

Meril 2 Tablet COE Guide

COE Submission

- Press the Plus Button [+] to create a COE.
- Once a COE is created, it will have a status of Incomplete.
- Complete all required fields in each section.
- To add a child to the COE, click the New Enrollment Button then enter the child's information – Repeat for each child in the family.
- Ensure that the family reads the consent statements and signs. The date will fill in automatically.
- The recruiter must sign. The date will fill in automatically.
- When finished, press the Submit Button.
- Pressing Submit, prompts you to enter comments in the log. Comments are not required.
- Click OK and the status will change to New – you will no longer be able to edit the COE.
- Please remember that the Verifier will not get it until you upload.

COE Flow

- Recruiter completes the COE, including the family and recruiter signatures, and submits it to the Verifier.
- Verifier reviews the entire COE, and verifies it as Eligible or Rejects it back to the Recruiter.
- Reviewer searches for the children and reviews it for final approval or Rejects it back to the Verifier.
- State Certifier signs and approves the COE or Rejects it back to the Reviewer.
- Each time the Status changes, you are prompted to enter a comment into the log. Comments are required when a COE is rejected.

COE Status

- Incomplete – COE is partially complete and/or is not submitted
- New – All required items complete and COE submitted; Waiting for verification and approval
- Rejected – Problem with COE – Review log for more information
- Eligible – COE has been verified
- Reviewed – COE has been reviewed and student searches have been done
- Approved – COE completed

Ownership

- COEs can be owned by:
 - Recruiter
 - Verifier
 - Reviewer
 - State Certifier
- Only the owner can update the record

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Sending and Receiving COEs

- Under Procedures Menu, select Upload Changes
- System will check for Upgrades – If updates are available, follow the screens as prompted.
- Press the Begin Upload button
- When done, an “Upload Complete” message will display; Press OK
- Press “Close” button to close

Using the Log

- When a user completes a step of the process, it records:
 - User
 - Date and Time
 - Any Comment entered by the User
- Provides a record of the COE process
- Provides communication record between users; must be used if rejected

Navigation Buttons

- [|<] First COE
- [<] Previous COE
- [>] Next COE
- [>|] Last COE
- [+] Add/Create a New COE
- [–] Delete a COE
- [✓] Save Changes (many actions auto-save)
- [✕] Cancel Changes (can't cancel after certain actions that save)
- Note: Changing Screens Saves Changes