Oakland Fund for Children and Youth

Cityspan User Manual: FY 2014-2015

Cityspan training webinar available on
http://www.ofcy.org/cityspan/

Cityspan Help Desk: 866-469-6884 (toll-free)
Mon-Fri, 8AM-5PM, Pacific Time

What's New with Cityspan in FY2014-2015?

- **Cityspan training webinar available at http://www.ofcy.org/cityspan/**
- **All FY13-14 data has been copied over into FY14-15 Grant year**
- **Projecting Adults and Youth Participants separately in Group Activities pg. 8**
- **More User Friendly Quarterly Progress Reports – STATS pg. 16**
    - **Displays quarterly data by each activity in addition to the aggregated category data**
- **No Coversheet as part of the Quarterly Progress Reports pg. 16**
    - **Justifying not meeting your projected Units of Service has been incorporated into STATS.**

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Logging In:

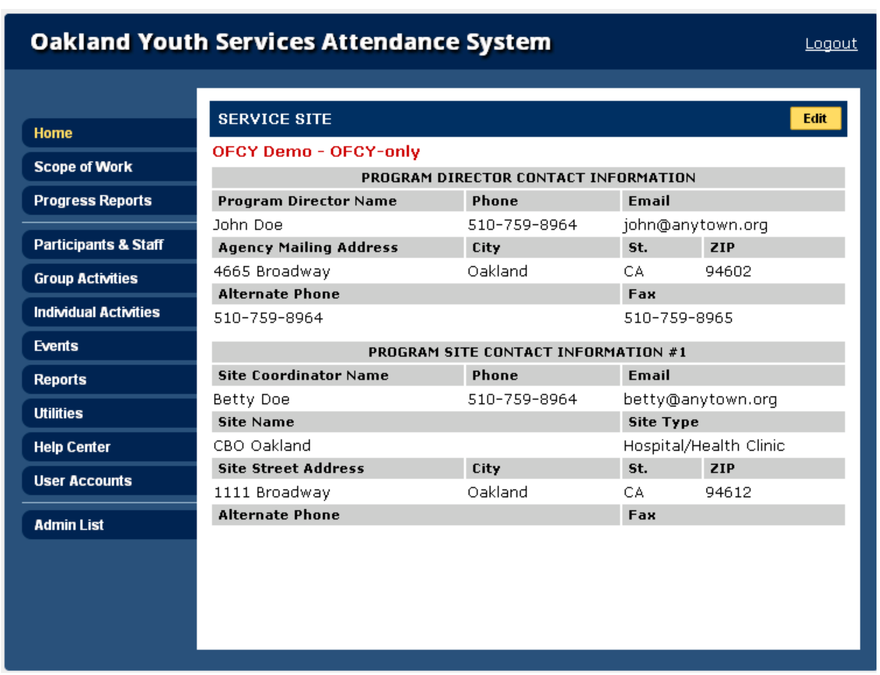
The log-in page is www.youthservices.net/ofcy. If you do not know your user name and password, please contact you supervisor or the Cityspan Helpdesk at 866-469-6884 (toll-free).

If you are a current grantee who will be continuing your work in FY14-15, you will see a dropdown option for which fiscal year you want to see, please choose the correct fiscal year for which you want to work in. The left blue menu tabs for: **Scope of Work (SOW)** and **Progress Reports** are different depending on which fiscal year you enter. Here is the difference:

Left Menu Tabs	What it is
Scope of Work 2013-2014 Progress Reports 2013-2014	Your data for the FY 2013-2014; these tabs will remain available until you close out the FY 2013-2014 year with OFCY.
Scope of Work 2014-2015 Progress Reports 2014-2015	Your data for the FY 2013-2014 have been copied over for your convenience. All the forms under these two tabs will be unlocked; make adjustments to the data entered here, based on the Grant negotiations that finalize your OFCY FY 2014-2015 program plan.

- ➔ Please make sure that the current contact information for your agency/program on the home page is complete and accurate.

- ➔ The contact information on the home page is split up between PROGRAM DIRECTOR CONTACT INFORMATION and PROGRAM SITE CONTACT INFORMATION. Also if your program provides services funded by a single OFCY grant at multiple sites, it is required that you enter each additional Program Site Contact Information on the home page. Please click edit to make the appropriate changes.



SUMMARY OVERVIEW
Setting up FY 2014-2015 Grant

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 2014-2015" and then go to the **Scope of Work** tab.

Scope of Work - Cover Page

The Cover Page includes the same data entered during the 2013-2016 Proposal process. Please review and modify, if necessary, this page to make sure that it accurately describes your program. Updating and submitting your Cover Page will open the Budget and Activities links.

1. Select **Cover Page**
2. Make changes
3. Click 'Submit'

Please make sure all information including ***Project Description*** is current.

Scope of Work - Demographics Form

In the Demographics tab, please estimate the total clients your program projects to serve during the period July 1, 2014 and June 30, 2015. Only include the youth and adult participants that will be enrolled in your program and served through Individual and Group Activities. DO NOT include in your projections the participants that will be served through Event Activities and will not be enrolled in your program.

Please review this information. If you need to make changes to the total numbers served, please email your Grant Manager know before making changes.

1. Select **Demographics**
2. Review for accuracy - (Note: Make sure the "Total Unduplicated Youth Participants" is the total number of children & youth (ages 0-20) you expect to serve throughout FY 2014-2015 program year. Meeting this projection will be based on the number of youth and adult participants you enter into the database throughout the year, enrolling them into group and individual 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).
3. Click 'Save' and 'Submit'

REMINDER: Each of the demographic categories (Race/Ethnicity, Age, Gender, etc.) 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.

Scope of Work - Budget

The FY13-14 budget has been copied into FY2014-2015. If your budget information has changed from what you proposed, please email your Grant Manager before making changes. If you have questions, please contact your Grant Manager.

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

1. Select **Budget**
2. Make changes
3. Click 'Save' and 'Submit'

Scope of Work - Activities

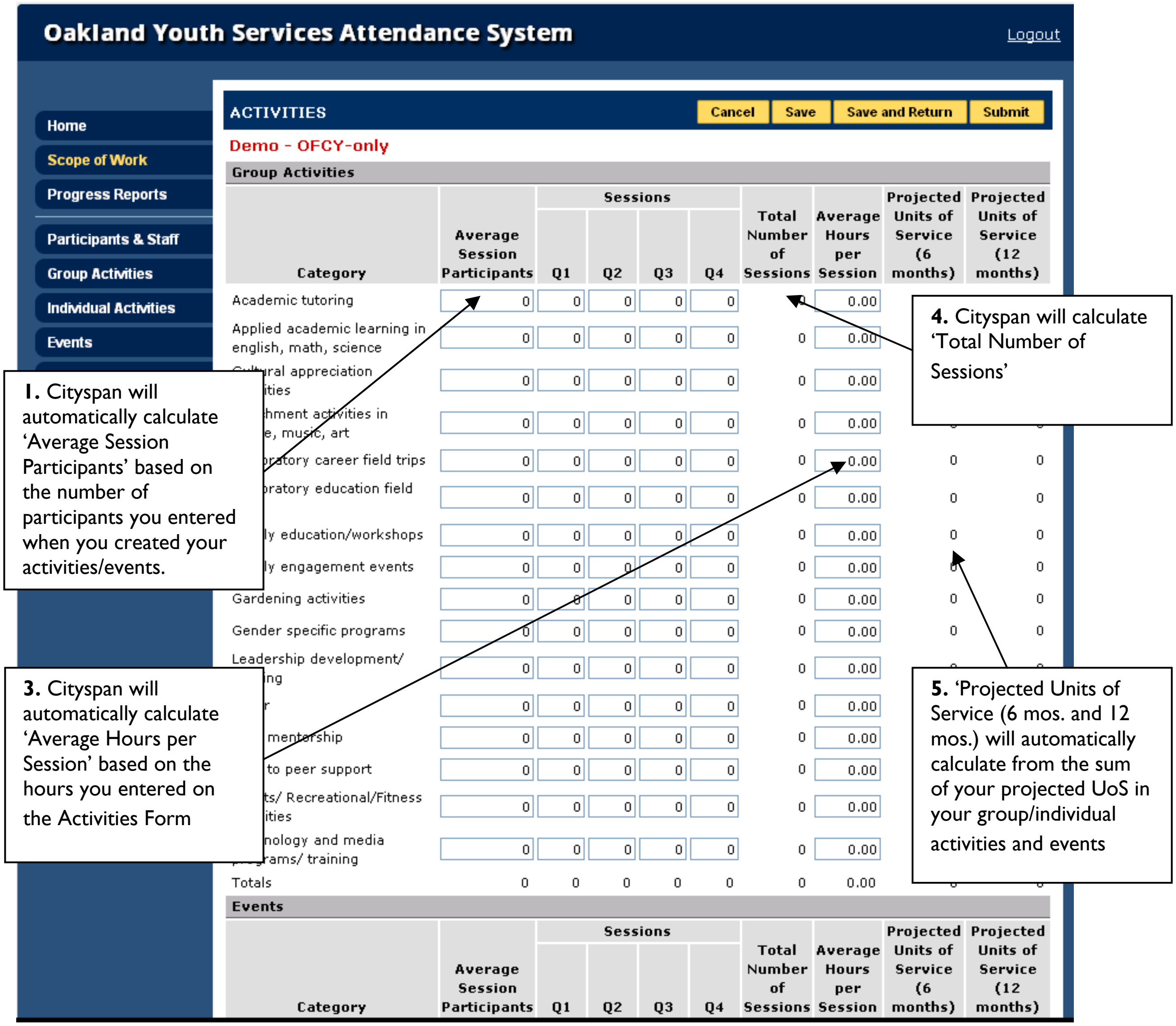
The Scope of Work (SOW) - Activities page is read only and aggregates by service category the numbers you projected when creating activities and events. You cannot make any edits to this page. To make changes to the projected numbers on Scope of Work - Activities page, you must edit your projections by going into each Individual Activity, Group Activity or Event.

All your FY2013-2014 activities and events have been copied over. For detailed instructions on how to modify or create Group Activities, Events and Individual Activities, go to pages 7-9. All copied activities and events from are easily identifiable by the tag [2014-2015].

Once your SOW - Activities form has been submitted, you CANNOT make changes to it or add new activities without contacting your Grant Manager at OFCY. The SOW- Activities form is LOCKED in the database once it is submitted because it is intended to represent your Granted agreement ~ which is generally not to be altered once your Grant has been finalized. You have the option of modifying your SOW-Activities two (2) times each Grant year. The deadline to request a SOW Modification is the end of the 3rd quarter. All SOW Modification requests must be submitted to your Grant Manager via email.

If your Grant Manager agrees that the SOW should be modified he/she will UNLOCK this section of the database in order for you to make changes and add new activities/events. (This also includes making changes to projections for numbers of participants to be served.)

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



Cityspan will then sum up the Units of Service projections and quarterly # of sessions by category on the Scope of Work Activities page (see below). Cityspan will also calculate the average session participants and average hours per session by category on the Scope of Work Activities page (see below). **Please review the Scope of Work Activities page and click Submit when you have finished creating all your activities and events.** Once the Activities form is completed and submitted, the projections for the FY 2014-2015 program year will be locked and you will not be able to create new activities.

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.

<u>NOTE:</u> All your FY2013-2014 Group Activities has been copied over to FY14-15. However, you will need to go in and enter a schedule for each Group Activity. Click the "Edit" button next to the Schedule and follow the prompts on the screen. For more information, please view the Cityspan webinar available at http://www.ofcy.org/cityspan/.

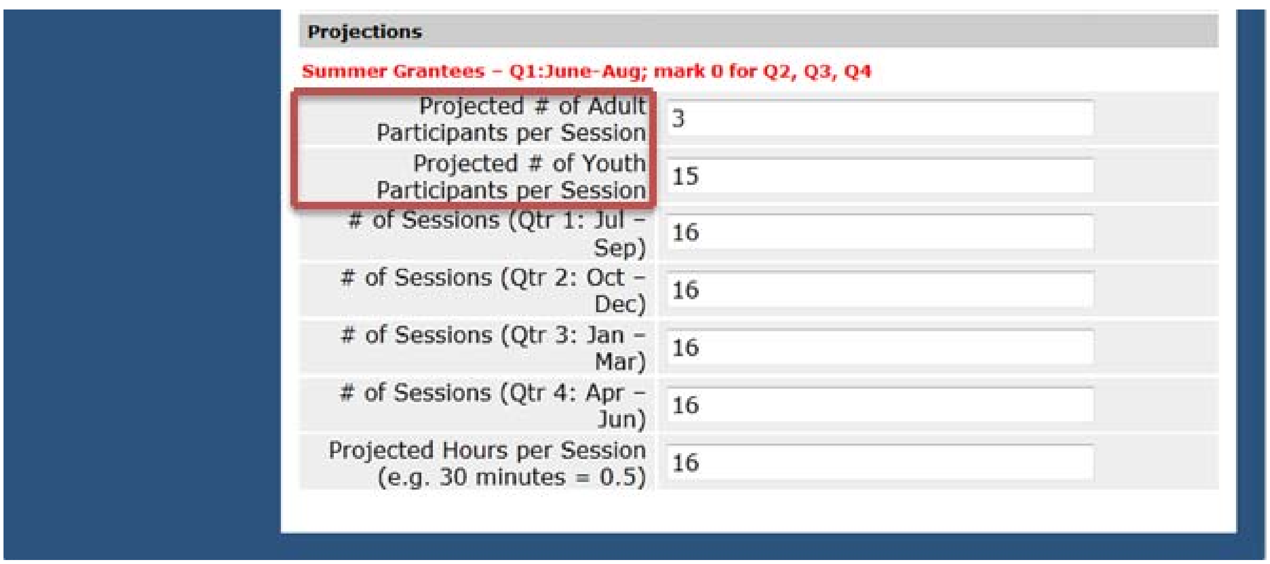
All participants must be entered into the database so they can be counted for attendance.

To view Group Activities:

1. Select **<u>Group Activities</u>**
2. Either select an existing activity to "Edit" (i.e., Schedule, Lead Staff, etc.) or click the <u>Add Activity</u> tab to create a new Group Activity
3. Enter the Activity Name and Select the appropriate funding source(s)
4. Click 'Save & Proceed'
5. Proceed through each step of the wizard, clicking 'Save & Proceed' with each step. Note that every field in the Group Activities must contain a selection in order for group activity entry to be complete.

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.

NEW: When projecting in Group Activities, you will be able to separate the number of projected adult participants and projected youth participants. If you only serve children and youth, please zero out the "Projected # of Adult Participants per Session:.



Projections

Summer Grantees – Q1:June-Aug; mark 0 for Q2, Q3, Q4

Projected # of Adult Participants per Session	3
Projected # of Youth Participants per Session	15
# of Sessions (Qtr 1: Jul – Sep)	16
# of Sessions (Qtr 2: Oct – Dec)	16
# of Sessions (Qtr 3: Jan – Mar)	16
# of Sessions (Qtr 4: Apr – Jun)	16
Projected Hours per Session (e.g. 30 minutes = 0.5)	16

Cityspan will use this information to calculate projected Units of Service at the 6 month and 12 month mark (see below) by each activity using the following formulas:

Projected UoS (6 months) = avg. participants x # of sessions (Q1 + Q2) x avg. hrs per session

Projected UoS (12 months) = avg. participants x # of sessions (Q1 + Q2 + Q3 + Q4) x avg. hrs per session

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

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.

NOTE: All your Events created during the 2013-2016 Proposal Process have been copied over. You do not have to enter in a schedule. The schedule is read only and will auto-populate once attendance has been entered.

To view Event Activities

- Select **Events**
- Either select an existing activity to "Edit" (i.e., Schedule, Lead Staff, etc.) or click the Add Events tab to create a new Event
- When adding 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.

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.

➔ **Caution: Never delete Events from the database.** There is no limit to the amount of historical data that is stored in the system.

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.

NOTE: All your Individual Activities created during the 2013-2016 Proposal Process have been copied over. You do not have to enter in a schedule. The schedule is read only and will auto-populate once attendance has been entered.

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.

➔ **Caution: Never delete Activities from the database.** There is no limit to the amount of historical data that is stored in the system.

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.

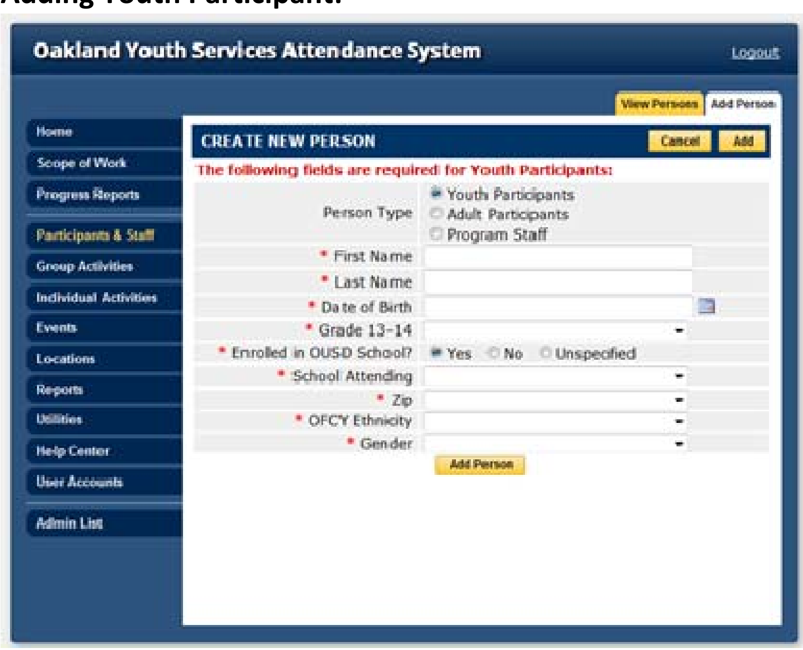
Searching:

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 Participants & Staff:

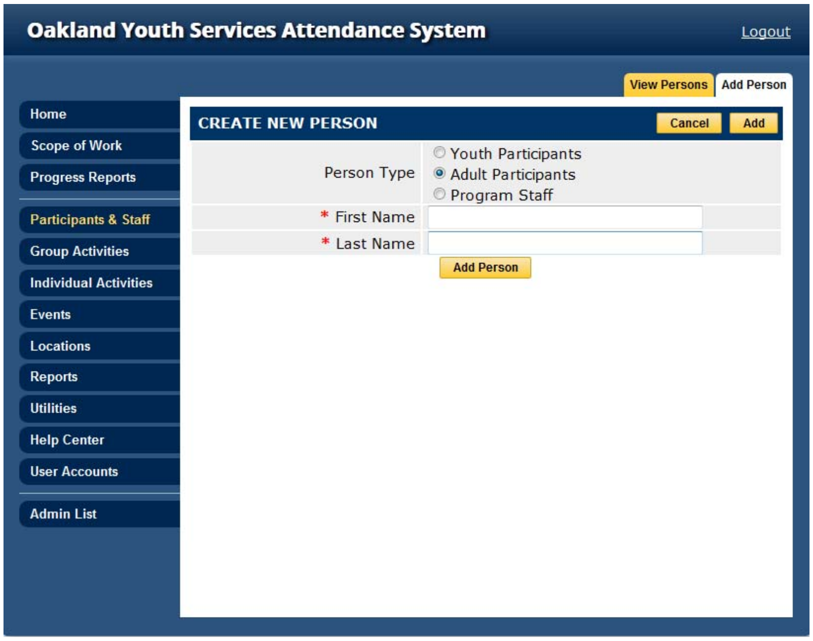
1. Select **Participants & Staff**
2. Click 'Add Person' (yellow tab)
3. Select 'Person Type' : Youth Participant (Anyone age 20 or younger); Adult Participant; Program Staff
4. Enter in the required fields.
5. Click 'Add Person'

Adding Youth Participant:

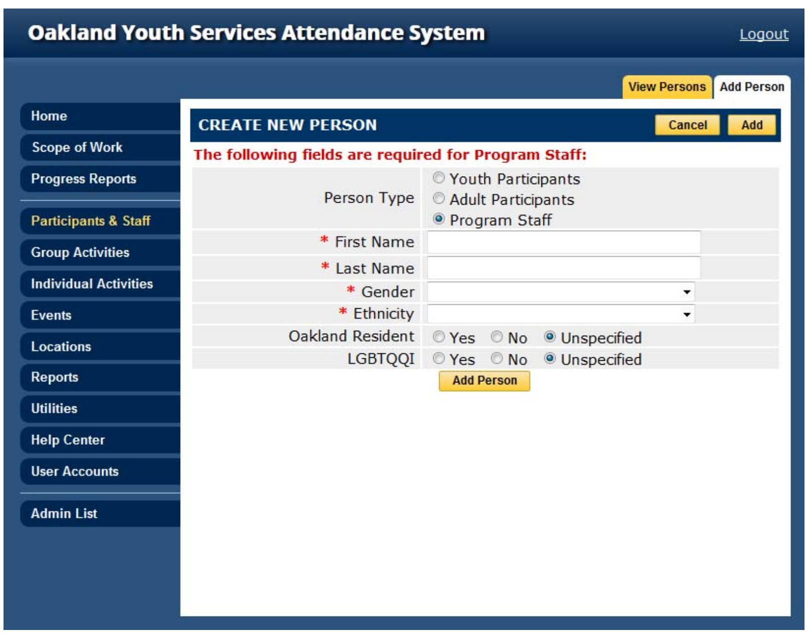


Enrolled in OUSD School. If you select 'Yes' for the 'Enrolled in OUSD School' field, a second conditional field called 'School Attending' appears and you must choose from a drop down list. This applies for the following strategies:

#5: Transition programs for youth into middle and high school
#6: Youth Leadership in Community Schools
#7: Community-based Out-of-School Time Programs
#8: Summer Program
#9: Youth Leadership and Community Safety
#10:Youth Career and Workforce Development
#11: Academic Support for Older Youth



Adding Adult Participant:
Only the First Name and Last Name are required.



Adding Program Staff:
Oakland Resident and LGBTQQI fields. These fields are not required.

- ➔ **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.

- ➔ **Note:** It is very important that you enter all required demographics information (DOB, Grade, Zip Code (Oakland), and Ethnicity for each participant. The system will not allow you to move forward without completing the required fields.

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

Attendance data will now be permanently locked on the 15th of each month for the preceding month (e.g. October will be locked on November 15th). Grantees are encouraged to complete data entry by the 10th of each month. This will allow enough time to address any data entry problems you may encounter that require OFCY or Cityspan Helpline assistance. After the 15th you must request via email to your Grant Manager that attendance be unlocked. The purpose of this new policy is to prevent accidental deletions of valuable reporting data by agency program staff during the course of the Grant year. Retrieving lost data has proven to be time consuming and very expensive. The cost is the responsibility of the grantee and is paid directly to Cityspan.

For Group Activities Attendance

Taking Attendance ~ By 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 (all pres.) or absent (all abs.)
5. Click 'Save' and 'Return'

Note: if a participant has any variation of attendance other than All Pres. or All Abs. they will be marked as having Mixed Attendance. This column is read-only and can not be selected. Mixed attendance means that the participant has a combination of present, absent, and/or unknown attendance for that date.

Reminder: If participants attend activities but skips 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 **DOES NOT COUNT** toward your attendance 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.

<u>For Event Attendance</u>

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 Individual Activities Attendance

1. Select **Individual Activities**
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.

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:

- **Grant 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
Grant 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 No Access for both Grant Management System and Service Management System.

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.

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'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.

NEW Stats: On the Stat 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. Also, actual service information from activities that are not marked "funded by OFCY" 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 done, press 'Submit'. Once you submit, your Stat report is locked and will no longer update.

The function of the former Cover Sheet has been incorporated into STATs. If you did not meet your projected Units of Service at the category level, you will be required to provide a reason why. You may also enter overall comments.

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.

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.

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. You can only change your program's Signatory by contacting OFCY directly before Cityspan can make the change.

Third Quarter Match Reporting Requirements:
Third Quarter Report and invoice must include record of the matching funds your OFCY program has utilized. Please provide information for each source of funding that make up the **TOTAL** amount of Projected Match column in your Budget.

1. Go to "Progress Reports" (left blue menu)
2. Under "**Quarter 3"**, click on **<u>Match</u>**
3. Enter "Source" (source of your matching funds)
4. "Amount" (amount of matching funds your OFCY program has received from the source)
5. Choose "Type of Funding" from drop down list.
6. Upload supporting documentation for at least 25% of your OFCY Grant award (displayed below as Minimum Match Documentation Amount). For further instructions, please refer to the Proof of Match Guidelines found on the Help Center tab on your left.
7. Click Add to update your Total Amount and to create an additional Service Record.
8. Repeat until all of your match sources and amounts are entered.
9. When done (your minimum match requirement should be met), click Submit.

Note: 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 Grant Manager.

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.)

Contact Us

Cityspan and OFCY Programmatic Assistance:
Debra Chester, OFCY Grants Manager, dchester@oaklandnet.com or 510-238-7496
Terry Hill, OFCY Grants Manager, thill@oaklandnet.com or 510-238-6380

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

Simple Solutions for Inaccurate Cityspan Data

The following are three common causes and solutions for inaccurate Cityspan Reports.

1. Attendance data has not been entered. At a minimum, all attendance should be entered on a monthly basis by the 10th day of the following month.

   Solution:
   1. Click on yellow attendance tab and verify attendance data status: Green = Complete, Red = Incomplete
   2. Enter attendance data

2. Activity category not selected or marked in the wrong category. If the Category was not selected when the activity was set up then it will not appear on your quarterly reports. The list of Service Categories appears under each Service Format (Individual, Group and Event). Your strategy (Early Childhood, School-based and Community-Based After School, Summer, Wellness and Healthy Transitions, or Older Youth) determines which Activities categories list you will see.

   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 are then used to determine how your program arrives at projection targets.

   Solution:
   1. Go to either the Group, Individual or Event blue tab on left
   2. Select the Activity(s) in question and verify the category has been selected and is correct
   3. If incorrect, select the yellow Edit tab at top of page
   4. Select correct category
   5. Select Save and Submit

3. OFCY was not identified as the Funding Source at the time the Activities were created.

Solution:

1. Select the Activity or Event that is not showing up in the quarter report
2. Select “Edit”
3. Mark the program as “Funded by OFCY” for the correct fiscal year
4. Click “Save & Proceed”

Strategy #1: Mental Health and Developmental Consultations in Early Care and Education

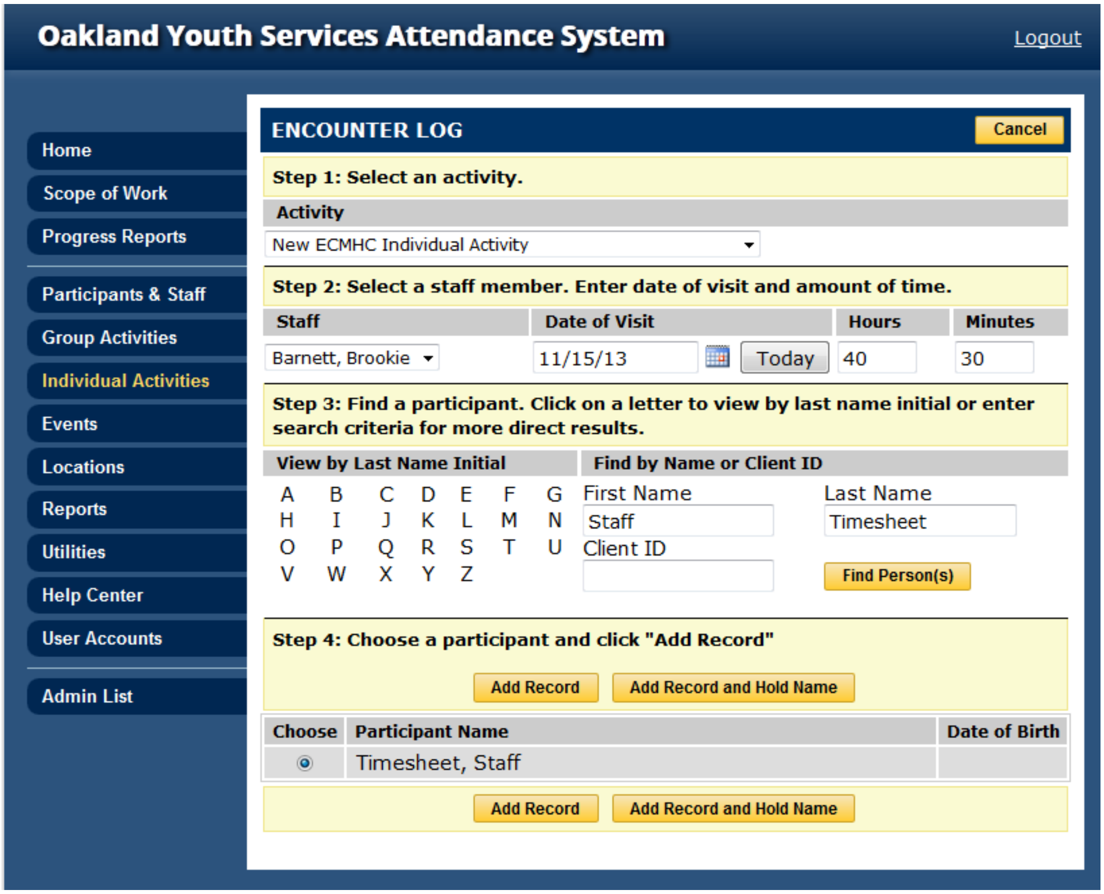
The following instructions and guidelines are provided in order to ensure consistency in how activities and units of service are tracked in Cityspan for Strategy #1: Mental Health and Development Consultations in Early Care and Education.

Instead of counting units of service and figuring out which participants to count for which activity, OFCY will track the two following data points for all services provided by OFCY’s ECMHC grantee:

1. Number of participants per service site (both child/youth and adult participants) – Group Activities
    a. Set up one Group Activity per service site
    b. For OFCY – Activity Category, choose “Consultation with preschool providers”
    c. Schedule one date at the end of each quarter (i.e. 12/31/2013, 3/31/2014, 6/30/2014)
        i. Set the hours for the quarterly dates to 9am-9:15am.
    d. Projections should all be listed as "0"
    e. <u>Take attendance for each student once per quarter. There is no need to take daily attendance any more.</u>
    f. Enroll new participants as you have done so. This process has not changed.
    g. You can also add adult participants here to reflect your work with parents, educators, staff, etc.

2. Number of service hours provided by each consultant per service site – Individual Activities. To capture consultation hours per site per consultant, please do the following:
    a. Set up one Individual Activity per service site
    b. For OFCY – Activity Category, choose “Consultation with preschool providers”
    c. Projections
        i. Enter projected hours of service per site per quarter
        ii. Set average session length to one hour
    d. Enroll each staff
        i. Click on EDIT
        ii. Select a staff name
        iii. If staff name does not appear, add staff by going to PARTICIPANTS & STAFF
        iv. Note: only one staff can be designated lead staff per activity. All others will be designated as Support Staff.
    e. Create an adult participant called “Staff Timesheet”

- Input attendance selecting the appropriate staff and the participant "Staff Timesheet"
  - Select the correct staff for whom you are entering hours for
  - Select the last date of the time period for which you are entering hours for. You have some discretion on how often you want to enter this based on your organization's current system of tracking hours. For example, if your organization has bi monthly timesheets ending on the 15th and last day of the month, you can enter hours dated on the 15th and the last day of the month. But at a minimum, please enter hours on a monthly basis.
  - Use the hours and minute fields to enter the number of hours that consultant worked at that site for the time period you are reporting for
  - Step 3: Search for participant "Staff Timesheet" and click "Add Record" to record hours.
    - The "Add Record and Hold Name Function" allow you to report for the same Consultant for multiple entries without having to search for Staff Timesheet again.

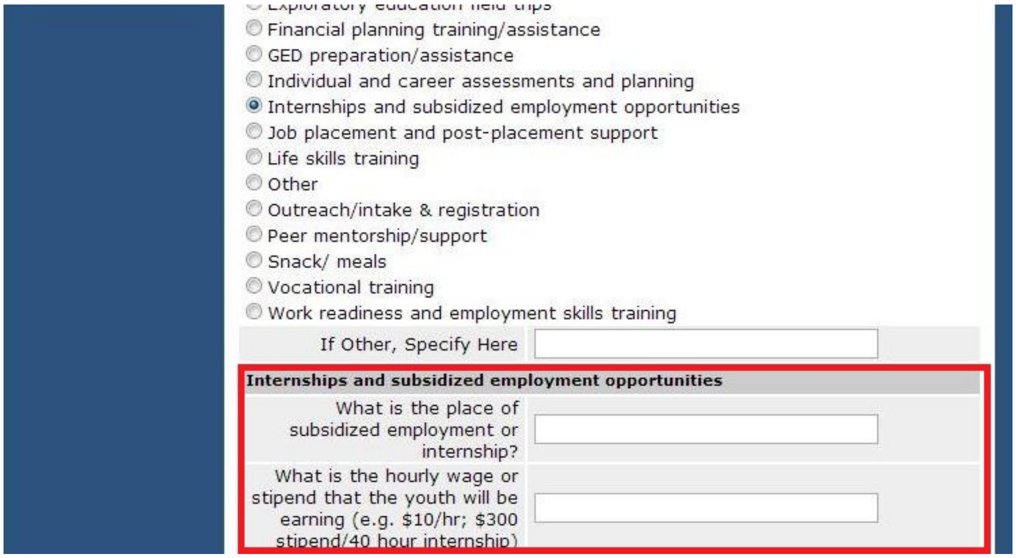


Strategy #10: Youth Career and Workforce Development

ONLY use Individual Activities when tracking your “Internships and Subsidized Employment” activities. Make sure to fill out the two additional fields of “

OFCY would like to better track its impact on youth internships and subsidized employment. All activities for the category “Internships and subsidized employment opportunities” should be created as Individual Activities.

When creating the Individual Activities and choosing the category “Internships and subsidized employment opportunities”, two conditional questions should appear underneath the category listing (see below). Both fields are required.

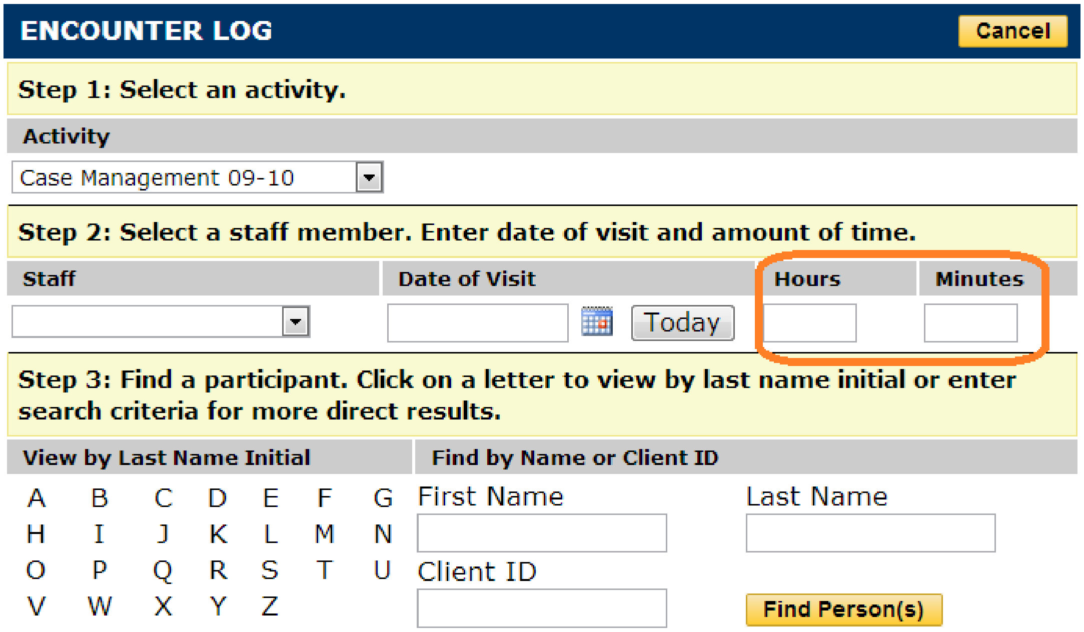


<u>Entering Attendance for Individual Activities with Category "Internships and subsidized employment opportunities"</u>

In order to mitigate the amount of data entry, you may enter the total number of hours worked on a weekly basis for each youth participant. You do not have to enter # of hours worked on a daily basis.

To enter weekly attendance for a youth participant:

1. Click on INDIVIDUAL ACTIVITIES tab on right side
2. Click on the appropriate Individual Activity
3. Click on the yellow ATTENDANCE tab on top right
4. Click ADD on top right
5. Select STAFF – A staff member has to be selected in order to take attendance.
6. DATE OF VISIT – Please enter the last day of the week that the youth participant worked.
7. Enter the total hours worked by the participant using both the HOURS and MINUTES fields. If you are not using both fields, one of the fields can be left blank.
8. Search for the youth participant by Last Name Initial or partial First or Last Name.
9. Once the participant is found, click ADD RECORD.
10. The ADD RECORD AND HOLD NAME function is if you want to input multiple entries for the specific participant. You just have to change the DATE OF VISIT, HOURS and MINUTUES fields. You do not have to search for the specific youth each time.


ENCOUNTER LOG
Cancel
Step 1: Select an activity.
Activity
Case Management 09-10
Step 2: Select a staff member. Enter date of visit and amount of time.
Staff
Date of Visit
Today
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
A B C D E F G
H I J K L M N
O P Q R S T U
V W X Y Z
First Name
Last Name
Client ID
Find Person(s)

Extra Question In Progress Reports Narrative Regarding Job Placement

OFCY would like to track each youth that has been placed in **unsubsidized** employment by the OFCY funded program on a quarterly basis. Please only enter actual job placements that took place during the quarter. As the prompt question states, please enter where the youth was placed in unsubsidized employment, their wage, and their projected average number of work hours/week. Please do so for each youth placed in unsubsidized employment. Click on ADD YOUTH PLACEMENT to add as many youth as needed. If you do not have any job placements for the quarter, click on DELETE THE ABOVE YOUTH PLACEMENT. If you would like to provide more information on the job placements, please do so in the Additional Comments section.

Job Placement

For each youth placed in unsubsidized employment in this quarter, please list where the youth was placed, their wage, and their average number of work hours/week. (e.g. Corporation A, $12/hour, 30 hours/week)

Youth 1

Placement	Hourly Wage	Average # of Hours/Week
Corporation A	9.50	20.00

Delete the above Job placement

Youth 2

Placement	Hourly Wage	Average # of Hours/Week
Hospital A	10.00	35.00

Delete the above Job placement

Youth 3

Placement	Hourly Wage	Average # of Hours/Week

Delete the above Job placement

Add Job Placement