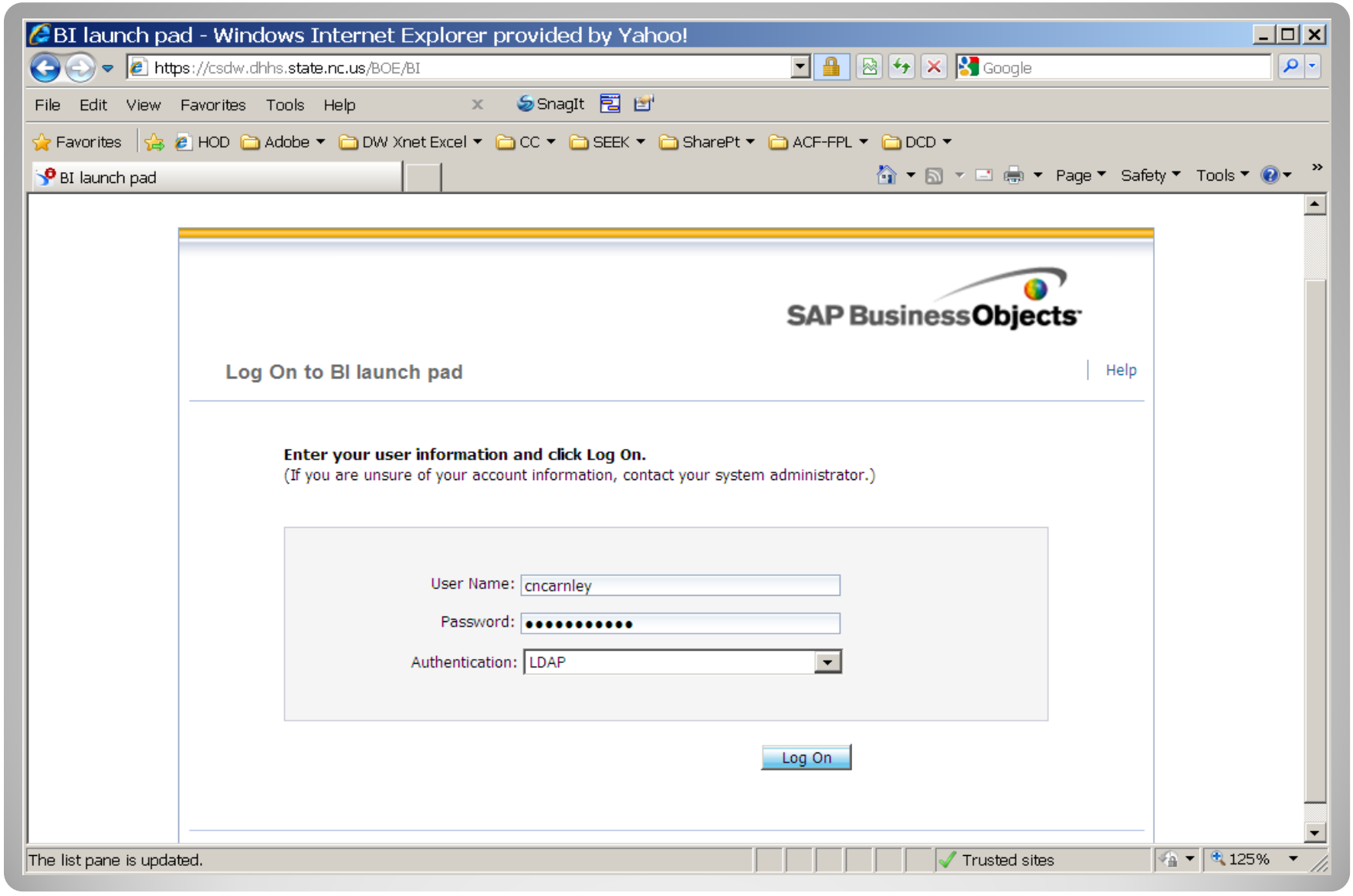
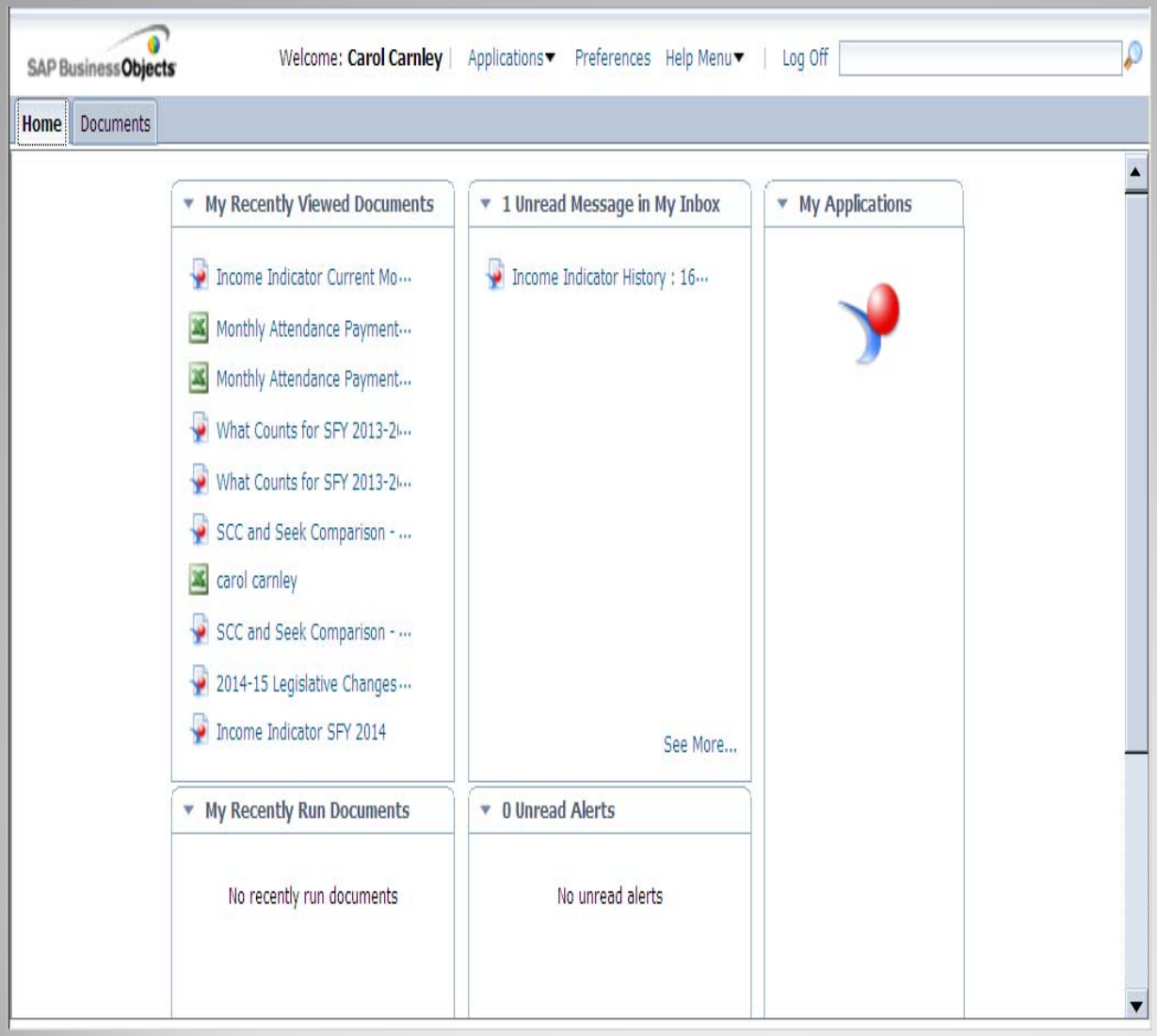
Data Warehouse

2014-2015 Legislative Changes to Subsidy Policy

- URL to access Data Warehouse:
- https://csdw.dhhs.state.nc.us/BOE/BI
- Users must login with their NCID login name and password
- Authentication = LDAP

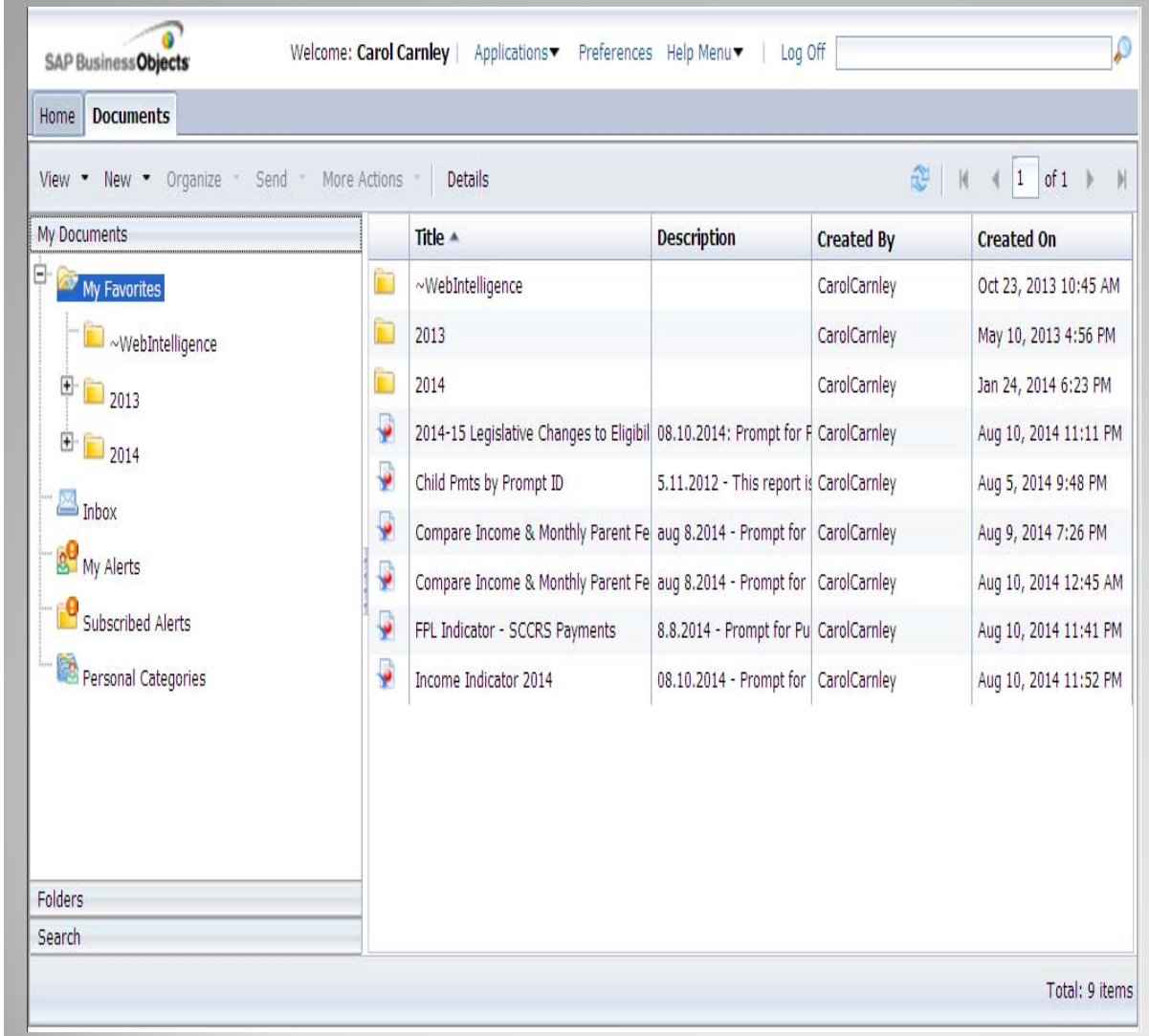

BI launch pad - Windows Internet Explorer provided by Yahoo!
https://csdw.dhhs.state.nc.us/BOE/BI
Google
File Edit View Favorites Tools Help
SnagIt
Favorites
HOD
Adobe
DW Xnet Excel
CC
SEEK
SharePt
ACF-FPL
DCD
BI launch pad
Page
Safety
Tools
SAP BusinessObjects
Log On to BI launch pad
Help
Enter your user information and click Log On.
(If you are unsure of your account information, contact your system administrator.)
User Name: cncarnley
Password: ••••••••••••
Authentication: LDAP
Log On
The list pane is updated.
Trusted sites
125%



DW Welcome screen has two primary tabs: Home and Documents.

"Home" provides quick access to reports you have recently viewed and to reports sent to your Inbox.

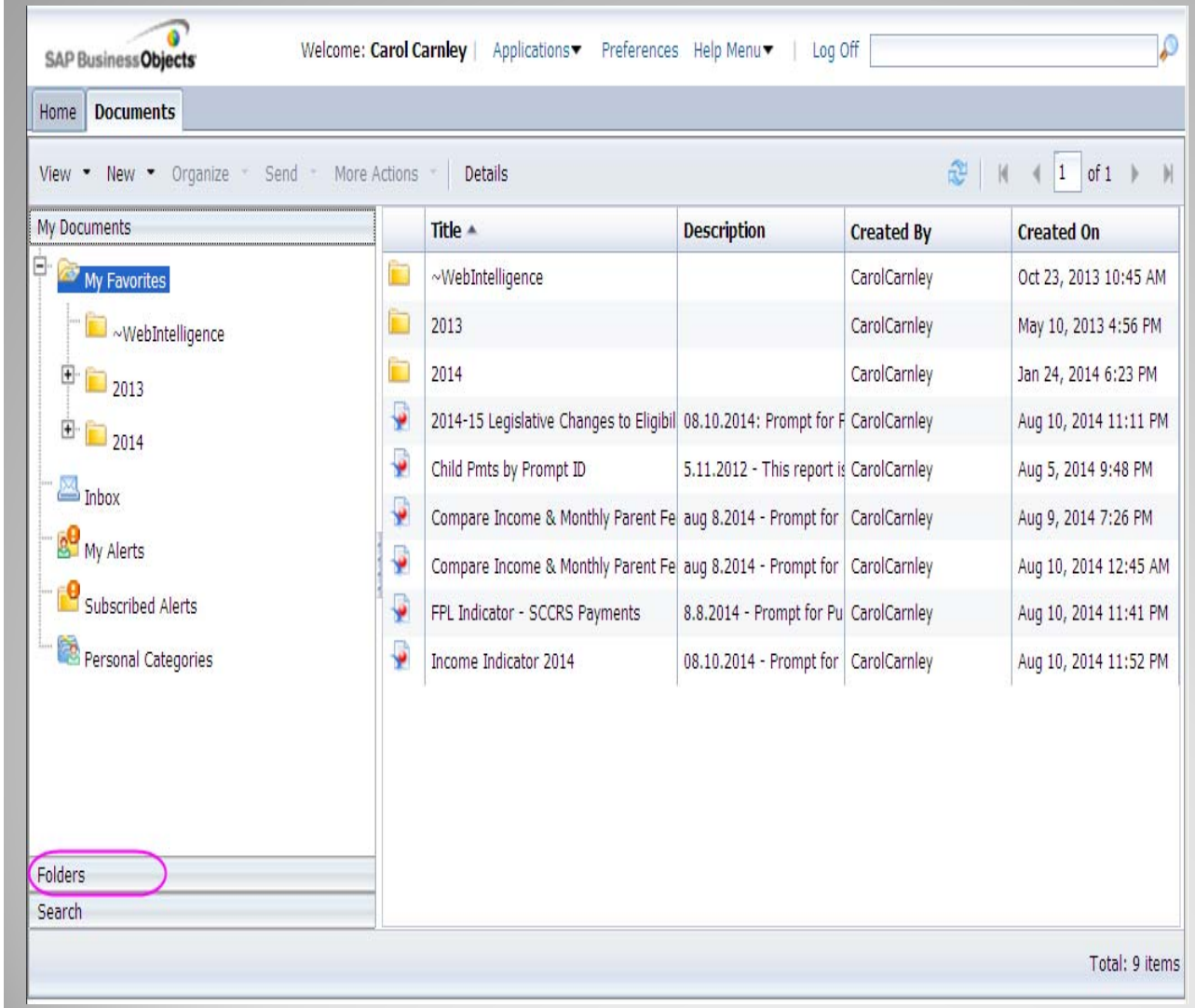
The "My Applications" icon is used to create new DW reports.



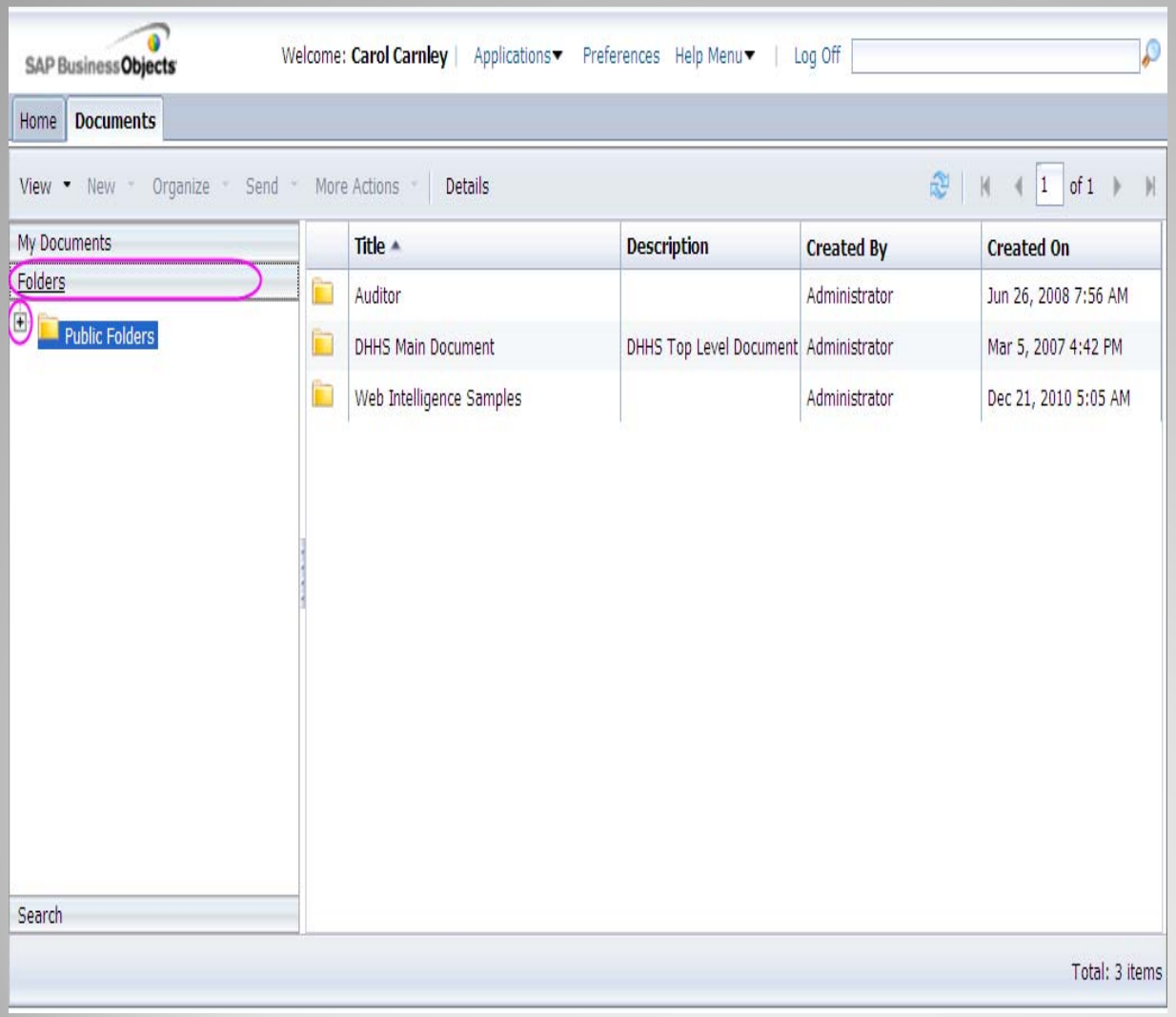
The Documents tab opens first to "My Documents", and displays reports (or sub-folders) saved in your "My Favorites" folder; and your Inbox folder.

The folder / filename "tree" looks just as it does in Windows Explorer.

Click any folder to see the reports saved there.

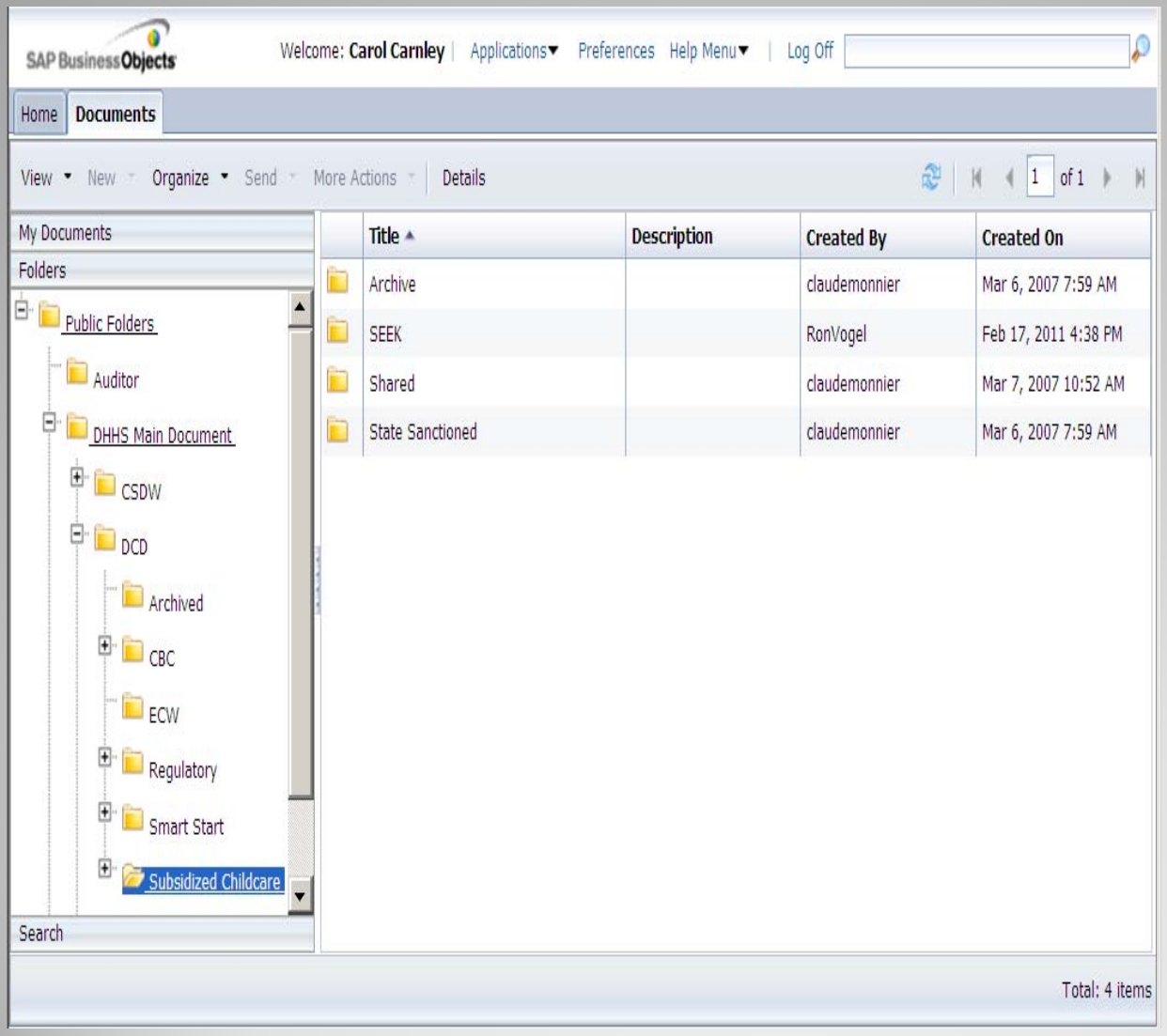


Click the blue bar at the bottom titled "Folders" – this will open the path to the Public folder and the reports saved there.



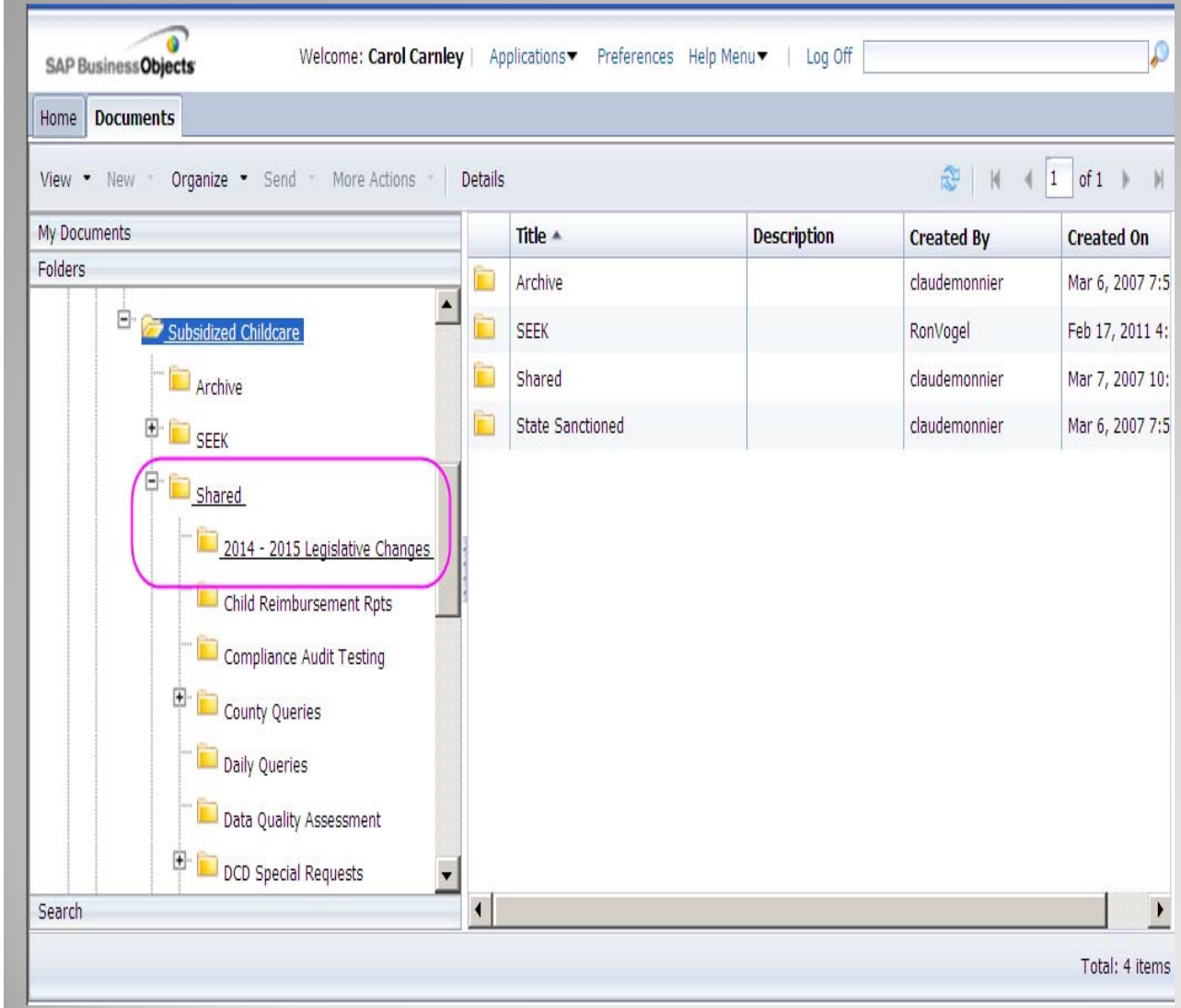
The Documents section with "My Favorites" is now closed and the Folders section, with the path to Pubic Folders, is now open.

Click the "+" symbol next to any folder to open & expand the list.



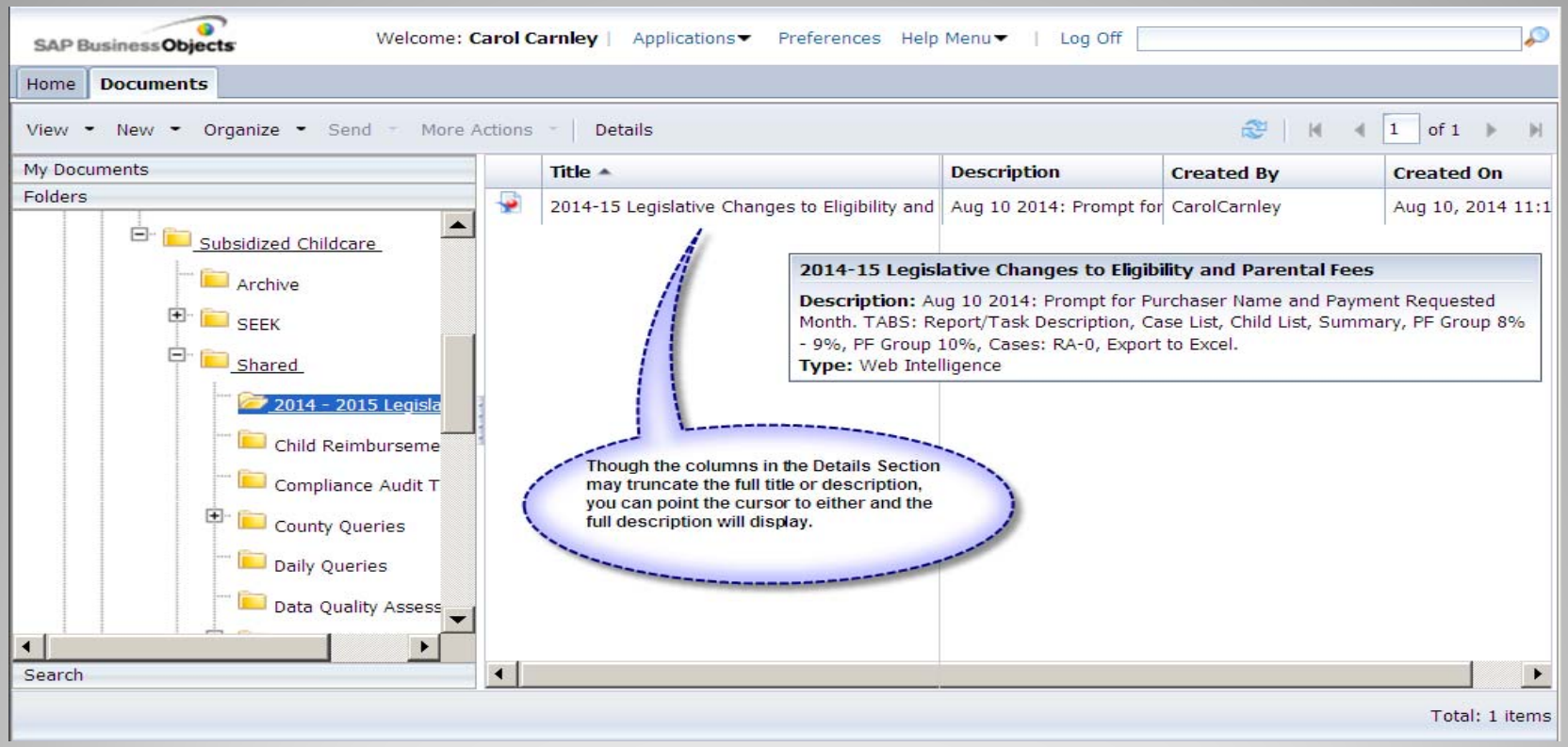
Follow this path:
Public Folders\
DHHS Main Document\
DCD\
to Subsidized Childcare.

Highlight the folder name – and view the content displayed in the Details section of the page - folders and reports listed by title.



Open **Subsidized Childcare** folder, then the **Shared** folder.

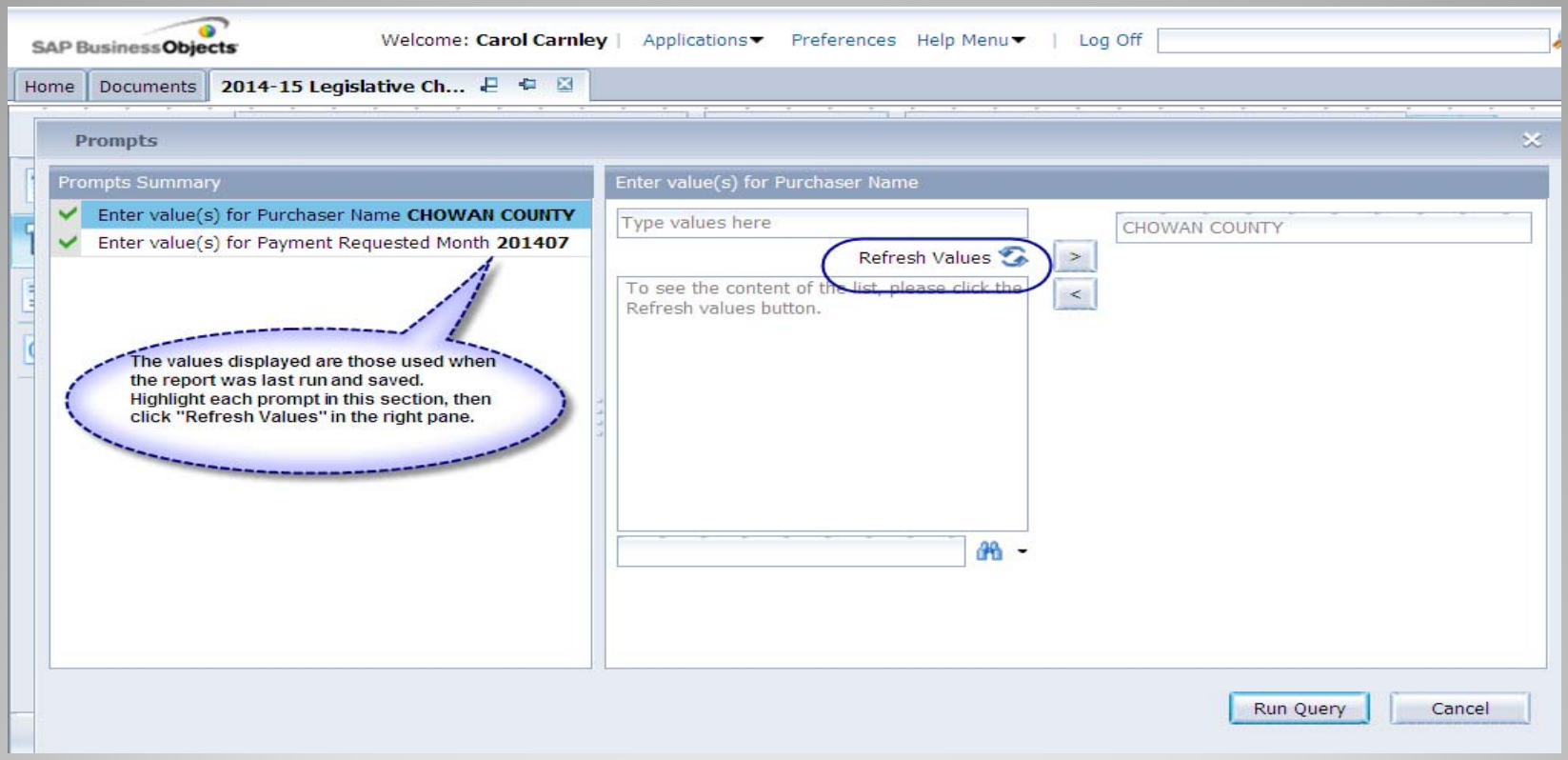
See folder: **2014-2015 Legislative Changes.**



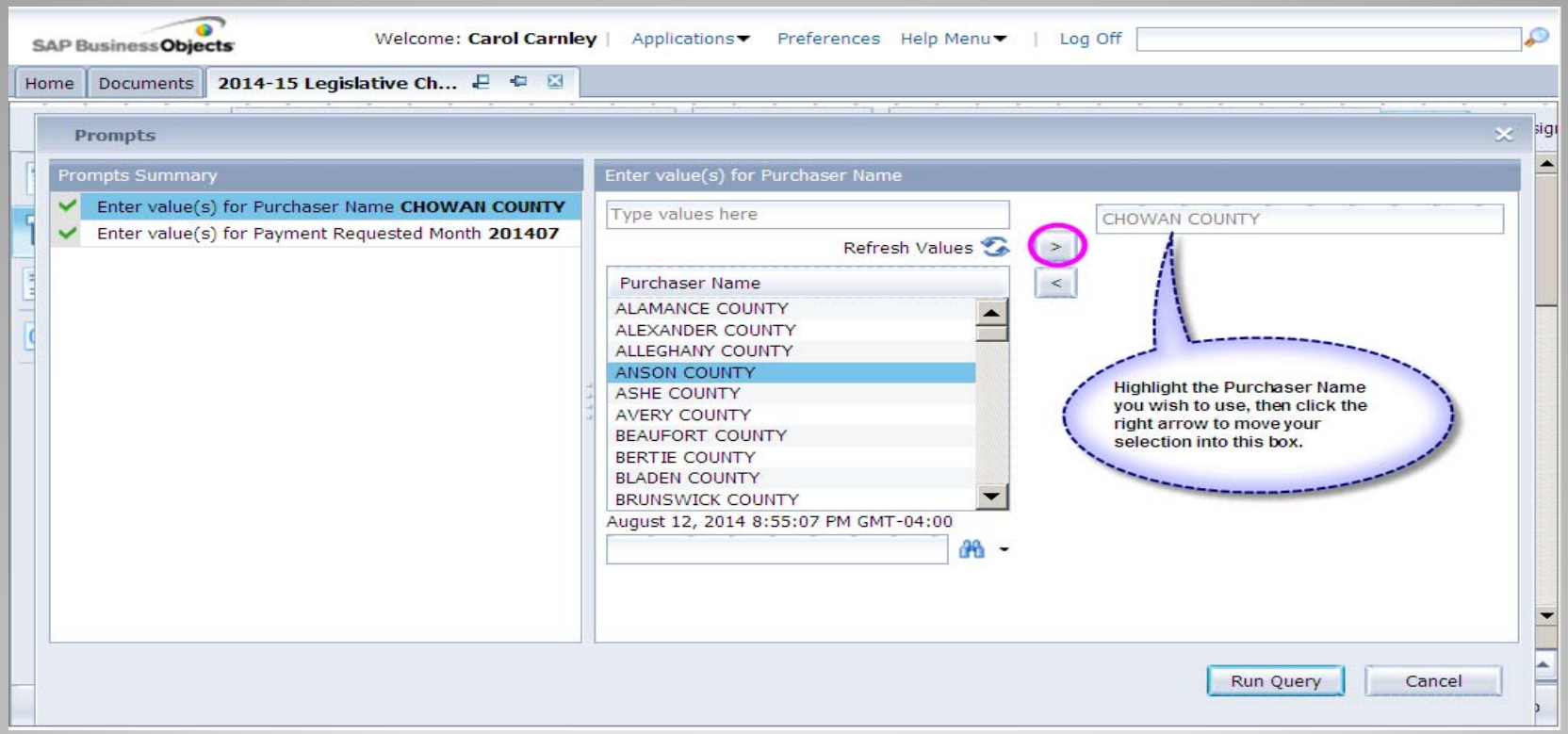
Report ➔ "2014-2015 Legislative Changes - Eligibility and Parental Fees".

This report has been designed specifically to assist county workers identify the families who will be affected by the new parental fee requirements.

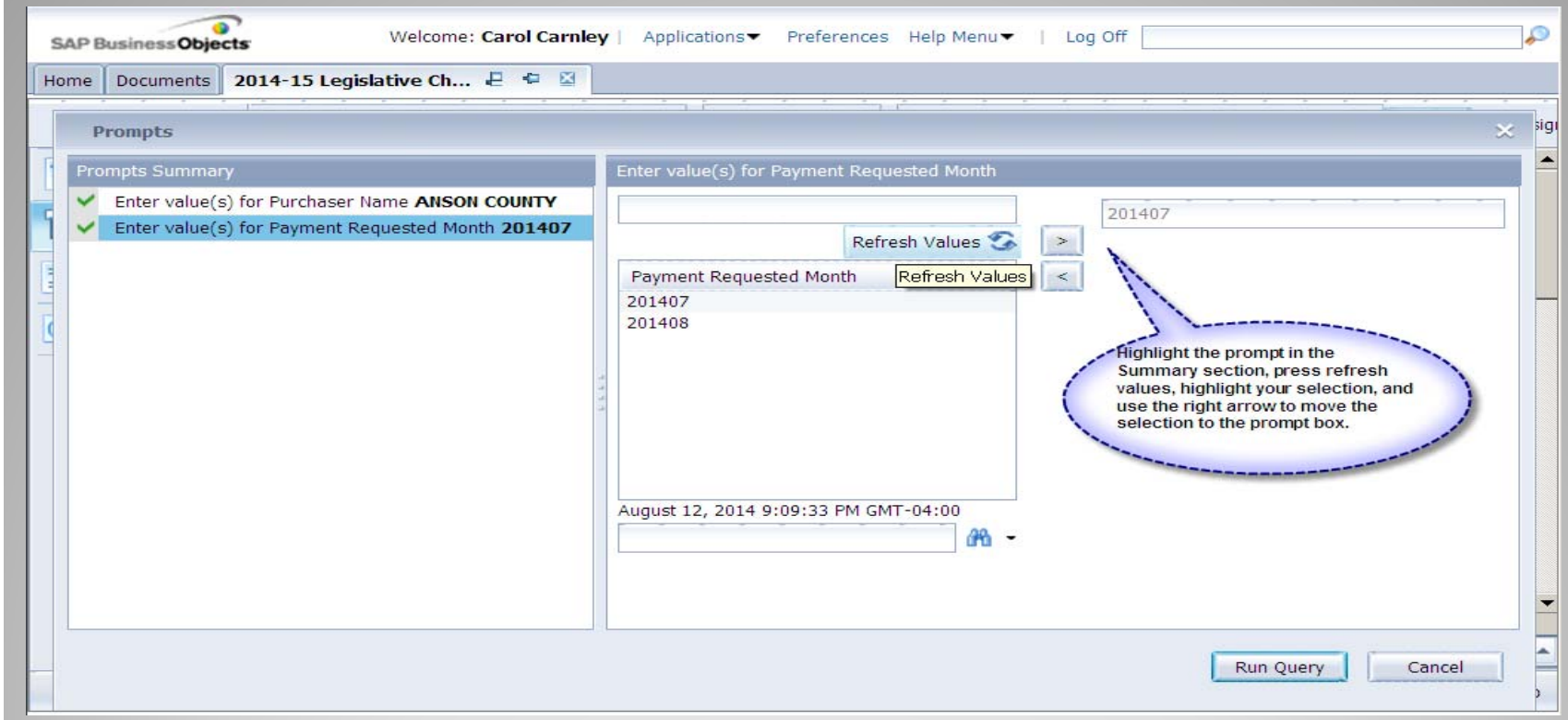
Point the cursor to the title and double click to open.



A prompt window will immediately appear.
The Prompts Summary section shows there are two prompts – one for Purchaser, one for Payment Requested Month.

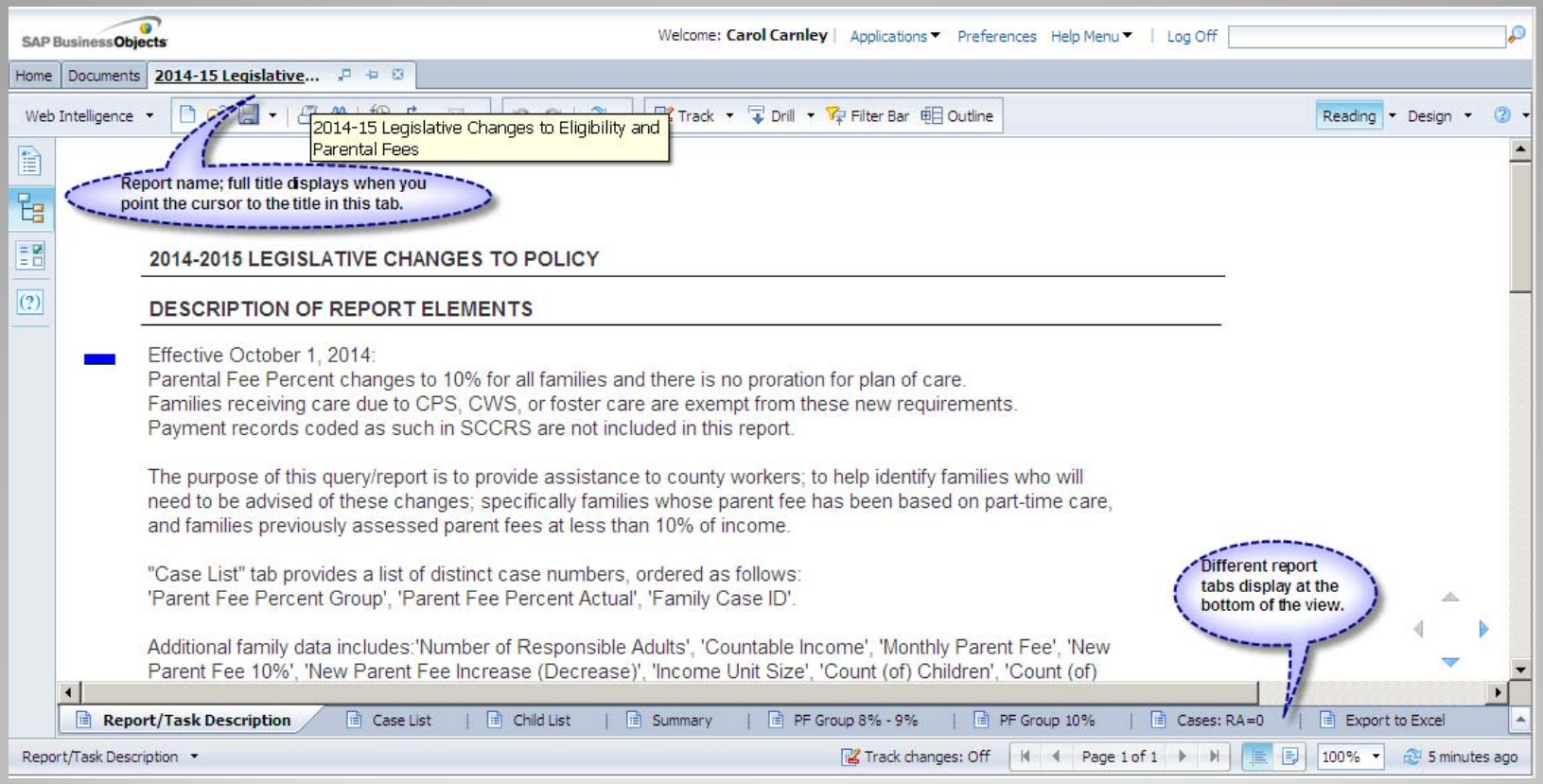


Highlight your choice and double-click the name, or highlight and press the right arrow to move your selection to the prompt box.

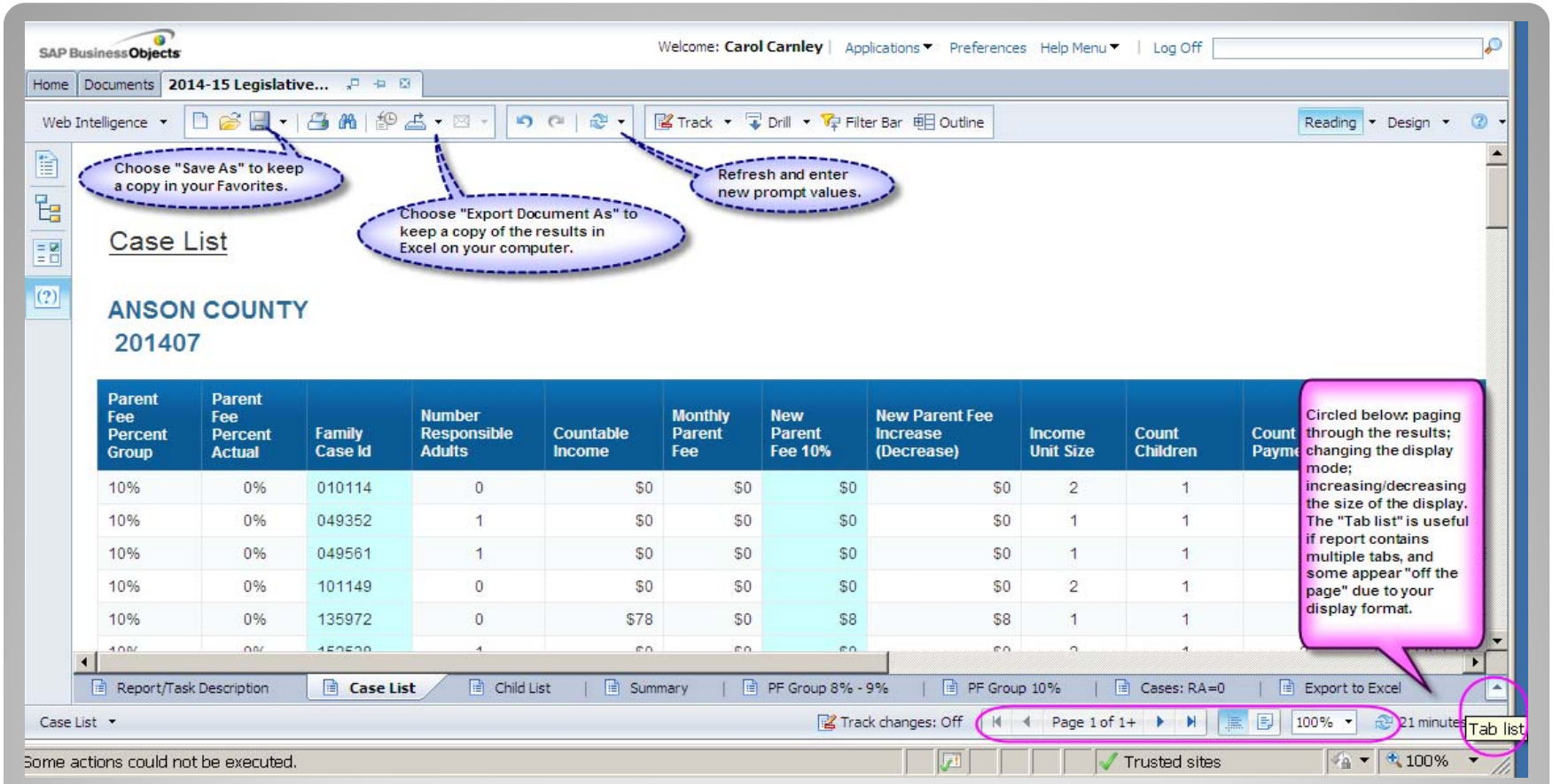


Payment Requested Month is the month for which you are updating payments.
This report collects data from SCCRS daily - so that updated results are available each day.

Because counties perform monthly closeout on different days, the report will give two options when it is run on a day, where any county has already closed out the earlier month. Always choose the earlier month. ~ Click "Run Query" when your selections are made.



Highlight of Data Warehouse features:
The report title appears in a new tab; the user can navigate back and forth between the report and Home or Documents. To the right of the title are 3 small icons. Click the 1st icon, and the report will re-open in a new window, and results can be viewed without browser headers. The 2nd icon will "pin" the report so that it automatically re-opens each time you open DW. The 3rd icon is a small "X" that you use to close the specific report.



Data Warehouse features you are most likely to use when viewing an existing report: save, export to Excel or pdf, refresh with new values; navigate through pages, and view all tabs via the Tab list.

2014-2015 Legislative Changes to Policy

- Data Warehouse Report Content

2014-2015 Legislative Changes to Policy

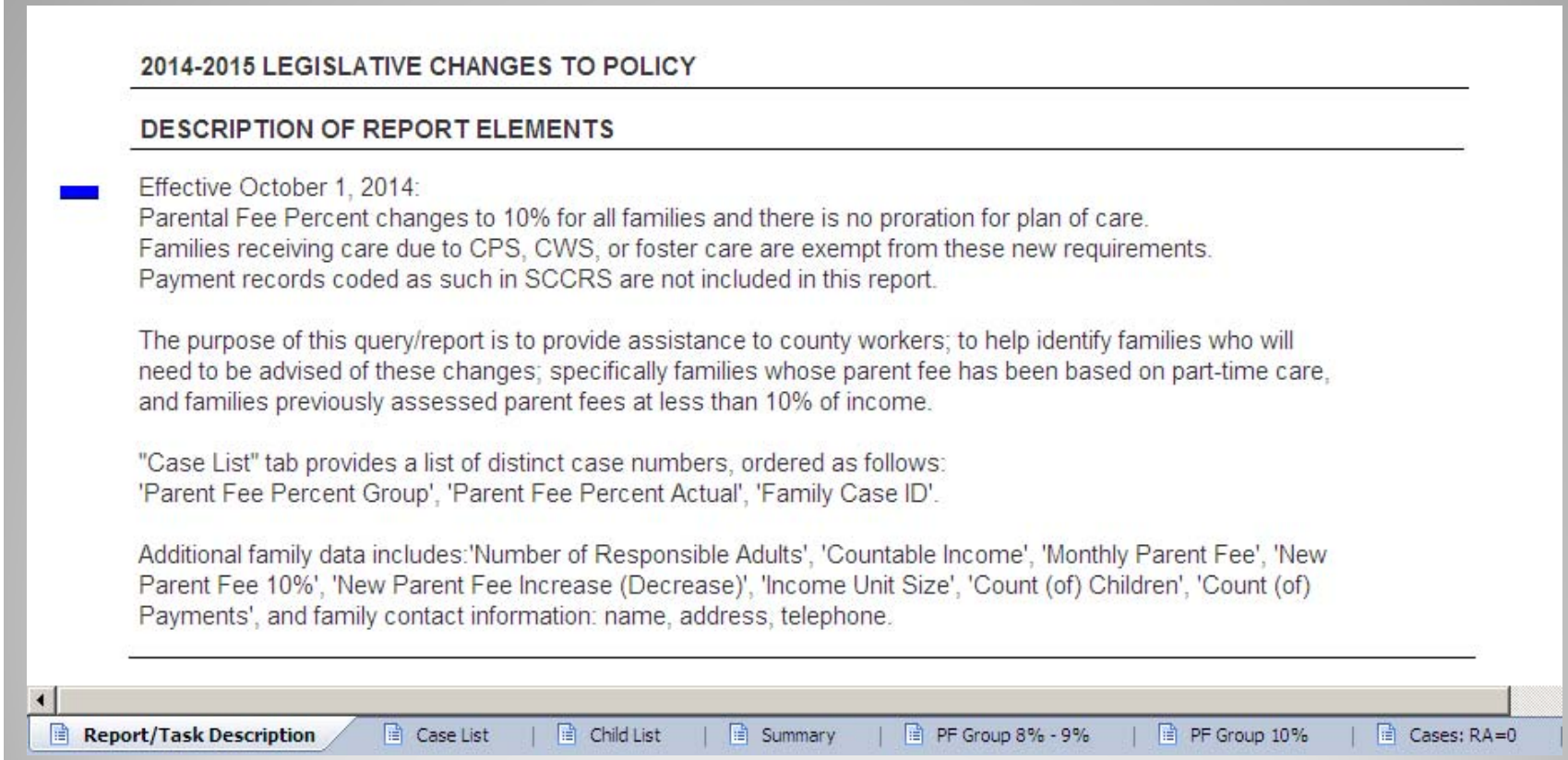
- Effective October 2014
- Parental Fee Percent changes to 10% for all families – regardless of family size and with no proration for plan of care.

- Effective January 2015
- Household sizes are redefined …

2014-2015 Legislative Changes to Policy

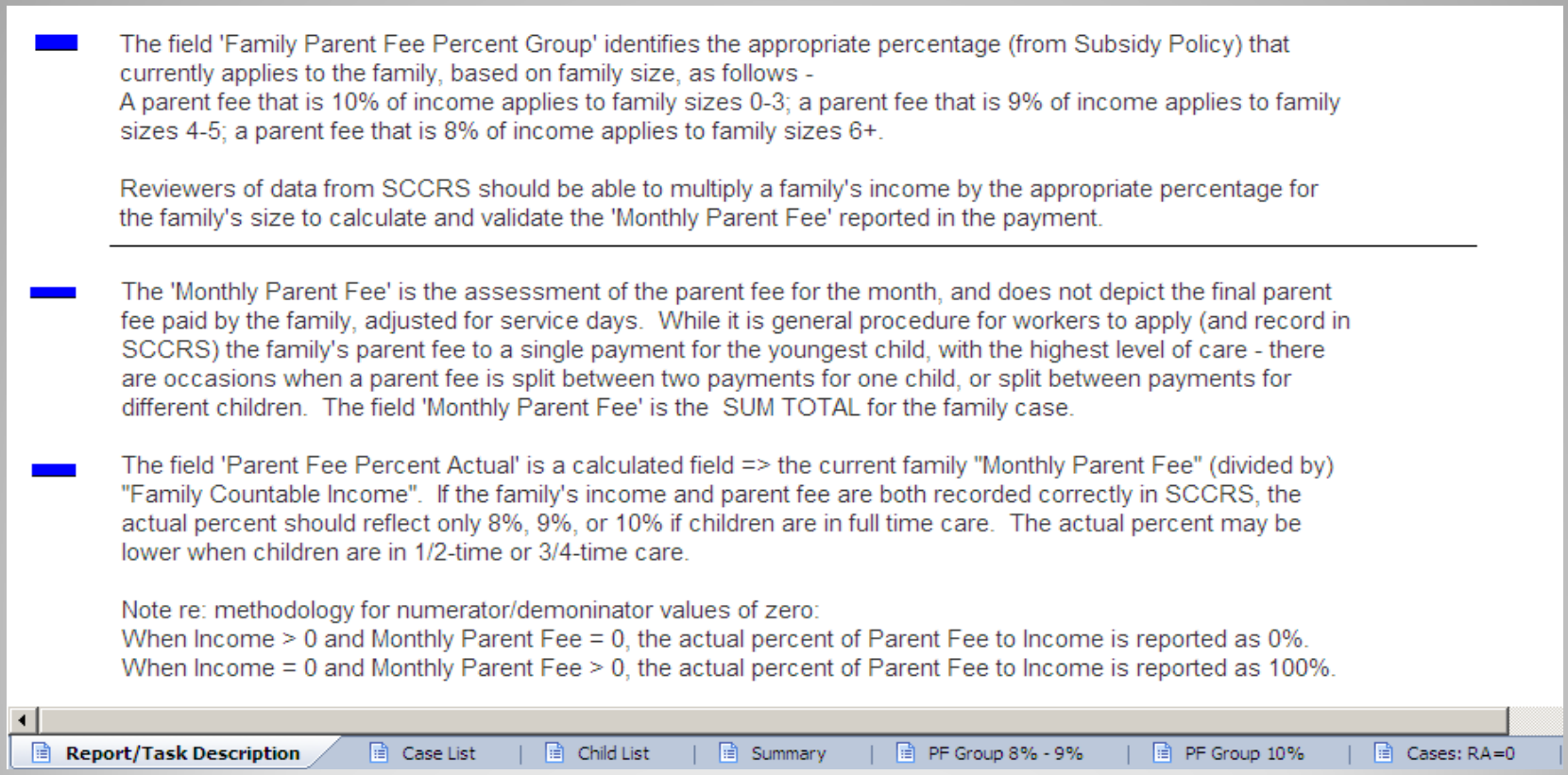
- Data Warehouse query excludes payment records that are identified as follows:
  - CPS
  - CWS
  - Foster Care
  - Client Status 4,5
  - Prior Month Corrections

Tab: Report/Task Description



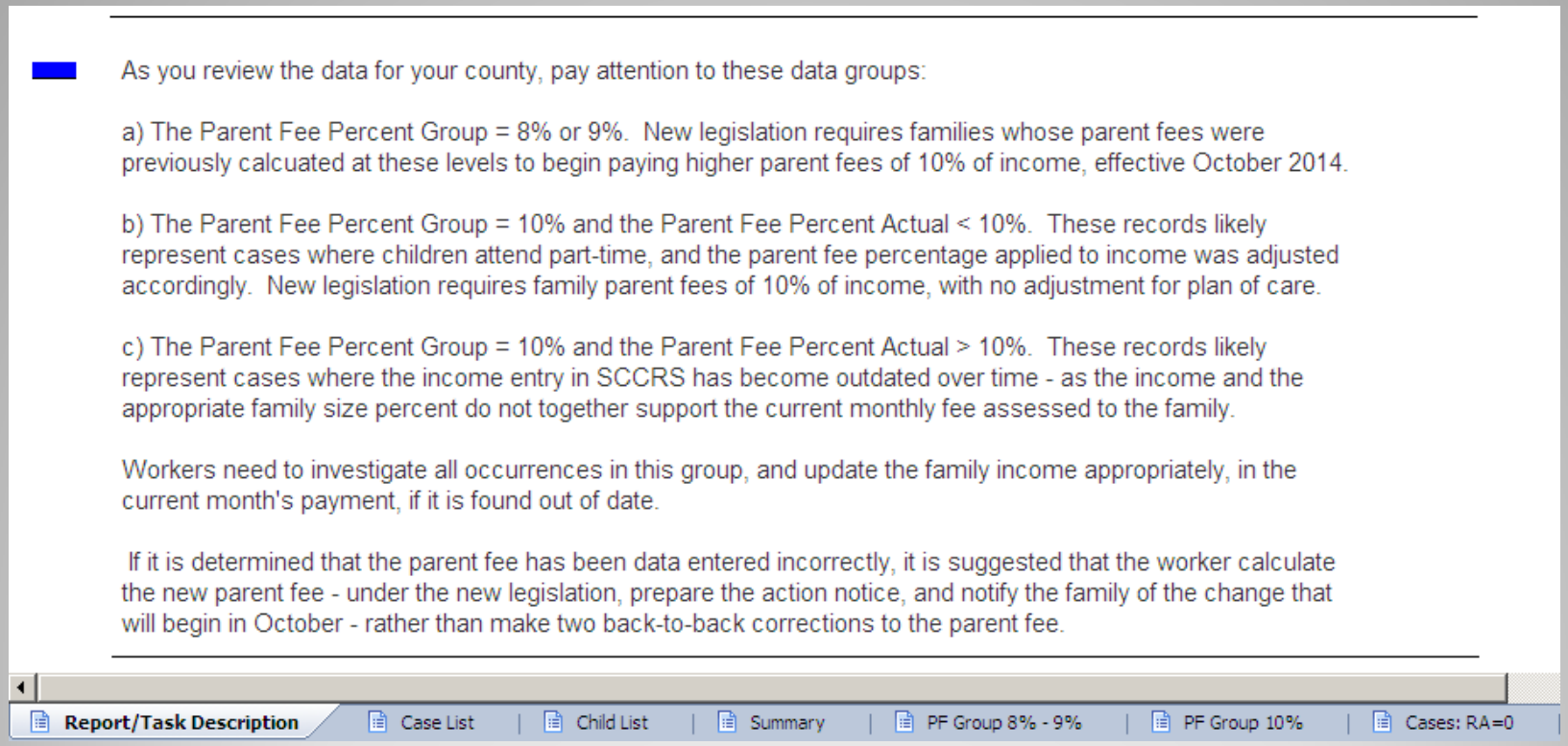
This first tab gives an overview of the report, including some of the standard fields, and descriptions about custom fields created specifically for this report.

Tab: Report/Task Description



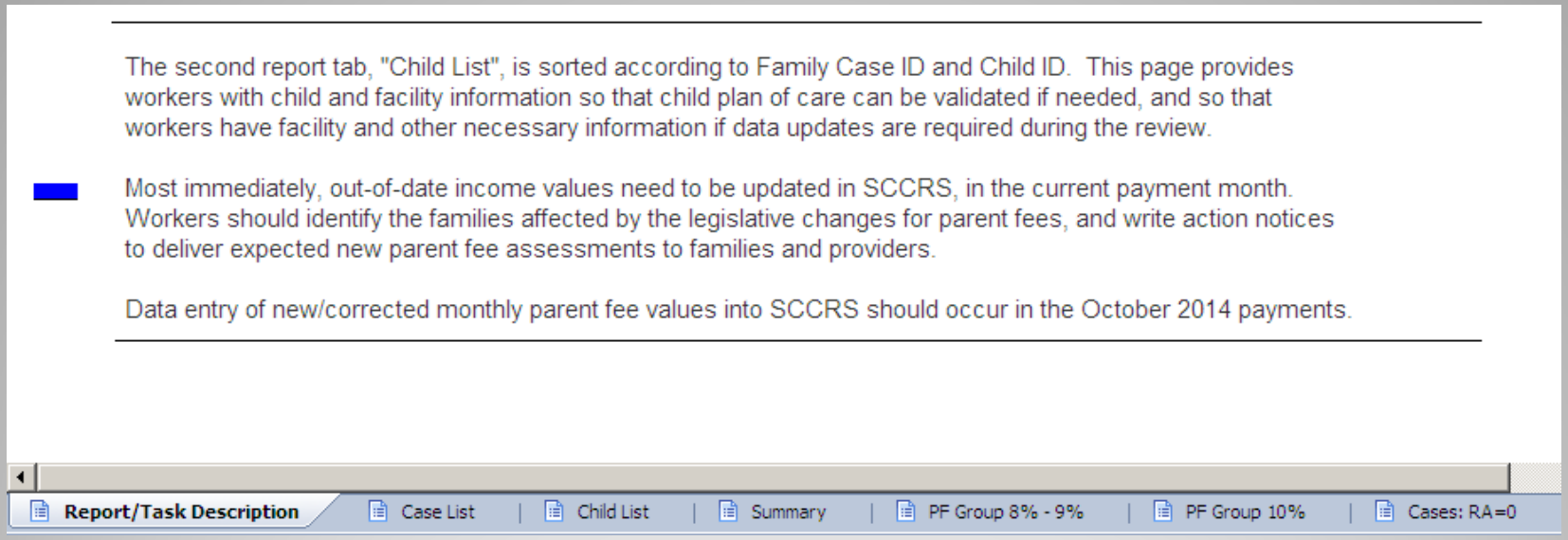
Make note of calculated fields: Parent Fee Percent Group and Parent Fee Percent Actual – and the methodology applied when a ratio involves ‘zero’.

Tab: Report/Task Description



The report groups cases by “parent fee percentage groups” to help you identify families affected by the parent fee percentage changes.

Tab: Report/Task Description



When reviewing family income and parent fee percent data in the Case list, it may be helpful to refer to the Child list for detail - child's level of care and facility placement.

The primary task at hand is to identify families who will pay a higher parent fee, prepare and send action notices and be prepared to update family parent fee in SCCRS in October.

Tab: Case List

Case List

ANSON COUNTY
201407

Parent Fee Percent Group	Parent Fee Percent Actual	Family Case Id	Number Responsible Adults	Countable Income	Monthly Parent Fee	New Parent Fee 10%	New Parent Fee Increase (Decrease)	Income Unit Size	Count Children	Count Payments
10%	0%	010114	0	$0	$0	$0	$0	2	1	1
10%	0%	049352	1	$0	$0	$0	$0	1	1	1
10%	0%	049561	1	$0	$0	$0	$0	1	1	1
10%	0%	101149	0	$0	$0	$0	$0	2	1	1
10%	0%	135972	0	$78	$0	$8	$8	1	1	2
10%	0%	152538	1	$0	$0	$0	$0	2	1	2
10%	0%	156226	1	$0	$0	$0	$0	1	1	1
10%	0%	173110	1	$0	$0	$0	$0	1	1	1
10%	0%	319230	0	$0	$0	$0	$0	1	1	1
10%	0%	339783	1	$0	$0	$0	$0	3	2	2
10%	0%	355570	0	$0	$0	$0	$0	1	1	1

Report/Task Description | Case List | Child List | Summary | PF Group 8% - 9% | PF Group 10%

Case list is ordered by Parent Fee Percent Group (current), Parent Fee Percent Actual (Monthly Parent Fee/Income), then by Case ID.

Note: where Monthly Parent Fee =0, the actual parent fee is also 0%; else where the Monthly Parent Fee > 0 and the Income = 0, the actual parent fee is conveyed as 100%. This should help flag records where data may be out-dated or in error.

Records above - where the family size indicates the parent fee should be 10% of income, and the actual parent fee percent is less than 10% , are examples where the county will want to investigate details.

Tab: Case List

Parent Fee Percent Group	Parent Fee Percent Actual	Family Case Id	Number Responsible Adults	Countable Income	Monthly Parent Fee	New Parent Fee 10%	New Parent Fee Increase (Decrease)	Income Unit Size	Count Children	Count Payments
10%	6%	108285	1	$1,961	$121	$196	$75	3	2	2
10%	6%	003833	1	$863	$54	$86	$32	3	2	2
10%	6%	179240	1	$876	$56	$88	$32	3	2	2

When family size indicates monthly parent fee should be 10% of income, and actual monthly parent fee percent is < 10% ==> these records generally (though not always) indicate a child in part time care. Workers can validate care plan information on the Child list.

10%	10%	177315	1	$1,594	$156	$159	$3	2	1	1
10%	10%	096614	1	$2,715	$268	$272	$4	3	1	1
10%	10%	256287	1	$1,103	$109	$110	$1	2	1	1

Records that indicate 10% in both expected and actual parent fee percent fields are cases that require no notification – these families are current paying at the 10% level, and will experience no change.

Tab: Case List

Parent Fee Percent Group	Parent Fee Percent Actual	Family Case Id	Number Responsible Adults	Countable Income	Monthly Parent Fee	New Parent Fee 10%	New Parent Fee Increase (Decrease)	Income Unit Size	Count Children	Count Payments
10%	24%	271780	2	$742	$175	$74	($101)	2	1	1
10%	24%	258481	1	$443	$105	$44	($61)	2	1	1
10%	43%	268657	1	$662	$284	$66	($218)	2	1	2
10%	49%	259240	1	$317	$155	$32	($123)	2	1	1

When family size indicates monthly parent fee should be 10% of income, and actual monthly parent fee percent is > 10% ==> these records require investigation.

If it is determined that the family income has not been kept up-to-date in SCCRS, workers should make that correction as soon as possible in their current month payments, but make no change to monthly parent fee until October. At that time, it must be properly calculated as 10% of current income, and the family and provider notified of the new expected fee.

Tab: Child List

Family Case Id	Child Last Name	Child First Name	Child Care Service Id	Monthly Parent Fee - Child's Pmt	Service Rate Group Code	Need Code 3 Desc	Scc Facility Id	Client Status Code	Income Unit Size	Countable Income
010114			20056030020	$0.00	R03	100% OF RATE	H0440008	2	2	$0.00
045062			20064579922	$0.00	R03	100% OF RATE	H0410063	2	3	$1,468.00
045062			20064579744	$147.00	R15	100% OF RATE	H0410063	2	3	$1,468.00
049352			20062572380	$0.00	R03	100% OF RATE	H0410013	2	1	$0.00
049561			20060595172	$0.00	V14	100% OF RATE	H0470108	2	1	$0.00
077798			20064582534	$0.00	R03	100% OF RATE	H0470106	2	1	$110.00
077798			20064582446	$11.00	R03	100% OF RATE	H0470106	2	1	$110.00
101149			20056030379	$0.00	R03	100% OF RATE	H0440008	2	2	$0.00
134555			20064579655	$0.00	R15	100% OF RATE	H0410066	2	3	$2,660.00
134555			20064579655	$266.00	R15	100% OF RATE	H0410066	2	3	$2,660.00
134722			20062570747	$0.00	R03	100% OF RATE	H0470108	2	4	$2,097.00
134722			20062570836	$0.00	R03	100% OF RATE	H0470108	2	4	$2,097.00
134722			20062570836	$0.00	R06	100% OF RATE	H0470108	2	4	$2,097.00
134722			20049591983	$189.00	R03	100% OF RATE	H0470108	2	4	$2,097.00
135972			20060596251	$0.00	R14	75% OF RATE	H0470061	2	1	$78.00
142231			20064582623	$6.00	R03	100% OF RATE	H0470061	2	1	$57.00
152538			20064580714	$0.00	R14	75% OF RATE	H0470092	2	2	$0.00
156226			20064586567	$0.00	R03	100% OF RATE	H0410066	2	1	$0.00

Child names blocked for privacy

Report/Task Description | Case List | Child List | Summary | PF Group 8% - 9% | PF Group 10% | Cases: RA=0 | Export to Excel

The Child list is included in the report, to provide the worker with additional details he or she may need to validate if the current monthly parent fee amount is correct. The records are ordered by Case ID, Child ID and include facility, rate group, & level of care.

Tab: Summary

Number Responsible Adults	Count Case
0	10
1	156
2	1

Parent Fee Percent Group	Count Case
10%	126
8%	5
9%	36

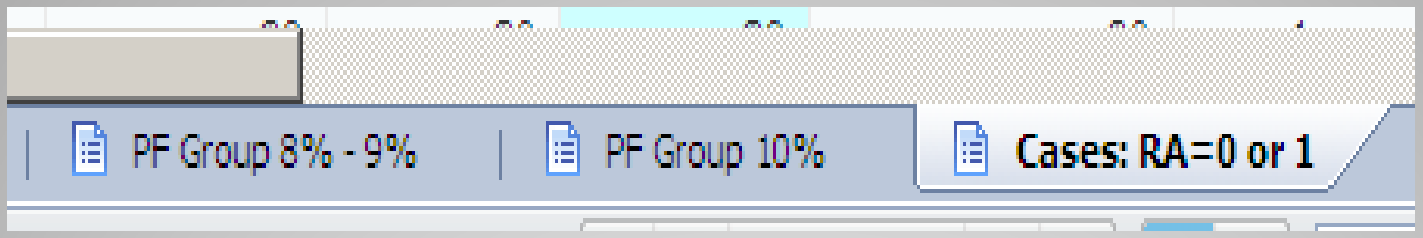
PF Increase	Count Case
No	86
Yes	81

The Summary tab provides quick information charts. The first chart provides the count of cases, according to the number of responsible adults. This will help workers know approximately how many may be contacted for additional information about family definition.

The count of cases by the parent fee percent group gives some idea of the number who must be contacted about parental fee increases (all cases assessed parent fees at 8% and 9%, at a minimum) .

The count by the indicator "parent fee increase" includes not only families whose original parent fee was based at 8% or 9%, but also families in the 10% category whose current, actual parent fee percent reflects children in part time care, or families with incorrectly assessed fees.

Tab: Case List – filter reports



Each of the remaining three tabs: "PF Group 8% - 9%", "PF Group 10%", and "Cases: RA = 0 or 1" are comprised of results that have been "filtered" from the original "Case List".

All families in the "8%-9%" group will need to be advised of the policy changes, as they will all be affected. Of the families in the 10% group – those with children in part time care (where parent fee reflects an actual percentage less than 10%) will need to be advised of the new requirements.

Families in the 10% group where the monthly parent fee reflects an actual percentage greater than 10% should be investigated as to why this is so.

Tab: Export to Excel

- In the upper left corner of the Data Warehouse / SAP Business Objects window, you will see two "tabs" – one each for "Home" and "Documents". Just below these tabs is a series of small icons that represent different functions. As you move your cursor over the icons, the name or description of the function will display.
- Two icons are presented with small "down arrows" next to the icon; the first is "Save", the second is "Export".
- Click the down arrow next to Export, highlight the option "Export Document As" and select Excel or Excel 2007.
- When the Excel version opens, you can save to your own computer for easy future access. Find the "View" option in the Excel menu, and the "Freeze Panes" function. This will allow you to set the top rows (header) so that they remain visible as you scroll through the remaining rows of data.

Summary

- Effective October 1, 2014 – every family with children eligible for childcare services will be assessed a monthly parental fee that is 10% of their countable income; regardless of the number of members in the family, and regardless of the level of care the children receive.

- Payments in SCCRS will continue to be recorded with the appropriate "level of care" (Need Code 3) code = 1, 2 or 3 to indicate the child receives full or part-time care. This designation has no effect on the monthly parent fee.

- The actual parent fee for the month will continue to be adjusted based on service days, just as the final payment to the provider is determined by monthly payment rate and service days.

. . continued

- When child's Eligibility Begin Date is **before** October 1, 2014 – the child remains eligible for the entirety of the eligibility period, as long as the family income is <= 75% SMI for the family size (current income chart). There is no change or impact for children aging from 5 to 6.

- When child's Eligibility Begin Date is **on or after** October 1, 2014 – the child must be evaluated for eligibility individually, and determination is based on his age, 'special needs' designation, and the family income.
  - This applies even if the eligibility review was conducted earlier in September – the Eligibility Begin Date is the trigger.

- Children with special needs and children <= 5 years old: family income must be <= 200% FPL.

  All others: family income must be <= 133% FPL.
- Special Needs: children with an IEP or an IFSP on file.

. . continued

- A "new" child with eligibility that begins on or after Oct 1, 2014 – who ages from 5 to 6 in his first payment month - must have his eligibility determined based on his age as of the date of his eligibility begin date. The child is either 5 or 6 years, depending whether the eligibility begin date falls before his birthday or on/after.

- A "continuing care" child with re-certified eligibility that began on or after Oct 1, 2014 – who ages from 5 to 6 - will be considered "age 5" for the entire month of his birthday month, if his birthday falls after the first day of the month. The family income must meet the "<= 200% FPL" test for the child to retain eligibility.

- In the next following month, when the child is considered "6" – the family income must then meet the "<= 133% FPL" test for the child to retain eligibility.

. . continued

- An enhanced version of this DW report is currently being developed. It should be available soon, and will be saved to the same folder.

- The new version will include additional custom fields to indicate whether a family's income - as currently recorded in SCCRS – is less than, or more than:

  A) the 75% SMI income limit for the family size
  B) the 200% FPL income limit for the family size
  C) the 133% FPL income limit for the family size

- The new information will assist workers with identifying children who may not meet the new income eligibility requirements when the family next re-certifies.

Fmly Size	75%SMI Monthly Income Limit	133% FPL Monthly Income Limit	200% FPL Monthly Income Limit
0	$2,177	$1,293	$1,945
1	$2,177	$1,293	$1,945
2	$2,847	$1,743	$2,622
3	$3,517	$2,193	$3,298
4	$4,187	$2,643	$3,975
5	$4,856	$3,093	$4,652
6	$5,526	$3,543	$5,328
7	$5,652	$3,993	$6,005
8	$5,777	$4,443	$6,682
9	$5,903	$4,893	$7,358
10	$6,029	$5,343	$8,035
11	$6,154	$5,793	$8,712
12	$6,280	$6,243	$9,388
13	$6,405	$6,693	$10,065
14	$6,531	$7,143	$10,742

DW Path to report:

Public Folders:
DHHS Main Documents\DCD\Subsidized Childcare\Shared\2014-2015 Legislative Changes

If you do not see one of the folders as named above in your DW session, please see your county security officer – it may be a "permissions" issue they can assist you with.

If you believe you do not have access to the different icons – such as "save" or "export" – seek assistance from your IT team, or try using a different browser, like Chrome.

Data Warehouse Assistance

I will gladly make time if you are new to
Data Warehouse and like more assistance.
We can a one-on-one, or a small-group session with your co-workers, using Adobe Connect and Data Warehouse for 1-2 hours.

Please email me if you would like to schedule training like this; or if you have question about the legislative report contents.

carol.carnley@dhhs.nc.gov

- URL to access Data Warehouse:
- https://csdw.dhhs.state.nc.us/BOE/BI
- Login with NCID username and password
- Authentication = LDAP