Cityspan User Manual

Cityspan training resources available at http://www.ofcy.org/cityspan/

Cityspan Help Desk: 866-469-6884 (toll-free) Mon-Fri, 8am-5pm
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INTRODUCTION

Welcome to the OFCY Cityspan User Manual. This guide is designed to help Cityspan users and staff reporting and managing the OFCY grant-funded program to understand the system for data entry and reporting.

Cityspan is an online data management system used to monitor your grant performance and manage grant payments. All OFCY-funded programs have a unique Cityspan account that you will use to enter clients, track their participation in activities, manage your program budget and invoice for payment, and provide quarterly reporting on progress.

While the guide provides an overview for many of the critical functions and features, it does not provide a complete overview on all of the Cityspan features or OFCY grant management responsibilities.

For more information on Cityspan, please visit www.ofcy.org/cityspan . We also encourage users to utilize the Help Desk features and contact their staff directly for assistance by calling 866-469-6884 Monday through Friday, 8am-5pm. OFCY also offers Cityspan trainings annually in the City of Oakland computer labs; contact Scott Kim for more information. For assistance with your grant contract, contact your OFCY Grant Manager directly. OFCY staff contact can be found at the end of this guide.
GETTING STARTED

1) Log in to your Cityspan account at https://ofcy.cityspan.com. If you do not know your user name and password, please contact your supervisor or the Cityspan Helpdesk at 866-469-6884 (toll-free).

2) Select the fiscal year you want to work in from the dropdown list located in the top right corner. Cityspan will usually default to the current fiscal year.
   • Generally, only Power Users can select between various fiscal years. The only exception are regular users whose user account is linked to multiple OFCY grants.

3) Click on the program you want to setup.
The Scope of Work forms are the basis of the grant agreement in which you enter with the City of Oakland. The forms below are locked except for the Cover Page. To make any changes, you must go through a modifications process (page 7) and get pre-approval from your grant manager before making actual changes in Cityspan.

- Cover Page
- Demographics
- Budget
- Activities

**Scope of Work - Cover Page**

Please review and complete this page to make sure that it accurately describes your program. Be sure to update your Cover Page as needed during the program year to accurately reflect the key staff managing your OFCY-funded program. OFCY uses the contacts listed in the Cover Page for all ongoing communication and relies on programs to maintain accurate and up-to-date contacts through the Cover Page.

The following fields cannot be edited by the grantee. If any of the information has changed, please email your Grant Manager with the updated information.

- Program Name
- Strategy
- Are you using a fiscal sponsor?
- Designation of Applicant Type
- Collaborative Partners (if applicable)
- Program Summary that accurately and concisely describes your project.

The following fields can be edited by the grantee as needed by unlocking the Cover Page. After edits have been completed, please submit the Cover Page.

- **Executive Director** - The Executive Director must serve as the Signatory that will sign the grant agreement and approve the quarterly progress reports. If there is a fiscal sponsor, the Executive Director of the fiscal sponsor should be listed.

- **Contract Representative** - This individual must be an employee of the contracting agency/fiscal agency and have the authority to negotiate scopes of work, budgets, and complete contracting documents. This individual will receive all OFCY updates and information and has the responsibility to forward the communication to the appropriate program staff.
• **Program Representative** - This individual is responsible for program implementation and is able to answer any program specific questions. This individual will receive all OFCY updates and information and has the responsibility to forward the communication to the appropriate program staff.

• **Mailing Address for OFCY Invoice Checks** – Please list the mailing address, including the person whom it should be directed to, where OFCY checks should be mailed.

### Scope of Work – Demographics and Operations

The Demographics form projects the total number of clients a program projects to serve during a City of Oakland fiscal year July 1st to June 30th. For programs funded in the **Summer Programming** strategy and **Career Awareness and Employment Support-Summer Youth Employment** sub-strategy, the period is June 1st to August 31st. This is the annual enrollment target a grantee will be measured against.

Only include participants that will be enrolled in your program activities. Your program should have an application on file for all enrolled participants including first name, last name, date of birth, zip code, race/ethnicity, gender and an OFCY Release of Information giving consent to being entered and their participation tracked in Cityspan and agreeing to participate in an annual evaluation of the funded program by the City and/or its evaluation consultant.

Programs are required to enroll all clients into the Cityspan database system. All individuals (youth and adults) enrolled as participants in the program will be required to provide First Name, Last Name, Date of Birth, Gender Identity, Race/Ethnicity, and Residential Zip Code to enter into Cityspan. Enrolled clients are required to provide (and their parent, guardian, or other legally authorized representative if a minor) a Release of Information Form giving consent to being entered and their participation tracked in Cityspan and agreeing to participate in an annual evaluation of the funded program by the City and/or its evaluation consultant.

**TOTAL UNDUPLICATED YOUTH PARTICIPANTS**

- Youth participants must be Oakland residents age 0-21.
- The totals of **Race/Ethnicity, Ages to be Served, Gender Identity, Residential,** and Dosage must each equal the **Total Unduplicated Youth Participants**.
- The Dosage table is a projection of how many hours of programming you expect each participant to receive in a program year.
- Do not include in your projections participants that only receive ancillary services such as sitting through a one-time workshop. Do not include projected number of participants reached in outreach efforts; outreach will not be tracked through Activities.

**TOTAL UNDUPLICATED ADULT PARTICIPANTS**
• Projections for Adult participants are for programs funded in early childhood strategies: Parent Engagement and Support, Family Resource Centers, and Socioemotional Well-Being in Preschool and Early Childhood Education Settings.

• Adult participants must be parents or caregivers of children residing in Oakland.

• Do not include projected number of participants reached in outreach efforts; outreach will not be tracked through Activities.

For Socioemotional Well-Being in Preschool and Early Childhood Education Programs:

For Total Unduplicated Youth Participants, project the total unduplicated child participants that will benefit from mental health consultations at the proposed early childhood education sites or other locations receiving services.

PROGRAM OPERATIONS DATES

Provide information on the months that the program will be active, projected number of weeks the program will be active over the course of one year, and the projected days and hours of operation.

Please review the Demographics and Operations form for accuracy. If you need to make changes to the total numbers served, please submit a modifications request.

Scope of Work - Budget

Please review the Budget for accuracy because it will be the basis for your quarterly invoicing. If your budget information has changed from the proposal budget, please submit a modification request.

The budget section is organized in three columns:

• **Total Program Budget**
  - The total cost of funding a line item to operate the proposed program.

• **OFCY Funds Requested**
  - The portion of the total program cost for which you are requesting OFCY funds.

• **Projected Match**
  - This column is auto-calculated by the formula: Total Program Budget (-) OFCY Funds Requested (=) Projected Match
  - Grantees must provide detail on how this projected match was achieved annually. Each budget must have matching funds of at least 25% of OFCY Grant Award.

Provide a narrative justification for each line item in the budget. In general, each **Budget Justification and Calculation** statement should describe, in as much detail as required for clarity, what the specific item is and how the amount shown in the budget was calculated, and why the specific item is important to the program.
DIRECT COSTS

PERSONNEL
Please list all direct service staff including line staff, supervisory staff that supervises line staff, and support/clerical staff that work directly on the proposed program.

- Create a separate line item for EACH individual staff working directly on the program including Lead Agency Position, First Name, Last Name, Total Annual Salary/Wages.
- Please list all direct program staff responsible for the success of the project, even if their salaries or wages are being covered by other matching funds, and not OFCY funds. This will help OFCY better understand the total cost of operating your program.
- Do not include administrative staff not providing direct supervision of line staff, subcontractors, interns, or volunteers.

FRINGE AND BENEFITS
This line item represents benefits (health, dental, retirement, etc.) as well as mandatory employment costs such as FICA, Social Security, SDI, and unemployment taxes. Enter in a numerical total for all fringe benefit costs paid by OFCY and by your match. The total fringe amount is only for those personnel receiving benefits from your agency. In the Budget Justification and Calculation, provide a clear response of how your agency is calculating the Fringe and Benefits.

OTHER DIRECT COSTS
All items listed must directly benefit and support the operation of the proposed program. Direct costs that support the program include:

Equipment/Furniture
- Durable goods such as computers and furniture.

Facility Rental
- Pro-rated costs of space rental, utilities, building maintenance and other occupancy costs.

Food
- Meals, snacks and food for regular programming and special events.

General Office Supplies
- Paper, pens, toner, and other reasonable office supply expenses.

Participant Incentives
- Monies or other non-cash incentives, such as gift certificates, provided to a program participant as a reward for completing a program or achieving a programmatic milestone. Detail how many participants are projected to receive incentives, amount of incentive, and the reason for receiving the incentive.

Professional Development
- Please justify how you intend to use this amount in the narrative text box to support the professional development and training of your direct service staff.
Program Supplies
- Art supplies, workbooks, sports equipment, and other reasonable program supply expenses that are required for the proposed program.

Telephone/Internet/Communications
- May include mobile phone, telephone, internet and postage. Please be specific on how this cost was calculated and how it relates to the proposed program.

Travel/Transportation
- This item includes expenses for field trips and access to programs. The basis for the calculation as well as the purpose for all travel should be provided. Travel expenses for staff are allowed when directly benefiting children and youth. Funds cannot be used for travel to trainings or professional development conferences. Local travel estimates should be based on your organization's current policies, for example, 55.5 cents per mile or for AC Transit or BART. Any non-local travel needs to be carefully itemized and justified.

YOUTH WAGES AND STIPENDS

Youth Wages
This line item is for programs that offer youth an hourly wage for internships or employment experiences. Please enter a separate line item for each unique hourly wage. Do NOT enter a range for wages. Provide a description of what the employment is and how the cost was calculated.

Youth Wages Fringe
- Enter the total amount of fringe benefits associated with employing youth including any benefits youth may receive and mandatory employment costs such as FICA, SDI, and UI.

Youth Stipends
Stipends are used to support youth participants enrolled in your program in limited duration work experiences and internships. Please enter a separate line item for each unique stipend profile and stipend amount. Do NOT enter a stipend range. Provide a description of what the internship is and how the cost was calculated. Do NOT include incentives for program participation in this line item. These should be included in the line item Participant Incentives under Other Direct Costs.

SUBCONTRACTORS
Subcontractors are described as organizations or individuals/sole proprietors that provide specialized services to target populations to help enhance your programs. Each subcontractor must operate under a signed contract, MOU, or Letter of Agreement (LOA).

Any potential changes in subcontractors, scopes of work and budgets should be brought to OFCY’s attention before implementation. Subcontractors should meet the same contracting requirements of the City of Oakland that are required of lead contracting agency. When there is a subcontractor in the contract, it is the legal obligation of the lead agency to monitor the
subcontractor’s progress and to ensure accountability. However, OFCY staff has the right to conduct file reviews of subcontractor agencies and program observations of the subcontractor.

For this section, you will list the organization or individual name of each subcontractor or consultant. For each and every subcontractor, enter a line item budget using the same guidelines as the lead applicant budget.

All subcontractor detailed budgets must be submitted before the main budget form can be submitted.

**ADMINISTRATIVE/INDIRECT COSTS**

Administrative/Indirect costs by applicant designation are:

- **Single Agency:** Up to a total of 15% of total grant request may be requested.
- **Collaborative Applicants:** Up to a total of 15% of total grant request may be requested.
- **Small & Emerging:** Up to a total of 20% of total grant request may be requested.

Administrative/ indirect costs cannot exceed the limits stated above, including subcontractors.

Examples of allowable expenses in the administrative/indirect line item include: audit, bookkeeping, payroll/finance, facilities maintenance, fiscal sponsor costs, insurance, rent, storage, utilities, and allocated personnel costs (Executive Director’s time or any other staff who works minimally on the funded program).

**Example:** Indirect Costs are calculated as a percentage of the total OFCY Funds requested. A Single Agency applicant can request up to 15% of the total grant as Indirect Costs. If the agency applies for a grant requesting $100,000 from OFCY, the maximum indirect costs that can be requested is $15,000.

**Scope of Work - Activities**

The Scope of Work (SOW) - Activities page is read only and shows a summary view of all activities’ projections. You cannot make any edits to this page. Please review each activity. If you need to make any changes to SOW-Activities, please submit a modifications request.

To make changes to the projected numbers on SOW-Activities page, you must edit your projections by going into each activity. Once your SOW-Activities form has been submitted, you CANNOT delete, modify, or add new activities without submitting a modifications request.
**NOTE:** Grantees can still make changes and edits to activity schedules and enrollment for activities at any time. These changes do not need to go through the modification process or have the SOW-Activities unlocked by a Grant Manager.

**UNITS OF SERVICE**
Units of Service (UoS) are service hours multiplied by the number of participants receiving services. The formula for the projected UoS is:

\[(\text{Avg. Session Participants}) \times (\text{Total # of Sessions}) \times (\text{Avg. Hours per Session})\]

Actual UoS will be calculated as your program enrolls clients and tracks their attendance through individual, group and if applicable, Internships & Employment activities.

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**Scope of Work Modifications**

A system has been created within Cityspan to request Scope of Work modifications. This will be the only way for grantees to request Scope of Work modifications. This system will track both the grantee modification requests and the Grant Manager’s determination.

Two Budget modifications and two Activities modifications are permitted each contract year. Budget modifications are only necessary if there is more than a 10% difference in a line item from what was approved. All modification requests must be submitted and dated two weeks prior to the end of the third quarter through Cityspan and must be finalized by March 31st. No modifications are permitted after the third quarter. Please refer to the Grantee Manual for more information.

1) Click on the **Modifications** tab below the Progress Reports. Only users with access to Contract management will have access to this new Modifications tab.

2) Click on **Add a Modification** and then the **Modification ()** link that appears.

3) Select the **Type of Modification** from the drop down list. Note: Only one type of modification can be submitted at a time. Once you submit a request, there will be an option to add another modification request immediately.

   a. **Activities**

   b. **Budget**

   c. **Demographics**

4) Enter in **Modification Detail.** Generally describe what you are proposing to modify and the reason for the modification. Line by line justifications can be made in the required worksheets below.

5) You must upload the appropriate OFCY worksheet for the type of modification you are requesting. The workbooks are available to be downloaded in the
Modifications tab. Please read the Instructions tab completely before proceeding to fill out the workbook.

a. Scope of Work – Activities Modification Workbook
b. Scope of Work – Budget Modification Workbook
c. Scope of Work – Demographics Modification Workbook

6) You may upload as many supporting documents as you need but the first upload should always be the required OFCY workbook.

7) When you submit the modification request, Cityspan will email the assigned OFCY Grant Manager that you have submitted a modification request with a date/time stamp. You will also see a link appear called Status which is read-only. This is where the Grant Manager will either Approve or Deny the request with comments. The Grant Manager will review and make a determination on the Status of your request within five business days. Cityspan will send a notification email to you with the Grant Manager determination and comments.

8) If Approved, the Grant Manager will unlock the appropriate Scope of Work form (Activities, Budget, or Demographics) so that you can update the requested changes in the actual Cityspan form. Please make the approved modifications within five business days of email notification and resubmit the form. Do NOT make any changes that were not approved.

A recorded webinar, instructions and modification workbooks are available at www.ofcy.org/cityspan.
LOCATIONS

Each activity must be linked to a location created in this tab. Locations are used in grant management and program evaluation to determine where services are being delivered in Oakland. Please be sure to complete locations accurately with clear labeling of service site names by the most common and familiar name for a program site (e.g., a program at Oakland High School would be labeled “Oakland High School”, not “Afterschool Program at O High”).

To create a new location:

1) Select Locations
2) Click on the Add Location (yellow tab)
3) Enter all required fields
   - Service Site Name – Please enter the proper name of the location e.g. Rainbow Recreation Center. Do not use acronyms.
   - Service Site Type – choose from dropdown list
     o Church
     o Community Based Organization
     o Headstart
     o Hospital/ Health Clinic
     o Other Elementary
     o Other High
     o Other Middle
     o OUSD CDC
     o OUSD Elementary
     o OUSD High
     o OUSD Middle
     o Park/ Recreation center
     o Library
     o Other
     o Post-Secondary Institution
     o Public Housing
   - Street Address
   - Zip Code
   - District - You can find the City Council District of a location by entering its address at http://gisapps1.mapoakland.com/councildistricts/
4) Click Create
PARTICIPANTS & STAFF

Each participant and staff in your OFCY funded program must be created using this tab. Upon creation, these participants and staff can be enrolled or linked to activities and so that attendance or service records can be entered. OFCY and its designated evaluators also use the demographic information gathered through this tab to generally report who OCFY-funded programs are serving in regards to age, race/ethnicity, gender, and residential zip codes. Please make sure that your enrollment form captures the OFCY required information.

RELEASE OF INFORMATION

Every enrolled client (or their parent, guardian, or other legally authorized representative if a minor) must sign a Release of Information Form giving consent to having their information being entered into the Cityspan database and being evaluated by the City and the designated evaluation consultant, including sharing information with and from Oakland Unified School District (if applicable). Please visit http://www.ofcy.org/grant-policies/ to find more information and Release of Information forms in multiple languages.

ONLY EARLY CHILDHOOD STRATEGIES CAN SERVE AND REPORT ADULT PARTICIPANTS

Adult participants must be family members or caregivers of a child residing in Oakland. Non-family members and non-caregivers should not be reported as Adult Participants. All participant records in Cityspan must include: First Name, Last Name, Date of Birth, Gender, Ethnicity, Zip Code and signed Release of Information on file.

Searching for Existing Participants and Staff

You should also search your list of participants before creating a new participant to avoid duplicate records for the same participant. You will have access to participants from previous fiscal years.

1) Select Participants & Staff from left blue menu
2) Searches can be made using the partial or full first or last name, or the Client ID, or by View By Type, or by selecting the Last Name Initial.
3) Select participant and edit data accordingly
4) Click Save and return to Participants & Staff
5) To repeat follow steps 1-4
Creating New Participants & Staff

1) Select **Participants & Staff** from left menu
2) Click **Add Person** (yellow tab)
3) Select **Person Type**
   - Youth Participant (Client enrolled in your OFCY-funded program, age 21 or younger, residing in Oakland)
   - Adult Participant (parent or caregiver of children residing in Oakland; only visible to early childhood strategies)
   - Program Staff
4) Enter the required fields
5) Click **Add Person**
CREATING YOUTH PARTICIPANTS

**CREATE NEW YOUTH PARTICIPANTS**

OFCY Youth Participants must be ages 0-21 years old, Oakland residents, and have a signed OFCY Release of Information on file. Please visit [http://www.ofcy.org/grant-policies/] for more information on the OFCY Release of Information forms.

* First Name
* Last Name
* Date of Birth
* Zip
* OFCY Race/Ethnicity
* Gender Identity

[Add Youth Participants]

CREATING ADULT PARTICIPANT

**CREATE NEW ADULT PARTICIPANTS**

OFCY Adult Participants must be family members/caregivers, Oakland residents, 22+ years old, and have a signed OFCY Release of Information on file. Please visit [http://www.ofcy.org/grant-policies/] for more information on the OFCY Release of Information forms.

* First Name
* Last Name
* Date of Birth
* Gender Identity
* Race/Ethnicity
* Zip

[Add Adult Participants]

CREATING PROGRAM STAFF

**CREATE NEW PERSON**

Person Type:
- Youth Participants
- Adult Participants
- Program Staff

* First Name
* Last Name
* Gender Identity
* Race/Ethnicity
* Oakland Resident

[Add Person]
Making Youth or Adult Participants Inactive

If a participant is no longer in your program, you can make them inactive. This will remove them from the list of participants for you to enroll from.

1) Select **Participants & Staff**
2) Click **View Youth or Adult Participants**
3) Select the Participant
4) For **Status**, mark **Inactive**
5) Click **Save** and return to **Participants & Staff**
6) To repeat follow steps 1-5

Making Staff Inactive

If a staff member is no longer part of your program, you can make them inactive. This will remove them from the list of staff for you to link activities to.

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

**Caution:** Never delete Youth or Adult Participants or Staff from the database. If participants, adults or staff leaves the program, make them inactive, but DO NOT delete them or all historical service data associated with them will be deleted.
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 on an on-going basis.

For each Group Activity, you must do the following before you can enter attendance:

1) Enter a schedule
2) Enroll participants
3) Assign staff

If you must revise any projections, delete group activities that will not be used, or need to create new activities, please contact your Grant Manager. They must approve the change and unlock the Scope of Work-Activities so that changes can be made.

Creating Group Activities

1) Select Group Activities
2) Click the Add Activity tab to create a new Group Activity
3) Enter the Activity Name and Select the appropriate fiscal year
4) Click Save & Proceed
5) Location - Choose the location where the service is being offered. Each activity must be linked to a specific location. If you do the same activity at multiple locations, you must create separate activities for each location. You must create locations under the LOCATIONS tab in order to see them in your drop-down list.
6) Activity category – Select the most appropriate category for your activity.
   • Academics – includes literacy, math, STEM and STEAM programming
   • Arts, Dance, Music and Culture
   • College and Career Readiness
   • Community Building
   • Early Learning
   • Family Engagement and Parent Education
   • Field Trips
   • Health Education and Wellness – includes gardening, cooking and nutrition
   • Leadership and Civic Engagement – includes community service
• **Master Sign-In** - OFCY is piloting a different way of reporting participation. Grantees will have the option of setting up a general Master Sign-In group activities to track the full program participation instead of having to chunk out the day by various activities offered, differentiated by OFCY activity category.

• **Sports and Recreation**

• **Supportive Services** – includes mental health services, case management, mentoring, resource referrals, legal services, housing support, restorative justice

7) Projections – Each activity must have projections for:

<table>
<thead>
<tr>
<th>Projections</th>
</tr>
</thead>
<tbody>
<tr>
<td>Summer Grantees – Q1: June-Aug; mark 0 for Q2, Q3, Q4</td>
</tr>
<tr>
<td>Projected # of Youth Participants per Session</td>
</tr>
<tr>
<td># of Sessions (Qtr 1: Jul – Sep)</td>
</tr>
<tr>
<td># of Sessions (Qtr 2: Oct – Dec)</td>
</tr>
<tr>
<td># of Sessions (Qtr 3: Jan – Mar)</td>
</tr>
<tr>
<td># of Sessions (Qtr 4: Apr – Jun)</td>
</tr>
<tr>
<td>Projected Hours per Session (e.g. 30 minutes = 0.5)</td>
</tr>
</tbody>
</table>

• **Projected # of Youth Participants per Session** – Project how many will be present on average per session or class. For example, if you plan to enroll 20 youth in this activity, a more realistic projection may be 18 youth participants per session due to absences.

• **# of Sessions (Qtr 1: Jul – Sep)** – the number of times an activity will occur in this quarter.

• **# of Sessions (Qtr 2: Oct – Dec)** – the number of times an activity will occur in this quarter.

• **# of Sessions (Qtr 3: Jan – Mar)** – the number of times an activity will occur in this quarter.

• **# of Sessions (Qtr 4: Apr – Jun)** – the number of times an activity will occur in this quarter.

• **Projected Hours per Session** – enter the length of activity session in hours. For example, a 30 minutes session would be entered as 0.5; a 50 minute session would be entered as 0.83.

8) **Service Description** - Provide a short summary of the activity to provide information on the type of activity.
For Early Childhood programs, separate out the number of projected adult participants and projected youth participants when projecting Participants per Session in Group Activities.

For Summer Programs, Quarter 1 is June, July and August when projecting quarterly sessions. Enter zeroes for Q2, Q3, Q4 # of Sessions.

Cityspan will use this information to calculate projected Units of Service (UoS) by quarter. These will be the quarterly benchmarks that your program will be held to in the quarterly Progress reports. OFCY also uses this data in the public evaluation reports. In the General Info page for a specific group activity, the Projected Units of Service at the 6 month and 12 month mark will be displayed using the following formulas:

Projected UoS (6 months) = \( \text{avg. participants} \times \text{# of sessions (Q1 + Q2)} \times \text{avg. hrs per session} \)

Projected UoS (12 months) = \( \text{avg. participants} \times \text{# of sessions (Q1 + Q2 + Q3 + Q4)} \times \text{avg. hrs per session} \)

Caution: Never delete Group Activities with Attendance Records from the database. There is no limit to the amount of historical data that is stored in the system.

Entering a Schedule

A schedule must be created before attendance can be taken. The schedule should reflect the projected number of sessions by quarter and the Average Session Length.
Schedule dates can be created, modified and deleted at any time without the assigned Grant manager unlocking the Scope of Work-Activities form. To create a schedule:

1) Select **Group Activities** tab in left menu  
2) Select a specific **Group Activity** to work on  
3) In the **Schedule** section, click **Edit**  
4) Choose to either add multiple dates or a single date and follow prompts.

**NOTE:** Once you have created a schedule, you can delete certain dates in each activity or in bulk across all activities. The **Bulk Schedule Date Delete** function, found in the **Utilities tab**, is useful for holidays or other dates when you know your program will be closed.

### Enrolling Participants in Group Activities

All participants must be created in Participants & Staff tab and enrolled in a specific Group Activity in order for their name to appear on the attendance tab so they can be counted for attendance.

1) Select **Group Activities**  
2) Under **View Activities**, select the **Group Activity** for enrollment  
3) Click **Enrollment** tab (A schedule will need to have been created before enrollment can be entered.  
4) Click **Enroll Participants** (yellow tab)  
5) Search for the participant by last initial, first name, last name, person type.  
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**

**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 participants to override 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).
Dropping Participants in Group Activities

1) Select **Group Activities**  
2) Click the specific group activity to work on  
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** (entering a reason is optional)  
8) Click **Return**

To **Bulk Drop** follow steps 1-3 above and clicking on **Bulk Drop** (yellow button). 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 at a time to drop.

Re-enrolling Participants in Group Activities

If the participant re-enrolls back into an activity after s/he has been dropped:

1) Select **Group Activities**  
2) Click the specific group activity to work on  
3) Click **Enrollment** (yellow tab)  
4) Find the participant whose status should be listed as Dropped  
5) Click **Edit** (on the right of the participant’s name)  
6) Enter a Re-enrollment Date  
7) Under **Action**, click **Re-enroll**  
8) Click **Return**

**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.
**Entering Attendance in Group Activities**

Attendance data will be permanently locked at the Quarterly Progress Report deadline, which is the second Friday after the quarter ends (Sep 30th, Dec 31st, March 31st, June 30th). Grantees are encouraged to complete data entry frequently. This will allow enough time to address any data entry problems you may encounter that require OFCY or Cityspan Helpline assistance. After attendance is locked, you must request via email to your Grant Manager that attendance be unlocked if you need to make any changes or enter further attendance.

**TAKING ATTENDANCE BY DATE:**

1) Select *Group Activities* in blue left menu
2) Select the specific Group Activity you want to enter attendance for
3) Click *Attendance* in upper yellow tab
4) Select a *Date*
5) Mark participants present or absent
6) Click *Save* and *Return* or click *Save & Next Day* if you would like to enter attendance for the following day.

Units of Service for Groups are calculated based on participants being marked present only. If the participant is enrolled in a group activity but is marked absent, or no attendance is taken (there is no mark for present or absent), there would be no attendance or hours of service generated toward your attendance data.

**NEW: Master Sign-In Group Activity Option**

In FY19-20, OFCY is piloting a different way of reporting participation. Grantees will have the option of setting up a general Master Sign-In group activities to track the full program participation instead of having to chunk out the day by various activities offered, differentiated by OFCY activity category. Grantees will still have to project out these Master Sign-In activities by Number of Sessions, Average Session Participant, Average Length of Session and link it to a specific service location.

**Example:** Your summer program operates for five weeks from 9am-4pm serving 50 youth. Historically you had to create separate activities by activity categories to show the different types of activities offered through the 9am-4pm day. This created the need to create and enter attendance in Cityspan in multiple activities per day per youth. Many programs also created separate field trip activities even if field trips were included in the weekly programming model e.g. field trip every Friday for the same time 9am-4pm.
Using the Master Sign-In group activity, programs now can create a single group activity which accounts for the full 9am-4pm participation and enter attendance once per day per youth.

**HOW TO CREATE MASTER SIGN-IN GROUP ACTIVITIES**

In order to use the Master Sign-In option, you create group activities as usual but choose Master Sign-In as the Activity Category. You will still have to project out these Master Sign-In activities by Number of Sessions, Average Session Participant, Average Length of Session and link it to a specific service location.

**ENTERING ATTENDANCE IN MASTER SIGN-IN GROUP ACTIVITIES**

If using the Master Sign-In option, you must have a system of tracking late arrivals and early dismissals. And this must be accurately reflected in Cityspan when entering attendance.

**Example:** A youth arrives at 10am and leaves early at 2pm from your 9am-4pm summer camp. If a youth is just marked present for the scheduled time, s/he will be counted for seven service hours that day when s/he was at the program for four hours.

Enter attendance as usual in Cityspan group activity. Once the attendance for a particular day is saved or the *All Present* or *All Absent* button was used, the begin and end times listed next to each participant with a present or absent will become hyperlinks.

By clicking on the begin or end time, you can edit a participant’s begin and/or end time one participant at a time. The dropdown list of time options is listed in five minute increments so you must round to the nearest five minute increment. Make sure to save your changes before you navigate away from the attendance form.
WHEN TO CREATE MULTIPLE MASTER SIGN-IN GROUP ACTIVITIES

You have multiple locations where you provide concurrent programming. Example: Your summer program operates at four different sites, each serving 50 youth.
  • You should create four separate Master Sign-In Group Activities because each activity needs to be linked to each specific service location.
  • When naming your group activity, consider using the location name to clearly identify the location being reported on.

You have different cohorts through the summer with different projections in terms of # of sessions, Average Session Participant, Average length of session. Example: you serve a cohort of 100 youth for the first three weeks and then serve a smaller cohort of 50 youth for the next two weeks.
  • You should create two separate Master Sign In group activities.
  • When naming your group activity, consider using the cohort name to clearly identify the cohort being reported on.

You serve a high number of youth and you internally track attendance by cohorts. Example: you run a summer program that serves 200 youth in total but group them in 10 classes of 20 youth each. Each class takes their own attendance daily.
  • You can create ten Master Sign-In group activities to match how you internally track participation. This way, you only have to look through a roster of 20 names to report daily attendance instead of one long roster of 200 names to mark them present or absent.
  • When naming your group activity, consider using the class name to clearly identify the class being reported on.
Can I still use the historical method of creating and tracking activities e.g. creating multiple activities differentiated by OFCY activity category?
Yes. The Master Sign-In method is optional and is being offered to ease data tracking and reporting.

Can I use a combination of Master Sign-In option with some other activities using other OFCY activity categories?
Yes. For example, some programs offer a leadership track for a few youth that involves their participation in additional programming outside of the general summer program model. Alternatively, this leadership group could be setup using the Master Sign-In activity category.

For questions regarding the new Master Sign-In Option, please contact Scott Kim at sskim@oaklandca.gov or 510-238-2209.
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 one time or many times, on a regular or as-needed basis, and are services that occur one-on-one between participants and OFCY funded program staff. Examples of services includes mentoring, case management and counseling.

For each Individual Activity, you must assign staff since they will be part of the service record. You do not have to enroll participants or enter in a schedule for Individual Activities. The schedule is read only and will auto-populate once attendance has been entered.

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

**Creating Individual Activities**

1) Select *Individual Activities* in blue left menu
2) Click the *Add Activity*
3) Enter the Activity Name and Select the appropriate fiscal year
4) Click *Save & Proceed*
5) **Location** - Choose the location where the service is being offered. Each activity must be linked to a specific location. If you do the same activity at multiple locations, you must create separate activities for each location. You must create locations under the LOCATIONS tab in order to see them in your drop-down list.

6) **Activity category** – Select the most appropriate category for your activity.
   - **Academics** – includes literacy, math, STEM and STEAM programming
   - **Arts, Dance, Music and Culture**
   - **College and Career Readiness**
   - **Community Building**
   - **Early Learning**
   - **Family Engagement and Parent Education**
   - **Field Trips**
   - **Health Education and Wellness** – includes gardening, cooking and nutrition
   - **Leadership and Civic Engagement** – includes community service
• **Sports and Recreation**
• **Supportive Services** – includes mental health services, case management, mentoring, resource referrals, legal services, housing support, restorative justice.

7) **Projections** – Each activity must have projections for:

<table>
<thead>
<tr>
<th>Projections</th>
<th>Summer Grantees – Q1: June-Aug; mark 0 for Q2, Q3, Q4</th>
</tr>
</thead>
<tbody>
<tr>
<td>Projected Participants per Session</td>
<td>1</td>
</tr>
<tr>
<td># of Sessions (Qtr 1: Jul-Sep)</td>
<td></td>
</tr>
<tr>
<td># of Sessions (Qtr 2: Oct-Dec)</td>
<td></td>
</tr>
<tr>
<td># of Sessions (Qtr 3: Jan-Mar)</td>
<td></td>
</tr>
<tr>
<td># of Sessions (Qtr 4: Apr-Jun)</td>
<td></td>
</tr>
<tr>
<td>Projected Hours per Session (e.g. 30 minutes = 0.5)</td>
<td></td>
</tr>
</tbody>
</table>

• **Projected Participants per Session** – This is automatically set to one participant since this is an individual activity. This is not a projected unduplicated youth to be served through this activity. You may serve 1 youth or 50 youth through this activity, but you are serving them individually, one youth per session.

• **# of Sessions (Qtr 1: Jul – Sep)** – Project the number of sessions you plan to take place in this quarter. For example, if you enter 50 sessions in Quarter 1, it could mean that you plan to meet the same youth 50 times, or 50 youth one time each and everything in between.

• **# of Sessions (Qtr 2: Oct – Dec)**
• **# of Sessions (Qtr 3: Jan – Mar)**
• **# of Sessions (Qtr 4: Apr – Jun)**

• **Projected Hours per Session** – enter the length of activity session in hours. For example, a 30 minutes session would be entered as 0.5; a 50 minute session would be entered as 0.83.

8) **Service Description** - Provide a short summary of the activity to provide information on the type of activity.

---

**Assigning Staff in Individual Activities**

Each Individual Activity must have one or more staff linked to the activity. When you enter a record for Individual Activity, you must link that record with a staff member providing or supervising the activity.

1) Select **Individual Activities** in blue left menu
2) Select the specific **Individual Activity** to assign staff to
3) Click on **Edit** in the Staff section
4) Choose the appropriate staff person from the drop down list. This list is generated from all active Staff created in the Participants & Staff tab. If you do not see the staff person, you must go into Participant & Staff and create a new staff.
5) Select a Role for that staff from the drop down list of choices: Lead Staff, Support Staff, or Volunteer. NOTE: Only one staff person can be assigned the role of Lead staff per activity. All additional staff should be marked as Support Staff.
6) Click **Assign Staff Now**

**Entering Attendance in Individual Activities**

1) Select **Individual Activities** in blue left menu
2) Click the **Individual Activity** under the ‘View Activities’ tab
3) Go to **Attendance** (yellow tab)
4) Click **Add**
5) In Step 1, make sure the correct individual activity is selected from the drop down list.
6) In Step 2, select the staff conducting the activity, date of visit, and amount of time entered in hours and/or minutes.
7) In Step 3, find the participant. You can search by viewing by last name initial or by entering partial or full first or last 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 records for this participant without **Finding Person** over again. For example, if you have multiple records you want to enter for the same participant John Doe, you can click **Add Record and Hold Name** add multiple records for John Doe without having to go through the process of finding John Doe for each record]
9) Add Record

**OPTIONAL:** If you would like to enter Individual Visit Notes for the record you just created, you may do so by selecting **Click here to Edit Details**. However, OFCY does not require notes to be entered.

**REMINDER:** Staff must also be assigned to an activity in order for their name to be found. 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.
Caution: Never delete Individual Activities with Attendance Records from the database. There is no limit to the amount of historical data that is stored in the system.
ECMHC HOURS ACTIVITY

 Programs in the Early Childhood Mental Health Consultation (ECMHC) funding strategy will enter the consultation hours provided by staff at each service site through the ECMHC Hours activity.

Creating ECMHC Hours Activity

1) Click on ECMHC Hours in the blue left menu
2) Select Projections yellow tab on top
3) Select a Service Site from the drop down list of sites created in the Locations tab.
   NOTE: Only create one ECMHC Hours activity per service site.
4) Project the total number of consultation hours provided per quarter at that service site
5) Provide a brief description of the services provided at the site and the projected number of educators, children and parents/caregivers served. If there are collaborative partners or subcontractors, please specify in the service description the agency that will be providing the services for the activity
6) Click Save
7) To add another service site, select Click here to add ‘ECMHC Consultations Hours’ and repeat steps 1-6.

NOTE: ECMHC proposers may also create individual and group activities to capture work with enrolled children and parents/caregivers in their program such as parenting workshops and individual consultations with parents, caregivers and/or children. Consult first with your grant manager prior to creating individual and group activities.

Reporting ECMHC Hours

1) Click on ECMHC Hours in the blue left menu
2) Choose the appropriate quarter you want to report ECMHC Hours from the tabs on top labeled Q1 Actuals, Q2 Actuals, Q3 Actuals, Q4 Actuals.
3) For each Service Site Location, you will have up to five rows to enter staff and their hours in the quarter.
   • Under Staff, select staff name from Drop Down list. This list is populated from Program Staff created in Participants & Staff tab. If you do not see the staff you are looking for, go to Participants & Staff tab and create new program staff.
- Enter the number of consultation hours that staff person provided at the service site. Do not include travel time.
- You have the option of Saving or Submitting. Actuals must be submitted by the quarterly progress report deadline. Once submitted, revisions cannot be made unless unlocked by OFCY Grant Manager.

### ECMHC QUARTER 1

#### ECMHC Consultation Hours (1)

<table>
<thead>
<tr>
<th>Staff</th>
<th>Q1 Hours</th>
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<tbody>
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<td></td>
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<tr>
<td>Total Hours at this Site</td>
<td>0</td>
</tr>
</tbody>
</table>

#### ECMHC Consultation Hours (2)

<table>
<thead>
<tr>
<th>Staff</th>
<th>Q1 Hours</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Total Hours at this Site</td>
<td>0</td>
</tr>
</tbody>
</table>
The Career Awareness and Academic Support strategy has a distinct activity type to track *Internships & Employment* which track youth participation in internships and employment opportunities and the amount of wages or stipend received. These activities should align with the information entered in the *Budget* under *Youth Wages and Stipends*.

### Creating Internships & Employment Activities

A separate *Internship & Employment* activity must be created for each unique placement location, wage or stipend amount. For example, if service site XYZ will host placements at $14/hour and $15/hour, you will create two unique activities even though the placement is at the same location. Do **NOT** enter a range for hourly wage or stipend amount. Enter the **specific amount** to be provided to youth placed at the site at the wage or stipend amount.

1) Click on *Internships & Employment* tab in the left blue menu
2) Click the *Add Activity* tab to create a new Internships & Employment activity
3) **Location** – You must create each unique placement site under the LOCATIONS tab in order to see them in your drop-down list.
4) **Activity Category** – This has been preset to Internships and Employment.
5) **Industry/Sector** – Choose the most appropriate Industry/Sector for the internship or employment placement.
6) **Length of Internship or Employment per youth (hours)** – The projected length of internship or employment per youth.
7) **Amount of Stipend or Hourly Wage**
8) **Projections**
   o **Projected # of Participants** – The number of youth expected to participate in this internship or employment activity.
   o **# of Hours Worked by All Participants (Qtr 1: Jul – Sep)** 1) - Project out the sum total of all hours worked by all participants per quarter.
   o **# of Hours Worked by All Participants (Qtr 2: Oct – Dec)**
   o **# of Hours Worked by All Participants (Qtr 3: Jan – Mar)**
   o **# of Hours Worked by All Participants (Qtr 4: Apr – Jun)**
**For Summer Programs**, Quarter 1 is June, July and August when projecting quarterly # of Hours Worked by All Participants. Enter zeroes for Q2, Q3 and Q4.

**Example:** Ten youth will be placed for subsidized employment at Café Gabby at $13.80/hour. Each youth is expected to complete 100 hours of employment during a six-month period July – December for a sum total of 1,000 hours worked by all 10 youth. Historically, about 90 percent of youth complete their hours due to retention issues, in this case for a sum total of 900 hours (1000 x 90%). It is projected that half of the 900 hours (450 hours) will occur in July – September (Q1) and the other 450 hours in October – December (Q2). Your projections would be:

<table>
<thead>
<tr>
<th>Internships and Employment Opportunities</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Projected Number of Youth Participants</td>
<td>10</td>
</tr>
<tr>
<td>Length of Internship or Employment per youth (hours)</td>
<td>100</td>
</tr>
<tr>
<td>Amount of Stipend or Hourly Wage</td>
<td>13.80</td>
</tr>
</tbody>
</table>

**Projections**

| Summer Grantees – Q1: June-Aug; mark 0 for Q2, Q3, Q4 |
|-----------------------------------------------------|--|
| **Projected # of Participants** | **10** |
| **# of Hours Worked by All Participants (Qtr 1: Jul – Sep)** | **450** |
| **# of Hours Worked by All Participants (Qtr 2: Oct – Dec)** | **450** |
| **# of Hours Worked by All Participants (Qtr 3: Jan – Mar)** | **0** |
| **# of Hours Worked by All Participants (Qtr 4: Apr – Jun)** | **0** |

**What if I don’t know the employer sites at the beginning of the year when the scope of work is setup?**

Because the Internships & Employment Activities have to be linked to a specific location/ employer site, this presents a challenge since many programs do not know the exact placement sites at the beginning of the fiscal year. For the purposes of projecting out a scope of work please create a projections only Internships & Employment activity(ies) with the marker **PROJECTIONS** in the name of the activity. This will capture all projections for internships and employment for the fiscal year.
When you know the exact placements, you will have to create an I&E activity for each unique placement but will enter zeroes for all Projections. You will only enter actuals against these activities.

Assigning Staff in Internships & Employment

Each Internships & Employment activity must have one or more staff linked to the activity. When you enter a record, you must link that record with a staff member providing or supervising the activity. This staff should be an employee of the OFCY-funded program and not the on-site supervisor for work placement.

1) Select **Internships & Employment** in blue left menu
2) Select the specific **Internships & Employment** to assign staff to
3) Click on **Edit** in the Staff section
4) Choose the appropriate staff person from the drop down list. This list is generated from all active staff persons created in the Participants & Staff tab. If you do not see the staff person, you must go into Participant & Staff and create a new staff.
5) Select a Role for that staff from the drop down list of choices: Lead Staff, Support Staff, or Volunteer. NOTE: Only one staff person can be assigned the role of Lead staff per activity. All additional staff should be marked as Support Staff.
6) Click **Assign Staff Now**

Entering Actual Hours Worked

It is recommended to correlate the timesheet used to pay the youth to the Cityspan data entry so that you can easily report the numbers of hours worked in a given time period and the amount of compensation provided to the youth participant.

1) Select **Internships & Employment** from left menu
2) Select a specific **Internships & Employment** activity under the View Activities tab
3) Go to **Attendance** (yellow tab)
4) Click **Add**
5) In **Step 1**, the specific **Internships & Employment** activity should be defaulted in the drop down list
6) In **Step 2**:
   a. Select the staff supervising the specified **Internships & Employment** activity
b. Enter the Start Date and End Date of time period being reported. The Encounter period should not cross over reporting quarters (July-Sep, Oct-Dec, Jan-Mar, April-June). If you have an entry for a period that crosses over quarters, you will have to split up the entry.

c. Enter the length of time worked during the Encounter Period. You can enter this in Hours and/or Minutes.

d. Enter the Gross Payment to Youth before taxes or withholdings. In the case of unpaid internships or where only hours are being reported without any payment to youth for the encounter period, you may enter “0” for Gross Payment.

7) In Step 3, find the youth participant for which the entry is being made (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 records for this participant without Finding Person over again. For example, if you have multiple records you want to enter for the same participant John Doe, you can click Add Record and Hold Name add multiple records for John Doe without having to go through the process of finding John Doe for each record.]

**NOTE:** Cityspan will show you the details of the record you just created. If you need to correct the **Time Worked** and/or **Gross Payment to Youth**, you can select **Click here to Edit Details**. Make the necessary edits and click **Return**. If you need to revise the date range entered, you will have to delete the record and create a new entry. If you need to edit any details at a later time after initial record creation, you will have to delete the record and create a new corrected entry.
Oakland Youth Services Attendance System

ENCOUNTER LOG

Step 1: Select an activity.
Activity
Subsidized Employment Test

Step 2: Select a staff member. Enter the reporting period, time worked by youth during the reporting period, and the gross payment to youth during the reporting period.

Staff

Encounter Period
Start Date
End Date

Time Worked

Gross Payment to Youth

Hours
Minutes

Step 3: Find a participant. Click on a letter to view by last name initial or enter search criteria for more direct results.

View by Last Name Initial

Find by Name or Client ID
First Name
Last Name
Client ID

Find Person(s)
The Utilities tab on the left blue menu has some useful tools that may assist you in managing your Cityspan grant. Below are three functions most commonly used. If you have additional questions or need further assistance regarding the tools below, please contact the Cityspan Help Desk.

**Issue Tracker**

Issue Tracker allows you to request assistance from Cityspan. This is a public interface and Issue Tracker requests and responses are visible to all other OFCY Cityspan users.

**Bulk Schedule Date Delete**

Bulk Schedule Date Delete is useful when you want to delete certain dates, such as school holidays like January 1 or any time a number of activities will not be held on a scheduled date but do not want to go through each activity’s schedule to delete these dates. Please use this tool with caution; deleted attendance data cannot be recovered.

**Set Service Term**

Setting the service term will limit the view of services to those that are active during the time period selected. Services that are outside this date range are archived and NOT deleted. This function uses the dates created in Group Activity schedules and Individual Activity records to filter out which activities appear or not for a given service term. All Group Activities without schedules or Individual Activities without dated records will show up regardless of service term parameters because the system has no dates to filter out these activities.
USER ACCOUNTS

Only Power Users and Signatory will have access to the User Accounts tab. Each OFCY grantee should limit the number of Power Users because they will have the ability to create, modify and manage user accounts including resetting passwords. Please review the list of users to keep information up to date, and ensure that each user’s level of access is accurate and that former staff are inactivated.

Below is a summary of levels of access.

- **Contract Management** – access to Scope of Work (Cover Page, Demographics, Budget, Activities Summary) and Quarterly Progress Reports tabs
- **Service Management** – access to participants, activities and locations for service data entry (attendance)

<table>
<thead>
<tr>
<th></th>
<th>Power Users</th>
<th>Regular Users</th>
<th>Attendance User</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Contract Management</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Scope of Work</td>
<td>Access</td>
<td>Access</td>
<td>No Access</td>
</tr>
<tr>
<td>Progress Report</td>
<td>Access</td>
<td>Access</td>
<td>No Access</td>
</tr>
<tr>
<td><strong>Service Management</strong></td>
<td></td>
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<tr>
<td>Service Data Entry</td>
<td>Access</td>
<td>Access</td>
<td>Access</td>
</tr>
<tr>
<td>User Accounts</td>
<td>Access</td>
<td>No Access</td>
<td>No Access</td>
</tr>
</tbody>
</table>

**Managing Multiple OFCY Funded Programs**

If your agency has multiple OFCY-funded programs and certain staff members need access to more than one program, you may email support@cityspan.com to request that Cityspan create one user name and password for that staff to access multiple OFCY-funded programs.

**Creating Users**

To create new user accounts:

1) Select **User Accounts** from the left blue menu
2) Select **Add User** in the upper right corner
3) Complete all required fields for **Personal Information**
4) Select the appropriate level of access for **Contract Management System** and **Service Management System**
5) Click **Create**
### Changing Password

Power Users and Signatory have the ability to reset any user’s password.

To change password:

1. Select **User Accounts** from left blue menu
2. Select the **User** you want to change the password for
3. Under the section **Change Password**, enter and re-enter new password
4. Click **Save and Return**

There is no autogenerated notification sent to the user that their password was reset. The person resetting the password must communicate the new password to the user.

### Inactivating Users

The Cityspan system is intended only for current, active staff. If you have an employee that leaves your agency, inactivate the user so they no longer have access to the Cityspan account and program information.

To make a current user inactive:

1. Select **User Accounts** from left blue menu
2. Select the **User** you want to inactivate
3. Select **No Access** for both Contract Management System and Service Management System
4. Click **Save and Return**
This section will cover notes on signing off and submitting Quarterly Progress Reports & Invoicing. For each quarter of the fiscal year, you will need to submit a report and an invoice.

To access Progress Reports, go to *Progress Reports* tab on the left blue menu and choose the appropriate quarter.

**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 are done to avoid losing information should you get timed-out and to proof read for accurate spelling and grammar. You will need to enter a response for every question before you can submit the Narrative section. You can *Save* what you have entered and return to the section later at any time. *Save your work!* Press *Submit* when you have completed the narrative responses. Once you *submit*, you cannot go back to edit your narrative responses.

**Stats**

On the *Stats Report*, you will see a listing of each of your activities in addition to aggregated data by category. Only the data you have projected and taken attendance for *within* the reporting quarter will appear. 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. Once you have completed your data entry for participation and enrollment in service activities, return to the Stats Report to verify the accuracy of the data. If you did not meet your projected Units of Service at the category level, you will be required to provide a reason. You may also enter overall comments. Once you have completed your review and provided comments, press *Submit* to complete your review. Once you submit, your Stat report is locked and will no longer update.

**Invoice**

Enter all OFCY 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 are final and ready to **Submit**. Once you submit, you cannot go back to edit your invoice.

Over the course of four quarters, each grantee should account for how the entire OFCY grant was spent, including the advance payment provided by OFCY and received by your program at the beginning of the fiscal year.

**NOTE:** The person’s name who is logged in to Cityspan and submitting the invoice will be auto filled in the **Prepared By** and **Title** fields. This person CANNOT be the Signatory.

### Supporting Documentation for OFCY Invoicing

OFCY is requiring grantees to upload supporting documentation for the following budget categories: Personnel, Subcontractors, Consultants, and Youth Wages, Stipends & Incentives. If grantees are requesting reimbursement in any of these categories in the Quarterly Progress Reports - Invoice, they must upload supporting documentation.

**Personnel**: Provide a payroll journal/ledger or report that shows the reimbursement period, total salary and fringe benefits for each staff person for the program, and the amount allocated to OFCY.

**Subcontractors**: Provide copies of the subcontractor’s invoices and the checks to show they have been paid. If only part of the expenditure is allocated to OFCY, indicate that amount on the invoice or receipt.

**Consultants**: Provide copies of the consultant’s invoices and the checks to show they have been paid. If only part of the expenditure is allocated to OFCY, indicate that amount on the invoice or receipt.

**Youth Wages, Stipends & Incentives**:
- **Wages** – Provide a payroll journal/ledger or report that shows the reimbursement period, total wages and fringe benefits for each youth participant and the amount allocated to OFCY.
- **Stipends** – Provide checks for each youth that received a stipend in the invoice period. If only part of the expenditure is allocated to OFCY, indicate that amount.
- **Incentives** – Provide receipts for all incentives for which you are requesting reimbursement. For gift cards and travel passes, please provide a list of youth participants that received them and its monetary value.

### Uploading Supporting Documents in Quarterly Invoice
At the bottom of the Quarterly Progress Report – Invoice in Cityspan, there will be a section called **Supporting Documentation** where grantees will be able to upload a single file. All supporting documentation should be consolidated into one PDF file.

Uploading supporting documentation is required before grantees can submit the invoice. In the unlikely case that there are no requests for reimbursement in any of the aforementioned categories, grantees can upload a simple document stating “Not Applicable”.

### Signoff

The Signatory is responsible for approving what is submitted in the quarterly progress report by entering her/his user account password as the e-signature in Signoff. Only the actual individual who is registered as the Signatory may use their account to review and finalize submission of the quarterly reports.

To find out who is the Signatory for your program, go to ‘User Accounts’ (left blue menu) and you will see the designated Signatory for your program. Contacting your OFCY Grant Manager directly to update and change the Signatory for your program.

### Match Reporting

Matching funds refers to all program funding above the OFCY award that is necessary to provide the services at the proposed levels. Grantees must show funding that equals at least 25% of the OFCY grant award as a program match. This minimum 25% match of OFCY program funding must be a cash match and must support the costs of the OFCY funded program. This projected match amount is shown in the Projected Match column in the Scope of Work – Budget. Grantees may not use one OFCY grant as a match for another. Additionally, school site facility or regular school costs may not be used as match.

**Cityspan Match Report**

At the end of Quarter 3, grantees must complete the Match Report as part of their Quarter 3 Progress Report. For grantees only operating and reporting summer programming, the Match report will be due as part of the Quarter 1 Progress Report.

In this Match Report, grantees are responsible for accounting for **ALL (100%)** of matching funds in the Projected Match column in the Scope of Work – Budget. For each source of funding, grantees will be required to enter the Source, Amount, and Type of Funding.
• **Source** – Type in the full proper name of the funding entity or source. Do not use acronyms.

• **Amount** – Enter the dollar amount that supports the OFCY funded program.

• **Type of Funding** – Choose from a drop-down list of choices consisting of Philanthropic Grants, Government Grants and Contracts, Corporate Donations, Individual/Private Donations, and Program Fees.
  
  o If you received funding from a philanthropy setup by a corporation, please label it as a **Philanthropic Grants** instead of a Corporate Donations. For example, a grant you proposed and received from Salesforce Foundation, the philanthropic arm of Salesforce.com, should be designated as a Philanthropic Grant.

  o If you received funding from an individual who setup a donor advised fund through a foundation, please label it **Philanthropic Grants** instead of Individual/Private Donations.

**Submission of Supporting Documentation**

Additionally, grantees are required to upload support documentation into Cityspan Match Report accounting for at least 25% of the OFCY grant award in the Cityspan Match Report. Acceptable match documentation for uploading into Cityspan include:

**Philanthropic Grants**

• Copies of award letters from foundations or private donor-advised funds setup through a foundation on donor’s organizational letterhead.

• Copies of checks, bank statements or payment schedules with grant identified.

**Government Grants and Contracts**

• Copies of government grant or contract agreements with funding amount and date term.

• Copies of checks, bank statements or payment schedules with the government grant or contract agreement identified.

**Corporate Donations**

• Copy of letter documenting the donation on donor’s organizational letterhead.

• Copies of accompanying checks, bank statements or payment schedules.

**Individual/Private Donations**

• Submit a ledger or financial report from your accounting software showing a list of donations received with dates.
• Proof of deposit per each donation. This could include copies of checks, bank deposit slips or bank statements.

Program Fees
• Submit a ledger or financial report from your accounting software showing a list of program fees collected with dates.
• Proof of deposit per each program fee collected. This could include copies of checks, bank deposit slips or bank statements.
ANNUAL DATA ROLLOVER

The annual data roll over in Cityspan usually occurs in April for the upcoming fiscal year. This coincides with the contracting process for the new fiscal year. Cityspan will default to the current fiscal year until the deadline for Quarter 4 Progress reports. If the grantee needs to modify any of the scope of work forms, they must manually select the correct upcoming year to work in that year’s Scope of Work forms and modifications workbook. After the Quarter 4 progress report deadline, Cityspan will default to the new year when users log in.

What data is copied over from one year to the next?

- All Scope of Work forms (Cover Page, Demographics, Budget, and Activities) have been copied over from the prior year and locked.
- All activities have been copied over from prior year and tagged with new fiscal year e.g. [17-18].

What data is NOT copied over from one year to the next?

- Group activity schedules and enrollment are not copied over because schedules and enrollment change year to year. Schedules and enrollment for each Group Activity must be set up annually.

Participants

There is no need in Cityspan to copy over Participants because all Participants you created in the current three-year grant cycle are available to you. There is no need to recreate the same participants. As best practice, please search your Participants list before creating a new participant.

If you need to make any changes to the Scope of Work during the contracting process, please complete the appropriate workbook and submit a Modifications request through Cityspan. Please make sure you are submitting the modifications request in the correct fiscal year. These requests are part of initial contract setup and will not count toward the modifications limits. Please see following further instructions specific to each Scope of Work form.

Scope of Work – Cover Page

Please make sure that all contact information listed in the Cover Page is up to date. All OFCY communications will be sent out to the Contract and Program Representatives listed. To update contact information listed in the Cover Page, which is also reflected in the home page, grantees themselves can unlock the Cover Page, update the
information, and re-submit the Cover Page. There is no need to submit a modifications request.

To update your Program Description, please email your Grant Manager the revised description and they can update it after their review and approval.

**Scope of Work – Demographics**
Please review the Demographics for accuracy. The number entered for Total Unduplicated Youth Participants (and for Total Unduplicated Adult Participants for Early Childhood programs) will be the annual projected goal that your program will be measured against. If there needs to be any changes made, please complete a workbook and submit through the Modifications tab.

**Scope of Work – Budget**
Please review the entire budget line by line for accuracy including staffing changes as reflected in the names entered. The names in the budget will be cross-checked with your supporting documentation for quarterly invoicing. If the names do not match, there may be a delay in processing your invoice. If there needs to be any changes made including personnel names, please complete a workbook and submit through the Modifications tab.

<table>
<thead>
<tr>
<th>Personnel</th>
<th>First Name</th>
<th>Last Name</th>
<th>FTE Annual Salary</th>
<th>% Time (99% = .99)</th>
<th>Total Project Budget</th>
<th>OFCY Funds Requested</th>
<th>Projected Match</th>
</tr>
</thead>
<tbody>
<tr>
<td>Executive Director</td>
<td>Sarah</td>
<td>John</td>
<td>85000</td>
<td>0.50</td>
<td>42,500.00</td>
<td>24,200.00</td>
<td>16,300.00</td>
</tr>
<tr>
<td>Program Director</td>
<td>Bob</td>
<td>Bee</td>
<td>65000</td>
<td>0.50</td>
<td>32,500.00</td>
<td>25,000.00</td>
<td>7,500.00</td>
</tr>
<tr>
<td>Instructor</td>
<td>Jill</td>
<td>Lee</td>
<td>35000</td>
<td>1.00</td>
<td>35,000.00</td>
<td>20,000.00</td>
<td>15,000.00</td>
</tr>
</tbody>
</table>

**Scope of Work – Activities**
All prior year activities have been copied over and labeled with the new year e.g. [19-20]. You can see a summary view of all activities and their projections in the Scope of Work - Activities.

Please review in detail for accuracy for all copied over elements of each activity:

- **Name** – The name of activity.
- **Category** – This is chosen from a dropdown list of pre-set OFCY categories.
- **Location** – Where the service is being offered.
- **Avg Session Part.** – The number of participants on average that you project to attend each session. If you plan to enroll 20 youth, you may consider entering 18 to account for youth being absent for various reasons. For Early Childhood Programs only: this field is a sum of Youth and Adult participants that you project out separately when setting up each activity.
- **Sessions by Quarter and Total** – The number of times you project that this activity will occur within a given quarter. The total is the sum of quarterly session and is auto-calculated.
- **Avg Hours per Session** – Make sure this field is entered in hours, not minutes. For example a 30 minute session should be entered in hours (0.5), not in minutes (30).
- **Units of Service (12 months)** – This is auto calculated by the following formula:
  
  \[
  \text{Average Session Participants} \times \text{Total # of Sessions} \times \text{Average Hours per Session} = \text{Units of Service (12 months)}
  \]
- **Service Description** – Make sure the description is still accurate and provides detail on what the activity is.

If you need to make any modifications (adding new activities, deleting copied over activities, modifying any copied over activities), please complete a workbook and submit through the Modifications tab. These requests are part of initial contract setup and will not count toward the modifications limits.
CONTACT US

Cityspan Database & Technical Assistance:
Cityspan Help Desk, support@cityspan.com
866-469-6884 (toll-free); Monday – Friday, 8:00a.m.-5:00p.m.

OFCY Grant Managers for Programmatic Assistance:
Kia Wallace, kwallace@oaklandca.gov, 510-238-6532
Scott Kim, sskim@oaklandca.gov, 510-238-2209
Terry Hill, thill@oaklandca.gov, 510-238-6380