

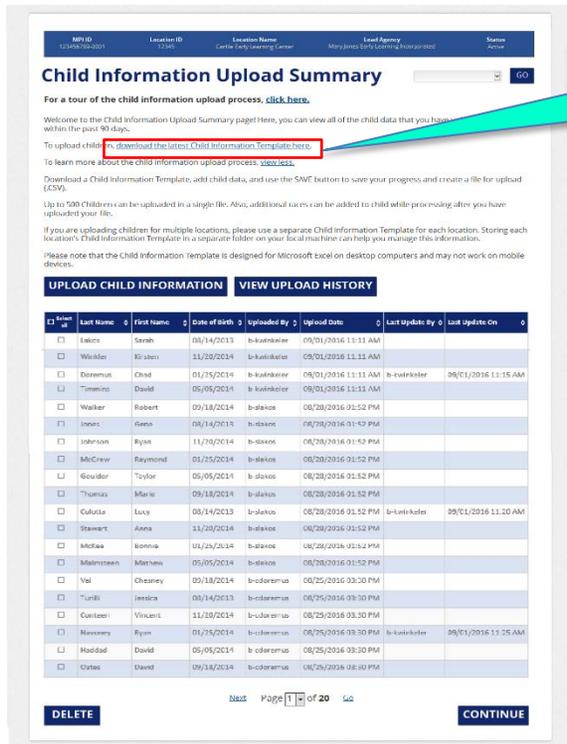
AUTOMATIC CHILD INFORMATION UPLOAD

TIP SHEET

The purpose of this tip sheet is to demonstrate the automatic child information upload process. These steps include downloading the Child Information Template, entering child data, uploading the template, selecting the child(ren) to process, reviewing and/or updating child and parent information, and performing child clearance.

Child Information Upload Process

1. Download the **Child Information Template**. This template can be downloaded from the **Child Information Summary** screen or from the **Child Information Upload** pop-out. See the examples below.



Child Information Upload Summary

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 within the past 90 days.

To upload child info, [download the latest Child Information Template here](#).

To learn more about the child information upload process, [click here](#).

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

Up to 500 Children can be uploaded in a single file. Also, additional saves can be added to child 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.

UPLOAD CHILD INFORMATION **VIEW UPLOAD HISTORY**

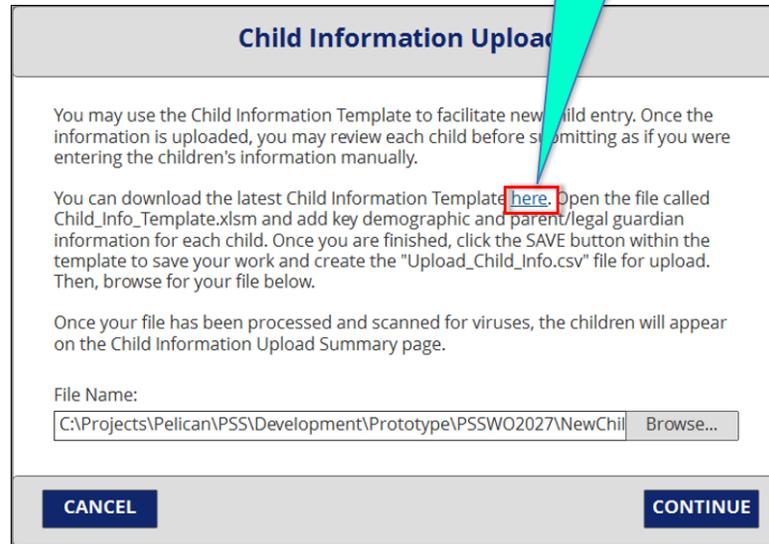
<input type="checkbox"/>	Last Name	First Name	Date of Birth	Uploaded By	Upload Date	Last Update By	Last Update On
<input type="checkbox"/>	Lalics	Sarah	03/14/2013	b-ksinkov	09/01/2016 1:11 AM		
<input type="checkbox"/>	Walden	Erin	11/20/2014	b-ksinkov	09/01/2016 1:11 AM		
<input type="checkbox"/>	Domeno	Chad	01/25/2014	b-ksinkov	09/01/2016 1:11 AM	b-ksinkov	09/01/2016 1:15 AM
<input type="checkbox"/>	Timmons	David	05/05/2014	b-ksinkov	09/01/2016 1:11 AM		
<input type="checkbox"/>	Walker	Robert	09/18/2014	b-ksinkov	08/20/2016 01:52 PM		
<input type="checkbox"/>	Isaac	Isaac	03/14/2013	b-ksinkov	08/20/2016 01:52 PM		
<input type="checkbox"/>	Johnson	Ryan	11/20/2014	b-ksinkov	08/20/2016 01:52 PM		
<input type="checkbox"/>	McCree	Raymond	01/25/2014	b-ksinkov	08/20/2016 01:52 PM		
<input type="checkbox"/>	Goulden	Taylor	05/05/2014	b-ksinkov	08/20/2016 01:52 PM		
<input type="checkbox"/>	Thomas	Maria	09/18/2014	b-ksinkov	08/20/2016 01:52 PM		
<input type="checkbox"/>	Culotta	Lucy	08/14/2013	b-ksinkov	08/20/2016 01:52 PM	b-ksinkov	09/01/2016 11:20 AM
<input type="checkbox"/>	Stamer	Anna	11/20/2014	b-ksinkov	08/20/2016 01:52 PM		
<input type="checkbox"/>	McKee	Bonnie	01/25/2014	b-ksinkov	08/20/2016 01:52 PM		
<input type="checkbox"/>	Malmgren	Matthew	05/05/2014	b-ksinkov	08/20/2016 01:52 PM		
<input type="checkbox"/>	Yal	Cheaney	09/18/2014	b-coburn	08/25/2016 03:20 PM		
<input type="checkbox"/>	Trilli	Jessica	03/14/2013	b-coburn	08/25/2016 03:20 PM		
<input type="checkbox"/>	Carleton	Vincent	11/20/2014	b-coburn	08/25/2016 03:20 PM		
<input type="checkbox"/>	Nevoney	Ryan	01/25/2014	b-coburn	08/25/2016 03:20 PM	b-ksinkov	09/01/2016 11:25 AM
<input type="checkbox"/>	Haddad	David	05/05/2014	b-coburn	08/25/2016 03:20 PM		
<input type="checkbox"/>	Ortiz	David	09/18/2014	b-coburn	08/25/2016 03:20 PM		

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DELETE **CONTINUE**

Click the hyperlink...

Or, Click the here hyperlink.



Child Information Upload

You may use the Child Information Template to facilitate new child entry. Once the information is uploaded, you may review each child before submitting as if you were entering the children's information manually.

You can download the latest Child Information Template [here](#). Open the file called Child_Info_Template.xlsm and add key demographic and parent/legal guardian information for each child. Once you are finished, click the SAVE button within the template to save your work and create the "Upload_Child_Info.csv" file for upload. Then, browse for your file below.

Once your file has been processed and scanned for viruses, the children will appear on the Child Information Upload Summary page.

File Name:
 Browse...

CANCEL **CONTINUE**

2. Enter child data. Use the **Child Information Template** to enter child demographic and parent/legal guardian information for upload.

AUTOMATIC CHILD INFORMATION UPLOAD

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	A	B	C	D	E	F	G	H
1	Please enter Child Information below to populate into ELN. The SAVE button will save your progress and create a .CSV file for upload. Required fields must be added to this template in order to successfully upload the child.							
	<input type="button" value="SAVE"/>							
2	Child's Last Name (Required)	Child's First Name (Required)	Child's Middle Initial	Child's Suffix (Select from dropdown)	Child's Date of Birth (Required)	Child's Gender (Select from dropdown) (M/F) (Required)	Child's Race (Select from dropdown) (Required)	Child's Ethnicity (Select from dropdown) (Required)
3								
4								
5								
6								
7								
8								
9								
10								
11								
12								
13								
14								

Note the required fields: Child's Last Name, Child's First Name, Child's Date of Birth, Child's Gender, Child's Race, and Child's Ethnicity.

Additional fields available on the template include the following: Parent's Suffix, Parent's Gender, Parent's Date of Birth, Parent's Relationship to Child, Parent's Secondary Relationship to Child, Parent's Role, Parent's Address (street, county, state, zip code), Parent's School District of Residence, Parent's Phone Number, and Parent's Email.

3. Save the Template on your computer when finished. The SAVE process will create two files containing the information – one is an Excel file and one is a .csv file (for the upload).
4. Upload the completed template to PELICAN from the **Child Information Upload** screen.

AUTOMATIC CHILD INFORMATION UPLOAD

TIP SHEET

Child Information Upload

You may use the Child Information Template to facilitate new child entry. Once the information is uploaded, you may review each child before submitting as if you were entering the children's information manually.

You can download the latest Child Information Template [here](#). Open the file called Child_Info_Template.xlsx and add key demographic and parent/legal guardian information for each child. Once you are finished, click the SAVE button within the template to save your work and create the "Upload_Child_Info.csv" file for upload. Then, browse for your file below.

Once your file has been processed and scanned for viruses, the children will appear on the Child Information Upload Summary page.

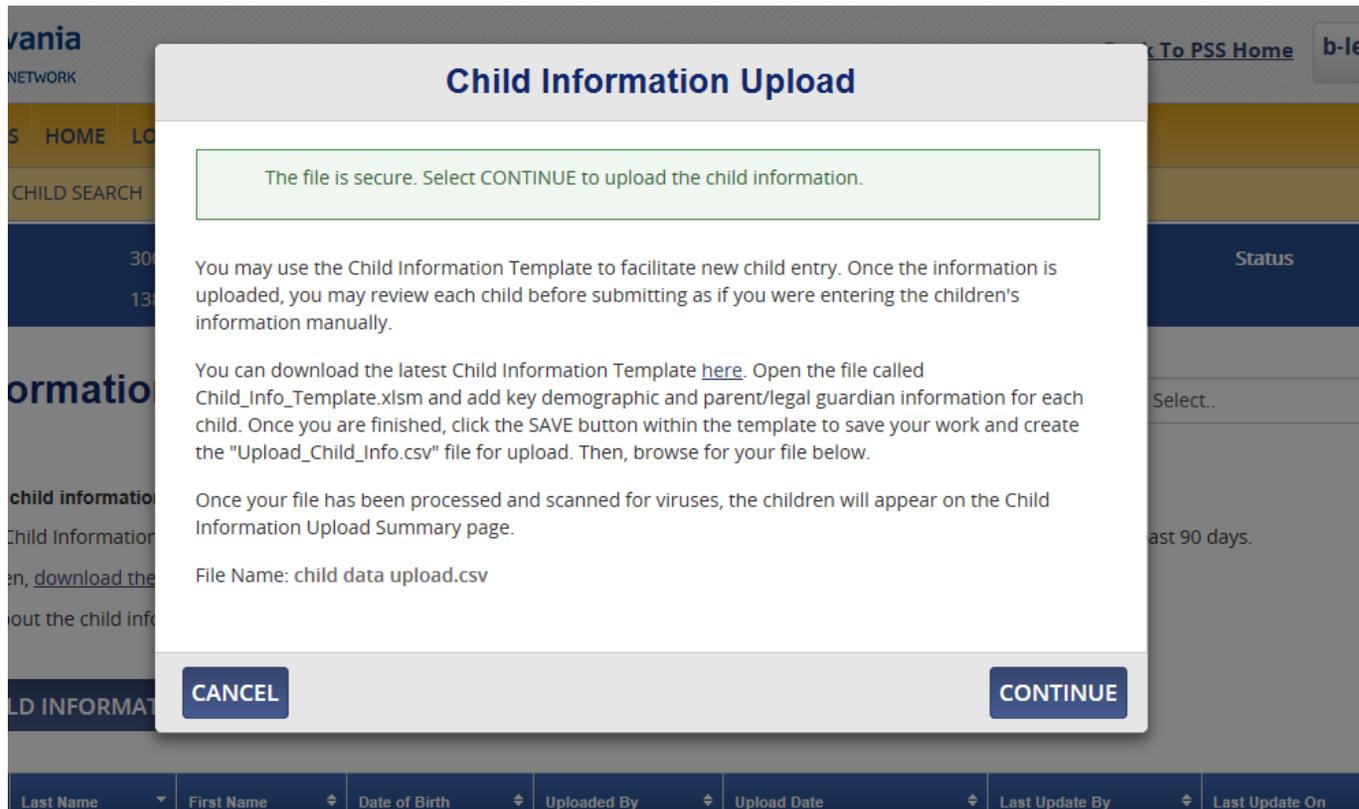
File Name:

Click the Browse button to find your Upload_Child_Info.csv file to upload.

5. Click [**CONTINUE**] to upload your file.
6. A system virus scan will run. The **Child Information Upload** pop-out will display a message indicating the file is secure.

AUTOMATIC CHILD INFORMATION UPLOAD

TIP SHEET



The screenshot shows a web application interface with a modal dialog box titled "Child Information Upload". The dialog box has a light gray header and a white body. At the top of the body is a green-bordered box containing the text: "The file is secure. Select CONTINUE to upload the child information." Below this, there are three paragraphs of instructional text. The first paragraph explains that the Child Information Template can be used for new child entry and that information should be reviewed before submission. The second paragraph provides instructions on how to download the latest template, fill it out, and save it as "Upload_Child_Info.csv". The third paragraph states that once the file is processed and scanned for viruses, the children will appear on the Child Information Upload Summary page. Below the text, the file name "File Name: child data upload.csv" is displayed. At the bottom of the dialog box are two buttons: "CANCEL" on the left and "CONTINUE" on the right. The background of the screenshot shows a blurred web page with a table header containing columns: "Last Name", "First Name", "Date of Birth", "Uploaded By", "Upload Date", "Last Update By", and "Last Update On".

Child Information Upload

The file is secure. Select CONTINUE to upload the child information.

You may use the Child Information Template to facilitate new child entry. Once the information is uploaded, you may review each child before submitting as if you were entering the children's information manually.

You can download the latest Child Information Template [here](#). Open the file called Child_Info_Template.xlsm and add key demographic and parent/legal guardian information for each child. Once you are finished, click the SAVE button within the template to save your work and create the "Upload_Child_Info.csv" file for upload. Then, browse for your file below.

Once your file has been processed and scanned for viruses, the children will appear on the Child Information Upload Summary page.

File Name: child data upload.csv

CANCEL **CONTINUE**

5. Click [CONTINUE].
6. Receive **Child Information Upload** summary pop-out.

Child Information Upload

There are 505 children on the upload file for this location.

Children Successfully Uploaded

485 child(ren) have been successfully uploaded from the file.

Children Unsuccessfully Uploaded

15 child(ren) have not been uploaded from the file because their First Name, Last Name, or Date of Birth was not entered.

5 child(ren) have not been uploaded from the file because over 500 children were on the upload file.

You may edit child data and confirm data accuracy after clicking **CONTINUE**. Additional children can be manually entered by selecting the **CREATE NEW CHILD** button on the Child Roster or Child Search screens.

CONTINUE

The Child Information Upload

This screen confirms the child information upload and provides the upload results by showing the number of children successfully uploaded and the number of children unsuccessfully uploaded.

7. Click **[CONTINUE]**.

AUTOMATIC CHILD INFORMATION UPLOAD

TIP SHEET

MPI ID: 123456789-0001
Location ID: 12345
Location Name: Carlie Early Learning Center
Lead Agency: Mary Jones Early Learning Incorporated
Status: Active

Child Information Upload Summary

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 less](#).

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

Up to 500 Children can be uploaded in a single file. Also, additional races can be added to child 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.

UPLOAD CHILD INFORMATION
VIEW UPLOAD HISTORY

<input type="checkbox"/> Select all	Last Name	First Name	Date of Birth	Uploaded By	Upload Date	Last Update By	Last Update On
<input type="checkbox"/>	Lakos	Sarah	08/14/2013	b-kwinkeler	09/01/2016 11:11 AM		
<input type="checkbox"/>	Winkler	Kirsten	11/20/2014	b-kwinkeler	09/01/2016 11:11 AM		
<input type="checkbox"/>	Doremus	Chad	01/25/2014	b-kwinkeler	09/01/2016 11:11 AM	b-kwinkeler	09/01/2016 11:15 AM
<input type="checkbox"/>	Timmins	David	05/05/2014	b-kwinkeler	09/01/2016 11:11 AM		
<input type="checkbox"/>	Walker	Robert	09/18/2014	b-slakos	08/28/2016 01:52 PM		
<input type="checkbox"/>	Jonas	Gena	08/14/2013	b-slakos	08/28/2016 01:52 PM		
<input type="checkbox"/>	Johnson	Ryan	11/20/2014	b-slakos	08/28/2016 01:52 PM		
<input type="checkbox"/>	McGrew	Raymond	01/25/2014	b-slakos	08/28/2016 01:52 PM		
<input type="checkbox"/>	Goulder	Taylor	05/05/2014	b-slakos	08/28/2016 01:52 PM		
<input type="checkbox"/>	Thomas	Marie	09/18/2014	b-slakos	08/28/2016 01:52 PM		
<input type="checkbox"/>	Culotta	Lucy	08/14/2013	b-slakos	08/28/2016 01:52 PM	b-kwinkeler	09/01/2016 11:20 AM
<input type="checkbox"/>	Stewart	Anna	11/20/2014	b-slakos	08/28/2016 01:52 PM		
<input type="checkbox"/>	McKee	Bonnie	01/25/2014	b-slakos	08/28/2016 01:52 PM		
<input type="checkbox"/>	Malmsteen	Mathew	05/05/2014	b-slakos	08/28/2016 01:52 PM		
<input type="checkbox"/>	Vai	Chesney	09/18/2014	b-cdoremus	08/25/2016 03:30 PM		
<input type="checkbox"/>	Turilli	Jessica	08/14/2013	b-cdoremus	08/25/2016 03:30 PM		
<input type="checkbox"/>	Conteen	Vincent	11/20/2014	b-cdoremus	08/25/2016 03:30 PM		
<input type="checkbox"/>	Navoney	Ryan	01/25/2014	b-cdoremus	08/25/2016 03:30 PM	b-kwinkeler	09/01/2016 11:26 AM
<input type="checkbox"/>	Haddad	David	05/05/2014	b-cdoremus	08/25/2016 03:30 PM		
<input type="checkbox"/>	Gates	David	09/18/2014	b-cdoremus	08/25/2016 03:30 PM		

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DELETE
CONTINUE

After clicking [CONTINUE] in the previous step, the **Child Information Upload Summary** screen appears.

This screen allows you to view all the child data that was uploaded or updated within the past 90 days that have not been processed.

8. Select child(ren) to process by clicking the checkbox(es).

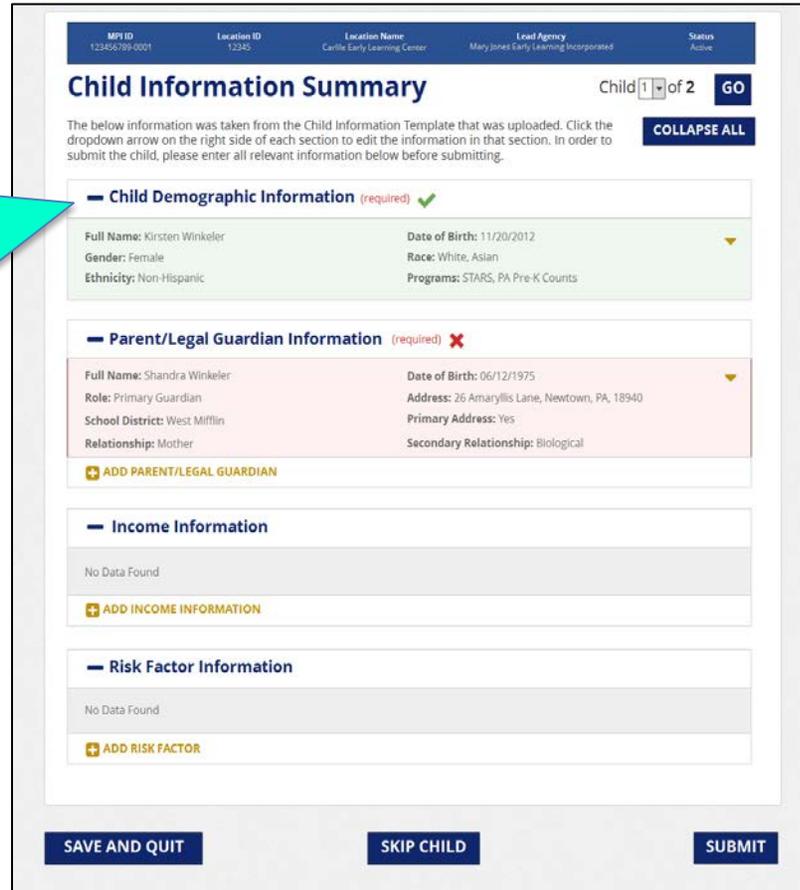
9. Click [CONTINUE]

10. Process what you uploaded. After clicking [CONTINUE] in the previous step, the **Child Information Summary** page displays.

AUTOMATIC CHILD INFORMATION UPLOAD

TIP SHEET

From this screen, by clicking the “+” sign, you can view and edit Child Demographic Information, Parent/Legal Guardian Information, Income Information, and Risk Factor Information.



The screenshot shows the 'Child Information Summary' interface. At the top, there is a header with fields for MPI ID (123456789-0001), Location ID (12345), Location Name (Carlisle Early Learning Center), Lead Agency (Mary Jones Early Learning Incorporated), and Status (Active). Below the header, the title 'Child Information Summary' is displayed, followed by 'Child 1 of 2' and a 'GO' button. A 'COLLAPSE ALL' button is also present. A note states: 'The below information was taken from the Child Information Template that was uploaded. Click the dropdown arrow on the right side of each section to edit the information in that section. In order to submit the child, please enter all relevant information below before submitting.' The form is divided into four sections: 1. 'Child Demographic Information (required)' with a green checkmark, containing fields for Full Name (Kirsten Winkeler), Date of Birth (11/20/2012), Gender (Female), Race (White, Asian), and Ethnicity (Non-Hispanic). 2. 'Parent/Legal Guardian Information (required)' with a red X, containing fields for Full Name (Shandra Winkeler), Date of Birth (06/12/1975), Role (Primary Guardian), Address (26 Amaryllis Lane, Newtown, PA, 18940), School District (West Mifflin), Primary Address (Yes), and Relationship (Mother). 3. 'Income Information' with 'No Data Found' and an 'ADD INCOME INFORMATION' button. 4. 'Risk Factor Information' with 'No Data Found' and an 'ADD RISK FACTOR' button. At the bottom, there are three buttons: 'SAVE AND QUIT', 'SKIP CHILD', and 'SUBMIT'.

Note: Child data can also be edited from the **Child Demographic Information** screen, after the child is enrolled (i.e., after child clearance).

However, the preferred way to edit child data is from the **Child Information Upload Summary** screen (left), prior to submitting and enrolling the child (i.e., prior to child clearance).

After performing all the edits and updates for the child from the **Child Information Upload Summary** screen, click [SUBMIT].

11. Child Clearance. After clicking [SUBMIT] in the previous step, the **Child Clearance** screen will load if a child record matching the data entered is currently in the system.

AUTOMATIC CHILD INFORMATION UPLOAD

TIP SHEET

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.

Last	First	MI	Suffix	DOB	Gender	SSN
Winkeler	Kirsten	M		11/20/2012	F	

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

Select	Last	First	MI	Suffix	DOB	Gender	SSN	Match Score
<input type="radio"/>	Winkeler	Kristen			08/14/2014	F	xxx-xx-4573	90
<input type="radio"/>	Winkler	Kiersten	M		11/20/2012	F	xxx-xx-4738	80
<input type="radio"/>	Winkeler	Kristen	S		09/14/2014	F		70

Create New Child

CANCEL

SAVE

Follow the instructions on the screen.

If the child data entered matches a child listed on the screen, click the **[SELECT]** radio button next to that match.

If the child data entered does **not** match a child listed on the screen, select the **[Create New Child]** radio button.

If a Match Score is 98 or above, the record is considered an exact match and must be selected. Creating a new child is not an option.

12. Submit New Child. After selecting the **[Create New Child]** radio button in the previous step, the **Submit New Child** confirmation screen displays.

Submit New Child

The information for **Kirsten Winkeler** has been added to your location and is available as "In-Process." You can make any additional changes to the child's information from the Child Information Summary.

This child will no longer be available on the Child Upload Summary page. You can see a record of all uploaded children by clicking the UPLOAD HISTORY button on the Upload Summary page.

CONTINUE

Click [**CONTINUE**].

- Repeat Steps 10 through 12 for each child selected to process. The system will display the next child that was selected to process until all have processed. After clicking [**CONTINUE**] for the last child, the **Child Information Upload – Upload Summary** screen displays.

Shows how many children were successfully submitted. Click the “+” icon to see the names of these children.

Shows the number of unsubmitted children. Click the “+” icon to see the names of these children.

Child Information Upload

Upload Summary

The children you have submitted are listed in the green box below. These children have been saved to your location as "In Process." These children will no longer appear on the Child Information Upload Summary and have been placed in the Child Information Upload History. You can make changes to these children on the Child Roster page.

Submitted Children

— 5 Child(ren) were successfully submitted.

- Lakos, Sarah
- Winkeler, Kirsten
- Walker, Robert
- Rosenstein, Stefani
- Skywalker, Lucas

The children you have not submitted are listed in the yellow box below. You can continue entering these children later from the Child Information Upload Summary.

Unsubmitted Children

+ 2 Child(ren) were not submitted.

[BACK TO UPLOAD SUMMARY](#)

14. Click [**BACK TO UPLOAD SUMMARY**] to return to the **Upload Summary** page.

AUTOMATIC CHILD INFORMATION UPLOAD

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MPN ID
123456789-0001
Location ID
12345
Location Name
Carlisle Early Learning Center
Lead Agency
Mary Jones Early Learning Incorporated
Status
Active

Child Information Upload Summary

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UPLOAD CHILD INFORMATION
VIEW UPLOAD HISTORY

<input type="checkbox"/> Select All	Last Name	First Name	Date of Birth	Uploaded By	Upload Date	Last Update By	Last Update On
<input type="checkbox"/>	Lakos	Sarah	08/14/2013	b-kwinkeler	09/01/2016 11:11 AM		
<input type="checkbox"/>	Winkler	Kirsten	11/20/2014	b-kwinkeler	09/01/2016 11:11 AM		
<input type="checkbox"/>	Doremus	Chad	01/25/2014	b-kwinkeler	09/01/2016 11:11 AM	b-kwinkeler	09/01/2016 11:15 AM
<input type="checkbox"/>	Timmins	David	05/05/2014	b-kwinkeler	09/01/2016 11:11 AM		
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<input type="checkbox"/>	Malmsteen	Mathew	05/05/2014	b-slakos	08/28/2016 01:52 PM		
<input type="checkbox"/>	Val	Chesney	09/18/2014	b-doremus	08/25/2016 03:30 PM		
<input type="checkbox"/>	Turilli	Jessica	08/14/2013	b-doremus	08/25/2016 03:30 PM		
<input type="checkbox"/>	Conteen	Vincent	11/20/2014	b-doremus	08/25/2016 03:30 PM		
<input type="checkbox"/>	Navoney	Ryan	01/25/2014	b-doremus	08/25/2016 03:30 PM	b-kwinkeler	09/01/2016 11:25 AM
<input type="checkbox"/>	Haddad	David	05/05/2014	b-doremus	08/25/2016 03:30 PM		
<input type="checkbox"/>	Gates	David	09/18/2014	b-doremus	08/25/2016 03:30 PM		

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DELETE
CONTINUE

Important Notes:

Children successfully submitted will no longer appear on the Upload Summary page.

- These children are not enrolled.
- Navigate to CHILD ROSTER and filter to view *In Process* records to enroll the children.

Children that were not successfully submitted through the upload will require updates to correct the data before resubmitting.

- These updates can be made from the Upload Summary screen. It is not necessary to upload the file again.

If all children were submitted successfully, and there are no additional child records to submit, the Child Information Upload Summary page will not display child records.

- Navigate away from the Upload Summary page by choosing a page from navigation drop-down menu or an option from the ELN menu headers.