displayed.
Create Enrollments

3 enrollments will be created when you click SAVE.

Please enter all the necessary information below to create enrollments for the selected children.

Location: UAT ELN TRAINING CENTER

Classroom Session: (required)
Select...

Program: (required)
Select...

Sub-Program: (required)
Select...

Lead Agency - Grant ID: (required)
Select...

Funding Source: (required)
Select...

Enrollment Begin Date: (required)

Days for this Session: (required)
Select...

Hours for this Session: (required)
Select...

Schedule for this Session: (required)
Select...

CANCEL  SAVE

Figure 83 Create Enrollments

The Create Enrollments page allows users to select one or more children from the Child Roster and enroll them in one action.

Enter all required fields by typing in or using the dropdown lists to select a response.

Once all required data has been entered, select the [SAVE] button to validate the information. The Create Enrollments Summary is displayed.

The Create Enrollments Summary shows a summary of what enrollments were and were not created after the user performed a bulk create enrollments action.
By selecting the [CONTINUE] button, the summary page is closed and the user is returned to the Child Roster.

5.12.3 End-Date Enrollments

The End-Date Enrollments screen is used to end-date enrollments in bulk for children selected on the Child Roster.

To end-date a child(ren) enrollment record(s)

1. Select the radio button for one or more children on the Child Roster to be end-dated
2. Once the records are selected, the END-DATE ENROLLMENT button is activated.
### New Provider User Training Guide

**Figure 85 End Date Enrollments**

The *End-Date Enrollments* screen is displayed

#### End-Date Enrollments

3 Enrollments will be end-dated when you select SAVE.

Please select the Enrollment End Date and the Enrollment End Date Reason for the enrollments you are modifying.

- **Enrollment End Date:** (required)
  - 12/31/2017
- **Enrollment End Date Reason:** (required)
  - Moved to a New Classroom

![End Date Enrollments Screen](image)

**Figure 86 End Date Enrollments - End-Dating**

**Steps:**

1. Enter the required **Enrollment End Date** by typing in the date (MM/DD/YYYY)
2. Enter the **Enrollment End Date Reason** by selecting the appropriate reason from the dropdown list.
3. Click the [CANCEL] button to return to the previous screen without making changes.
4. Click [SAVE] to validate the enrollment information. The *End-Date Enrollments Summary* screen is displayed.
End-Date Enrollments Summary

Below is a summary of the enrollments you have end dated. Use the (+) and (-) symbols to view more or less detail and click CONTINUE to return to the Child Roster.

Enrollments Successfully End Dated
+ 2 Enrollment(s) were successfully end-dated.
   • LAMB, PATRICIA
   • RHINO, JEFF

Enrollments Not End Dated
- 1 Enrollment(s) were not end-dated. Children 36 months or older cannot be enrolled in Early Head Start.
   • LAMB, PATRICIA

Figure 87 End Date Enrollments Summary

The End-Date Enrollments Summary screen shows a summary of what enrollments were and were not end-dated after the user performs a bulk end-date enrollment action.

Click the [CONTINUE] button to close the summary and return to the Child Roster screen with the selected child records end-dated.

5.12.4 Create New Child

If a user is unable to find an existing ACTIVE or INACTIVE record for the child to be enrolled, they will create a new child record for enrollment.

1. To create a new child, select the [CREATE NEW CHILD] button from the Child Roster.

Figure 88 Create New Child
The Child Demographic Information screen is displayed.

### Child Demographic Information

Please enter the demographic information below for the child.

- **First Name:** Enter child’s last name.
- **Middle Initial:** Not required. Enter a middle initial for the child if known.
- **Last Name:** Enter child’s first name.
- **Suffix:** Not required. Enter a suffix if the child has one.
- **Date of Birth:** Enter the date the child was born in the format MM/DD/YYYY.
- **Gender:** Use dropdown list to select child’s gender.
- **Ethnicity:** Use the dropdown list to select child’s ethnicity.
- **Race:** Use the dropdown list to select the child’s race. The available options are:
  - Black or African American
  - American Indian or Alaskan
  - Asian

---

**Figure 89 Child Demographic Information**

2. Enter child demographics information as described below and then click [SAVE] to continue.

- **Last Name:** Enter child’s last name.
- **First Name:** Enter child’s first name.
- **Middle Initial:** Not required. Enter a middle initial for the child if known.
- **Suffix:** Not required. Enter a suffix if the child has one.
- **Date of Birth:** Enter the date the child was born in the format MM/DD/YYYY.
- **Gender:** Use dropdown list to select child’s gender.
- **Ethnicity:** Use the dropdown list to select child’s ethnicity.
- **Race:** Use the dropdown list to select the child’s race. The available options are:
SSN: Not Required. Enter the Social Security Number in the boxes provided. NOTE: The last five digits of the SSN are acceptable if the parent or legal guardian does not wish to provide the entire SSN.

English the 1st language: Click the appropriate radio button to indicate if English is or is not the child’s first language.

Program Information: Use the dropdown list to select the programs the child is enrolled in for the specified location.

3. Click the [SAVE] button to continue.
   a. If the system identifies a potential matching record for the child entered, the Child Clearance screen is displayed. (See page 57 for additional information on the Child Clearance screen)
      i. Complete the child clearance process and continue to enter the pertinent child demographic information.
   b. If the system DOES NOT identify a potential matching record for the child entered, the Child Information Summary page is displayed with the Child Demographic information section updated.
   c. Continue to enter information to complete the following sections of the Child Information Summary screen:
      i. Parent/Legal Guardian Information
      ii. Income Information
      iii. Risk Factors

For more information on these topics, see the corresponding sections in this Training Guide.

5.13 Additional Information

5.13.1 Cancel - Confirmation

The Cancel Confirmation screen is displayed to confirm any changes a user made will not be saved in the system.

Select the [CANCEL] button to return to the previous screen without making any changes. The Cancel Confirmation screen is loaded for review.
Select **[BACK]** to return to the previous screen and resume editing.

Select **[CONTINUE]** to close the Cancel Confirmation screen and return to the previous screen without making updates.

### 5.13.2 Delete - Confirmation

The Delete Confirmation screen is displayed to confirm that a record will be permanently deleted from the system.

Select the **[DELETE]** button to delete the selected records. A Delete Confirmation screen is loaded for review.

Select **[CANCEL]** to exit without deleting the record selected.

Select **[DELETE]** to continue deleting the record.
5.0 TRANSFER CHILD(REN) AND STAFF

6.1 Transfer Home

The Transfer Home screen allows users to access Child Transfers and Staff Member Transfers functionality.

To navigate to the Transfer Home screen, select [TOOLS] from the top header menu and then, [TRANSFERS] from the sub-navigation menu.

6.2 Transfer Children

Select the [TRANSFER CHILD OR CHILDREN] button from the Transfer Home page to continue.
The *Child Location Transfer* screen is displayed and allows users to search for a child or children to initiate a transfer across locations within the specified Lead Agency or Legal Entity.

**NOTE:** Users should contact the PELICAN Help Desk to transfer children to a partner location or a location within a different Lead Agency or Legal Entity.

To move children from one program to another (e.g., from PA Pre-K Counts to Head Start), users should:

- End-date the child’s current enrollment and,
- Create a new enrollment in the appropriate program.

To begin the transfer process, enter the required search criteria by selecting from the dropdown lists for **Program** and **Lead Agency/Legal Entity** and then click the [SEARCH] button.

The Child Location Transfer screen is updated based on the search criteria selected, and a listing of enrollments is returned.
**Child Location Transfer**

*For a tour of the Child Location Transfer process, click here*

This page will allow you to move children from one location to a different direct location within your Lead Agency or Legal Entity. [View More](#).

Enter search criteria below and click SEARCH to find children. Select the children you would like to transfer and click the CONTINUE button to select destination information.

<table>
<thead>
<tr>
<th>Name</th>
<th>Date of Birth</th>
<th>Lead Agency/Legal Entity</th>
<th>Current Location</th>
<th>Program</th>
<th>Current Classroom Session</th>
<th>Contacted Move Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>CAT SIMONE</td>
<td>09/11/2011</td>
<td>PA Pre-K Centers</td>
<td>PA Pre-K Centers</td>
<td>PA Pre-K</td>
<td>10/01/2017</td>
<td></td>
</tr>
<tr>
<td>GUS TRAVIS</td>
<td>09/11/2011</td>
<td>PA Pre-K Centers</td>
<td>PA Pre-K Centers</td>
<td>PA Pre-K</td>
<td>10/01/2017</td>
<td></td>
</tr>
<tr>
<td>JASON JASON</td>
<td>09/11/2011</td>
<td>PA Pre-K Centers</td>
<td>PA Pre-K Centers</td>
<td>PA Pre-K</td>
<td>10/01/2017</td>
<td></td>
</tr>
<tr>
<td>DOE SARA</td>
<td>09/11/2011</td>
<td>PA Pre-K Centers</td>
<td>PA Pre-K Centers</td>
<td>PA Pre-K</td>
<td>10/01/2017</td>
<td></td>
</tr>
<tr>
<td>RICK RICK</td>
<td>09/11/2011</td>
<td>PA Pre-K Centers</td>
<td>PA Pre-K Centers</td>
<td>PA Pre-K</td>
<td>10/01/2017</td>
<td></td>
</tr>
<tr>
<td>TINA TAMMY</td>
<td>09/11/2011</td>
<td>PA Pre-K Centers</td>
<td>PA Pre-K Centers</td>
<td>PA Pre-K</td>
<td>10/01/2017</td>
<td></td>
</tr>
</tbody>
</table>

**Figure 95 Child Location Transfer – Enrollments Returned**

Review the list of returned child record results and select the child(ren) to be transferred by clicking the radio button that corresponds with the child(ren) to be transferred.
**Child Location Transfer**

For a tour of the Child Location Transfer process, click here.

This page will allow you to move children from one location to another direct location within your Lead Agency or Legal Entity. View More.

Enter search criteria below and click SEARCH to find children. Select the children you would like to transfer and click the CONTINUE button to select destination information.

**Program:** PA PreK Counts  
**Lead Agency/Legal Entity:** UAL ELIN Training Co Inc  
**Location Name:**

**Classroom Session Name:**  
**Last Name:**  
**First Name:**

![Child Location Transfer Table](image)

**Figure 96 Child Transfer - Select Child**

Click the [CONTINUE] button to select the destination information. To return to the Transfer Home page without making a selection, click the [BACK TO TRANSFER HOME] button.

The **Destination Location** screen is displayed.

The **Destination Location** page allows the user to select Destination Location information while completing a Child Transfer. The child(ren) selected from the **Child Location Transfer** screen are listed in the Current Location Information table.
Enter all required information by typing in the fields or selecting an option from the dropdown lists.

Click the [SAVE] button to transfer the child records to the designated location.

The Child Transfer Confirmation screen is displayed.

Click the [CONTINUE] button to return to the Transfer Home page.
6.3 Transfer Staff

Select the [TRANSFER STAFF MEMBER] button from the Transfer Home page to continue.

![Transfer Home](image)

**Figure 99 Transfer Home - Transfer Staff Member**

The Staff Transfer screen allows users to (1) search for staff members to initiate a transfer and (2) copy staff members to a different direct location within a Lead Agency or Legal Entity. To initiate a staff transfer, enter the search criteria and click [SEARCH] to find staff members.

![Staff Transfer](image)

**Figure 100 Staff Transfer**
NOTE: Contact the PELICAN Help Desk to transfer a staff member to a partner location within a different Lead Agency or Legal Entity.

To initiate a staff transfer, enter the search criteria and click [SEARCH] to find staff members.

Review the list of Staff Members returned based on the search criteria entered.

Select the staff member(s) to be transferred by clicking the radio button that corresponds to the staff member(s) to be transferred and click [CONTINUE].

![Staff Transfer - Select Staff](image)

*Figure 101 Staff Transfer - Select Staff*

The Staff Transfer – Destination Location screen is displayed.

The Staff Transfer – Destination Location page allows users to select Destination Location information while completing a Staff Transfer. NOTE: Only OCDEL HQ and Help Desk users will be able to transfer staff across different MPIs.
Enter the required destination location information and click the [SAVE] button to continue.

The staff records are copied to the designated locations and the Staff Transfer Confirmation screen is displayed.

The Staff Transfer Confirmation screen gives the user confirmation that the Staff Transfer was successful.

Select the [CONTINUE] button to navigate to the Transfer Home page.
7.0 EARLY LEARNING OUTCOMES

Pennsylvania transformed how child outcomes are reported through PELICAN ELN. This strategy allows early childhood providers to use an approved child assessment tool, to create their own classrooms, enter staff and children, and generate teacher and parent reports by fully utilizing the assessment company’s online products.

Pre-K Counts (PKC) and Head Start Supplemental Program (HSSAP) providers are required to complete approved assessments on all enrolled children. Regulation 405.46 PKC providers will select and use an assessment tool from the available tools approved by PDE to assess and monitor a child’s developmental progress. Student assessments guide instructional practice, professional development and technical assistance to programs and provide a method for reporting all progress of children participating in a PKC and HSSAP programs. To ensure the collection of reliable data, staff responsible for implementation of the chosen assessment tool must attend training on the use of the tool.

PKC and HSSAP providers must monitor child outcomes information and establish a means to maintain outcomes information so that it is available upon request of the Department. Data gathering from families, the education team, and research-based assessment instruments should be combined to obtain the information needed to assess and report children’s progress on the chosen assessment tool.

PKC and HSSAP providers are required to use an approved web-based tool for reporting. The Keystone STARS performance standards allow programs flexibility around use of approved child assessments. STARS providers are encouraged to consider the full range of tools and resources around child assessments and make a decision that is right for them. STARS providers are still required to complete approved assessments on the children’s progress.

The list of approved tools can be found on the PA Keys website at http://www.pakeys.org or http://www.education.pa.gov. Providers should follow assessment company guidelines for assessment completion dates.

Assessment companies will not report assessment results to OCDEL in the form of Outcomes reporting. PKC, HSSAP and STARS providers will not see current assessment information under each child entered in ELN.

ELN provides a unique identifier for each child (Child Outcome ID)> However, it is not required for use in the web-based assessment tool.

The following reports will be available for the previous year’s data only:


The Student Outcomes reports will be available for children enrolled in past years but will not compare outcomes results with state results specifically on enrollments for your locations.

- **ELNRPT106** – *Student Outcomes Report – Location* – Displays aggregate student outcomes data for children by location.
- **ELNRPT107** – *Student Outcomes Report – Program* – Displays aggregate student outcomes data for children by program.
- **ELNRPT108** – *Student Outcomes Report – County* – Displays aggregate student outcomes data for children by county.
- **ELNRPT113** – *Student Outcomes Report – Legislative District* – Displays aggregate student outcomes data for children at the legislative district level.

### 7.1 Reporting

The PELICAN system provides a wide range of reports that can be generated by users. The user's system security access will determine which reports are available. This guide will provide a high-level overview of how to request a report and how to view the report once it has been generated.

OCDEL encourages users to explore the reports available to determine if the data provided will be helpful to them. Users will not incur charges for requesting reports and as such, may submit requests for any available report as often as needed. Additionally, reports can be saved or deleted locally on the user’s desktop.

Both Headquarters (HQ) and Location (LOC) Reports may be available. This guide will provide steps to request, view, and print a report.

Additionally, to obtain a complete and up to date listing of reports available, or to learn more about a report, click on the [PA Keys website report page](https://www.pakeys.com) link and search for a specific report.
Accessing Reports

- Click the [Reports] from the **ADDITIONAL OPTIONS** dropdown menu from the main header on the *PA Pre-K Counts Home* page.

![PA Pre-K Counts Home](image1)

The *Reports Home* page is displayed.

![Reports Home](image2)

- To see the available Headquarter reports, click the [GO] icon for HQ Reports, or [HQ] from the sub menu header.

![Reports Home](image3)

Figure 104 ELN Menu - Reports

Figure 105 Reports Home - Select HQ Reports

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To see the available Location reports, click the [GO] icon for Location Reports, or the [LOCATION] from the sub menu header.

Figure 106 Reports Home - Select Location Reports

- The HQ Reports page is displayed. Select the desired report (in this example, PKCRPT116 – Classroom Session Attendance report is selected) and then click [GO] to continue.

Figure 107 HQ Reports - Select a Report

- The Classroom Session Attendance Report page is displayed.
Enter the report criteria and
Click [GENERATE REPORT].

NOTE: If there are issues with how the report criteria were entered, an error message is displayed in the same location. Correct the report criteria and click [GENERATE REPORT] to resubmit the request.

When the report is successfully submitted, the message “214: Report request submitted successfully” is displayed.

Users may change Report Criteria again to submit a different request of the same report. Once all the reports needed have been submitted, click [Inbox] to continue.
The Reports Inbox page is displayed. The status of the report is “Report Requested”. The status will change to “Complete” when the report is ready to be reviewed.
Reports are typically available within 24 hours. To view a requested report,

- Return to the Reports Inbox page the next business day.
- The “Status” is updated to “Complete.”
- Click the report title [hyperlink] to view the report.
- A new browser session may open to display the selected report.
- Each report will return data based on the report criteria requested. If the message “No Data Found” is displayed on the report, then there is not available data for the requested criteria.

### Reports Inbox

<table>
<thead>
<tr>
<th>Delete</th>
<th>Date Requested</th>
<th>Report Title</th>
<th>Status</th>
<th>Days Remaining in Inbox</th>
</tr>
</thead>
</table>

*Figure 110 Reports Inbox - Report Status*
### Grantee Report

<table>
<thead>
<tr>
<th>Name</th>
<th>Standard Slot Types</th>
<th>Total Children Enrolled for Standard Slot Types</th>
<th>% of Utilization for Standard Slot Types</th>
<th>Other Slot Types</th>
<th>Total Children Enrolled for Other Slot Types</th>
<th>% of Utilization for Other Slot Types</th>
<th>Funding</th>
</tr>
</thead>
</table>

**NO DATA FOUND**

*Figure 111 Grantee Report - No Data Found*

NOTE: The report will be available for 30 days. The “Days Remaining in Inbox” column is updated daily and tracks when the report will be systematically removed. Users may wish to remove the report earlier and can select the report for deletion by clicking the appropriate checkbox and then click [DELETE].

### 7.2 Print Capability

Currently, there is no print functionality built into the PELICAN application. Users should access the print functionality within their web browser to print reports. Use the web browser’s navigation menu to learn more about its’ print capability and to view the browser’s Help files.
8.0 WHERE TO GO FOR HELP

Additional training resources are available on the Pennsylvania (PA) Keys website. This site has tip sheets to assist users who want to learn more about the PELICAN system and the various programs offered by OCDEL.

To access training materials for a specific program, Keystone STARS for example, follow the steps below:

2. Click [Getting Started > Early Learning Programs > Keystone STARS > Resources].

3. The Keystone STARS Resources page will display. Click the [Combined Optional Tools and Resources] link to access training materials.
4. The Combined Optional Tools and Resources document will display in a new tab.
Or search for PELICAN Resources through the Search text box.

2. Type "Pelican Resources" in the search box and [ENTER].
3. Search results are displayed.
4. Select “PELICAN RESOURCES.”

---

**Figure 113 PA Key Website Search box**

**Figure 114 PA Key Website - PELICAN Resources**
The *PELICAN Resources* page includes a variety of training materials prepared to assist users. There are both general references as well as references to specific functionality and reports. OCDEL encourages users to take time to explore these materials as you may be referred to this site by the PELICAN Help Desk staff or your Specialist.

The next several figures are samples of information found on this page.

The following resources are for all PA Pre-K Counts, Head Start and Keystone STARS providers.

**Guides for New Providers**

- PELICAN As One (PPT) (updated 1/2/2018)
- Helping Parents Understand ELN (updated 7/27/2017)
- PELICAN ELN System Training Guide for PA Pre-K Counts, Head Start and STARS providers (updated 12/15/2015) Updates coming soon!
  - Includes step by step instructions and screenshots on how to complete data entry for these programs.
  - For grantees and partners: Includes step by step instructions and screenshots on how to complete financial management data entry for these programs.

**Tip Sheets for All Providers**

- Accessing ELN Through PSS for Existing Providers (updated 1/25/18)
- Basic Navigation Within PELICAN (updated 1/25/18)
- Automatic Child Upload Tip Sheet (updated 11/18/2017)
- Child Longitudinal Outcomes Reports Tip Sheet (updated 6/14/2014) Updates coming soon!
- View Child Outcomes Tip Sheet (updated 11/18/2017)
### GETTING STARTED

- Creating Enrollments Tip Sheet (updated 11/18/17)
- End Dating Tip Sheet (updated 11/18/2017)
- Alerts Tip Sheet (updated 09/01/13); Updates coming soon!
- Processing Alerts (updated 1/25/18)
- Child Demographic Alerts - Accept/Reject (updated 12/22/17)
- ELN Reports for PKC, HS, and STARS (updated 11/18/2017)
- Attendance and Location Funding Tracking in PSS (updated 1/25/18)
- Pop-Up Blocker Tip Sheet (updated 1/2/2018)
- Tips and Tricks for Using Your Computer Short Cut Keys (updated 1/2/2018)
- Excel Tips and Tricks (updated 1/2/2018)
- Help Desk Procedures
  - ELN/STAR Procedures (updated 1/2/2018)
  - PKC/HS Procedures (updated 1/2/2018)
- Staffing Changes – to remove system access for former employees, contact the ELN Help Desk at 877-491-3818 or ra-eln@pa.gov.
- Data Field Forms for capturing child and family information for PELICAN
  - ELN Child and Family Data Form (updated 1/2/18)
  - ELN Staff Information Data Form (updated 1/2/18)

### Tip Sheets specifically for PA Pre-K Counts and Head Start Providers

- PA Pre-K Counts-Head Start Continuation Grant Application Tip Sheet (updated 01/25/2018)
- Financial Management Tip Sheet (updated 01/25/18)

### Federal Head Start Upload to ELN

- Updated materials to be released December 2018.

If you have questions or need help, please contact the PELICAN Help Desk at 877-491-3818 or by email at ra-eln@pa.gov. Hours of operation are 8:30 am to 5:00 pm, Monday through Friday.
Users should review the PELICAN Resource page to find the training materials most beneficial to them. If you are unable to find help in the form of a training material on the resource page, contact the PELICAN Help Desk at 877-491-3818 or email at ra-eln@pa.gov for assistance.
### Glossary of Terms

<table>
<thead>
<tr>
<th>Term</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alerts</td>
<td>Alerts notify users of actions required by the system. They provide a quick and easy way of notifying users when information changes or actions are required. Users must actively select “Alerts” to view.</td>
</tr>
<tr>
<td>Approved Assessment</td>
<td>The tool(s) utilized for the assessment of children in a classroom session.</td>
</tr>
<tr>
<td>Attendance</td>
<td>The number of days of class a child has attended each month.</td>
</tr>
<tr>
<td>Child Enrollment</td>
<td>The process of assigning a child to a classroom session and program. When a child is enrolled in a classroom session, the child's name appears on the Child Roster for each enrollment by program at that location.</td>
</tr>
<tr>
<td>Child Risk Factor Report</td>
<td>The Child Risk Factor Report lists all the children enrolled in classroom sessions in a location within a grant stream along with all their risk factors. It also gives a total of all risk factors for children enrolled in a classroom session.</td>
</tr>
<tr>
<td>Classroom Session Roster</td>
<td>The Classroom Session Roster is a list of all children with current or future enrollments.</td>
</tr>
<tr>
<td>Classroom Session</td>
<td>The period in which qualified staff members engage with enrolled children for the purposes of instructional and educational activities. Classroom sessions should always be assigned to a Physical Room at a location. A child can have multiple unique program enrollments at the same location and in one or more physical rooms and classroom sessions. Active enrollments in PKC and Head Start programs are limited to one per program.</td>
</tr>
<tr>
<td>Classroom Session Lead</td>
<td>The teacher who is assigned as the lead contact for a classroom session. There may be additional staff assigned to a classroom session, but there can only be one Classroom Session Lead selected for each classroom session. A Classroom Session Lead must be selected for each classroom session.</td>
</tr>
<tr>
<td>Classroom Session Name</td>
<td>The name given to a classroom session at a Location.</td>
</tr>
<tr>
<td>COMPASS</td>
<td>Commonwealth of Pennsylvania Access to Social Services (COMPASS) is an online application for Pennsylvanians to apply for many health and human services programs.</td>
</tr>
<tr>
<td>English Language Learner (ELL)</td>
<td>A student whose first language is not English and who either lacks proficiency in English or has a beginning level proficiency in English.</td>
</tr>
<tr>
<td>Environmental Rating Scale (ERS)</td>
<td>The Environment Rating Scales (ERS) are observational assessment tools used to evaluate the quality of early childhood programs. ERS scales are divided into criteria that assess the program's physical environment, health and safety procedures, materials, interpersonal relationships, and opportunities for learning and development within a classroom session.</td>
</tr>
<tr>
<td>Early Head Start (EHS)</td>
<td>A federal program focused on providing comprehensive services to eligible families including child development, health, safety, nutrition, parent engagement, family goal planning, and shared governance for pregnant women, infants, and toddlers.</td>
</tr>
<tr>
<td>Term</td>
<td>Description</td>
</tr>
<tr>
<td>-----------------------------------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Federal Poverty Level (FPL)</td>
<td>The FPL is the set minimum amount of gross income determined by the Department of Health and Human Services that a family needs for food, clothing, transportation, shelter, and other necessities. FPL varies per family size and is updated annually.</td>
</tr>
<tr>
<td>Head Start State Supplemental Assistance Program (HSSAP)</td>
<td>Provides comprehensive early learning services to preschool aged children and families who are most at risk of academic failure. Families earning 100% of the federal poverty level or less are eligible to apply. There is no cost to families.</td>
</tr>
<tr>
<td>Individualized Education Plan (IEP)</td>
<td>The written education plan for individual learners including action plans, goals and objectives, and timetable; usually developed jointly by educators, counselors, and learners.</td>
</tr>
<tr>
<td>Lead Agency (LA)</td>
<td>The Lead Agency in a Partnership has ultimate responsibility for fiscal and administrative oversight, program leadership, and decision-making authority relative to PA Pre-K Counts. The Lead Agency communicates directly with the Preschool Program Specialist assigned to the Partnership and with OCDEL. It is the entity that responds to OCDEL requests, submits documents to OCDEL on behalf of the Partners, and holds responsibility for the Partners' compliance with PA Pre-K Counts requirements.</td>
</tr>
<tr>
<td>Legal Entity (LE)</td>
<td>An individual, partnership, association, organization, or corporation responsible for the operation of multiple child care facilities or locations, specific to Keystone STAR providers.</td>
</tr>
<tr>
<td>Location</td>
<td>The physical site where the early childhood program is offered.</td>
</tr>
<tr>
<td>MPI Number</td>
<td>A unique identification number assigned to a Provider through the Master Provider Index (MPI). Used for Clearance. A Legal Entity MPI is a 9-digit number and 13 digits for a Lead Agency.</td>
</tr>
<tr>
<td>OCDEL</td>
<td>The Office of Child Development and Early Learning (OCDEL) promotes opportunities for all Pennsylvania children and families by building systems and providing supports that help ensure access to high quality child and family services.</td>
</tr>
<tr>
<td>Operational Days</td>
<td>The number of days in a month that a classroom session is operational.</td>
</tr>
<tr>
<td>Outcome ID</td>
<td>An identification number assigned to a child at a site, used to associate child outcomes with the child at a specific location. A child outcome ID is a 9-digit number. This number is entered by the provider into the assessment company’s system.</td>
</tr>
<tr>
<td>PA Key</td>
<td>The role of the Pennsylvania Key is to work with the Office of Child Development &amp; Early Learning (OCDEL) to provide statewide leadership in the development of an integrated and coordinated system of program quality improvements and professional development supports for early childhood education.</td>
</tr>
<tr>
<td>Partner</td>
<td>A Partner is an eligible provider in the Lead Agency’s current fiscal year PKC or HSSAP grant, which is providing a Pre-K Counts or HSSAP classroom session.</td>
</tr>
<tr>
<td>PELICAN</td>
<td>Pennsylvania’s Enterprise to Link Information for Children Across Networks (PELICAN) is the Department of Human Services’ initiative to integrate the Department’s child care programs under a single management information system. All child care services information is managed in PELICAN.</td>
</tr>
<tr>
<td>Term</td>
<td>Description</td>
</tr>
<tr>
<td>------</td>
<td>-------------</td>
</tr>
<tr>
<td>PELICAN Early Learning Network (ELN)</td>
<td>The PELICAN Early Learning Network (ELN) is a web-based network that enables Pennsylvania to better understand the children served by providing a platform for collecting, tracking, and analyzing information about children, classroom sessions, staff, and Providers to assess outcomes and best practices across programs.</td>
</tr>
<tr>
<td>Physical Room</td>
<td>The name of the physical space that houses Classroom Sessions (i.e., Physical room – Blue room might have two sessions PKC am and PKC pm).</td>
</tr>
<tr>
<td>Pre-School Program Specialist</td>
<td>A Pre-School Program Specialist works collaboratively to aid pre-school programs in a variety of early learning settings to support and maintain high quality standards, develops partnerships, and communicates effectively with the pre-school sites.</td>
</tr>
<tr>
<td>Program Enrollment</td>
<td>The process of registering a child into a specified program.</td>
</tr>
<tr>
<td>Program Review Instrument (PRI)</td>
<td>The Program Review Instrument is a tool used by a Specialist to monitor Lead Agencies and Partners on a continuous basis every fiscal year.</td>
</tr>
<tr>
<td>Program Type</td>
<td>The type of early childhood program a child is enrolled in.</td>
</tr>
<tr>
<td>Quarterly Narrative</td>
<td>The Quarterly Narrative provides OCDEL with the ability to evaluate the effectiveness of Early Learning Network programs. Lead Agencies respond to questions around benefits/concerns, partnerships, and communications.</td>
</tr>
<tr>
<td>Registration</td>
<td>The process of completing an application or Optional Enrollment Screener tool by parents/guardians to enroll their child in specific.</td>
</tr>
<tr>
<td>Relationship to child</td>
<td>The way in which a Legal Guardian is associated with a child.</td>
</tr>
<tr>
<td>Role</td>
<td>The status of the Legal Guardian’s current involvement with a child.</td>
</tr>
<tr>
<td>SKRP</td>
<td>Summer Kindergarten Readiness Program.</td>
</tr>
<tr>
<td>Waiting List</td>
<td>The act of placing a child on a list for an available slot.</td>
</tr>
</tbody>
</table>