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Oakland Fund for Children and Youth

CitySpan User Manual: FY 2011-2012

Index

1) Logging In:

Log onto CitySpan with the same username and password you have been using. You will see the option to go to your 2010-2011 Program or your 2011-2012 Program. The left blue menu tabs for: **Scope of Work (SOW)** and **Progress Reports** are different depending on which Program year you enter. Here is the difference:

Left Menu Tabs	**What it is**
Scope of Work 2010-2011 Progress Reports 2010-2011	Your data for the FY 2010-2011; these tabs will remain available until you close out the 2010-2011 year with OFCY.
Scope of Work 2011-2012 Progress Reports 2011-2012	Includes the existing data entered during the OFCY grant application. All the forms under these two tabs will be unlocked; make adjustments to the data entered here, based on the contract negotiations that finalize your OFCY FY 2011-2012 program plan.

SUMMARY OVERVIEW
Setting up FY 2011-2012 Contract

(If you have multiple contracts, you will need to enter passwords accordingly to access each program)

The second tab on the left side menu is the ‘Scope of Work’ (SOW) tab. Under SOW, your program information needs to be updated including contact information, demographic data, budget and activities.

To get started, go to “OFCY FY 2011-2012” and then go to the **Scope of Work** tab.

2) Cover Page

The Cover Page includes the same data entered during the 2010-2013 Proposal process. If you need to make edits and corrections you must do so now. Updating and submitting your Cover Page will open the budget so that you can make budget modifications accordingly.

- Select **Cover Page**
- Make changes
- Click 'Submit'

3) *Updating* Demographics Form

All programs must update and submit the **Demographics** form. OFCY requires that programs report the 'Total Unduplicated YOUTH Participants' you expect to serve. Completing your 'Scope of Work' requires that you complete a demographics projection first for the participants you expect to serve in the OFCY funded program.

- Select **Demographics**
- Make changes- (Note: Make sure the "Total Unduplicated Youth Participants" is the total number of children & youth you expect to serve throughout FY 2011-2012 program year. Meeting this projection will be based on the number of youth participants you enter into the database throughout the year, enrolling them into activities, and marking them present for attendance. Reminder: when you enter a **new** participant into the database – you select whether the participant is a "youth" or an "adult" (See Searching Existing and Adding New Participants & Staff on page 9).
- Click 'Save' and 'Submit'

Reminder: Each of the demographic categories (Race/Ethnicity, Age, Gender) add up to the "Total Unduplicated Youth Participants" – YOUTH you are planning to serve. The "Total Unduplicated Youth Participants" number that you enter on the Demographics form will appear on your 'Scope of Work Activities' form and will be used to calculate your projected Youth Cost per Unit of Service.

Early Childhood

*Early Childhood programs ONLY: We are collecting data for the Oakland Fund for CHILDREN & YOUTH

- **Parents as Participants:** If your program serves parents/caregivers (directly and they are receiving services) of very young children – include the young children in the "Unduplicated Youth Participants" count – use the "0-5" age category for this purpose – you are serving the child by virtue of serving the parent/caregiver.
- For more details refer to the 2010-2011 Early Childhood Handout. If you need a new copy, please contact Jasmine Dawson at jdawson@oaklandnet.com.

4) Budget

The Budget form includes the same data that was completed during your last contract negotiation with OFCY. If you need to make edits and corrections you can do so now. You may also 'Save and Return' and skip to other areas of the online SOW. **As you complete your Budget, please remember to factor in the recommended 8% reduction in funding from last years award amount.** If you have questions, please contact your Program Officer.

Please refer to your contract attachment, Schedule N, for the City of Oakland's Cost of Living Wage Ordinance.

- Select **Budget**
- Make changes (reminder: 'Total OFCY Funds Request' must be 8% lower than last year's award amount, if you have questions please contact your Program Officer.)
- Click 'Save' and 'Submit'

5) Activities (Scope of Work)

NEW

Calculating activities in the database has been modified from the previous year. The new form will be blank. You will continue to calculate projections and costs after the data has been saved and submitted.

Each section on the Activities form is separated by 'Service Format:' Group Activities, Events and Individual Activities. A list of Service Categories appears under each Service Format. Your strategy (Early Childhood, School-based and Community-Based After School, Summer, Wellness and Healthy Transitions, or Older Youth) determines which Group Activities categories list you will see. Once the Activities form is completed and submitted, the projections for the FY 2011-2012 program year will be locked.

Each OFCY funded activity that your program operates is based on the categories listed. Your agency's numerous activities are rolled into their respective categories and which are then used to determine how your program arrives at projection targets.

To fill out the Activities (Scope of Work) form, you must first determine:

- On average, how many children and youth will be served in each session (by service category)
- How often they will be served (per Quarter)
- On average, how many hours per session (90 minutes = 1.5 hours)

Many of you will likely already know this information as there may not have been much change to your programs. <u>As a reminder, each contract is based on the Activities by category.</u>

To begin:

- Select **<u>Scope of Work</u>**
- Click 'Activities'
- Then begin updating each section on the 'Activities' form. See detailed steps 1-4 on the next page.

*Reminder: the previous fiscal year's activities have been carried over and are based on strategy type (eg. Early Childhood, School-based or Community Based, Summer, Wellness and Healthy Transitions or Older Youth). If these Activity categories do not apply, you may enter data in the 'Other' row for each service category. But first determine that none of the other categories are applicable.

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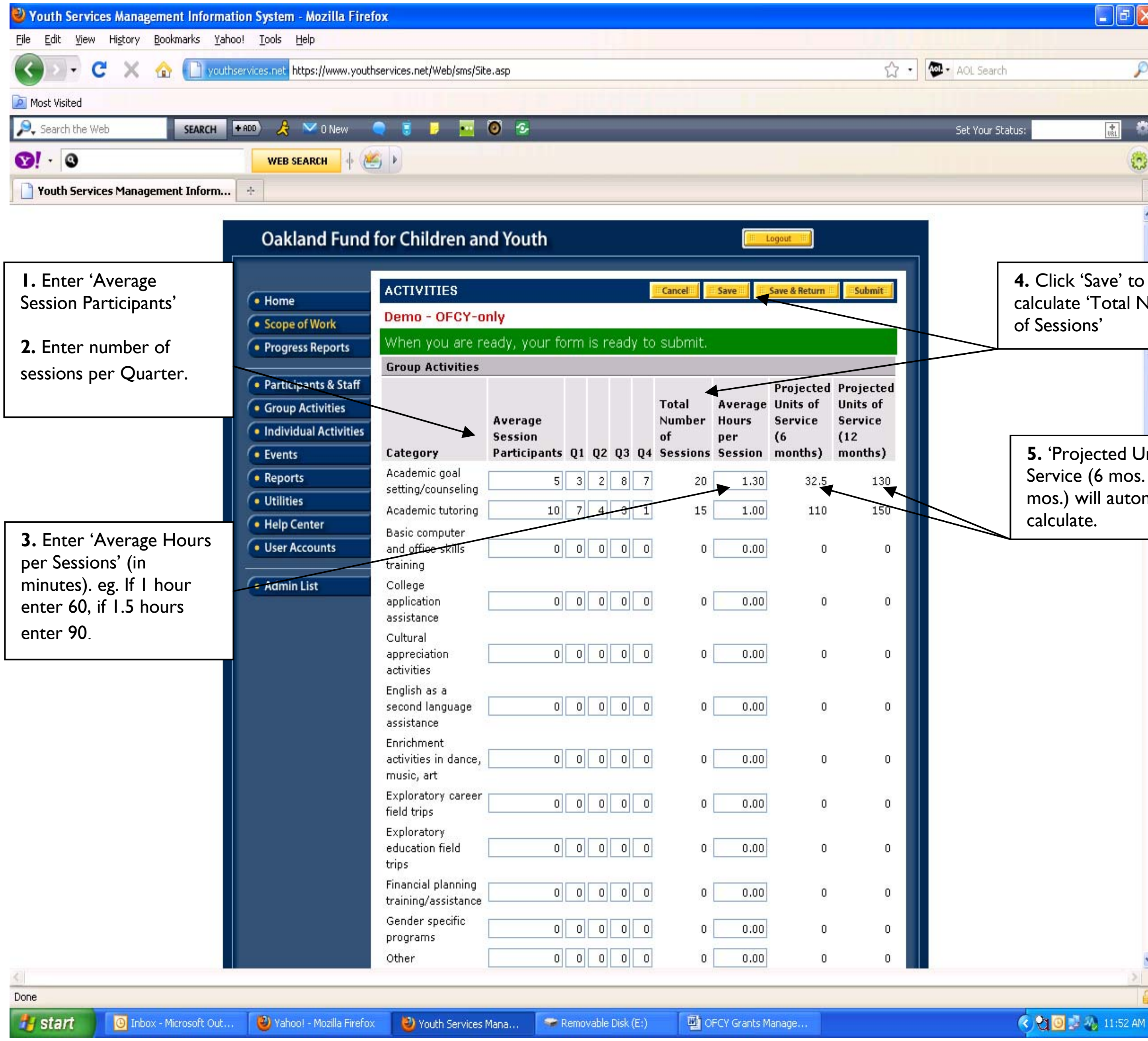
1. Enter 'Average Session Participants'

2. Enter number of sessions per Quarter.

3. Enter 'Average Hours per Sessions' (in minutes). eg. If 1 hour enter 60, if 1.5 hours enter 90.

4. Click 'Save' to calculate 'Total Number of Sessions'

5. 'Projected Units of Service (6 mos. and 12 mos.) will automatically calculate.



Youth Services Management Information System - Mozilla Firefox

https://www.youthservices.net/Web/sms/Site.asp

Oakland Fund for Children and Youth

Logout

- Home
- Scope of Work
- Progress Reports
- Participants & Staff
- Group Activities
- Individual Activities
- Events
- Reports
- Utilities
- Help Center
- User Accounts
- Admin List

ACTIVITIES

Cancel | Save | Save & Return | Submit

Demo - OFCY-only

When you are ready, your form is ready to submit.

Group Activities

Category	Average Session Participants	Q1	Q2	Q3	Q4	Total Number of Sessions	Average Hours per Session	Projected Units of Service (6 months)	Projected Units of Service (12 months)
Academic goal setting/counseling	5	3	2	8	7	20	1.30	32.5	130
Academic tutoring	10	7	4	3	1	15	1.00	110	150
Basic computer and office skills training	0	0	0	0	0	0	0.00	0	0
College application assistance	0	0	0	0	0	0	0.00	0	0
Cultural appreciation activities	0	0	0	0	0	0	0.00	0	0
English as a second language assistance	0	0	0	0	0	0	0.00	0	0
Enrichment activities in dance, music, art	0	0	0	0	0	0	0.00	0	0
Exploratory career field trips	0	0	0	0	0	0	0.00	0	0
Exploratory education field trips	0	0	0	0	0	0	0.00	0	0
Financial planning training/assistance	0	0	0	0	0	0	0.00	0	0
Gender specific programs	0	0	0	0	0	0	0.00	0	0
Other	0	0	0	0	0	0	0.00	0	0

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Entering New Activities or Services for: Group, Event or Individuals

There are three different service activity categories in the OFCY CitySpan database: Group Activities, Events and Individual Activities. Reminder, for each new service your agency is providing through the OFCY funded program select the best category. Each activity should only be entered once, under one of the categories. The process is to first set up the activity – as part of your Activities form (Scope of Work) – then, throughout the year, enter the services provided to show how the agency is meeting the OFCY funded program projections.

Refresher!

Create All New Activities for the new Fiscal Year…

Group Activities

Group Activities are activities or services that involve a group of participants that your program is tracking closely throughout a period of time. A group can be a service that occurs only one time, or it may occur many times, on an on-going basis.

All participants must be entered into the database so they can be counted for attendance.

To view Group Activities:

- Select **Group Activities**
- Click the Add Activity tab to create a new Group Activity
- Enter the Activity Name and Select the appropriate funding source(s)
- Click 'Save & Proceed'
- Proceed through each step of the wizard, clicking 'Save & Proceed' with each step.

Reminder: The projected Units of Service for each group activity will calculate automatically based on your projected number of participants, # of sessions and average hours per session.

Event Activities

Event Activities are activities that do not require individual participants to be entered into the database or individual attendance to be taken. Service activities that meet the following descriptions should be entered as an Event if:

- The activity involves a large number of people (50 or more), such as an assembly;
- Individual attendance is not taken, everyone involved is not entered into the database as an OFCY participant;
- The activity involves an entire school or entire classrooms on a less than regular basis.

To view Event Activities

- Select **Events**
- Click the Add Events tab to create a new Event
- Enter the Activity Name and Select the appropriate funding source(s)
- Click 'Save & Proceed'
- Proceed through each step of the wizard, clicking 'Save & Proceed' with each step.

Reminder: The projected Units of Service for each event will calculate automatically based on your projected average session participants, # of sessions, and average hours per session.

Individual Activities

Individual Activities require that participants are entered into the database so that their individual service time can be entered each time the activity takes place. These activities are services provided to individual participants that your program is tracking closely throughout a period of time and can occur only one time, or may occur many times, on an on-going basis, and are services that occur one-on-one between participants and OFCY funded program staff. Examples include services such as mentoring, case management and counseling.

Reminder: The projected Units of Service for each Individual Service will calculate automatically based on your projected number of participants, # of sessions and average hours per session.

- ➔ **Caution: Never delete Activities from the database.** There is no limit to the amount of historical data that is stored in the system. When the fiscal year ends, go on to the following year by creating new activities. DO NOT delete them or you will lose all of the attendance associated with those activities.

NOTE: Making Changes to the Scope of Work
Once your Activities form (SOW) has been submitted, you CANNOT make changes to it or add new categories without talking to your Program Officer at OFCY. The 'Activities' form is LOCKED in the database once it is submitted because it is intended to represent your contracted agreement ~ which is generally not to be altered once your contract has been finalized.

If your Program Officer agrees that new categories should be added to your 'Activities' form the Program Officer will need to UNLOCK this section of the database in order for you to make changes. This also includes making changes to projections for numbers of participants to be served.

You can still make changes and edits to your activities that fall under the categories. This data will not be locked.

6) Searching Existing and Adding New Participants & Staff

Participants and Staff are being carried over from the previous year. First, search the database **before** adding a new record.

Searching:
1. Select **Participants & Staff**
2. Enter the name of the participant or staff. Searches can be made using the first or last name or the Client ID or by viewing by 'View By Type: Youth/Adults/Program Staff'
3. Select participant and edit data accordingly
4. Click 'Save' and return to 'Participants & Staff'
5. To repeat follow steps 1-4.

Adding New:
1. Select **Participants & Staff**
2. Click 'Add Person' (yellow tab)

3. Select 'Person Type' : Youth Participant (Anyone age 20 or younger); Adult Participant; Program Staff
4. Enter: First and last name, then 'Add Person'
5. Click 'View Record' – Complete the registration (important data to input: DOB, Grade, Zip Code (Oakland), and Ethnicity

   If Adding Staff: Follow steps 1-4. No more information is required for OFCY only programs; OUSD sites have additional required information for staff.

6. Click 'Save' and return to 'Participants & Staff'
7. To repeat follow steps 1-6.

➔ **Caution: Never delete program Participants or Adults or Staff from the database.** If participants, adults or staff leaves the program, make them inactive, but DO NOT delete them or all of the services they provided will be deleted.

INACTIVE STATUS

Making Youth or Adult Participants Inactive:

1. Select **Participants & Staff**
2. Click 'View Youth or Adult Participants'
3. Select the Participant
4. From 'Participant's Intake' tab, next to Status, mark the 'Inactive'
5. Click 'Save' and return to 'Participants & Staff'
6. To repeat follow steps 1-5.

Making Staff Inactive:

1. Select **Participants & Staff**
2. Click 'View Program Staff'
3. Select the Staff
4. From 'Form 1' tab, next to Status, mark the 'Inactive'
5. Click 'Save' and return to 'Participants & Staff'
6. To repeat follow steps 1-5

Enrollment

Enrolling Participants

1. Select **Group Activities**
2. Under 'View Activities', select the 'Group Activity' for enrollment
3. Click 'Enrollment' tab
   (A schedule for the group will need to have been created before enrollment can be entered. Select either 'Group Activities', 'Events' or 'Individual Activities'. Select the activity, under 'General Tab', and under 'OFCY Projections' click 'Edit')
4. Click 'Enroll Participants' (yellow tab)
5. Enter the name of the participant and select 'participant type' (youth or adult participant, program staff, OUSD Students or Non-OUSD Students)
6. Click 'Find Person'
7. Check 'Enroll' box
8. Click 'Next Step'

9. Enter 'Enroll Date' (participants will be enrolled according to the dates indicated. Dates will automatically appear as the first date scheduled for the group – you may change these dates per participant if participants started at later dates)
10. Click 'Next Step'
11. Click 'Done'
12. To repeat follow steps 1-11.

Reminder: If any of your participants have already been enrolled in other groups that meet at the same time as this group, you will see **"Schedule Conflicts"** for these participants. YOU MAY SELECT THE PARTICPANTS TO OVER-RIDE THE CONFLICT if you do in fact want the participants to be enrolled in more than one activity at a time (participants may have the option of choosing from different activities on a given day)

Enrollment History

- To **drop this participant** from this activity, select the "Edit" link and enter a drop date. This action will remove attendance records that belong to this participant for this activity that are dated after the drop date.
- To **change the enrollment start date**, select the "Edit" link and enter an alternate date. This action will remove attendance records that belong to this participant for this activity prior to the start date.
- To **undo the drop** of this participant, select the "Edit" link and remove the drop date. This will only work on the latest enrollment period.
- To **completely remove a participant** from this activity and **delete all attendance records** associated with this participant, select the "Un-enroll" link. Note: You should only un-enroll participants if the participant was mistakenly enrolled in this activity. When a participant is rightfully enrolled and only attends a portion of this activity, it is strongly recommended that you use the "Drop" function to maintain their attendance data.

Dropping Participants

1. Select **Group Activities**
2. Click the activity under the 'View Activities' tab
3. Click 'Enrollment' (yellow tab)
4. Find the participant*
5. Click 'Edit' (on the right of the participant's name)
6. Under "Action", click Edit
7. You may enter a Drop Date here and Save (reasons are optional - not required)
8. Click 'Return'

*To 'Bulk Drop' follow steps 1-4 above. You may also 'Bulk Drop' participants, by selecting 'Bulk Drop.' Enter a drop date that does not precede dates with valid attendance data otherwise this will result in the deletion of the data. You may select 'All' or select one participant to drop.

Re-enrolling Participants

1. If the participant Re-enrolls back into this activity at a later date, you may come back to the page by following steps 1-6 above, enter a "Re-enrollment Date", and under "Action" select Re-enroll

Reminder: Participants will only appear on Attendance taking rosters for dates that they are enrolled.
NEVER DELETE participant attendance! If participants leave a group, use the Drop Date feature described above, or don't take their attendance for days they are not present.

Attendance

Taking Attendance ~ By Individual Group:

1. Select **<u>Group Activities</u>**
2. Click the 'Activity' under the 'View Activities' tab
3. Select the Group you will be taking attendance for
4. Go to 'Attendance' (yellow tab)
5. Select the Date
6. Mark participants present (pres.) or absent (abs.). (Note: There is now an 'All Present' or 'All Absent' feature)
7. Click 'Save' and 'Return'

Taking Attendance ~ By Date:

You can take attendance ONE TIME per participant, per day and for every group activity that they are enrolled in on that date, the system will mark them present automatically.

1. Select **<u>Group Activities</u>**
2. Click 'View by Date'
3. Select the Date
4. Mark participants present (pres.) or absent (abs.)
5. Click 'Save' and 'Return'

Reminder: If participants attend activities but skip one to leave early, you can mark him/her absent for that date. If in your program, all participants essentially attend every activity they are enrolled in as long as they are present that day, this above attendance taking feature will reduce the data entry demand.

Units of Service for <u>Groups</u> are calculated based on participants being marked **<u>present only</u>**. The following **DO NOT** affect your data:

Participant is enrolled in a group, but:

- No attendance taken (there is no mark for present or absent)
- Marked absent

OFCY calculations are based on positive attendance data, participants marked present only.

For <u>Event</u> Attendance

1. Select **<u>Events</u>**
2. Click the 'Event' under the 'View Events' tab
3. Go to 'Attendance' (yellow tab)
4. Click 'Add'
5. Enter the Date of the Event (Visit)
6. Enter the Total Attendees (the number of people that were present)
7. First Time Attendees (the number of people present that were new to this event. If it is a one time only event, Total Attendees # will be the same as First Time Attendees)
8. Total Staff Attendees (number of OFCY program funded staff present that conduct the event)
9. Enter Time Spent (the total minutes the event lasted. Ex.1 hr = 60 min)
10. Click 'Save' and 'Return'

For <u>Individual Activities</u> Attendance

1. Select **<u>Individual Activities</u>**

2. Click the 'Individual Activity' under the 'View Activities' tab
3. Go to 'Attendance' (yellow tab)
4. Click 'Add'
5. In Step 1, select the activity (the selected activity may default)
6. In Step 2, select the staff conducting the activity, date of visit, and minutes*
7. In Step 3, find the participation (search by viewing by last name initial or by finding their name or entering Client ID)
8. In Step 4, click 'Add Record' or 'Add Record and Hold Name' [Note: 'Add Record and Hold Name' if you want to enter multiple contacts for this participant without Finding Person over again]
9. Add Record
10. Select 'Click here to Edit Details'
11. Enter 'Individual Visit Notes' (optional)
12. Click 'Return'

*If you don't see the Staff person assigned to the activity, click 'Cancel' and then follow steps 1-6 on 'Searching Existing and Adding New Participants & Staff' on page 9.

Reminder: Staff must also be assigned to an activity in order for their name to be found.

7) Maintaining User Accounts

Each OFCY grantee should have one person who is in charge of User Accounts. This is the only person that needs to have access to the 'User Accounts' tab located at the bottom of the left blue menu.

When the person in charge of User Accounts is logged on, this person can create new database users for your program and manage existing users' access levels.

➔ **Caution:** You do not want multiple people to have access to User Accounts. When a person has access to User Accounts, they can create new users, change passwords for existing users or delete users.

1. Go to 'User Accounts'– left blue menu

   - **Current User –** The person who is currently logged on
   - **Signatory –** The only person for your program that can Sign Off to submit your quarterly report and invoice. See Notes on Signing Off and Submitting Quarterly Reports and Invoice on page 15.
   - **Power Users –** People who are users of your OFCY database AND have access to the User Accounts tab (when they log on, they have the User Accounts tab available)
   - **Regular Users –** People who are users of the database and do not have access to User Accounts.
   - **Attendance User –** People who only have access to individuals and group and events.

2. To make edits, Update the list of Power and Regular Users – (if necessary) Click on each name and confirm each users' access levels to make edits:

   ➢ **Contract Management –** offers access to the tabs Scope of Work and Progress Reports, see levels below.

   ➢ **Service Management –** offers access for service data entry (for attendance and events/activities).

		Power Users	Regular Users	Current User	Attendance User	No Access Users
Contract Management	**Scope of Work**	✓	✓	✓	✗	✗
--------------------	**Progress Report**	✓	✓	✓	✗	✗
Service Management	**Service Data Entry**	✓	✓	✓	✓	✗
	User Accounts	✓	✗	✗	✗	✗

➔ **Caution:** You do not want people to have access to the database that are no longer staff. If people no longer need access to the database – give them <u>No Access</u> for both Contract Management System and Service Management System.

8) Quarterly Reports & Invoice

This section will cover notes on signing off and submitting Quarterly Reports & Invoicing. For each quarter of the fiscal year, you will need to submit a report and invoice.

Quarterly Reports

Refresher!

Go to "Progress Reports" (left blue menu)

There are four sections to complete:

Narrative: Enter a response for each of the narrative questions listed. You can type your responses in a Word document, then copy and paste into the text box when you're done to avoid losing information should you get timed-out. You will need to enter a response for every question before you can submit the Narrative section. You can Save what you've entered and return to the section later at any time. Save your work! Press 'Submit' when you are done entering narrative responses. Once you submit, you cannot go back to edit your narrative section.

Stats: Make sure you press 'LOAD/REFRESH DATA' whenever you visit the Stats page in order to see the current status of your data. On the Stat report, you will see a summary of the data you have entered ***within*** the reporting period only, that is: the quarter you are viewing. Services that occurred outside the date range of the quarter you are viewing will not be included in the Stats report. For each service, you will see the current status of **Actual Units of Service** provided for the quarter, in relation to the **Projected Units of Service** for the quarter. Make sure all the services your program has provided have been entered so that your **Actual Units of Service** is accurate. If not, go back and finish entering service data. Come back to the Stats report, press 'LOAD/REFRESH DATA' and check your **Actual** status again. Once done, press 'Submit'. Once you submit, your Stat report is locked and will no longer update.

Invoice

Enter all expenses incurred, per line item, for this quarter. You must press 'Save' each time you want your data to update on the invoice – calculations occur based on what you've entered only when you SAVE. You can update information and Save as often as you want, until you Submit. Once you submit, you cannot go back to edit your invoice.

Signature

Signoff: Signatory does not need to be logged in, to signoff. Any user can signoff, using the Signatory accountholder's password as the e-signature.

Who is the Signatory for our program?

Go to: "User Accounts" (left blue menu), you will see the designated Signatory for your program. You can only change your program's Signatory by contacting OFCY directly before CitySpan can make the change.

What is an Electronic Signature?

The e-signature is the Signatory accountholder's password.

Match Report

Third Quarter Match Reporting Requirements

Third Quarter Report and invoice must include record of the matching funds your OFCY program has utilized.

1. Go to "Progress Reports" (left blue menu)
2. Under "**Quarter 3"**, click on **Match**
3. Enter "Source" (source of your matching funds)
4. "Amount" (amount of matching funds your OFCY program has received from the source)
5. Click Add to update your Total Amount and to create an additional Service Record
6. Repeat until all of your match sources and amounts are entered - Save
7. When done (your minimum match requirement should be met), click Submit

Notes: CitySpan will only unlock individual Progress Report forms if the Quarter has not yet been signed. If it is signed, you must ask for OFCY approval. If you have questions, ask your Program Officer.

9) Data Security & Confidentiality

The City of Oakland and CitySpan have a Data Sharing Agreement. A summary of important points from this agreement are listed below:

1. The City of Oakland does not have access to individually identifiable information for anyone. OFCY City staff can only access reports that summarize the service activities that have been entered into the database; these reports do not include information that can identify participants.
2. The OFCY evaluators do not have access to individually identifiable information for anyone. The OFCY evaluator will receive only data that has been stripped of any identifying information.
3. OFCY programs have access to a limited set of student information from OUSD, and only for students enrolled in their program.
4. Each Grantee owns their data. Neither the City of Oakland, nor CitySpan, owns the data.
5. CitySpan provides for the protection of confidential information with the most advanced security technology available, and meets all applicable rules, regulations, and laws, including but not limited to, Federal Privacy Regulations (45 CFR Part 46, 45 CFR 160 and 164 [HIPAA Regs.], 42 CFR Part 2, etc.)

10) Contact Us For

Basic Assistance:
Jasmine Dawson at OFCY, via email: jdawson@oaklandnet.com or 510-238-2209

OFCY Programmatic Assistance:
Terry Hill at OFCY, Ph: 510-238-6380 or email: thill@oaklandnet.com

CitySpan Database & Technical Assistance:
CitySpan Help Desk at 866-469-6884 (toll-free); Mon-Fri, 8AM-5PM, Pacific Time