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# AS21 HANDBOOK

FOR OPERATING AFTERSCHOOL21 DATA PROGRAM MANAGEMENT SOFTWARE

UPDATED: 07/27/2022

TRAINING DATE

LOCATION



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# GETTING STARTED

## CONFIGURING YOUR COMPUTER

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The AfterSchool 21 system is compatible with the most recent versions of Google Chrome, Microsoft Edge, and Mozilla Firefox.

**1**

### ENTER THE WEB ADDRESS IN THE RIGHT PLACE

Ensure that the web address is entered into the browser address bar, not a Search bar such as Google.

**2**

### ADD YOUR AS21 SITE AS A FAVORITE

Make it easy to get back to your site by bookmarking or favoriting it in your browser.

**3**

### TURN OFF POP-UP BLOCKERS

Pop-ups are used throughout the system when saving information. If these pop-ups are blocked, the information you enter may not save correctly.

- For Chrome:
  - From the menu in the upper-right corner click Settings. From the menu on the left click Privacy and Security. Click the Site Settings section. Click Pop-ups and redirects. Slide the toggle at the top of the screen so that it is set to Allowed.
- For Edge:
  - From the menu in the upper-right corner click Settings. At the top left of the menu click the Privacy & Security tab (the lock icon). Scroll down to the Security section. Under Block Pop-Ups, click the toggle and set to Off.
- For Firefox:
  - From the menu in the upper-right corner click Options. Click the Privacy & Security tab on the left of the screen. Scroll down to the Permissions section. Uncheck the box for Block Pop-Up Windows.

# NAVIGATION

## IMPORTANT SYSTEM FEATURES

3

1

### DASHBOARD

The customizable dashboard allows users to select key information they would like to see when the first connect to the system.

2

### MY PROFILE

The My Profile area contains information specific to your account. Change your password. View version update information in What's New. Use Change Credentials to view other Sites or Terms.

3

### SUPPORT

Submit help requests, access an electronic version of this handbook, view training videos, or contact us.

4

### NAVIGATION BAR

Use the vertical navigation bar to move through the system. The white highlighting indicates the section of the system in which you are currently working.

# TERMINOLOGY

## A GLOSSARY OF TERMS USED IN THIS HANDBOOK

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### APR

The APR or Annual Performance Report is the set of data submitted to the US Department of Education via the 21APR federal database to show what took place in your program during a reporting year.

### REPORTING PERIOD

There are multiple reporting periods (e.g. Summer, School Year, Full Year) associated with each APR reporting year. The reporting year **BEGINS** with the summer reporting period, then continues through the fall and spring reporting periods.

### TERM

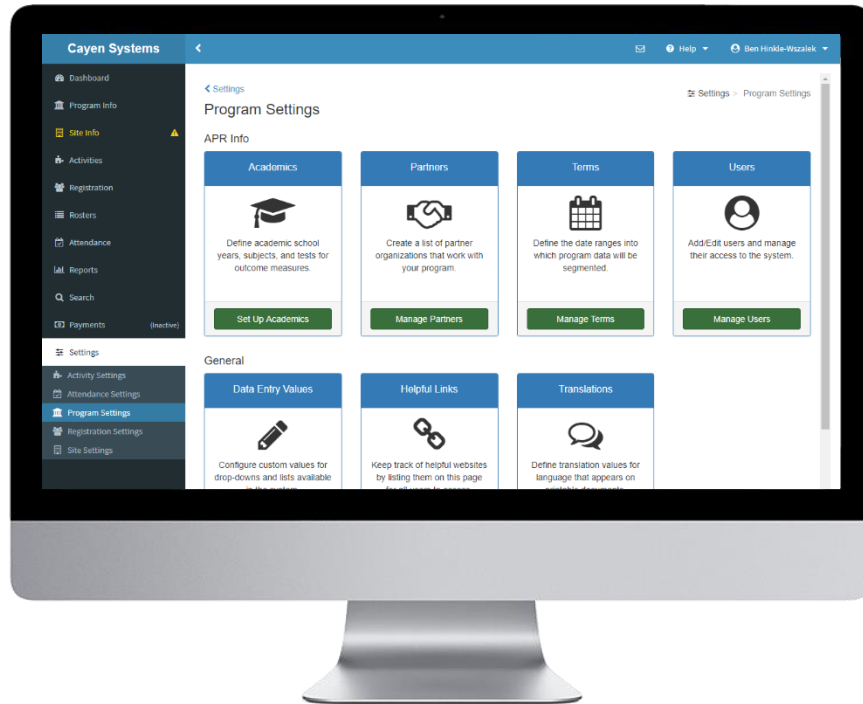
A Term is a date range that defines when your after-school program is in operation. Typically, Terms align with the APR reporting year.

### REGISTERED / ATTENDEE

Registered participants are people that have a registration form on file with your program. Attendees are participants that are not registered – commonly used for adults and family members of registered participants.

### ROSTERS

Rosters are lists of participants and can be used to print paper attendance sheets for recording participation. Rosters can be associated with specific sessions being offered at a site or can be established for a custom group of participants.



# PROGRAM SETUP

Program Setup describes configuring the software to align with your program, district, and site.

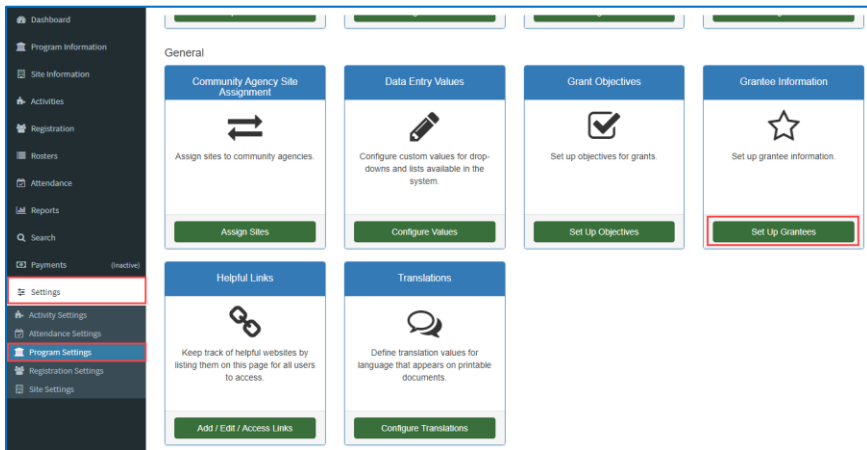
- |  |                                   |
|--|-----------------------------------|
| ✓ Enter Grantee Details (pg #8)          | ✓ Add Objectives (pg #10)         |
| ✓ Add a Term (pg #11)                    | ✓ Add / Edit Users (pg #12)       |
| ✓ Add / Edit Community Partners (pg #14) | ✓ Identify Board Members (pg #16) |

## IMPORTANT NOTES ABOUT WORKING IN THIS SECTION

- Change Credentials and connect to ALL SITES when modifying Program Settings.
- Many districts have more than one associated grant. Make sure you are working with the right grant when modifying grantee information.
- Save data entry time and improve the accuracy of academic information by sending data from your Student Information System to Cayen Systems via our secure data uploads site (<https://datauploads.datapropeller.com>).

# ENTER GRANTEE DETAILS

Details related to grants will appear on the annual performance report and should be reviewed and updated annually, as needed.



- Set up District / Grants**
1. In your left-hand navigation menu, click 'Settings' → 'Program Settings'
  2. Locate the 'Grantee Information' Card
  3. Click 'Set Up Grantees'

- Set up Grantees**
4. If sites have been assigned to a Grantee, this will show in the list
  5. You will get a 'Warning' message if there are any sites that are not assigned to a Grantee
  6. Click 'Add New Grantee', at the top of the screen, to create a new Grantee
  7. Complete the fields under all tabs (see below), then click 'Save'

The screenshot shows a table titled 'Grantee Information' with the following data:

Grantee	Grantee Type	Address	Contact	Grant Length	Initial Reporting Year	CLC APR Required	Sites
2019 Grantees	School District	1234 Main Street Milwaukee, WI 53210	Mary Smith E: (414) 555-5555 marysmith@email.com	5 year(s)	2019 - 2020	Yes	Prendergast
2020 Grantees	School District	1234 Main Street Milwaukee, WI 53210	Mary Smith E: (414) 555-5555 marysmith@email.com	5 year(s)	2020 - 2021	Yes	Ansonia Middle School Mead

The screenshot shows the 'Grantee Information' form with the 'General' tab selected. The fields are as follows:

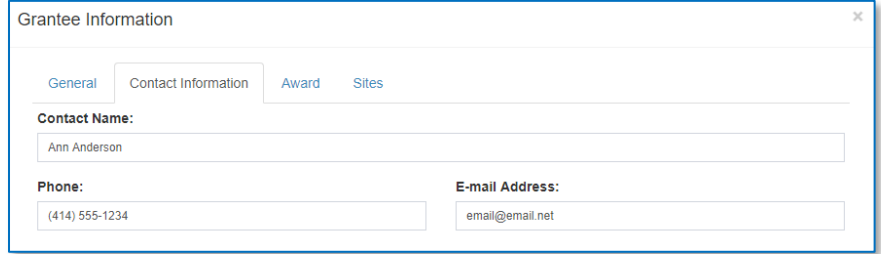
- Grantee Name:** Middleton School District
- Grantee Type:** School District
- CLC APR Required:** Yes
- Address:** 123 Main Street
- City:** Milwaukee
- State:** WI
- Zip:** 53222

- Grantee Setup – General Tab**
8. Complete the fields
  9. If CLC APR Reporting is required, set the field to 'Yes'
  10. Click 'Save' at the bottom of the screen



**Grantee Setup – Contact Information Tab**

1. Enter the Grantee contact information, 'Name', 'Phone', and 'Email Address'
2. Click 'Save' at the bottom of the screen



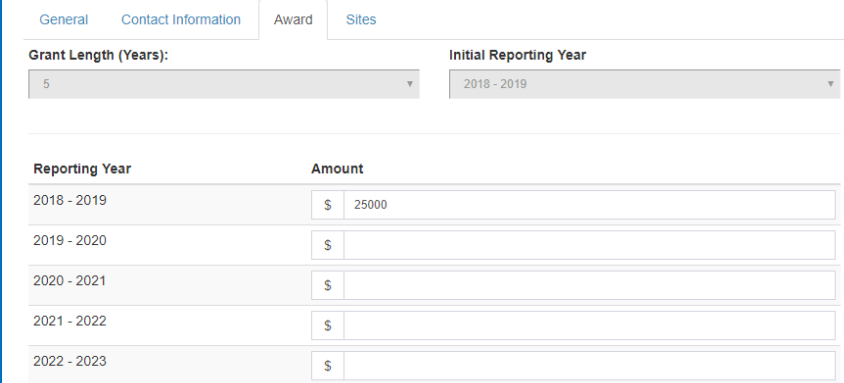
Grantee Information

General Contact Information Award Sites

**Contact Name:**  
Ann Anderson

**Phone:** (414) 555-1234 **E-mail Address:** email@email.net

**Grantee Information**



General Contact Information Award Sites

**Grant Length (Years):** 5 **Initial Reporting Year:** 2018 - 2019

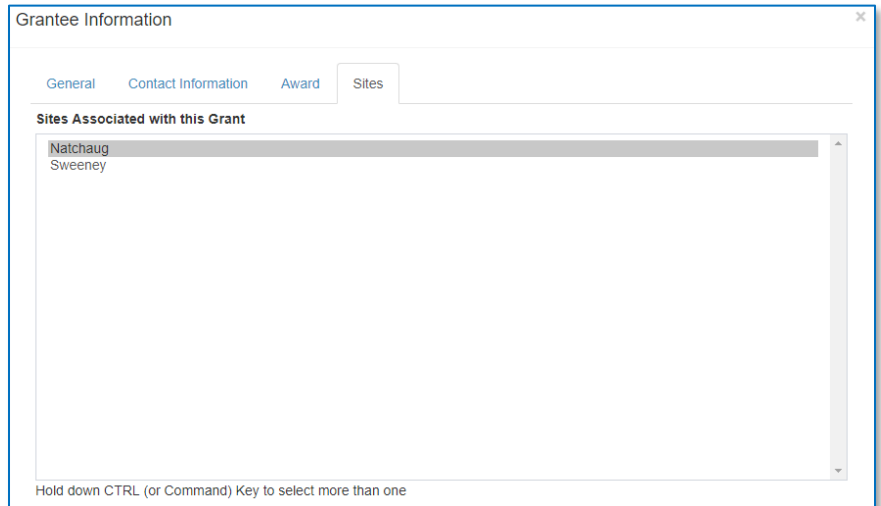
Reporting Year	Amount
2018 - 2019	\$ 25000
2019 - 2020	\$
2020 - 2021	\$
2021 - 2022	\$
2022 - 2023	\$

**Grantee Setup – Award Tab**

1. Select the 'Grant Length' and 'Initial Reporting Year'
2. Enter the amount awarded for the current and past years only, leaving future year information blank
3. Click 'Save' at the bottom of the screen

**Grantee Setup – Sites Tab**

1. Select the site(s) associated with this Grant
2. Hold down the CTRL (Apple) key to select more than one site.
3. Click 'Save' at the bottom of the screen



Grantee Information

General Contact Information Award Sites

**Sites Associated with this Grant**

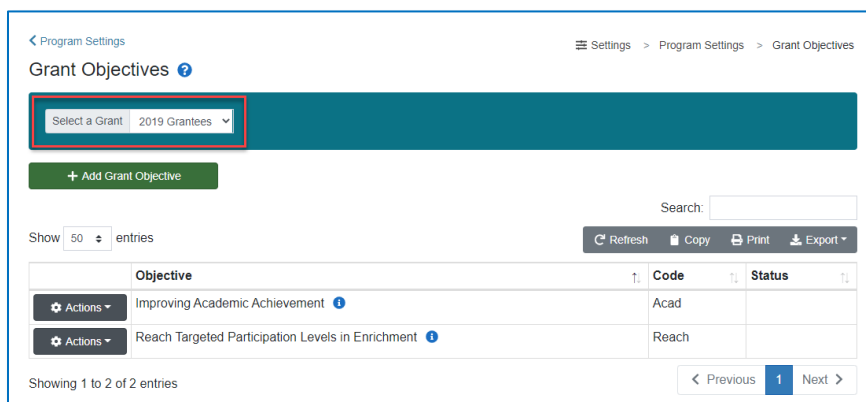
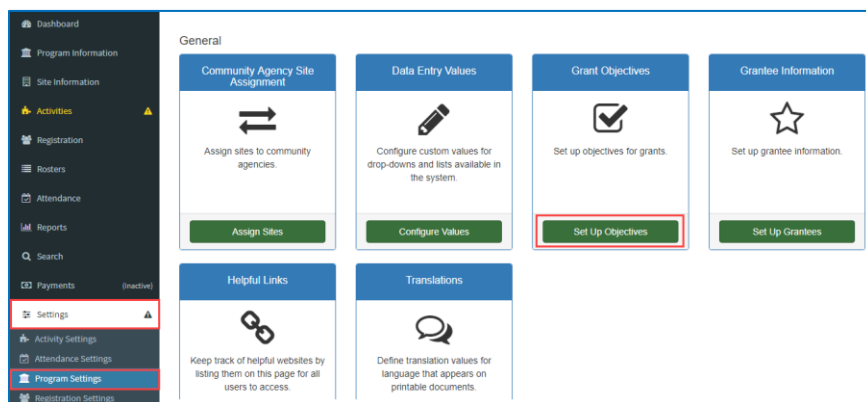
- Natchaug
- Sweeney

Hold down CTRL (or Command) Key to select more than one

# ADD OBJECTIVES

## Set Up Objectives

1. In your left-hand navigation menu, click 'Settings' → 'Program Settings'
2. Locate the 'Grant Objectives' Card
3. Click 'Set Up Objectives'



## Set Up Objectives

1. Select the appropriate Grantee from the drop-down
2. Click 'Add Grant Objective'
3. Enter the Objective Information
4. Click 'Save'

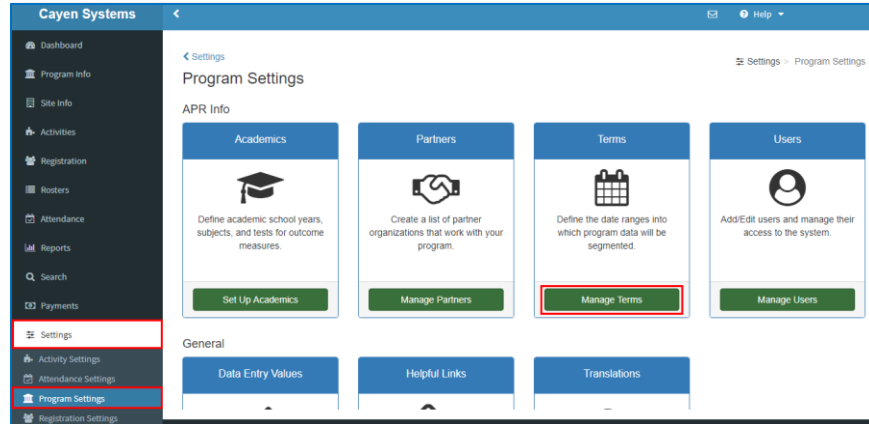


## Notes

- Objectives that have been linked to an activity or used in a previous term cannot be deleted. However, they can be renamed (if needed).
- At least one objective must be entered in order to set up activities in your sites.

# ADD A TERM

Terms are used to define the date range of your program. Typically for 21<sup>st</sup> CCLC programs, the term should begin with the summer program and end with the spring program.

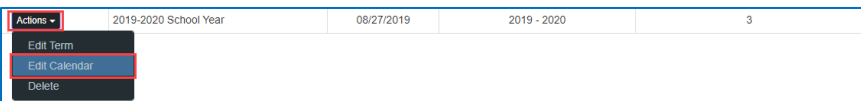
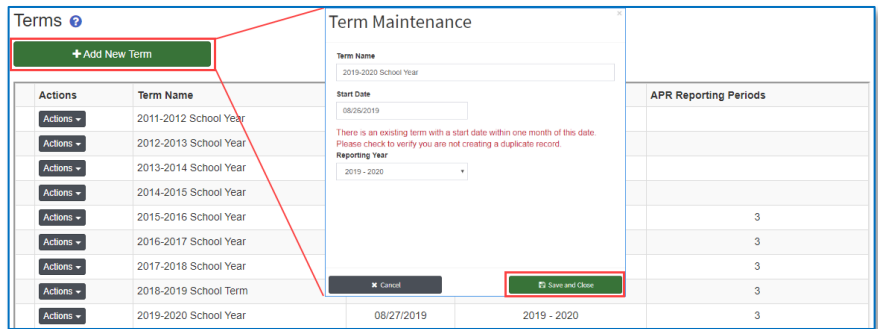


**Manage Terms**

1. In your left-hand navigation menu, click 'Settings' → 'Program Settings'
2. Locate the 'Terms' Card
3. Click 'Manage Terms'

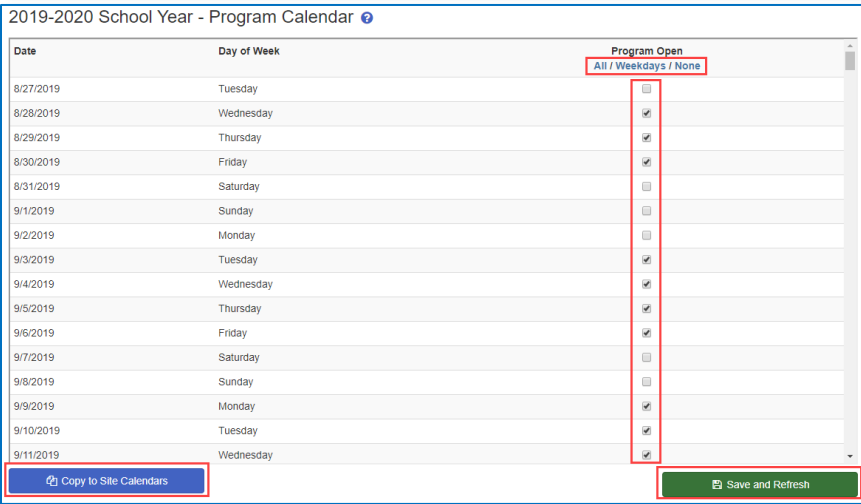
**Add a Term**

1. Click 'Add New Term' at the top of the screen
2. Enter the 'Term Name', 'Start Date', and select the 'Reporting Year'
3. Click 'Save and Close'



**Set Up Calendar**

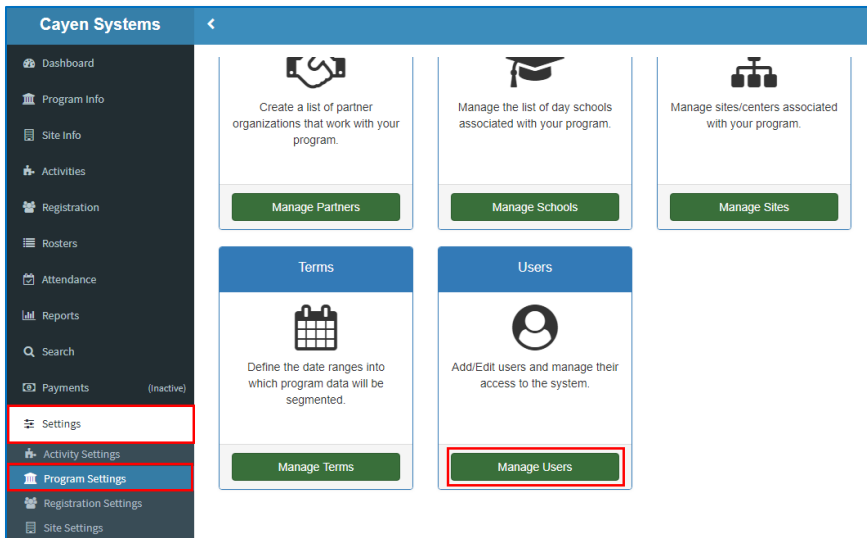
1. Click the Actions button next to the term
2. Click 'Edit Calendar'
3. Click "All", "Weekdays", or "None" to quickly apply the option to the Program Open check boxes. Or check the boxes individually to select days that the program is open
4. Click 'Save and Refresh'
5. Click 'Copy to Site Calendars'
6. Check the box(es) to select the site(s) to copy the Calendar to
7. Click 'Save'



- If a New Term has a Start Date within one month of an existing term, a warning message will display to ensure that a duplicate term is not being created.
- Setting up a term calendar, then copying it to your sites can save time when setting up activities and sessions.

# ADD USERS

Anyone who needs to access this system should have their own login and password.

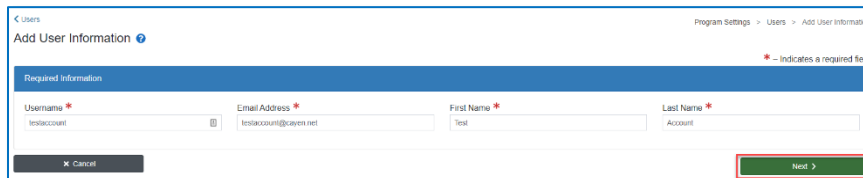


## Manage Users

1. In your left-hand navigation menu, click 'Settings' → 'Program Settings'
2. Locate the 'Users' Card
3. Click 'Manage Users'

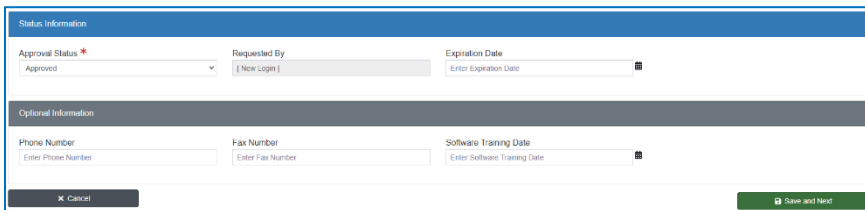
## Add a User

4. Click 'Add New' at the top of the screen
5. Enter the person's username, email, and name
6. Click 'Next'



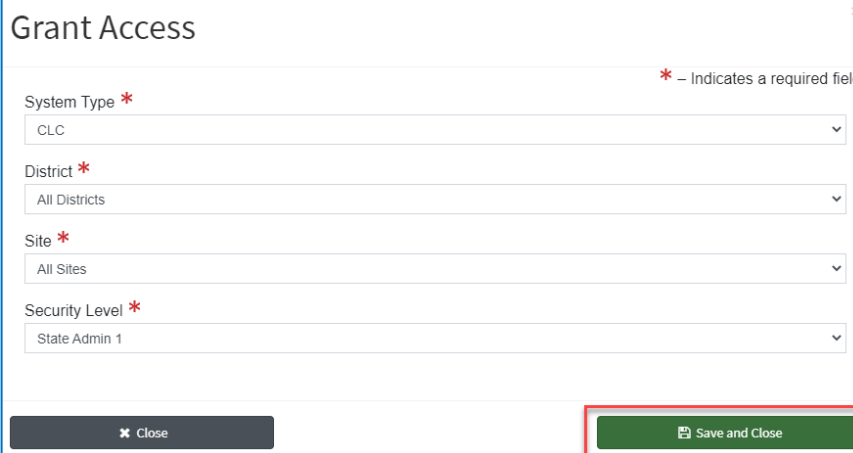
## Add a User

7. Set the Status Information and add any Optional Information
8. Click 'Save and Next'



## Add a User

9. Select the appropriate system type, district (if applicable), site (if applicable), and security level for the user, based on their job function/ responsibility
10. Click 'Save and Close' to close the Grant Access modal
11. Click 'Save and Close' at the bottom of the Add User Information screen



# EDIT A USER

Reasons for editing a user: enable/disable their access due to hiring/termination or update contact information.

Username	LastName	FirstName	Email	Last Login	Login Status	Expiration Date
testaccount	Account	Test	testaccount@cayen.net	Never	Enabled	

## Edit a User

1. Locate the user you wish to edit using the Search bar at the top of the screen
2. Click the 'Actions' button and select 'Edit'
3. Edit the user record as needed
4. Click 'Save and Close' when finished

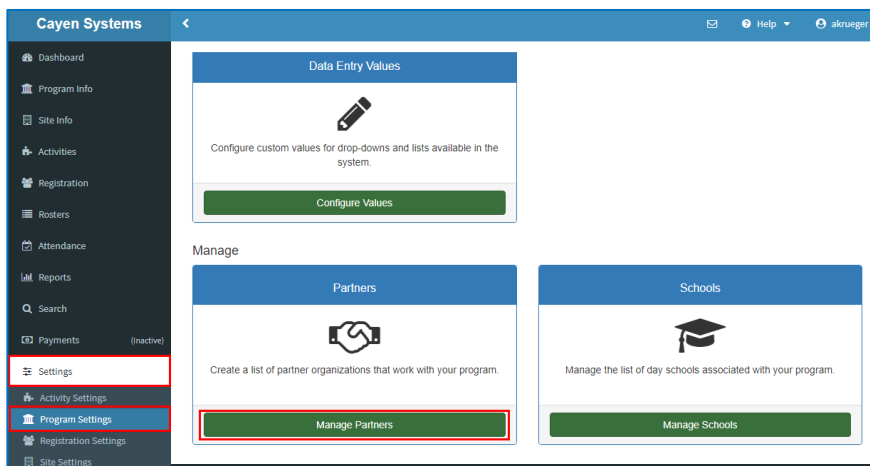


## Notes

- A user can only be **deleted** if they do not have related data. However, they can be **disabled**.
- You can modify a user's access to districts, sites, and/or security levels (based on your own access) by clicking Grant Access in the user's record and assigning additional values or by clicking the Remove Access button next to a specific access record.

# ADD/EDIT PARTNERS

A partner is a business or community agency other than the grantee actively contributing to the 21<sup>st</sup> CCLC-funded project. Information about partners is required on the APR.

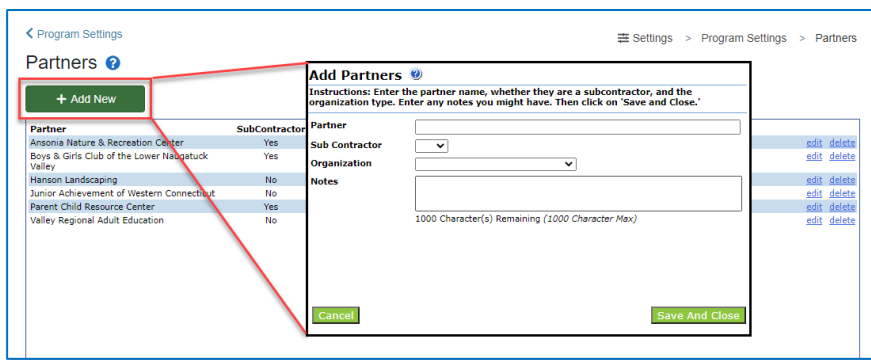


**Manage Partners**

1. In your left-hand navigation menu, click 'Settings' → 'Program Settings'
2. Locate the 'Partners' card
3. Click 'Manage Partners'

**Add Partners**

4. Click 'Add New' at the top of the screen
5. Enter the Partner's information
6. Click 'Save and Close'



 **Tips**

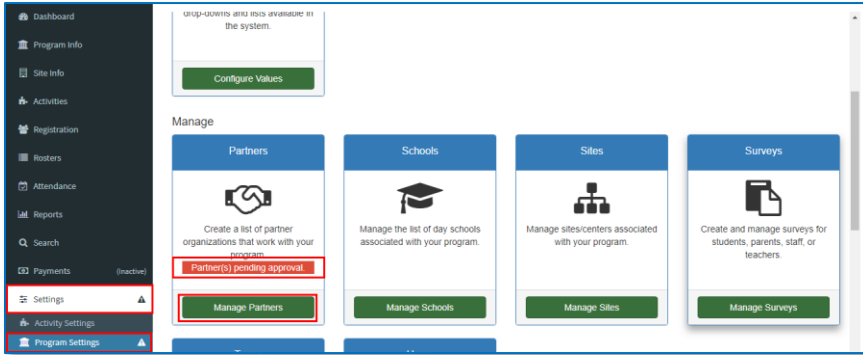
- Try to avoid creating duplicate entries. This can lead to confusion if different sites begin to enter multiple partners when, in fact, there should only be one.
- A partner would be added as a sub-contractor if you pay for at least a portion of the services, goods, etc. provided.

 **Notes**

- Partners that are entered in the district's partner list can later be selected by a site. The site has the option to enter additional information to detail the contributions made to their site in a specific term.

# REVIEW PENDING PARTNER REQUESTS

If a site requests a new partner, an alert message will show on the Partners card to notify you that there are pending requests. We'll see how sites request partners in Part 2: Site Setup.



- ### Review Pending Partner Requests
1. In your left-hand navigation menu, click 'Settings' → 'Program Settings'
  2. Locate the 'Partners' card
  3. Click 'Manage Partners'

- ### Approve Pending Partners
1. Click the 'Pending' link to the left of the pending partner
  2. Set the drop-down to 'Approved'
  3. Click 'Save and Close'

### Partners

Purpose: Districts/grantees often report on collaborative participation by community organizations. Partners that are entered here can later be selected by a site as Partner Contributions with primary contribution types and amounts.

Sites can also request new partners. These requests will appear in the top of this list in red. The Partners button on the welcome screen will turn red when requests are pending. Determine whether the requested partner should be approved. Then notify the site staff that the partner has been added to the list, was already in the list (perhaps under a different name), or was not approved.

Instructions: To add a new partner, click on the 'Add New' button. To edit an existing partner record, click on the [edit](#) link. To delete an unused partner, click on the [delete](#) link. To approve pending partners, if there are any, click on the [pending](#) link to the left of the partner name.

Partner	SubContractor	Organization Type	Requested By	Request Notes
<a href="#">Pending</a> Pizza Palace	No	BUS-Business	,	Donating pizza for opening and closing day events. <a href="#">delete</a>
Hillandale Community Association	No	CBO-Community-Based Organization		<a href="#">details</a> <a href="#">edit</a> <a href="#">delete</a>

# IDENTIFY BOARD MEMBERS

Create a list of the members of your program's advisory board.

The screenshot shows a dashboard with a left-hand navigation menu. The 'Settings' menu is expanded, and 'Program Settings' is selected. In the main content area, there are four 'Manage' cards: 'Board Members', 'Schools', 'Sites', and 'Teachers'. The 'Board Members' card has a red box around the 'Manage Board Members' button. Above the cards are two configuration boxes for drop-downs and lists, and another box for websites.

## Enter Board Member Information

1. In your left-hand navigation menu, click 'Settings' → 'Program Settings'
2. Locate the 'Board Members' card
3. Click 'Manage Board Members'

## Enter Board Member Information

4. Click 'Add Board Member' at the top of the screen.
5. Complete the fields
6. Click 'Save and Close'

The screenshot shows the 'Board Members' page. At the top, there is a green button labeled '+ Add New Board Member' with a red box around it. Below the button is a search/filter input field and a toolbar with 'Refresh', 'Copy', 'Print', and 'Export' icons. A table below shows one entry for 'Smith, John' with columns for Name, Title, Organization, Date Joined, and Date Resigned. The table has pagination controls at the bottom.

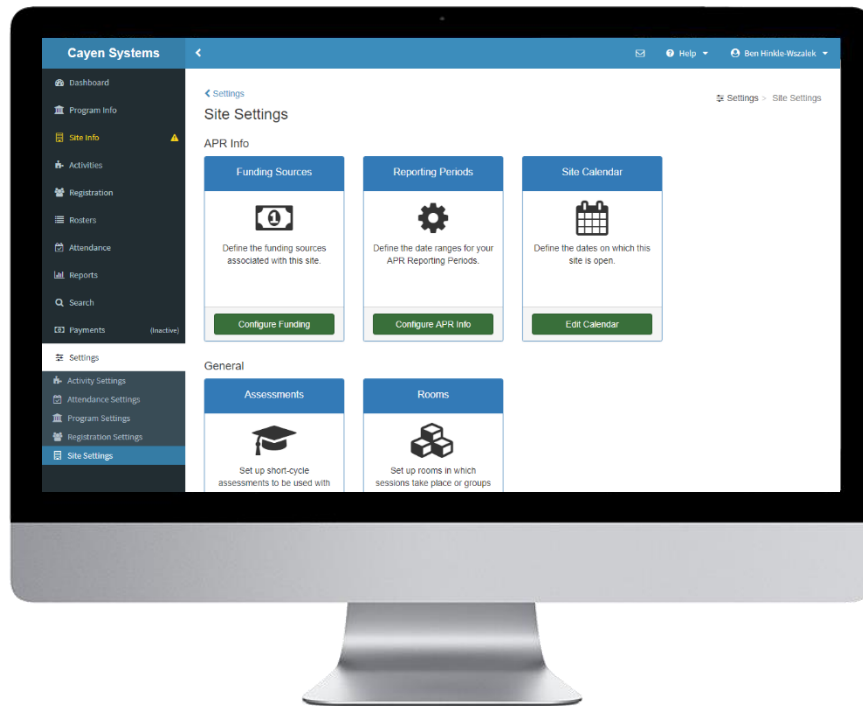
Name	Title	Organization	Date Joined	Date Resigned
Smith, John	Director	ABC, Inc.	04/05/2022	



## Notes

- Board Members must be entered prior to recording Advisory Board Meetings.





# SITE SETTINGS

At the start of every term, critical information needs to be defined for each site within a program. The Site Settings section shows how to configure this information.

✓ Add / Edit Funding Sources (pg #18)

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✓ Add / Edit APR Reporting Periods (pg #19)

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✓ Edit Site Calendar (pg #20)

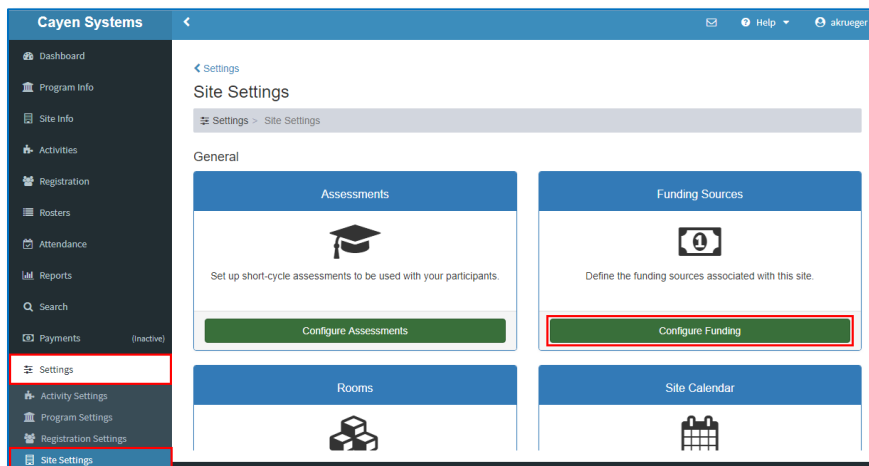
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## IMPORTANT NOTES ABOUT WORKING IN THIS SECTION

- Change Credentials and connect to a specific site when modifying Site Settings.
- While some of these settings may be the same across a program, Site Settings must be configured for each active site individually.

# ADD/EDIT FUNDING SOURCES

By adding funding sources, including 21st CCLC funding, you can associate them to your activity sessions and generate reports for those specific funders, including the APR.



**Configure Funding**

1. In your left-hand navigation menu, click 'Settings' → 'Site Settings'
2. Locate the 'Funding Sources' card
3. Click 'Configure Funding'

**Add a Funding Source**

1. Click 'Add New' at the top of the screen
2. Enter the 'Funding Source'
3. Select the District Funding Source from the drop-down. Remember that the Site and the District may have different names for the same funding source
4. Enter a dollar amount, if known
5. Click 'Save and Close'

Funding Source	District Funding Source	APR Funded	Description	Amount
Federal 21st CCLC	Federal 21st CCLC	Yes		<a href="#">edit</a> <a href="#">delete</a>
General	General	No		<a href="#">edit</a> <a href="#">delete</a>
STEM Grant	General	No		<a href="#">edit</a> <a href="#">delete</a>

**Funding Source - Add New**

**Instructions:** Note that the site and district may have different names for the same funding source. This function links the two. Enter the name of the funding source and then select the district's name for the same source. Enter a dollar amount and description. When you have finished, click on 'Save and Close.'

Funding Source:

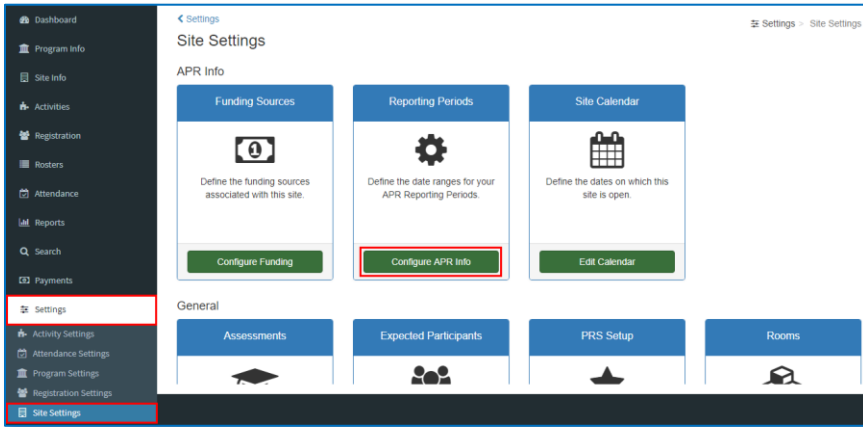
District Funding Source:

Amount (optional): \$

Description (optional):

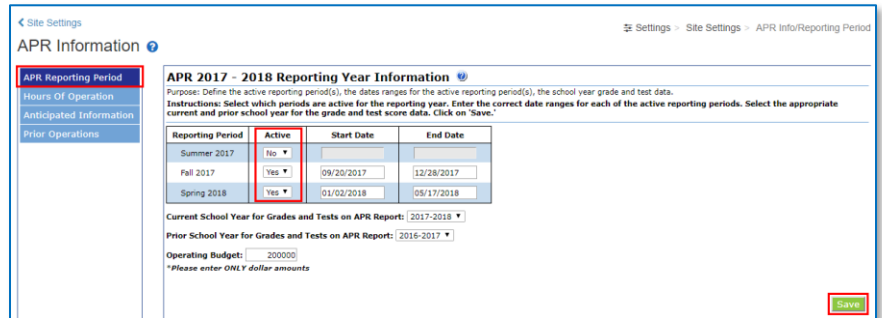
# ADD/EDIT APR REPORTING PERIODS

Reporting periods specify the dates for which information will be collected and aggregated for the annual performance report.



- Add APR Reporting Periods**
1. In your left-hand navigation menu, click 'Settings' → 'Site Settings'
  2. Locate the 'Reporting Periods' card
  3. Click 'Configure APR Info'

- Configure Reporting Year Info**
4. Set the Active column to 'Yes', for the periods which are active
  5. Enter the 'Start Date' and 'End Date' for the active periods
  6. Select the current and prior school year for grade and tests
  7. Enter the 'Operating Budget' for this Site
  8. Click 'Save'



## Tips

- When entering date ranges for reporting periods, it is best to make sure there are no gaps between the end date of one period and the start date of the next period.

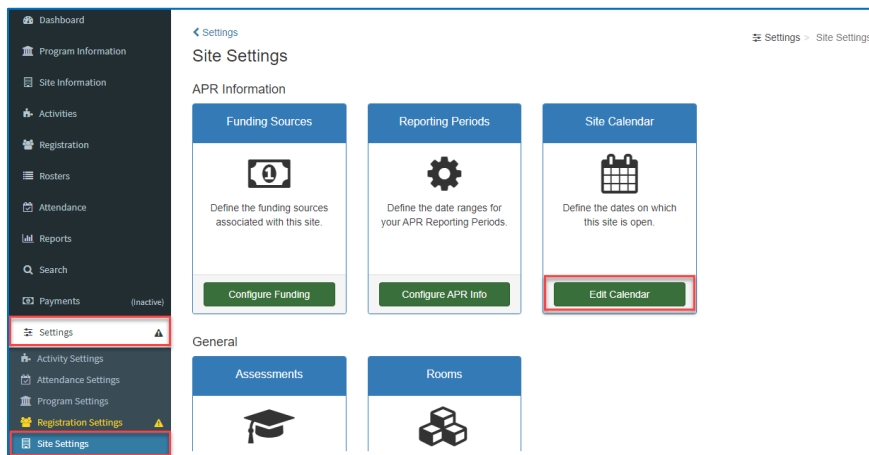


## Notes

- If a site is not active for a reporting period (e.g. Summer 2019), the Active field should be set to No. The start and end dates will not need to be entered for that period.

# EDIT SITE CALENDAR

Site calendars can be established to assist with scheduling activities and sessions.



**Edit Site Calendar**

1. In your left-hand navigation menu, click 'Settings' → 'Site Settings'
2. Locate the 'Site Calendar' card
3. Click 'Edit Calendar'

**Set the Days Open**

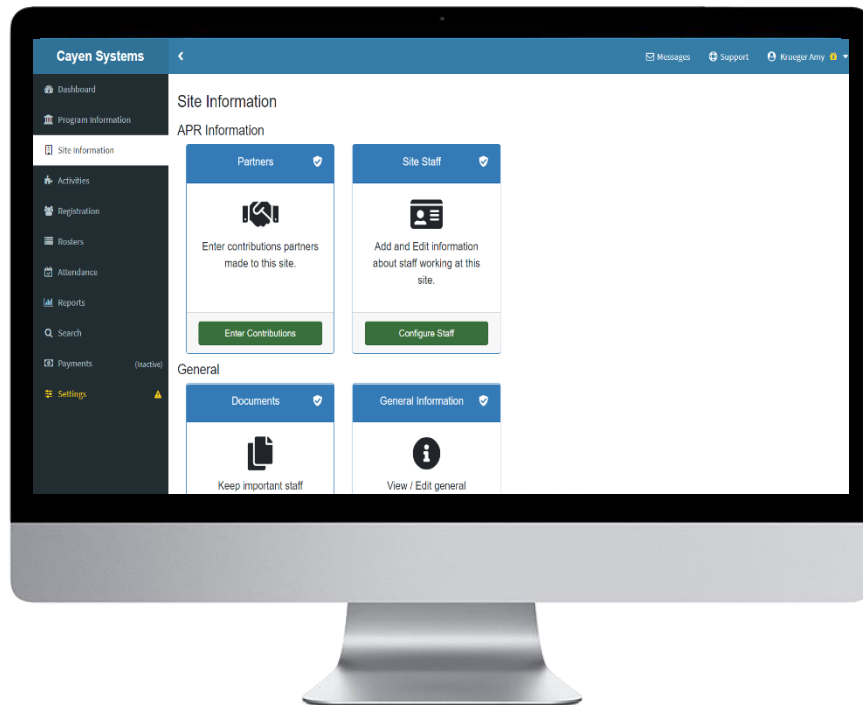
4. Check the boxes in the 'Site Open' column to indicate dates in which this site anticipates being open.
5. Click 'Save'

Date	Day of Week	District Calendar Open	Site Open
9/23/2019	Monday	Open	<input checked="" type="checkbox"/>
9/24/2019	Tuesday	Open	<input checked="" type="checkbox"/>
9/25/2019	Wednesday	Open	<input checked="" type="checkbox"/>
9/26/2019	Thursday	Open	<input checked="" type="checkbox"/>
9/27/2019	Friday	Open	<input checked="" type="checkbox"/>
9/28/2019	Saturday	Closed	<input type="checkbox"/>
9/29/2019	Sunday	Closed	<input type="checkbox"/>
9/30/2019	Monday	Open	<input checked="" type="checkbox"/>
10/1/2019	Tuesday	Open	<input checked="" type="checkbox"/>
10/2/2019	Wednesday	Open	<input checked="" type="checkbox"/>
10/3/2019	Thursday	Open	<input checked="" type="checkbox"/>
10/4/2019	Friday	Open	<input checked="" type="checkbox"/>
10/5/2019	Saturday	Closed	<input type="checkbox"/>
10/6/2019	Sunday	Closed	<input type="checkbox"/>
10/7/2019	Monday	Open	<input checked="" type="checkbox"/>
10/8/2019	Tuesday	Open	<input checked="" type="checkbox"/>



## Notes

If a site is closed due to inclement weather or some other unforeseen event, the calendar does NOT need to be updated. The system will assume the site was closed if no attendance was entered for that date.



# PROGRAM INFORMATION

The Program Information section houses information specific to a District. Unlike Program Settings, values may need to be added or updated in Program Information over a reporting year.

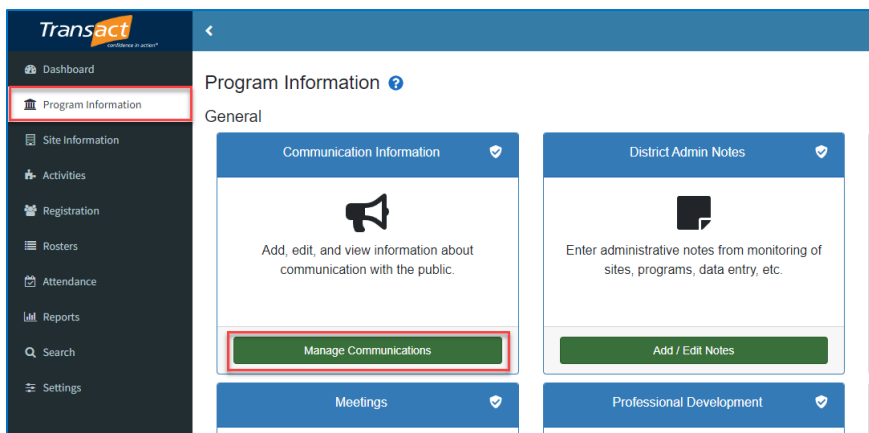
- ✓ Add / Edit Communication Information (pg #22)
- ✓ Add / Edit Fundraising Information (pg #23)
- ✓ Enter Meeting Details (pg #24)
- ✓ Enter Professional Development Details (pg #23)

## IMPORTANT NOTES ABOUT WORKING IN THIS SECTION

- Change Credentials and connect to a specific district when modifying Program Information.
- “All Sites” records will not appear if you are connected to a specific site in Change Credentials.

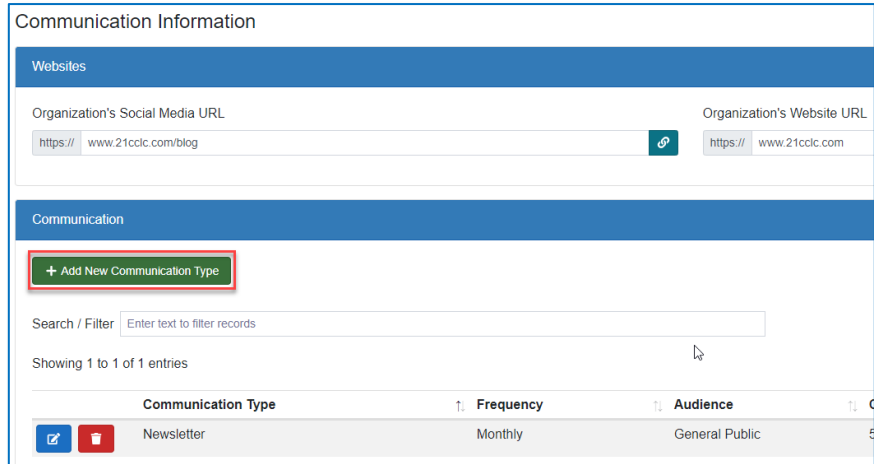
# ADD/EDIT COMMUNICATION TYPES

Document types of communication sent from your organization.



- Add / Edit Communication Types**
1. In your left-hand navigation menu, click 'Program Information'
  2. Locate the 'Communication Information' card
  3. Click 'Manage Communications'

- Add / Edit Communication**
4. Click 'Add New Communication Type'
  5. Enter the Communication type, Frequency, Count of communications to date, Audience, and Description
  6. Click 'Save and Close'

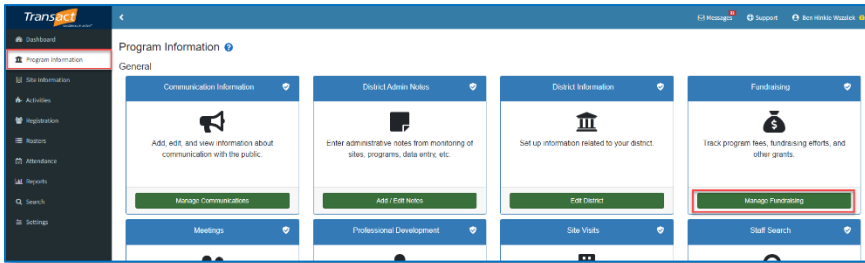


## Notes

- URLs for your program’s social media and organization website can also be entered in the Communication Information section.

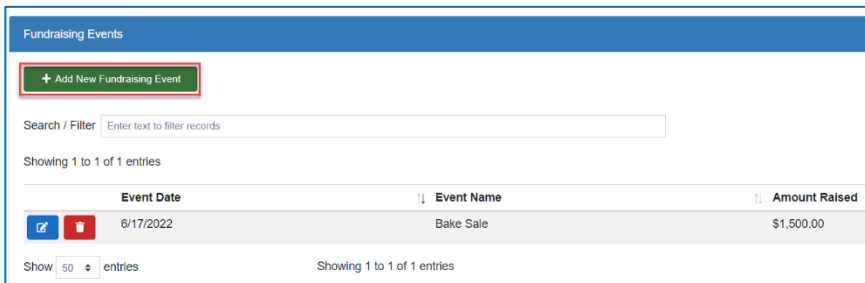
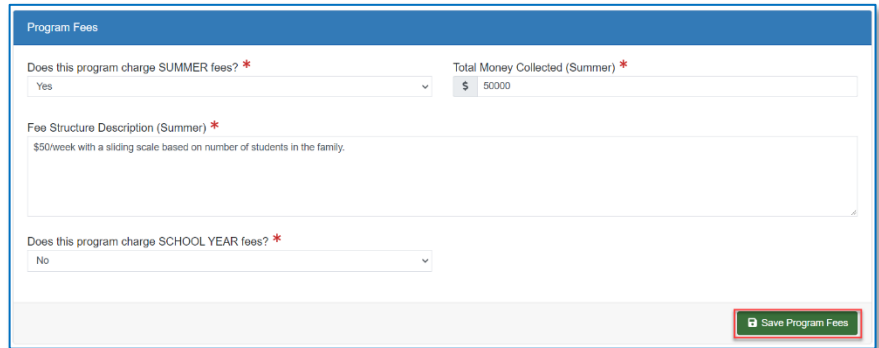
# ADD/EDIT FUNDRAISING INFORMATION

Enter information about the fundraising efforts of your program.



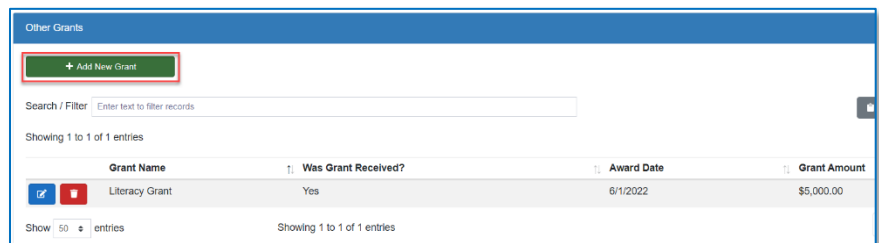
- Add / Edit Fundraising Information**
1. In your left-hand navigation menu, click 'Program Information'
  2. Locate the 'Fundraising Information' card
  3. Click 'Manage Fundraising'

- Update Program Fees Information**
4. Enter details in the Program Fees section of the screen
  5. Click 'Save Program Fees'



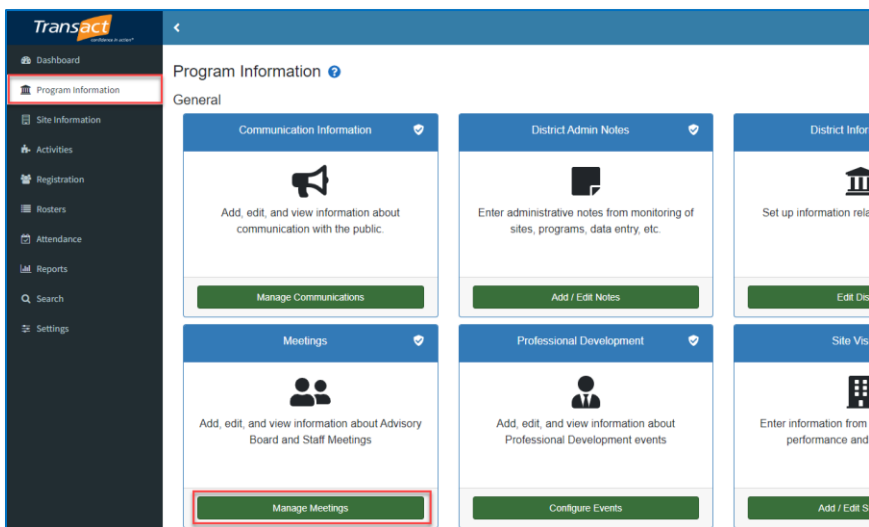
- Enter Fundraising Events**
10. Click 'Add New Fundraising Event'
  11. Enter the Event Date, Event Name, and Amount Raised
  12. Click 'Save and Close'

- Enter Other Grants**
6. Click 'Add New Grant'
  7. Enter the Grant Name, Was Grant Received, and Description.
  8. If the Grant was received, also enter the Award Date and Grant Amount
  9. Click 'Save and Close'



# ENTER MEETING DETAILS

Document staff and advisory board meetings.

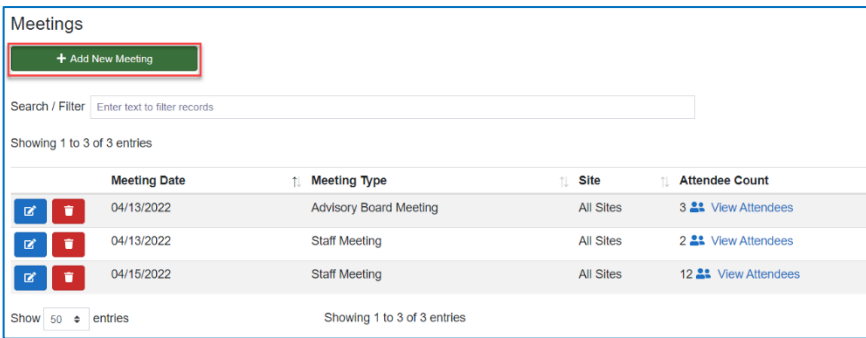


**Enter Meeting Details**

1. In your left-hand navigation menu, click 'Program Information'
2. Locate the 'Meetings' card
3. Click 'Manage Meetings'

**Enter Meeting Details**

4. Click 'Add New Meeting'
5. Enter the Meeting Date, Meeting Type, and Meeting Summary
6. Select the people that attended the meeting
7. Click 'Save and Close'



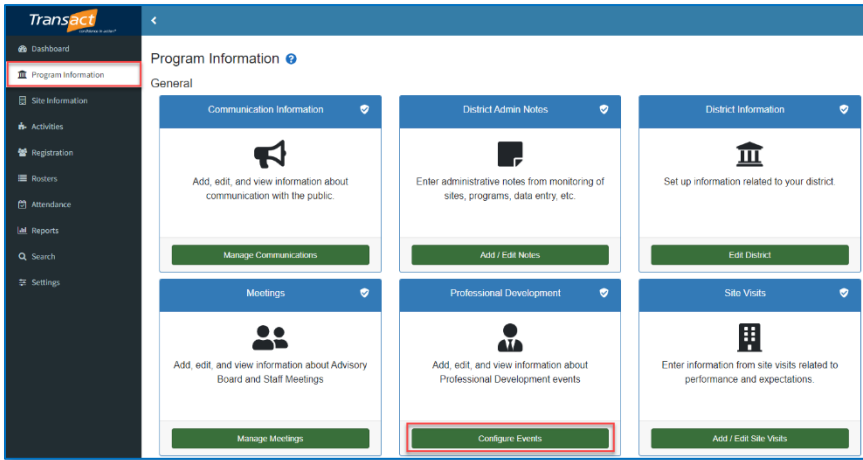
## Notes

- The list of available Meeting Attendees is based on the selected Meeting Type. Staff Meetings will display a list of staff entered in Site Info -> Site Staff. Advisory Board Meetings will display a list of board members entered in Settings -> Program Settings -> Board Members.
- Site Staff or Board Members that were not active on the date in which the meeting took place will not appear in the list of available Meeting Attendees.



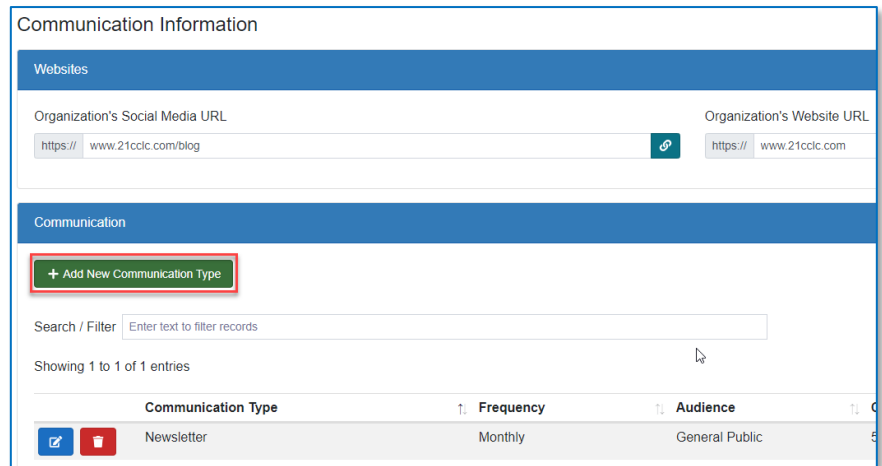
# ENTER PROFESSIONAL DEVELOPMENT DETAILS

Schedule professional development events and document staff participating in those events.



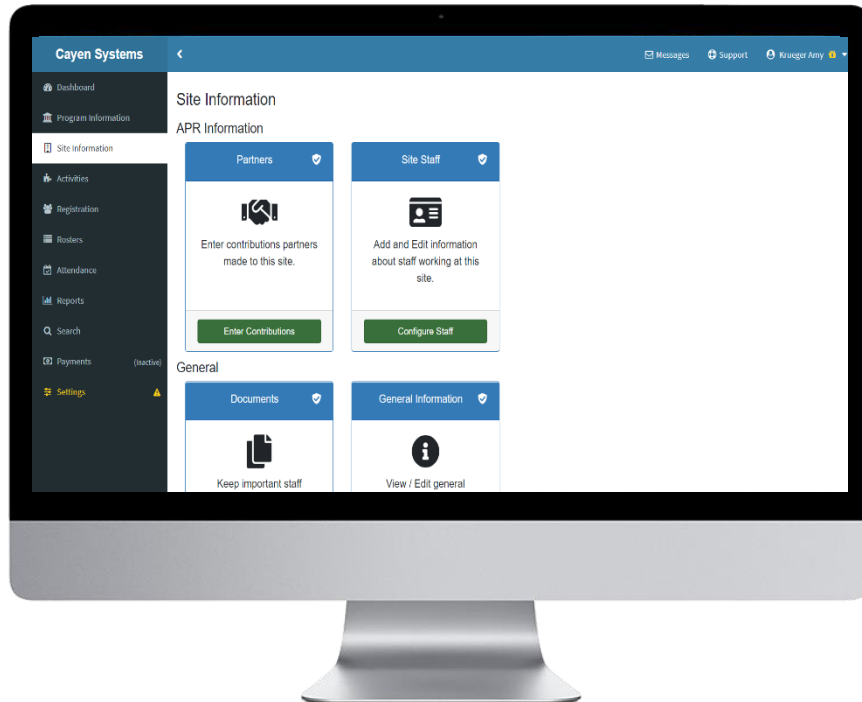
- Add / Edit Professional Development Events**
1. In your left-hand navigation menu, click 'Program Information'
  2. Locate the 'Professional Development' card
  3. Click 'Configure Events'

- Add / Edit Communication**
4. Click 'Add New Event'
  5. Enter the Event Type, Event Name, Event Date, and Length in Hours
  6. Select the Event Attendees
  7. Click 'Save and Close'



## Notes

- The Event Attendees will display a list of staff entered in Site Info -> Site Staff.
- Site Staff that were not active on the date in which the meeting took place will not appear in the list of available Event Attendees.



# SITE INFORMATION

The Site Information section houses information specific to a single site. Information here is critical to Annual Performance Reporting. Unlike Site Settings, values may need to be added or updated in Site Information over a reporting year.

✓ Add / Edit Partner Contributions (pg #27)

✓ Add / Edit APR Site Staff (pg #28)

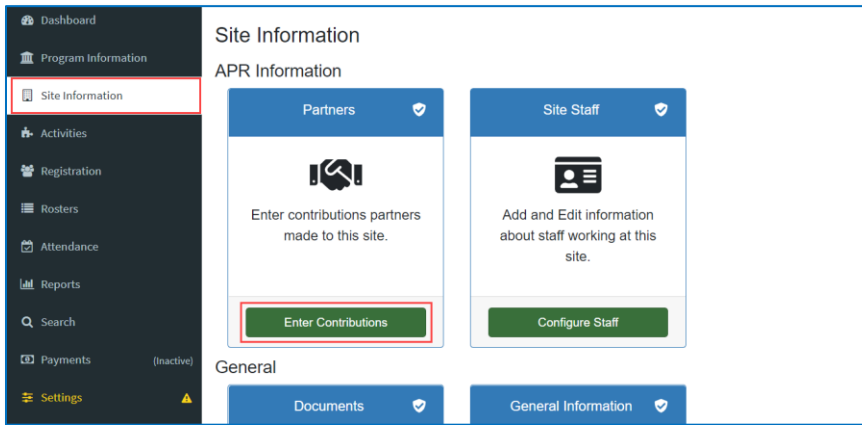
✓ Enter Staff APR Information (pg #29)

## IMPORTANT NOTES ABOUT WORKING IN THIS SECTION

- Change Credentials and connect to a specific site when modifying Site Information.
- While some of these values may be the same across a program, Site Information must be configured for each active site individually.

# ADD/EDIT PARTNER CONTRIBUTIONS

Partners that worked with each site within a term will be reported on the annual performance report.

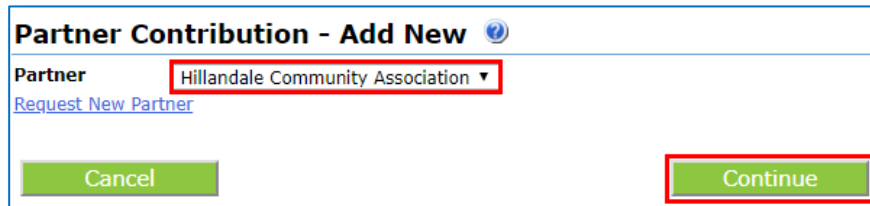
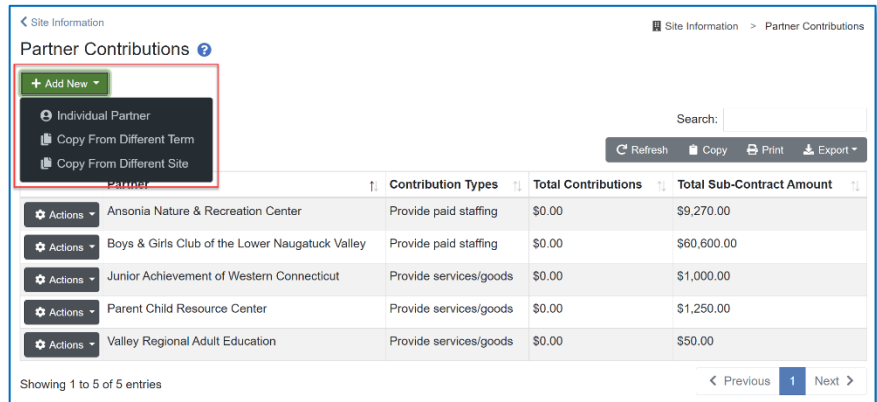


**Enter Partner Contributions**

1. In your left-hand navigation menu, click 'Site Information'
2. Locate the 'Partners' card
3. Click 'Enter Contributions'

**Copy Partners**

4. If working with the same partners from a different term or site, click 'Add New,' then 'Copy From Different Term' or 'Copy From Different Site'
5. From the drop-down, select the term or site from which you would like to copy partners
6. Check the box(es) next to the partner(s) you would like to add
7. Click 'Copy'



**Add New Partners**

1. Click 'Add New,' then 'Individual Partner'
2. Select a Partner from the drop-down menu
3. Click 'Continue' (This will add the selected partner to your list of active partners)

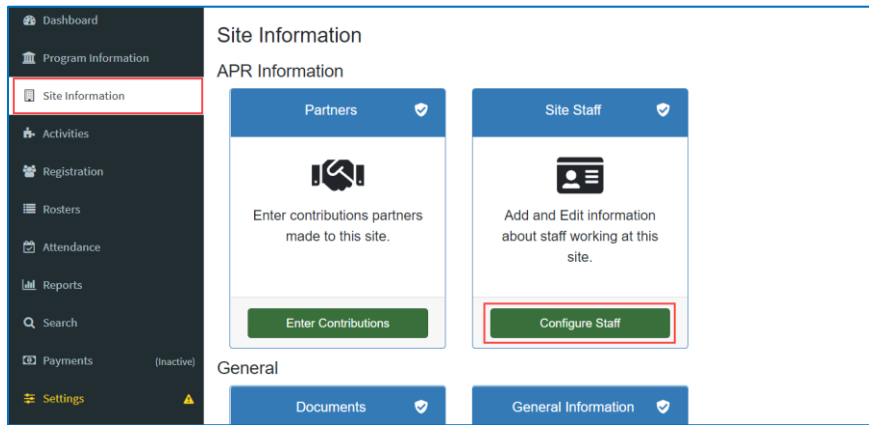


## Notes

- Specific contributions can also be tracked including contribution type, contribution amount, and sub-contract amount.

# ADD/EDIT STAFF

Information about site staff is required for the annual performance report. Site staff can also be associated with activities as session leaders.

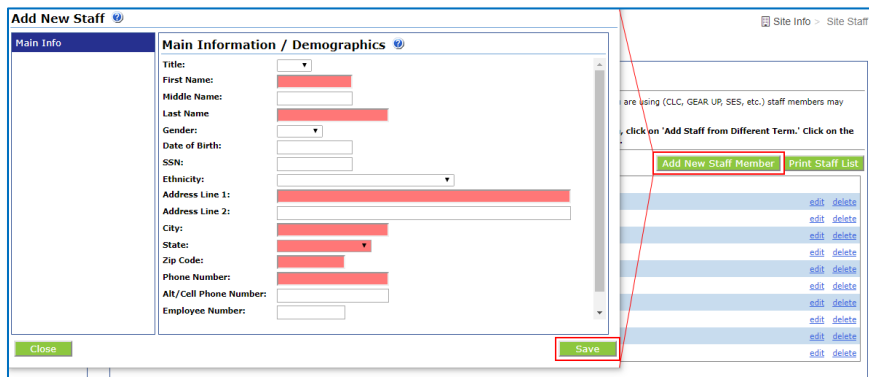
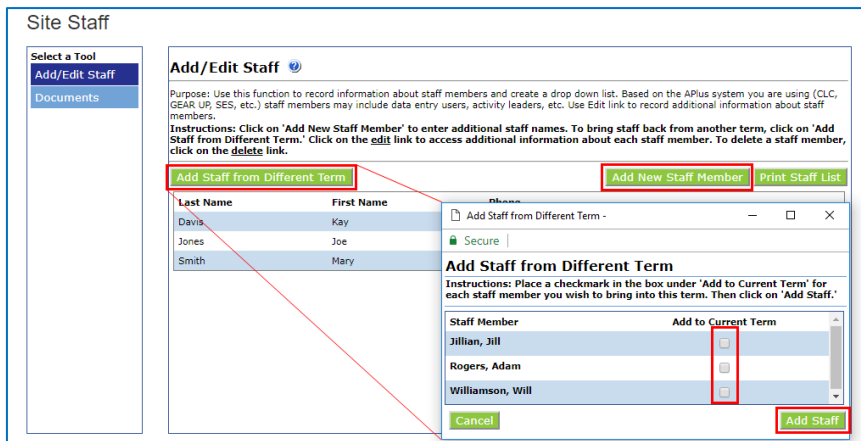


**Configure Staff**

1. In your left-hand navigation menu, click 'Site Information'
2. Locate the 'Site Staff' card
3. Click 'Configure Staff'

**Add Staff from Different Term**

1. If working with the same staff from a different term, click 'Add Staff From Different Term'
2. Check the box next to the staff member you would like to bring back from a prior term
3. Click 'Add Staff'



**Add New Staff Member**

1. Click 'Add New Staff Member'
2. Complete the required fields
3. Click 'Save'

# ENTER STAFF APR INFORMATION

Staff information is required for each reporting period (summer, fall, and spring) for which a site is active in an APR reporting year.

**2017 - 2018 Reporting Year Staff Information**

Purpose: This function allows you to enter staff information without having to retrieve Staff records one by one.  
 Instructions: Select/enter the correct information for each APR required field.

Period: Spring 2018

Staff Name	Compensation	Regular Staff	Staff Type	21 <sup>st</sup> CCLC Staff Member
...	Pad	Yes	Other Non-Teaching School Staff	Yes
...	Pad	Yes	Other Non-Teaching School Staff	Yes
...	Pad	Yes	Other Non-Teaching School Staff	Yes
...	Pad	Yes	Other Non-Teaching School Staff	Yes
...	Pad	Yes	Other Non-Teaching School Staff	Yes
...	Pad	Yes	Other Non-Teaching School Staff	Yes
...	Pad	Yes	Other Non-Teaching School Staff	Yes
...	Pad	Yes	Other Non-Teaching School Staff	Yes
...	Pad	Yes	Other Non-Teaching School Staff	Yes

Save

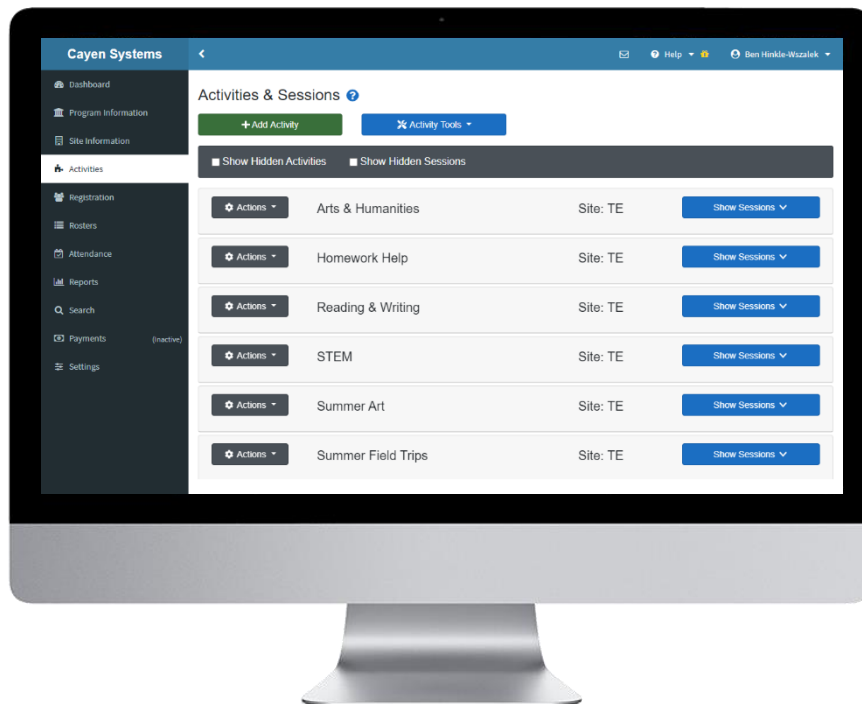
## Enter APR Related Staff Info

1. Click 'Staff Info \*APR' in the left, blue menu
2. Select the Period you wish to view
3. Complete the fields of information for all staff members listed on the APR Staff Info screen
4. Click 'Save'



## Notes

- Be sure to enter APR information for each of the active reporting periods for the site.
- If a staff member did not work at the site during a reporting period, set 'Compensation' to 'Not Active'
- Regular Staff are staff with a set schedule.
- 21<sup>st</sup> CCLC Staff Members will be included in counts on the Annual Performance Report.



# ACTIVITIES / SESSIONS

Activities are general programming and services accessible within a site. STEM, Homework Help, and Snack are examples of Activities. Sessions are the specific offerings of those Activities. New sessions should be established for different groups of participants being served on different dates or times.

✓ What are activities and sessions? (pg #31)

✓ Add Activities (pg #32)

✓ Add Sessions (pg #33)

## IMPORTANT NOTES ABOUT WORKING IN THIS SECTION

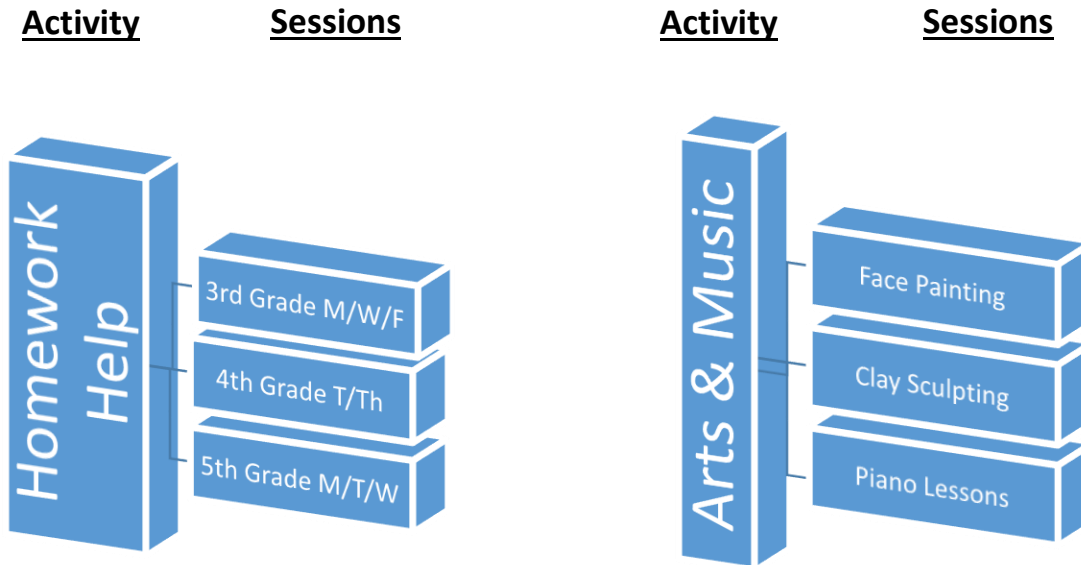
- Activities should only be copied from a prior term if no changes to the categorization of the activity are needed.
- Grant Objectives and Funding Sources must be set up before adding Activities.
- Activities can be copied from one Site to another. However, site-specific information such as Session Leaders and Funding Sources will need to be assigned to the Activity once it has been copied to another Site.

# WHAT ARE ACTIVITIES AND SESSIONS?

## Explanation of Activities/Sessions

When setting up your Activities and Sessions, think about a college course. The general course may be Chemistry; however, there will be multiple offerings of that course based on date, time, location, teacher, or grade level.

Below are two examples of Activities and Sessions.



Activities & Sessions ?

+ Add Activity    \* Activity Tools

Show Hidden Activities    Show Hidden Sessions

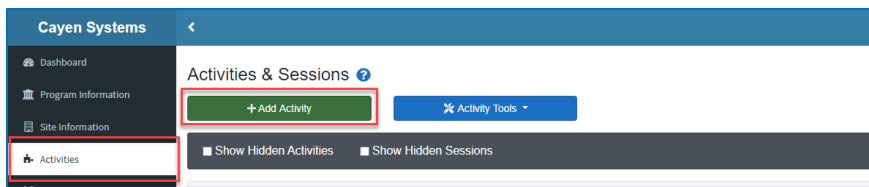
Actions	Arts & Humanities	Site: TE	Show Sessions
Actions	Homework Help	Site: TE	Show Sessions
Actions	Reading & Writing	Site: TE	Hide Sessions

Session Name	Start Date	End Date	Start Time	End Time
Actions History Making	8/24/2020	5/14/2021	4:00 PM	5:00 PM
Actions Journaling	8/24/2020	5/14/2021	3:30 PM	4:00 PM
Actions Pets	8/24/2020	5/14/2021	4:00 PM	5:00 PM

Here is the Activity in AS21

Here are the Sessions within that Activity

# ADD AN ACTIVITY



**Add Activities**

1. In your left-hand navigation menu, click 'Activities'
2. Click 'Add Activity'

**Choose Prior-Term Activity OR Add New**

1. If you have offered the EXACT SAME Activity in a prior term, double-click on that activity in the list of Prior-Term Activities. Click 'Continue' to create the activity for the current term

OR

1. If entering an activity that HAS NOT been offered at your site in the past, click 'Add New'

**Add a prior-term activity or a brand new one to the term's list**

Purpose: Use this page to view prior-term activities and select one if you will offer it again in the current term. By 'carrying forward' the details of the activity, you can guarantee the consistency of activity data from term to term. You may also add a brand new activity from this page.

Instructions: Review the list of activities below. To add/review a prior-term activity, find it in the list below and click on the name. If in examining the activity information, you would change key fields, you probably want to create a new activity instead. To add a new activity, click on 'Add New.'

Prior-term Activity	Description	Original term created
ALL-STARS	Leadership and Positive Behavior Awareness	2010-2011 School Year
Art	Teach students basic art fundamentals for drawing, painting, and sculpting	2010-2011 School Year
Cooking	Teach students life skills and measuring units.	2010-2011 School Year

**Add New**

**Activity Information**

Activity Name: (50 char max)

Activity Description: (2000 char max)

1000 Character(s) Remaining

Show in Activity List: Yes

Special Event: No

Focus:

Assessments Used:

21st CCLC APR Subject Area: Art/Music, Mathematics, Nutrition/Health, Other, Reading/English

Grant Objectives: Enrichment Activities

21st CCLC APR Category:

21st CCLC APR Targeted Student Population: Below Grade Level or Failing Student, Limited English Proficient Student, No Specified Population, Other, Special Needs or Disabilities Student, Truant, Suspended or Expelled Student

2017 - 2018 Reporting Year APR Category:

**Cancel** **Continue**

**Enter Activity Information**

2. Enter the required information to categorize the activity for reports
3. Click 'Continue' to save the activity



## Notes

- When adding an activity from a prior term, some field values may not be editable.
- The reporting Year APR Category selection will determine the area of the APR in which information from an activity will be counted.



# ADD A SESSION

Once the activity has been created, you will need to establish at least one session of that activity.

**Activity: Homework Help** **Add Session: New Session**

Session Name:  Shareable:  Yes  No

Time-based:  Allow Head Count:  No  Yes

Maximum Enrollment:  Is Virtual Programming:  No, In Person  Yes

Room:  To:

Average hours / session/day:

Dates:  To:

Days Offered Description:

Session Leader:

Funding Sources:

Hold down CTRL (or Command) Key to select more than one

For Schedules:

Every Day

Every Monday

Every Tuesday

Every Wednesday

Every Thursday

Every Friday

Every Saturday

Every Sunday

Select Multiple Days

Site Days Open Only

All Days

All Sundays

All Mondays

All Tuesdays

All Wednesdays

All Thursdays

All Fridays

All Saturdays

Select Individual Days

<< << 08/23/2021 >> >>

S	M	T	W	R	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

Today

Days Offered

08/09/2021 Mo

08/10/2021 Tu

08/11/2021 We

08/12/2021 Th

08/13/2021 Fr

08/14/2021 Sa

08/15/2021 Su

08/16/2021 Mo

08/17/2021 Tu

08/18/2021 We

08/19/2021 Th

08/20/2021 Fr

08/21/2021 Sa

08/22/2021 Su

08/23/2021 Mo

08/24/2021 Tu

08/25/2021 We

08/26/2021 Th

08/27/2021 Fr

08/28/2021 Sa

08/29/2021 Su

08/30/2021 Mo

08/31/2021 Tu

Clear Dates

Cancel Save and Close Save and Build Roster

## Enter Activity Information

1. Name the session. The session name will default to 'New Session.' Be sure to rename with a useful name to avoid confusion when viewing reports
2. Complete all required fields
3. Click 'Save and Close'

## Add Additional Sessions

1. Add more sessions as needed. After adding the first session for an activity, you can add additional sessions to the activity
2. From the Activities screen, find the Activity to which you need to add a session
3. Click the 'Actions' button next to the Activity name
4. Click 'Add Session'
5. Complete all fields
6. Click 'Save and Close'

Actions Reading & Writing Site: TE Hide Sessions ^

Edit Activity

+ Add Session

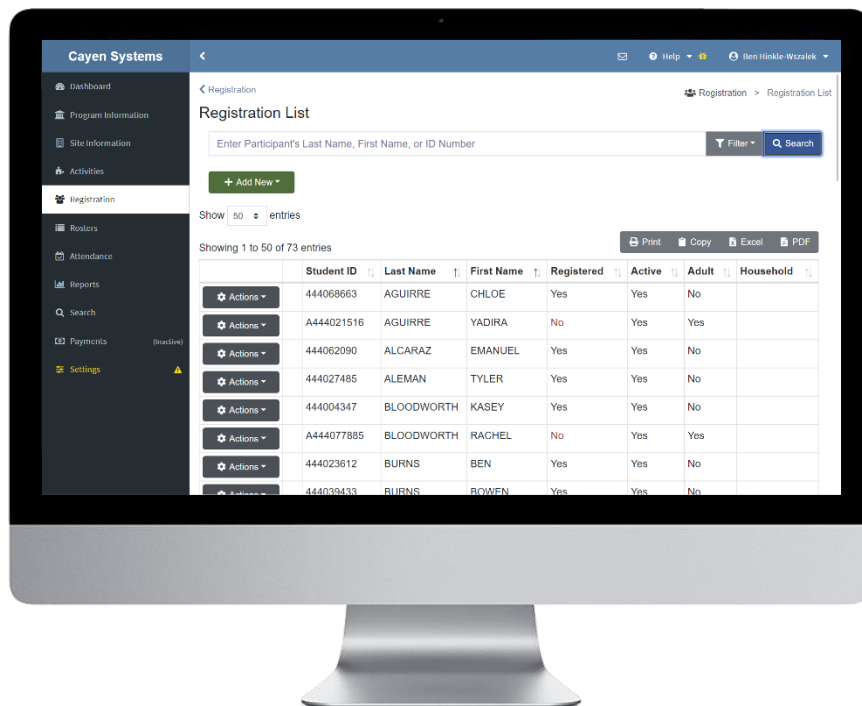
Session Quick Edit

Activity Name	Start Date	End Date	Start Time	End Time
Reading & Writing	8/24/2020	5/14/2021	4:00 PM	5:00 PM
Journaling	8/24/2020	5/14/2021	3:30 PM	4:00 PM
Pets	8/24/2020	5/14/2021	4:00 PM	5:00 PM



## Tips

- Be sure to select the appropriate funding source for each session. Only information with sessions funded by 21<sup>st</sup> CCLC will appear on the Annual Performance Report.
- If multiple similar sessions are being offered for an activity, it may be easier to Copy the session and edit the copy rather than setting up a whole new session from scratch.
- If the session is offered virtually (e.g., via a web session, a recording, or a take-home packet) indicate this by selecting 'Yes, Virtual Programming' from the "Is Virtual Programming" field.
- Virtual sessions that are marked as 'Live' will not show when entering virtual session headcounts. Live virtual session attendance should be recorded in the same manner as in-person sessions.



# REGISTRATION

Information related to the people being served at a site can be found in Registration. Participant demographics, academic information, emergency contact information, and more can be stored in a registration record.

- ✓ Registration overview (pg #35)
- ✓ Quick add from pre-registration list (pg #36)
- ✓ Quick add from a prior term (pg #37)
- ✓ Add individual participants (pg #38)

## IMPORTANT NOTES ABOUT WORKING IN THIS SECTION

- Use the alphabet bar or Find Person options to locate an individual participant.
- Save data entry time and improve the accuracy of participant information by sending data from your Student Information System to Cayen Systems via our secure data uploads site (<https://datauploads.datapropeller.com>)

# REGISTRATION OVERVIEW

Information about participants needs to be collected for various reports, including the 21<sup>st</sup> CCLC annual performance report.

Registration List

Enter Participant's Last Name, First Name, or ID Number Filter Search

+ Add New

Show 100 entries Copy Print Export

Actions	Student ID	Last Name	First Name	Registered	Active
	22874	ABDULBASHIR	HWLEE	Yes	Yes
	224192	ALEXANDER	DANIEL	Yes	Yes
	22298	ALLEN	JACOB	Yes	Yes

### Edit a participant

1. In your left-hand navigation menu, click 'Registration,' then click 'Manage Participants'
2. Locate the participant using the search bar or click 'Search' with no value in the search bar to see all participants
3. Click the edit button in the Actions column next to their name

1. View and update information as needed.
  - o Participant demographics are found on the Participant Info tab. Additional data can be located on the other blue tabs within the Registration record.
2. Click 'Save'

Registration List Registration > Registration List > Participant Information

### Participant Information

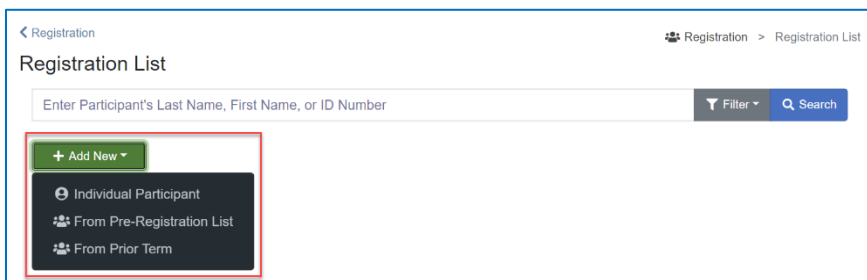
**AGUIRE, CHLOE**

Participant Info	Registered	Active
Last Name: AGUIRE	Registered: Yes	Active: Yes
First Name: CHLOE	Select Participant: No	Adult Participant Type: No
Date of Birth: 12/27/2008	Record last changed: 8/24/20	Last date attended: 6/11/20
Age: 11	Original record created: 8/24/20	Term record created: 8/24/20
Gender: Female	Last Edited by: Bivens, Pam	
Ethnicity: White (Not of Hispanic origin)		
Primary Language: English		
Head Of Household: No		
Address/Phone last updated: 8/24/2020 1:02:04 PM		
Home Address		
Address		
City: Milwaukee		
State: WI		
Zip: 53210		
Phone: 414-555-1234		
E-mail: apptest@cayen.net		
Mailing Address		
Address		
City: Milwaukee		
State: WI		
Zip: 53210		
Migrant: No		
School Attending During Day: Adair County Elementary		
Grade: 4		
Lives With: Homeroom		
Elem. Homeroom Teacher	MS/HS Math Teacher	MS/HS English Teacher
		Homeroom

Reg Form <Prev Close Next> Save

# ADD STUDENTS FROM THE PRE-REGISTRATION LIST

Student demographic and contact information can be exported from your school district’s student information system and sent to TransACT to create a pre-registration list.

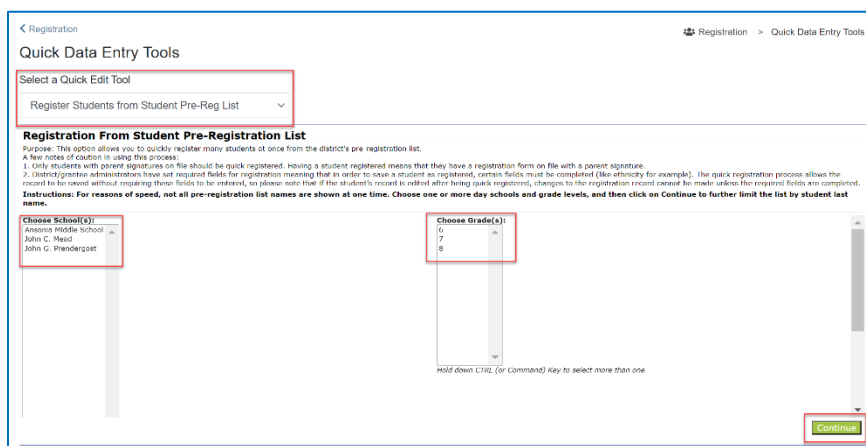


## Add Students from Pre-Registration List

1. In your left-hand navigation menu, click ‘Registration’
2. Click ‘Manage Participants’ in the Registration List card
3. Click ‘Add New’ then ‘From Pre-Registration List’

## Add Students from Pre-Registration List

4. Click your school under the Choose School(s) column
5. Click the appropriate grade levels under the Choose Grade(s) column
6. Click ‘Continue’



Reg	Student ID	Name	Grade	Gender	Homeroom	Date of Birth	School	Record Date
<input checked="" type="checkbox"/>	11111111	John C. Mead	6	Other		3/18/2001	Windham Middle School	12/16/2011 10:04:29 AM
<input checked="" type="checkbox"/>	11111112	John C. Mead	7	Other		9/22/2001	Windham Middle School	12/16/2011 10:04:29 AM
<input checked="" type="checkbox"/>	11111113	John C. Mead	8	Other		11/20/2000	Windham Middle School	12/16/2011 10:04:29 AM
<input checked="" type="checkbox"/>	11111114	John C. Mead	6	Other		10/20/2000	Windham Middle School	12/16/2011 10:04:29 AM
<input checked="" type="checkbox"/>	11111115	John C. Mead	7	Other		7/30/2000	Windham Middle School	12/16/2011 10:04:29 AM
<input checked="" type="checkbox"/>	11111116	John C. Mead	8	Other		6/26/2000	Windham Middle School	12/16/2011 10:04:29 AM
<input checked="" type="checkbox"/>	11111117	John C. Mead	6	Other		12/7/2000	Windham Middle School	12/16/2011 10:04:29 AM
<input checked="" type="checkbox"/>	11111118	John C. Mead	7	Other		11/22/2000	Windham Middle School	12/16/2011 10:04:29 AM
<input checked="" type="checkbox"/>	11111119	John C. Mead	8	Other		4/3/2001	Windham Middle School	12/16/2011 10:04:29 AM
<input checked="" type="checkbox"/>	11111120	John C. Mead	6	Other		2/5/2001	Windham Middle School	12/16/2011 10:04:29 AM
<input checked="" type="checkbox"/>	11111121	John C. Mead	7	Other		7/13/2000	Windham Middle School	12/16/2011 10:04:29 AM

## Add Students from Pre-Registration List

7. Click ‘All’ at the end of the alphabet bar to display the entire student pre-registration list of available participants to register
8. If you have a large number of participants, you can filter the list by selecting a letter
9. Select the participants to register by clicking in the box next to each participant’s name under the Reg column or click the blue ‘Select All’ link.
10. Click ‘Register Selected’ once you have selected the participants you wish to register

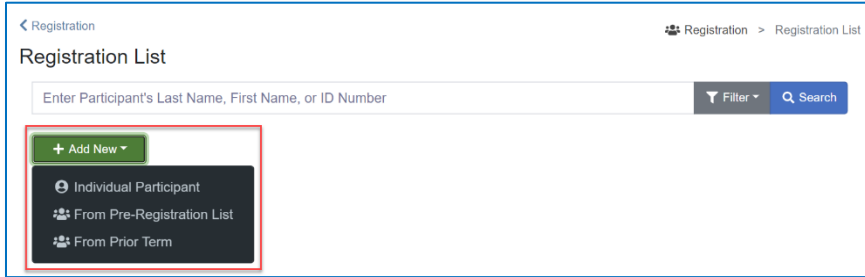


## Tips

When selecting participants, the ‘Record Date’ indicates the date on which the student information system data was imported into AS21. Verify that the student data is from a recent import prior to registering them.

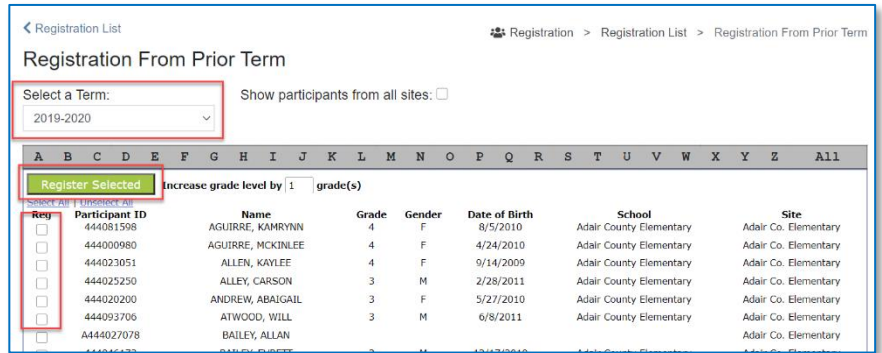
# ADD PARTICIPANTS FROM PRIOR TERM

If participants were served by a site in a prior term and have returned, their information can be pulled forward into the new term, saving considerable time.



- Add Students from Prior Term**
1. In your left-hand navigation menu, click 'Registration'
  2. Click 'Manage Participants' in the Registration List card
  3. Click 'Add New' then 'From Prior Term'

- Add Participants from Prior Term**
4. Select the Term from the drop-down and click 'All' on the alphabet bar. A list of participants from the term selected will appear
  5. Check the boxes for the participants that you would like to bring to the new term
  6. Click 'Register Selected' once you have selected the participants you wish to register

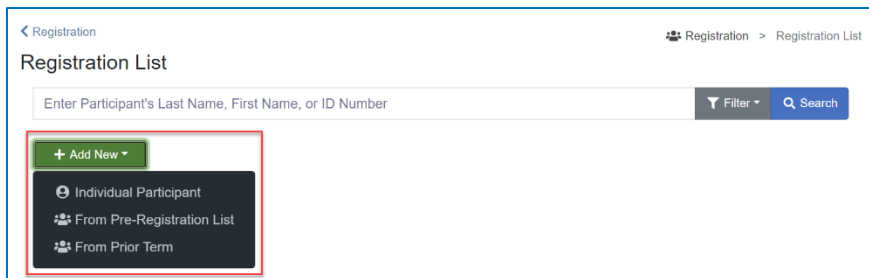


## Notes

- When adding a participant from a prior term, you may need to modify the 'Increase grade level by # grade(s)' field accordingly.
- Some demographic information may need to be updated after participants are registered – namely school and teacher values.
- Participants that attended other sites in your district in a prior term can be located by checking the box labelled 'Show participants from all sites.'

# ADD INDIVIDUAL PARTICIPANTS

If a site does not have access to a student pre-registration list or prior term records or if a new participant joins a program mid-year, they will need to be added individually as a new participant.

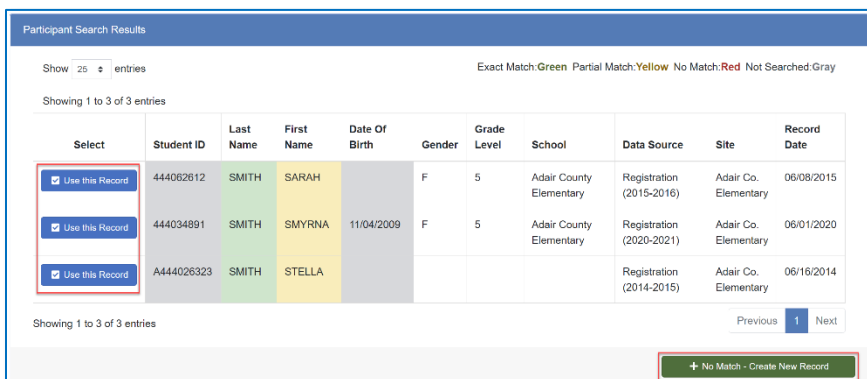
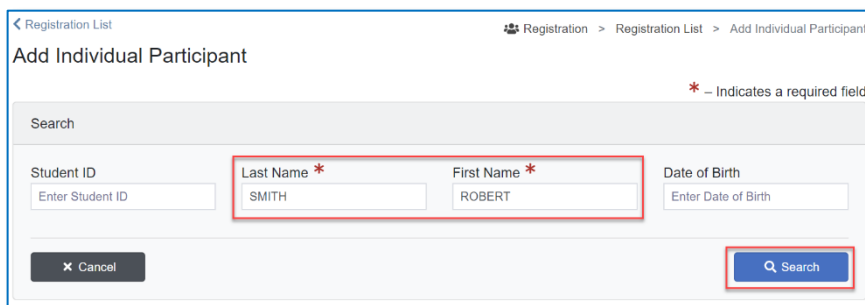


### Add Individual Participant

1. In your left-hand navigation menu, click 'Registration'
2. Click 'Manage Participants' in the Registration List card
3. Click 'Add New' then 'Individual Participant'

### Add Individual Participant

4. Enter the all or part of the participant's Last and First Name, Student ID, and Date of Birth (if available)
5. Click 'Search'



### Add New Participants

6. If the desired Participant shows in the Search results, click 'Use this Record.' Review and update the Registration record then click 'Save'
7. If the desired Participant is not displayed, click 'No Match – Create New Record'. Enter the participant's information then click 'Save'



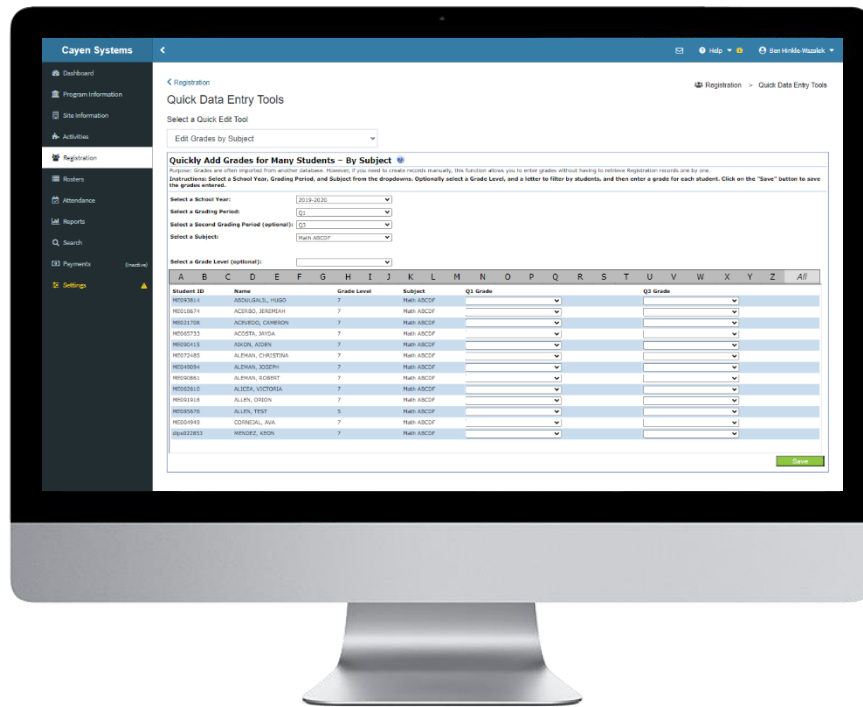
## Tips

- This process uses pop-up windows to validate information being entered. Ensure that your computer's pop-up blockers are disabled to avoid issues when saving.



## Notes

- The add new participant search will hunt for matching records in your site for the current and prior terms, your district for the current and prior terms, and your student pre-registration list.



# QUICK EDIT TOOLS

Data entry can be a tedious process. The Quick Edit Tools allow users to efficiently review and update critical information associated with their participants.

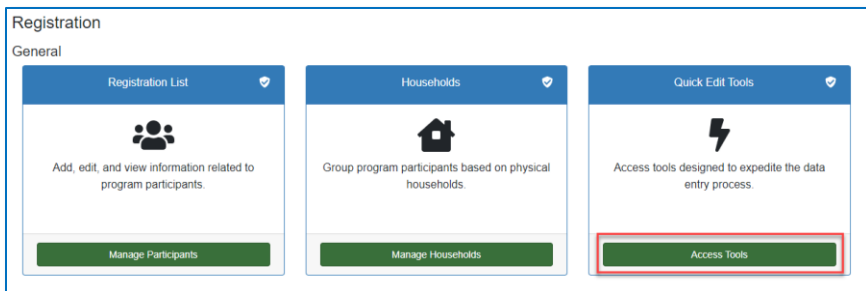
- ✓ Fill in missing demographics (pg #40)
- ✓ Add / Edit grades by student (pg #41)
- ✓ Print surveys / enter survey responses (pg #41)
- ✓ Add / Edit test scores (pg #40)
- ✓ Add / Edit APR outcomes (pg #41)

## IMPORTANT NOTES ABOUT WORKING IN THIS SECTION

- Save frequently when working with any of the quick edit tools.
- Save data entry time and improve the accuracy of academic information by sending data from your Student Information System to TransACT via our secure data uploads site (<https://datauploads.datapropeller.com>)

# QUICK EDIT TOOLS

The quick edit tools section allows you to enter data more efficiently. The images in this guide may be slightly different than your screen. Please get in touch with your program administrator with questions.

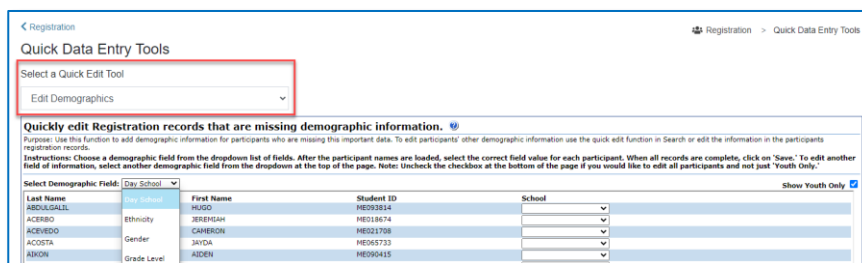


### Access Quick Edit Tools

1. In your left-hand navigation menu, click 'Registration'
2. Click 'Access Tools'
3. The Quick Edit Tools screen will open, click a tab in the left, blue menu. (below are examples of quick edit tools options)

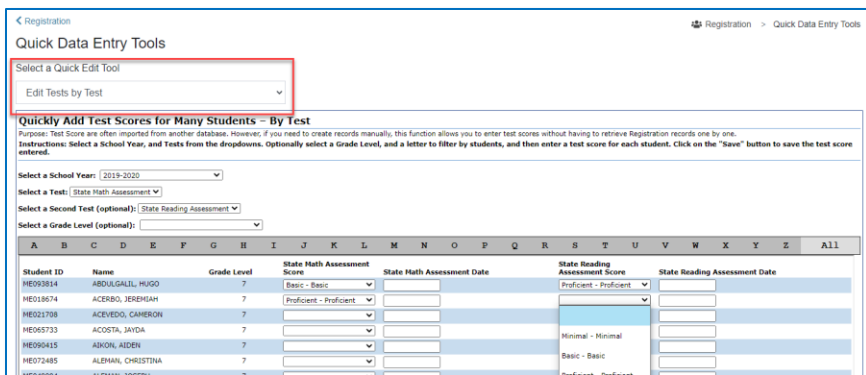
### Fill in Missing Demographics

1. Select 'Edit Demographics' from the dropdown list
2. Select a demographic field from the drop-down (a list of participants missing these data will populate)
3. Enter the values for the participants
4. Click 'Save'



### Add/Edit Test Scores

1. Select 'Edit Tests by Test' from the dropdown list
2. Select a School Year and Test(s) from the drop-down menus
3. Add or edit test scores
4. Click 'Save'



## Tips

- If no participants appear in the list after selecting a demographic field in Edit Demographics, all participants have a value in that field.



## Notes

- Your program may need to record day school grades, state standardized test scores, and/or teacher surveys as outcomes for the APR.
- If entering test scores for the APR, enter the performance levels for those tests, not the numeric scores.



**Add/Edit Grades by Student (useful when entering grades from report cards)**

1. Select 'Edit Grades by Student' from the dropdown list
2. Select a School Year, Grading Period and Participant from the drop-down menus
3. Add or edit grade data
4. Click 'Save'

Student ID	Name	Grade Level	Subject	Q1 Grade	Q3 Grade
ME093814	ABDUGALLI, HUGO	7	Math ABCDF	C	A
ME018674	ACERBO, JEREMIAH	7	Math ABCDF	B	B
ME011798	ACEVEDO, CAMERON	7	Math ABCDF	A	B
ME055733	ACCOTA, JORDA	7	Math ABCDF		
ME090415	ABOHL, AIDEN	7	Math ABCDF		

**Add/Edit Unweighted GPA, In-School Suspensions, and School Attendance Rates**

1. Select 'Edit APR Outcomes' from the dropdown list
2. Select the outcome for which you have data to enter
3. Select a School Year(s)
4. Add or edit outcome data
5. Click 'Save'

**Print Surveys/Enter Responses**

1. In the left blue menu, click 'Print Survey/Enter Responses'
2. Select the survey and participant
3. Complete the survey
4. Click 'Save'



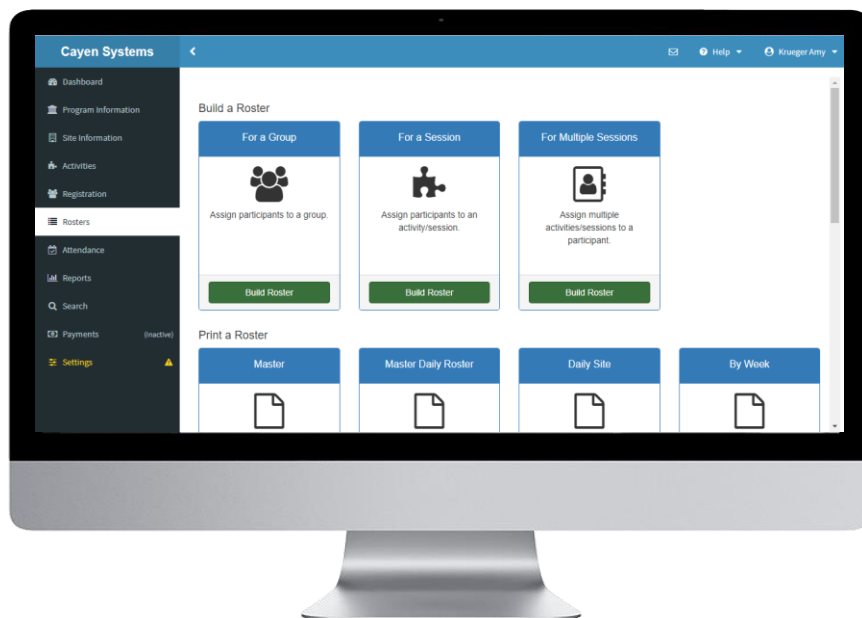
**Tips**

- Surveys can be taken by the respondent online through the Survey Portal without the paper! See your grant administrator or contact your Cayen Systems Account Manager with questions.



**Notes**

- When entering GPRA outcomes, the available school years are based on the Current and Prior School Year selections entered in Settings -> Site Settings -> Reporting Periods.



# ROSTERS

Rosters are lists of participants and can be used to print paper attendance sheets for recording participation. Rosters can be associated with specific sessions being offered at a site or can be established for a custom group of participants.

✓ [Group Rosters \(pg #43\)](#)

✓ [Session Rosters \(pg #45\)](#)

✓ [Multiple Session Selection \(pg #46\)](#)

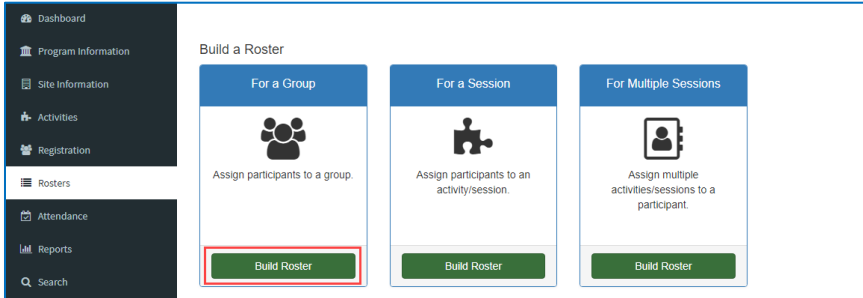
✓ [Print a roster \(pg #47\)](#)

## IMPORTANT NOTES ABOUT WORKING IN THIS SECTION

- Group Rosters can be used to create a list of participants with common attributes. Examples include groups for grade levels, teachers, bus routes, or students being picked up at the end of the day.
- Including bar-coded Student IDs on Rosters can expedite attendance entry.
- Changes to Roster Setup will affect all users at a Site.

# GROUP ROSTERS

Group rosters can be used to minimize the amount of paper, ink, and time needed to track attendance for a set of participants that move collectively from one session to another.

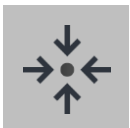
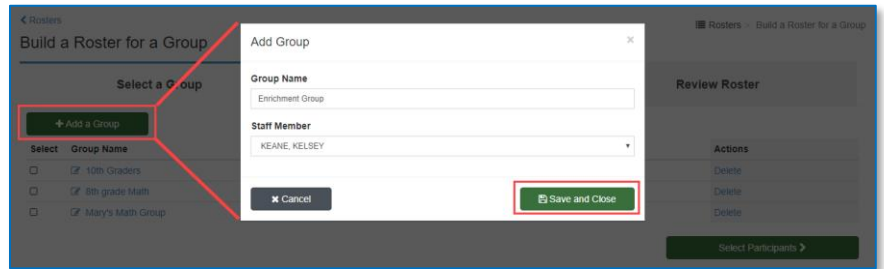


### Create a Group

1. In your left-hand navigation menu, click 'Rosters'
2. Locate the 'For a Group' card
3. Click 'Build Roster'

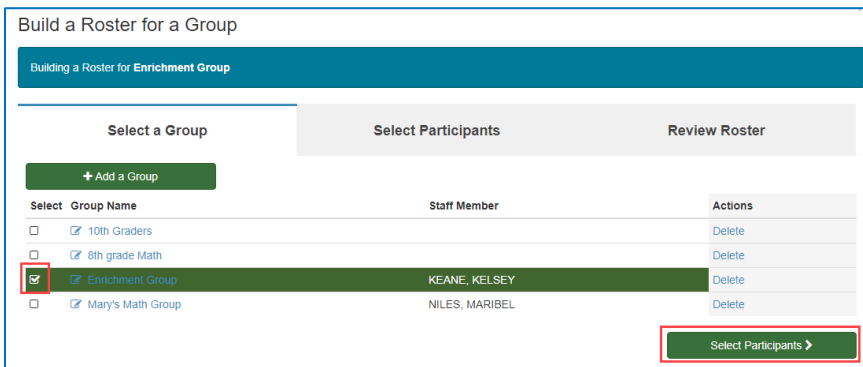
### Add a New Group

1. Click the green 'Add a Group' button, at the top of the screen.
2. Enter the Group Name and Staff Member associated with the group
3. Click 'Save and Close'
4. Your new group will now appear in the Group list at the bottom of the screen



## Notes

- Groups are site- and term-specific. So, new groups will need to be established at the start of each new term.
- Click a group name to edit the group



### Add Participants to a Group

1. Check the box to select the Group for which you wish to build a roster.
2. Click 'Select Participants'
3. You will be taken to the next screen to select participants.

Select Participants

1. Select participants using the options at the top of the screen. (By Name or Barcode, From Registration List, From Session Roster, From Group Roster, or By Search)
2. Click 'Review Roster' to advance to the next screen

Building a Roster for Morning Math

Select a Group | **Select Participants** | Review Roster

By Name or Barcode | From Registration List | From Session Roster | From Group Roster | By Search

Scan or type a person's name

Last Name, First Name or Participant ID

ID	Name	Grade Level	
125048	Esteves Reyes, Diana A.	8	Selected
126628	Estrada Rodriguez, Aleysha N.	7	

Select a Group | Select Participants | **Review Roster**

Saved: Gray Pending: Green Pending Delete: Red

0 participant(s) displayed

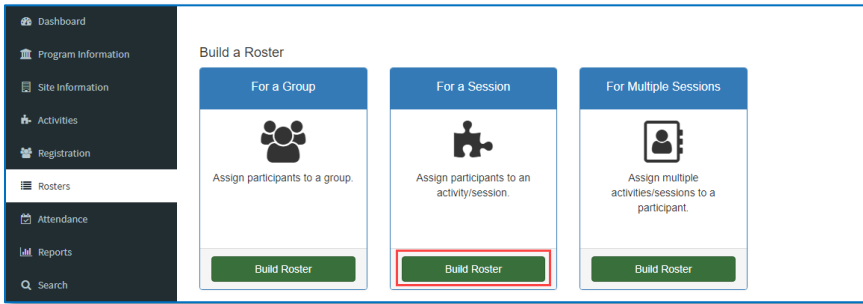
ID	Name	Grade Level	
AWMS065700	VALADEZ, ELENA		Pending
127410	SOTO, NATHAN		Pending
127385	SMITH, PARKER L.		Pending
AWMS062672	ROMERO, LILLYANNA		Pending
125387	RODRIGUEZ, CAMRON		Pending
125013	PEREZ, LAMONT		Pending
AWMS001088	MARTINEZ, ANDRES		Pending

Review Roster

1. Review the list of participants
2. Click on a participant name to remove it from the list
3. Click 'Save Roster'

# ADD PARTICIPANTS TO A SESSION ROSTER

Create rosters of participants that regularly attend or are enrolled in a specific session.

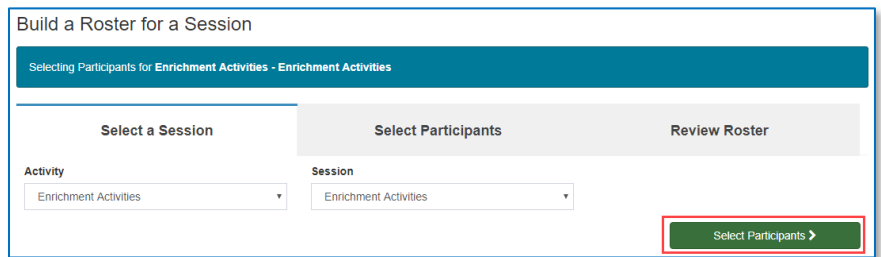


### Build a Roster for a Session

1. In your left-hand navigation menu, click 'Rosters'
2. Locate the 'For a Session' card
3. Click 'Build Roster'

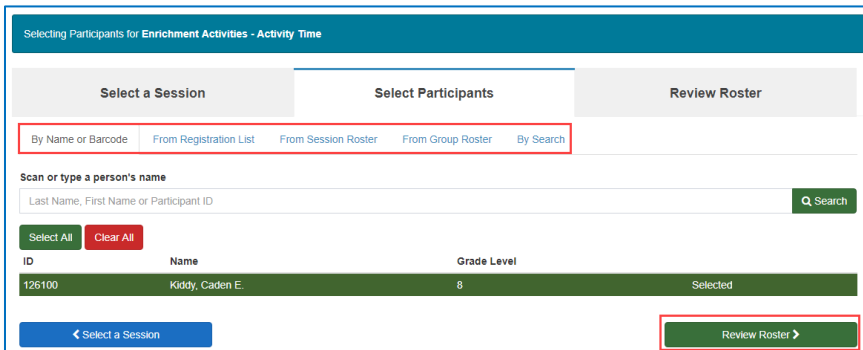
### Select Activity and Session

1. Use the drop-down menus to select the Activity and Session for which you are building a roster
2. Click 'Select Participants' to advance to the next screen



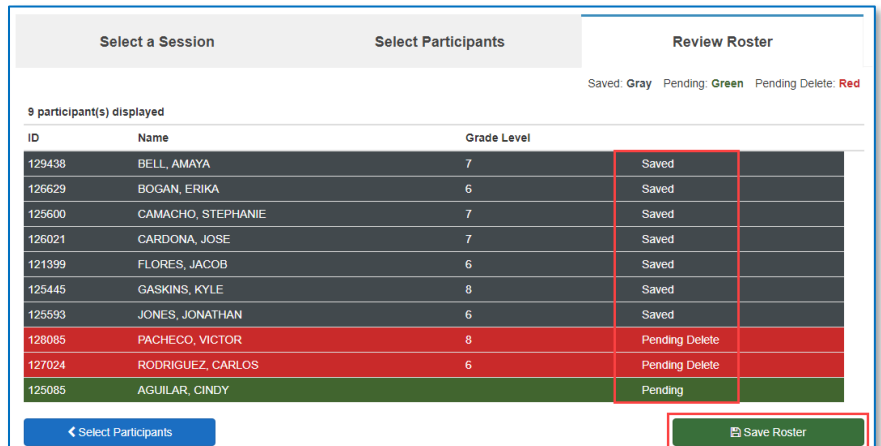
### Select Participants

1. Select participants using the options at the top of the screen. (By Name or Barcode, From Registration List, From Session Roster, From Group Roster, or By Search)
2. Click 'Review Roster' to advance to the next screen



### Review Roster

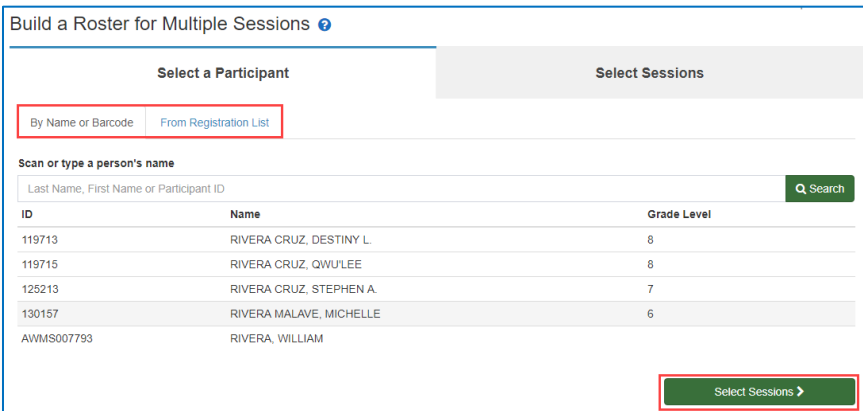
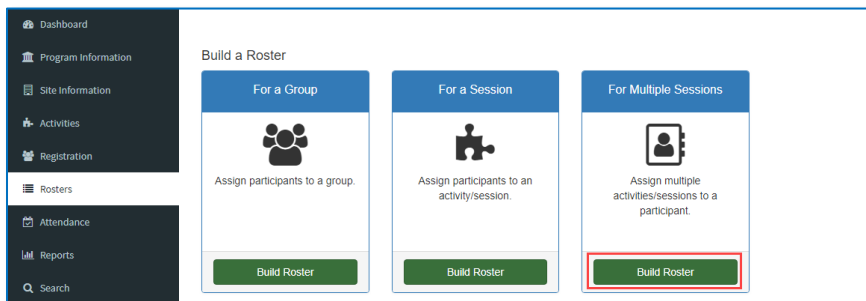
1. Review the list of participants
2. Click on a participant name to remove it from the list
3. Click 'Save Roster'



# MULTIPLE SESSION SELECTION

## Build a Roster for Multiple Sessions

1. In your left-hand navigation menu, click 'Rosters'
2. Locate the 'For Multiple Sessions' card
3. Click 'Build Roster'

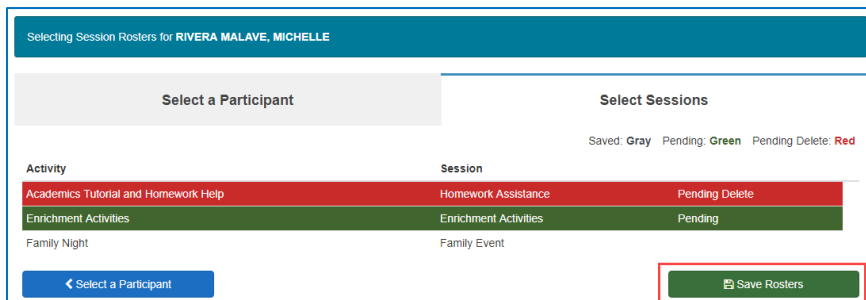


## Select a Participant

1. Select a participant using either, 'By Name or Barcode' or 'From Registration List'
2. Click 'Select Sessions' to advance to the next screen

## Select Sessions

1. Click on the sessions that you wish to select for the participant
2. Click 'Save Rosters' to update the rosters for these sessions



## Tips

- In many programs, participants can be enrolled in multiple activities and sessions at the same time.
- Ensure that all names are grey prior to leaving the roster screen. Any names highlighted in green will not be saved and names in red will not be deleted if you don't click Save.

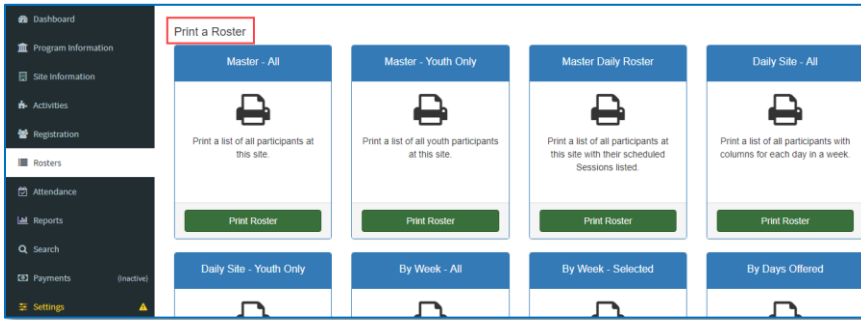


## Notes

- 'Build a Roster – For a Session' and 'Build a Roster – For Multiple Sessions' both update the session rosters. 'For a Session' starts with the session and shows the participants associated with that session roster. 'For Multiple Sessions' starts with the participant and shows the session rosters associated with that person.

# PRINT A ROSTER

Printed rosters can be used to record participation in sessions or as sign-in/out sheets.



## Print a Roster

1. In your left-hand navigation menu, click 'Rosters'
2. Scroll to the Print a Roster section
3. Locate the card for the roster you wish to print
4. Click 'Print Roster'

## Select and Print a Roster

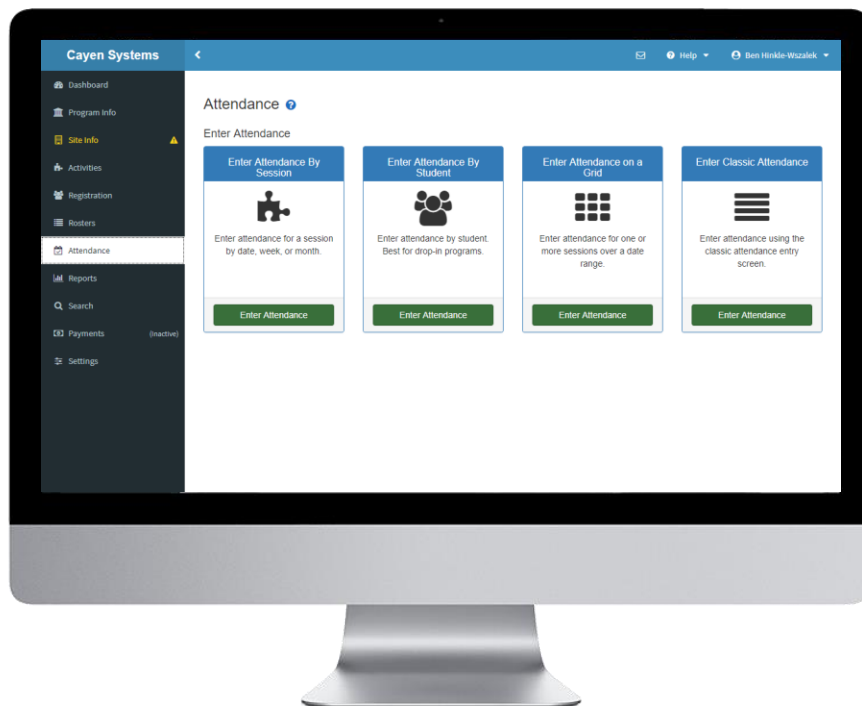
1. Select a date (if required)
2. Select an Activity/Session or Group
3. Click 'Preview Roster'
4. Click the green 'Print Roster' button

#	Name	Age	Mo 11/12	Tu 11/13	We 11/14	Th 11/15	Fr 11/16	Sa 11/17	Su 11/18	Student ID
1	AGUILAR, CINDY	13								
2	ALMODOVAR, OZHANE	12								
3	AMILL CRUZ, KAI	13								
4	BELL, AMAYA	12								
5	BERRIOS BONIANO, SAMANTHA	12								
6	BOGAN, ERIKA	12								
7	BUSANET, JONATHAN	14								
8	BUSTAMANTE DELGADO, MARILYN	12								



## Tips

- Be sure to click the green 'Print' button when printing. Do not use File > Print or Ctrl+P to print
- Click 'Roster Setup' to change the fields/columns that print on the roster.
- Including bar coded ID numbers on the printed rosters can help when entering attendance with a scanner.



# ATTENDANCE

Recording who came to each session is arguably the most critical data to collect at a site. Several methods of attendance collection are available in AfterSchool 21.

- ✓ [Enter basic attendance \(pg #49\)](#)
- ✓ [Add family members from sign-in sheet \(pg #51\)](#)
- ✓ [Enter Attendance on Grid \(pg #53\)](#)
- ✓ [Fill attendance from a roster \(pg #50\)](#)
- ✓ [Record real-time attendance \(pg #52\)](#)

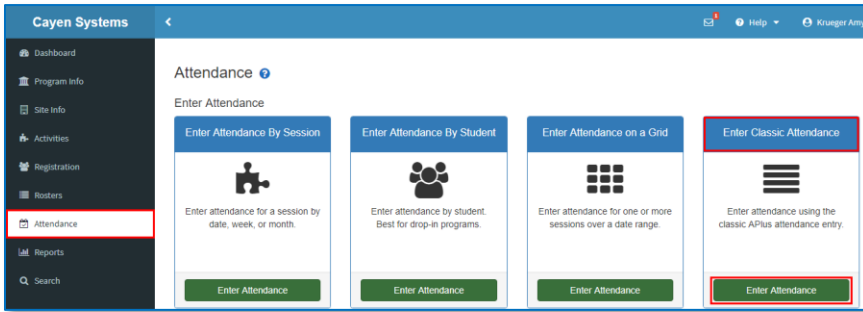
## IMPORTANT NOTES ABOUT WORKING IN THIS SECTION

- Attendance should be recorded daily to avoid getting too far behind on data entry.
- Rosters with bar-coded student IDs can be used to expedite the data entry process.
- Use Select Previous Attendance in the Classic Attendance feature to spot-check attendance entry efforts.
- Entering attendance on a grid should be a last resort. Please get in touch with TransACT support if needed.



# ENTER BASIC ATTENDANCE

The most common way of entering attendance.

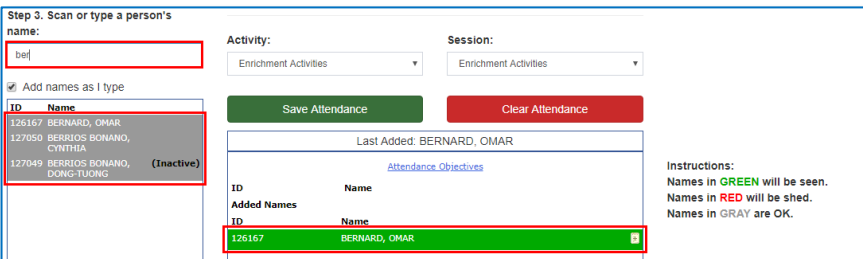
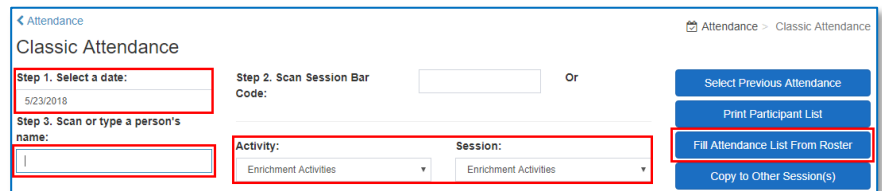


**Enter Attendance**

1. In your left-hand navigation menu, click 'Attendance'
2. Locate the 'Enter Classic Attendance' Card
3. Click 'Enter Attendance'

**Select Criteria for Entering Attendance**

1. Select the date of the attendance
2. Select the Activity and Session
3. Scan or type in the person's name  
OR click 'Fill Attendance List from Roster'



**If you scan or type in the person's name:**

1. Type in the participant name and hit Enter or Tab on the keyboard. All matching records will show below
2. Click the participant name to add to the attendance list
3. Click 'Save Attendance'



## Tips

- Scanning bar coded IDs from a roster is a quick and efficient way to enter attendance.
- Ensure that all names are grey prior to leaving the attendance screen. Any names highlighted in green will not be saved and names in red will not be deleted if you don't click Save Attendance.
- After attendance has been saved, use the Copy to Other Session(s) or Copy to All Scheduled Sessions to quickly populate other sessions that participants attended on a selected date.

## FILL ATTENDANCE FROM A ROSTER

It may be easier to start with a list of expected participants and remove those absent rather than typing or scanning all the people present.

**From Activity/Session**  
 **From Group**

**Activity:**  
 Enrichment Activities

**Session:**  
 Enrichment Activities

**Include Participants:** Active Only

Name	Participant ID	Grade	Add
AGUILAR, MELISSA	125085	7	<input checked="" type="checkbox"/>
ALMODOVAR, YANICE	126640	6	<input checked="" type="checkbox"/>
AMILL CRUZ, ANGELICA	125381	7	<input type="checkbox"/>
BELL, SHANIA	129438	7	<input checked="" type="checkbox"/>
BERNARD, OMAR	126167	6	<input type="checkbox"/>
BERRIOS BONANO, CYNTHIA	127050	6	<input checked="" type="checkbox"/>
BOGAN, BRITTNEY	126629	6	<input type="checkbox"/>
BUSANET, G	125403	8	<input type="checkbox"/>
BUSTAMANTE DELGADO, WEI	119773	7	<input checked="" type="checkbox"/>
CALDERON RUIZ, RUTH	117815	8	<input checked="" type="checkbox"/>

### Fill Attendance List from Roster

1. Click 'Fill Attendance From Roster'
2. Select the Activity and Session or Group for which you are entering attendance
3. Check the box next to each participant name for which you would like to add attendance
4. Click 'Add Attendance'
5. If necessary, repeat steps 1-3 with all rosters containing attendance for the selected Date and Activity/Session (or Group). Once done, click the 'Close' button
6. Click 'Save Attendance'

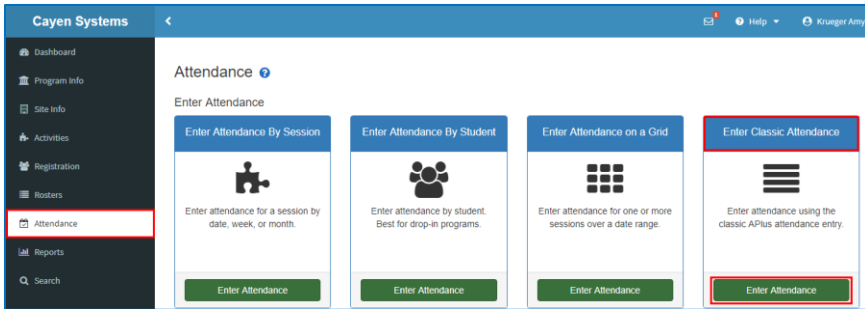


### Tips

- Fill from group rosters to quickly enter attendance for sessions with participants from multiple groups (e.g. Snack).

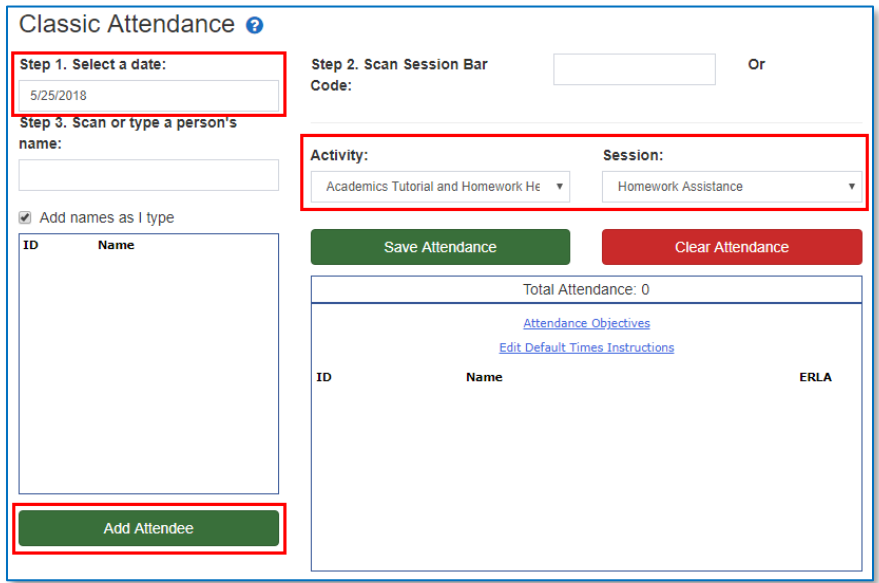
# ADD A FAMILY MEMBER FROM A SIGN-IN SHEET

When adding attendance for a family member or one-time participant from a sign-in sheet a participant can be added to registration ‘on the fly.’



- Add an Attendee**
1. In your left-hand navigation menu, click ‘Attendance’
  2. Locate the ‘Enter Classic Attendance’ Card
  3. Click ‘Enter Attendance’

- Select criteria for entering attendance**
1. Choose the date of attendance from the calendar
  2. Select an Activity and Session
  3. Click ‘Add Attendee’
- OR
3. Type the person’s name and hit Enter or Tab on the keyboard. If no match is found in Registration, you will be prompted to add the new person
  4. The Registration tab will open and the add new participant search screen will appear



Linton    
  Ashton    
  01/01/1998    

- Enter Attendee information**
1. Enter the information that you have on the attendee
  2. Click ‘Search’.

- Enter Attendee information**
3. If no matching records are found in the registration search, click ‘Add New’
  4. Update the information as needed in the new participant’s Registration record
  5. Click ‘Save.’ The Attendance tab will re-open and the new person will automatically be saved in attendance

Linton    
  Ashton    
  01/01/1998    

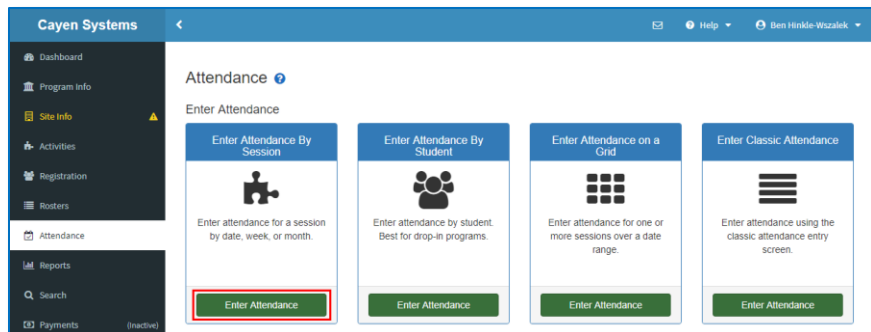
Use Household Search

**Note:** Green highlighting tells you these participants already have a current-term record at your site.

From	Term/Record Date	Student ID	Last Name	First Name	Date of Birth	Grade	Day School	Gender	Program	District	Site	%
<b>No Records Found</b>												

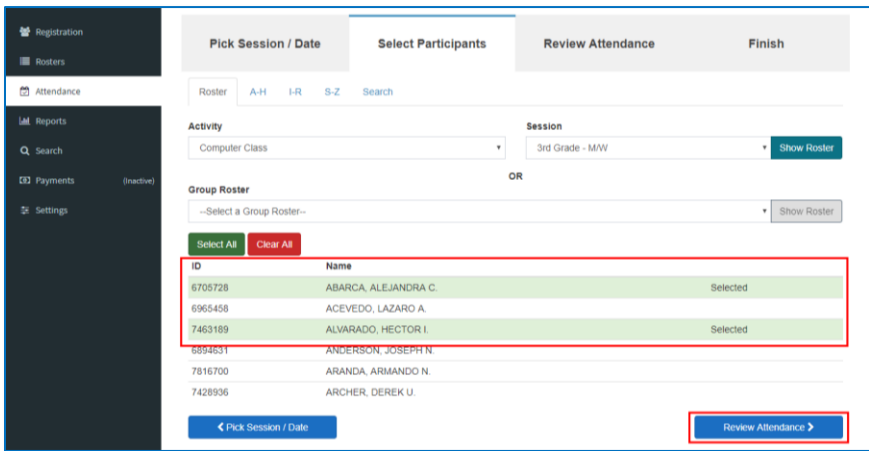
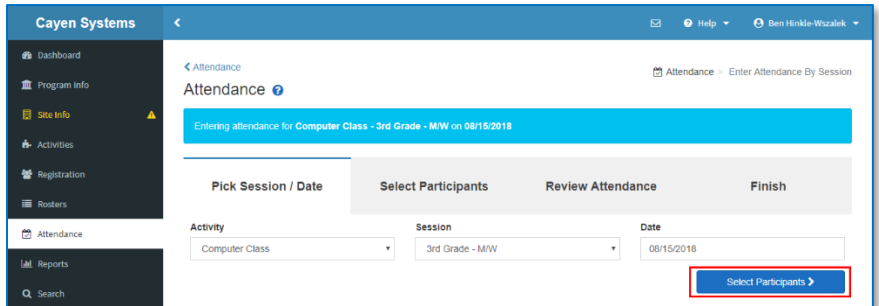
# RECORD REAL-TIME ATTENDANCE

Staff can record real-time attendance using a mobile device such as a tablet or smartphone. This can reduce the need for paper attendance sheets and increase the speed and accuracy of recording participation.



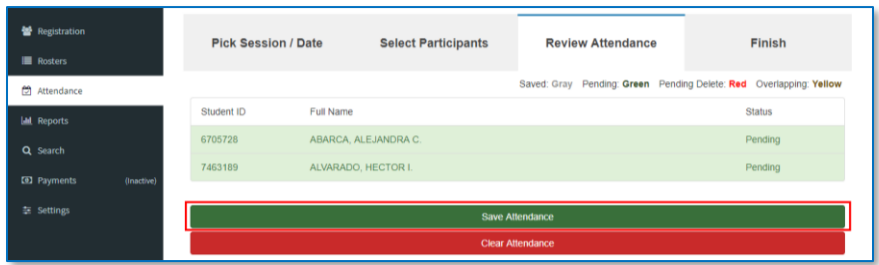
- Record Real-Time Attendance**
1. Use your smart device to access and login to you AS21 site
  2. In you left navigation menu, tap 'Attendance'
  3. Locate the 'Enter Attendance by Session' card
  4. Click or tap 'Enter Attendance'

- Select the Activity, Session, and Date
4. Pick the Activity, Session, and Date from the provided drop-down fields
  5. Click or tap 'Select Participants'



- Choose how you will select participants
6. Click or tap 'Roster,' 'Search,' or a group of letters
  7. Select participants and click or tap 'Review Attendance'

- Review the attendance list
8. Click or tap a pending (green) name to mark it for deletion (the name will turn red)
  9. Click or tap 'Save Attendance' upon completing review




# ENTER ATTENDANCE ON GRID

Enter attendance for one or more sessions for multiple participants and dates on a single screen.

**Attendance** ?

Enter Attendance


Enter Attendance by Session



Record real-time attendance for a session on a specific date.

Enter Attendance


Enter Attendance on a Grid



Enter attendance for one or more sessions over a date range.

Enter Attendance

Enter Classic Attendance



Enter attendance using the classic attendance entry screen.

Enter Attendance

**Enter Attendance on Grid**

1. In your left-hand navigation menu, click 'Attendance'
2. Locate the 'Enter Attendance on a Grid' Card
3. Click 'Enter Attendance'

**Select the Activities and Sessions**

4. Select the session or sessions for which you wish to enter attendance
5. Click 'Continue'

**Attendance on Grid - Select Sessions** ?

Take attendance for a single activity  
 Take attendance for multiple activities

**Attendance for Multiple Activities**

Timebased: No

Sessions:

- Academic Enrichment/Dance (Tuesdays)
- Academic Enrichment/Music (Wednesdays)
- Academic Enrichment/Pottery (Mondays)
- Academic Enrichment/Summer Art (Tuesdays)
- Academic Enrichment/Summer Choir (Mondays)
- Healthy and Active Lifestyle/6-8 Recreation (T/TH)
- Healthy and Active Lifestyle/K-5 Recreation (M/W)
- Nutrition/After-School Snack
- Nutrition/Summer Lunch

Back Continue

**Attendance on Grid - Select Date Range** ?

Start Date: 08/01/2022 End Date: 08/12/2022

August 2022

Su	Mo	Tu	We	Th	Fr	Sa
31	1	2	3	4	5	6
7	8	9	10	11	12	13

**Select Date Range**

12. Select the date range over which you wish to enter attendance
13. Click 'Continue'

**Select a list of Participants**

8. Select the list of participants for which you wish to enter attendance
9. Click 'Continue'

**Attendance on Grid - Participants** ?

All Participants  
 Use this group roster:

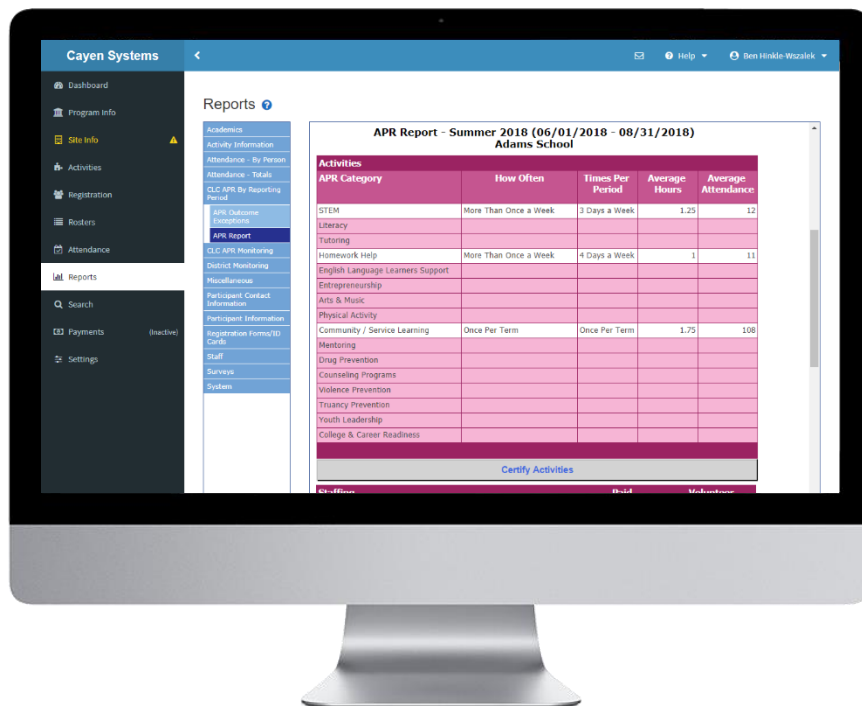
Include Inactive Participants: Yes

Student ID	Participant	Gender	Grade	Mon 8/1	Tue 8/2	Wed 8/3	Thu 8/4	Fri 8/5	Sat 8/6	Sun 8/7	Mon 8/8	Tue 8/9	Wed 8/10	Thu 8/11	Fri 8/12
7640706	ALEXANDER, SIMON A.	M	5	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7181167	ANDERSON, DEWAYNE E.	M	5	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7312644	AVILA, DEMARIO R.	M	5	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7034334	BAKER, JAQUAN Y.	M	8	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6705683	BARTLETT, CHRISTINE C.	F	4	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6904610	BELTRAN, JOSH Q.	M	7	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7426794	BILTMORE, JOSE E.	M	8	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7214294	BULTER, CHELSEA H.	F	8	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7826575	CAMP, DANESHA E.	F	4	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7456747	CAMPBELL, WILLIAM I.	M	5	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7650159	CRESPO, JASON S.	M	6	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7296703	DAVIS, MARY E.	F	5	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Back Save

**Record Attendance**

10. Check the boxes to indicate the participants that attended the selected session(s) on specific dates.
11. Click 'Save'



## REPORTS

Reports are the easiest way to get data out of AfterSchool 21. Hundreds of reports provide program-specific information to funders, administrators, and evaluators.

- ✓ Generate reports (pg #55)
- ✓ 21<sup>st</sup> CCLC Annual Performance Report (pg #57)
- ✓ Override APR Report Values (pg #59)
- ✓ Sample reports (pg #56)
- ✓ Certify Annual Performance Report data (pg #58)

### IMPORTANT NOTES ABOUT WORKING IN THIS SECTION

- On the main reports screen, a list of report categories will appear. Click a category to view the corresponding selection of reports.
- Refer to the Description documentation for information on the report you want to generate. For details on how a report's data is generated, click the blue [Report Explanation File](#) link below each report's description.

# GENERATE REPORTS

AS21 offers a wide variety of reports that can be generated to assist with day-to-day programming, data entry monitoring, and funding source and evaluation purposes.

## Generate a Report

1. In your left-hand navigation menu, click 'Reports'
2. Click a report category to view the corresponding selection of reports
3. Click on the report you wish to generate
4. Select any criteria to include/exclude on the report
5. Click 'View Report' in the lower-right corner
6. Click the green 'Print' button in the lower-left corner to print the report



## Tips

- Refer to the description documentation for information on the report you want to generate.
- For a report breakdown, click the blue Report Explanation File located below the description caption of the report.
- If you would like to download a report to Excel, use the Export Format field to select the Comma Separated Value (CSV) option prior to clicking View Report.

# SAMPLE REPORTS

**Daily Activity Attendance Report**  
 District: Windham Public Schools  
 Windham Middle School  
 Between 06/28/2017 and 06/26/2018  
 Activity: Snack  
 All Sessions  
 Date Run: Tuesday, June 26, 2018 at 11:56:51 PM (ET)

Name	Age	06/18	06/19	06/26	Days Attended	% Attendance
AGUILAR, MELISSA	12		X		1	33.3%
ALBUQUERQUE, MARIE	11	X		X	2	66.7%
ARREOLA, ANGELICA	12		X	X	2	66.7%
BETH, DANIELLE	13	X	X		2	66.7%
BORG, JAMES	13	X	X		2	66.7%
<b>Total Participants</b>		3	3	3	9	
<b>Average Daily Attendance:</b>		3	3	3	9	

Attendance – By Person → Daily Activity Attendance Report

- Use this report to see daily attendance information for a site’s participants, their attendance percentage for a specific date range, and average daily attendance information.

Attendance – Totals → Attendance Summary

- Use this report for an overview of participation in site’s activities.

**Number of Participants Registered: 55**    **Number of Unduplicated Participants: 4**  
**Number Active: 55**    **Total Days Open: 3**  
**Number Inactive: 0**    **Participant Daily Average (All Days): 3**  
**Number of Attendees: 0**  
*These totals reflect data as of 4/25/2012.*

Activity Name	Session Description	Avg Hours/Session	#Attended	#Adults	#Youth	#Times/Days Offered	Total Hours Offered	Avg Daily Attendance	Count/Percent of Participants Attending > 50%
Support Services Activity	Staff Attendance	1	1	0	1	1	1	1	1/100.00%

**Recreation**

Activity Name	Session Description	Avg Hours/Session	#Attended	#Adults	#Youth	#Times/Days Offered	Total Hours Offered	Avg Daily Attendance	Count/Percent of Participants Attending > 50%
Enrichment and Recreational Activities	Remedial Reading	2	4	0	4	3	6	2	2/50.00%

**Field Trip Emergency Information Report**  
 Hillandale Public School  
 Activities/Sessions: 2011 Summer Program/Academic Enrichment  
 Date Run: Wednesday, April 25, 2012 at 10:46:21 AM (CT)

Participant Name	Address	City	State	Zip	Phone	Date of Birth	Medical Limitations	Contact Name	Con Rel.
ANDERSON, SERENA	1167 N Henderson ST 401	Hillandale	WI	53202	555-9876	1/18/2004		Mark Anderson	Par
BANIDAR, LAZARO A	1108 CENTER ST	Milwaukee	WI	53218	566-4354	11/14/2000		Luis Banidar	Gra
BANNERS, SIENNA T	1167 N Henderson ST 401	Hillandale	WI	53202	555-9876	1/18/2003		Maria Banners	Par
BASTIAN, SONIA I	1019 MILTON WILSON BLVD	Milwaukee	WI	53217	567-6677	10/31/2002		Lola Bastian	Gra
BROWNE, DANESHA A	1118 HOPKINS HILL RD	Milwaukee	WI	53224	223-3224	7/19/2001		Kenneth Browne	Par
COSTRO, Tyrone	1167 N Henderson ST 401	Hillandale	WI	53202	555-9876	12/2/1998		N/A	

Participant Contact Information → Field Trip Report

- Use this report to quickly obtain medical limitations and emergency contact information of participants.

CLC APR By Reporting Period → APR Review Report

- Use this report to monitor sites to ensure accurate information is being entered.

District	Grantee	Site	School Year 2022 Date Range	Last Updated	Attendance						
					1-29	30-59	60-89	90+	American Indian	Asian	BI
Adair County - Cycle 10	Grantee 279	Adair Co. Elementary	08/25/2021-05/20/2022	2/24/2022	108	41	4	0	0	0	
Adair County Cycle 15 Continuation	Grantee 17	Adair Co. Primary Center	09/20/2021-05/06/2022	2/18/2022	191	35	27	0	0	2	



# 21<sup>ST</sup> CCLC ANNUAL PERFORMANCE REPORT

The 21<sup>st</sup> CCLC APR is submitted to the US Department of Education three times a year to demonstrate what each site and grant has done with their funds in the summer, fall, and spring reporting periods. The information on this report aligns with the 21APR federal database to make submissions as painless as possible.

APR Report - Summer 2022 (06/06/2022 - 08/31/2022) Hillandale K-12		
<b>Grantee Information</b>		
Type: School District	Award: \$100000.0000	
Hillandale Public Schools Cycle 5 123456 Apple St Hillandale, KY 53005		
<b>Grantee Contact Information</b>		
Sherry Maddox	Phone: (414) 555-5555	E-Mail: Smaddox@yopmail.com
<b>Center Information</b>		
Type: School	Center ID: [Not Set]	
Hillandale K-12 12456 N Apple St Hillandale, WI 53201		
<b>Center Contact Information</b>		
Jennifer Wilson	Phone: (920) 759-8695	E-Mail: jwilson@yopmail.com
<b>Feeder Schools (1)</b>		
<b>School</b>	<b>Summer</b>	<b>Full Year</b>
HILLANDALE PUBLIC SCHOOL	X	X
*Center Location		
<b>Partners (1)</b>		
<b>Partner</b>	<b>Subcontractor</b>	
American Red Cross	No	

CLC APR By Reporting Period → APR Report

- Use this report to compile information needed to submit your Annual Performance Report (APR) data to the 21APR federal database.



## Notes

- The report will show the reporting categories in sections (e.g. Activities, Staffing, Participation, etc.).
- Fields will show in white if data is present and in pink if no data is present.
- There is a certify button at the bottom of report. Instructions for certifying data can be found on the next page.

# CERTIFY APR DATA

Some programs must certify their APR data before submission to the 21APR federal database.

Reports

NUMBER OF PARTICIPANTS PER REPORT		NUMBER OF PARTICIPANTS PER REPORT	
Academics	Hispanic or Latino	3	10
Activity Information	Hawaiian or Pacific Islander	0	0
Attendance - By Person	White	5	9
Attendance - Totals	Two or More Races	0	0
CLC APR By Reporting Period	Data Not Provided	2	0
MIN Outcome Exceptions			
APR Report	<b>Sex</b>	<b>Count</b>	<b>Sex</b>
CLC APR Monitoring	Male	9	15
District Monitoring	Female	8	7
Miscellaneous	Not Reported in Male or Female	0	0
Participant Contact Information	Data Not Provided	1	0
Participant Information	<b>Population Specifics</b>	<b>Count</b>	<b>Population Specifics</b>
Program/Parenting Teen Services	LEP	0	0
Registration Forms/ID Cards	Economically Disadvantaged	0	0
Staff	Special Needs	0	0
Surveys	Family Members	0	0
System			
	Certify APR Data with These Values		
	Override These Values, then Certify		

- ### Certify APR Data
1. Click 'CLC APR By Reporting Period,' then 'APR Report'
  2. Select the Site and Reporting Period to certify
  3. Click 'View Report'
  4. Review the data in EACH section of the APR
  5. Click the certify button at the bottom of the APR
  6. Confirm that you wish to certify/lock the APR data



## Notes

- After you certify/lock the APR data, the report will not reflect any changes made to the site's data after the time of certification.
- The certify button will no longer be visible and a timestamp of when and by whom the data was certified will show at the top of the report.

# OVERRIDE APR REPORT VALUES (only available if allowed by your state)

## Override APR Report Values

1. If you have reviewed the report and feel that data is incorrect, click 'Override These Values, then Certify'
2. You will be redirected to Site Information to review and update values

Reports

Category	Count	Category	Count
Academics		Hispanic or Latino	10
Activity Information		Hawaiian or Pacific Islander	0
Attendance - By Person		White	9
Attendance - Totals		Two or More Races	0
CLC APR By Reporting Period		Data Not Provided	0
APR Outcomes Exemptions			
APR Report			
CLC APR Monitoring			
District Monitoring			
Miscellaneous			
Participant Contact Information			
Participant Information			
Program/Parenting Teen Services			
Registration Form/ID Cards			
Staff			
Surveys			
System			

Sex	Count	Sex	Count
Male	9	Male	15
Female	8	Female	7
Not Reported in Male or Female	0	Not Reported in Male or Female	0
Data Not Provided	1	Data Not Provided	0

Population Specifics	Count	Population Specifics	Count
LEP	0	LEP	0
Economically Disadvantaged	0	Economically Disadvantaged	0
Special Needs	0	Special Needs	0
Family Members	0	Family Members	0

Certify APR Data with These Values  
Override These Values, then Certify

APR Certification

Cloonan Middle School  
Fall 2018 (10/09/2018 - 12/06/2018) (Change)

Activities Staffing Participation Outcomes Confirm

STEM	Literacy	Tutoring
How Often: More than once a week	How Often: Not Offered	How Often: More than once a week
Times Per Period: 2 days a week	Times Per Period: N/A	Times Per Period: * Calculated Value: Not Offered
Average Hours Per Session: 1-2 hours	Average Hours Per Session: N/A	Average Hours Per Session: * Calculated Value: N/A
Average Participants: 21-30	Average Participants: N/A	Average Hours Per Session: 2-4 hours
		* Calculated Value: N/A

## Override APR Report Values

3. Start by reviewing the 'Activities' tab
4. Change values as needed
5. When a value is changed, the value that was calculated for the report will show below the field, in red

## Override APR Report Values

6. At the bottom of the tab, enter an 'Override Reason'
7. Click 'Save, Continue with Staffing', to move to the next tab

Override Reason:

← Reporting Period
Save, continue with Staffing →

APR Certification

Cloonan Middle School  
Fall 2018 (10/09/2018 - 12/06/2018) (Change)

Activities Staffing Participation Outcomes Confirm

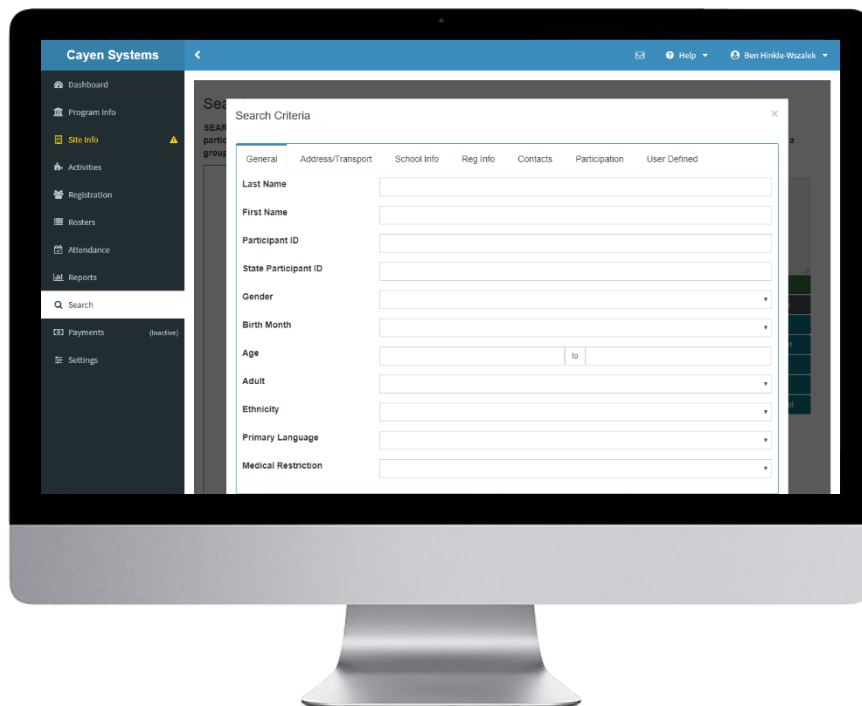
Certify Data

All values for the APR Certification have been saved. To complete the APR Certification and prevent changes, click the "Certify and Lock Data" button.

← Outcomes
Exit, Certify Later
Certify and Lock Data

## Override APR Report Values

8. Once you have reviewed all tabs, click either 'Exit, Certify Later' or 'Certify and Lock Data'
9. If you choose to certify later, you can do this in Reports → CLC APR by Reporting Period → APR Report



# SEARCH

Search is a powerful tool for quickly generating a list of participants meeting select criteria. Use the Quick Edit/Export Spreadsheet feature to edit information for a group of participants or to generate ad hoc reports.

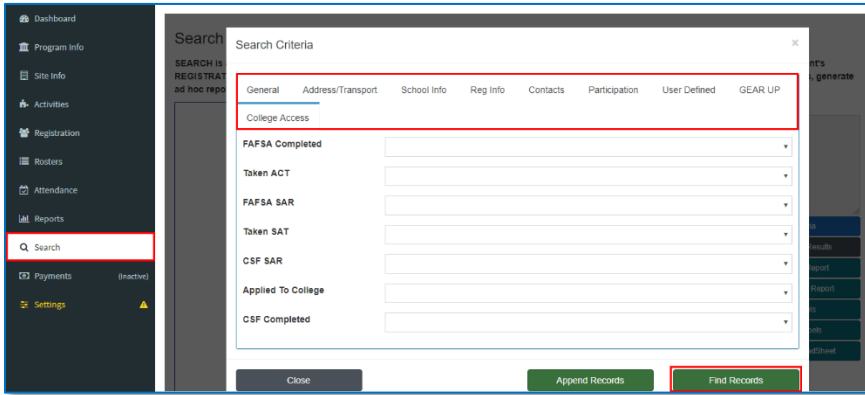
- ✓ Find records that match certain criteria (pg #61)
- ✓ Generate custom reports (pg #61)
- ✓ Quick edit registration records (pg #62)
- ✓ Print mailing / file folder labels (pg #63)

## IMPORTANT NOTES ABOUT WORKING IN THIS SECTION

- Fields from multiple tabs in the Edit Search Criteria screen can be combined to find the necessary information.
- Only participants that match ALL criteria entered in a search will be returned.
- If a search results in more than 1,000 records, the print mailing and file folder labels buttons will be disabled. Additionally, the performance of other features may be affected.

# FIND RECORDS THAT MATCH SPECIFIC CRITERIA

Programs often need to find participants that match specific criteria to either edit those participants' information or generate a report.



## Find Records

1. In your left-hand navigation menu, click 'Search'
2. Click 'Edit Search Criteria'
3. Use the criteria tabs to locate specific fields and enter values that match the desired participants
4. Click 'Find Records.' The search results will be displayed

## Next Steps:

- Generate a custom report
- Use quick edit to update registration information
- Create mailing / file folder labels
- Generate links for taking surveys via the survey portal

SEARCH is a powerful tool for quickly locating a participant or group of participants meeting selected criteria. A user may be directed to a participant's REGISTRATION record by double clicking on his/her name, use the Quick Edit utility to edit general participant information for a group of students, generate ad hoc reports to Excel, or create mailing and file labels.

**Search Results: 813 Found**

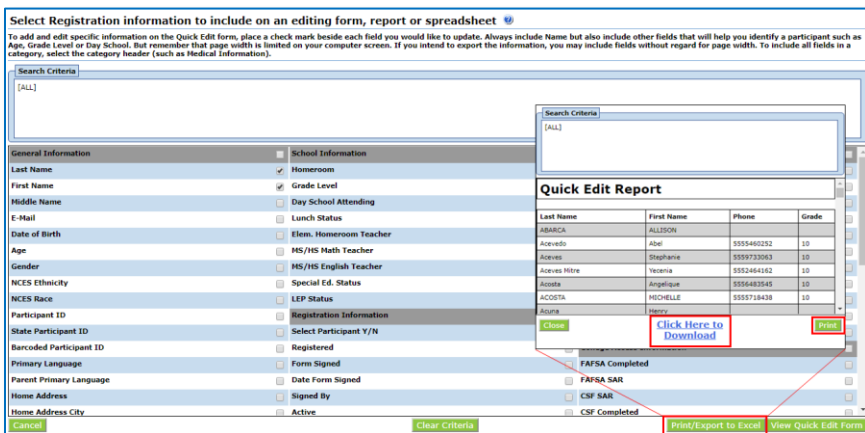
Student ID	Student Name	Birthdate	Gender
Edit HHS035652	ABARCA, ALLISON	5/1/2001	
Edit 344785	Accevedo, Abel	5/28/2001	M
Edit 356520	Aceves, Stephanie	2/19/2002	F
Edit 345751	Aceves Mitre, Yecenia	3/25/2002	F
Edit 351823	Acosta, Angelique	2/19/2002	F
Edit 345947	ACOSTA, MICHELLE	8/27/2002	F
Edit AHHS065713	Acuna, Henry		
Edit 332552	Addison, Ivan	4/10/2001	M
Edit 344217	Aguila, Gabriela	1/21/2002	F
Edit 435423	Aguilar, Marco Antonio	12/15/2001	M
Edit 321345	Aguilar, Randy	1/25/2001	M
Edit 445276	Alcala, Carlos	4/26/2002	M
Edit ASBHS068995	ALCALA, CARLOS		
Edit ASBHS010099	ALCARAZ, ALAN		
Edit 346717	Alvarez, Andrea	1/31/2002	F

Search Criteria: [ALL]

- Edit Search Criteria
- Clear Search Criteria/Results
- Print Demographics Report**
- Generate Survey Links Report
- Print Mailing Labels
- Print File Folder Labels
- Quick Edit/Export Spreadsheet

# GENERATE CUSTOM REPORTS

Search results can be used to create ad hoc reports that may be requested from funders, administrators, or evaluators.



## Create a custom report

1. Once search results have been returned, click 'Quick Edit/Export Spreadsheet.' A screen listing multiple participant-related fields will appear
2. Check the boxes for the fields you would like to include in the report
3. Click 'Print/Export to Excel.' A preview of the report will appear
4. Click 'Print' to print the report or click 'Click Here to Download' to export the information to Excel

# QUICK EDIT REGISTRATION RECORDS

Search results can be used to create quick edit forms to efficiently update information for a group of people simultaneously.

Select Registration information to include on an editing form, report or spreadsheet

To add and edit specific information on the Quick Edit form, place a check mark beside each field you would like to update. Always include Name but also include other fields that will help you identify a participant such as Age, Grade Level or Day School. But remember that page width is limited on your computer screen. If you intend to export the information, you may include fields without regard for page width. To include all fields in a category, select the category header (such as Medical Information).

Search Criteria  
[ALL]

General Information  
 Last Name  
 First Name  
 Middle Name  
 E-Mail  
 Date of Birth  
 Age  
 Gender  
 NCES Ethnicity  
 NCES Race  
 Participant ID  
 State Participant ID  
 Barcoded Participant ID  
 Primary Language  
 Parent Primary Language  
 Home Address  
 Home Address City

School Information  
 Homeroom  
 Grade Level  
 Day School Attending  
 Lunch Status  
 Elem. Homeroom Teacher  
 HS/HS Math Teacher  
 HS/HS English Teacher  
 Special Ed. Status  
 LEP Status  
 Registration Information  
 Select Participant Y/N  
 Registered  
 FAFSA Completed  
 FAFSA SAR  
 CSF SAR  
 CSF Completed

Print/Export to Excel  
View Quick Edit Form

Last Name	First Name	Phone	Grade
ADARCA	AUDREY		
ADARCA	AGE	3555462353	10
ADARCA	STEPHANIE	3555733653	10
ADARCA	TRACY		
ADARCA	ANGELIQUE	3555483545	Other
ADARCA	MICHELLE	3555738339	10
ADARCA	MARY		

## Quick Edit Records

1. Once search results have been returned, click 'Quick Edit/Export Spreadsheet.' A screen listing multiple participant-related fields will appear
2. Check the boxes for the fields you would like to include in the report
3. Click 'View Quick Edit Form'
4. Edit data as needed and click 'Save and Refresh'



## Tips

- Use quick edit in Search when you get updated demographic, contact, or teacher information for a group of participants. This feature can be very useful to update information after using Quick Register from Prior Term.
- Save frequently when using quick edit in Search. Often several hundred records are being saved at once. Internet connection issues could result in data not saving properly.

# PRINT MAILING AND FILE FOLDER LABELS

Search results can be used to print mailing and file folder labels.

## Position Labels on the Page and View/Print

Purpose: Print labels for the selected records.

**Instructions:** To position the first (or only) label, count across and down the page of blank labels. Enter the position number in the space provided. Then click on 'Create Labels' to review and print your labels. Please use Avery 5160 or compatible for printing mailing labels, and Avery 8366 or compatible for printing file folder labels. If you accidentally close the preview window, or if you want to print another set of the same labels, you can click on 'View/Print Labels' to view and print the labels again.

Start Printing Labels in Position Number:

To Parent/ Guardian of:

Use Mailing Address:

Print:

Close

View/Print Labels

## Print Mailing Labels

1. Once search results have been returned, click 'Print Mailing Labels'
2. Select criteria and determine if printing labels for All Participants or Select Participants
3. Click 'View/Print Labels'
4. Click 'Print' to print your labels

## Print File Folder Labels

1. Once search results have been returned, click 'Print File Folder Labels'
2. Select criteria and determine if printing labels for All Participants or Select Participants
3. Click 'View/Print Labels'
4. Click 'Print' to print your labels

## Position Labels on the Page and View/Print

Purpose: Print labels for the selected records.

**Instructions:** To position the first (or only) label, count across and down the page of blank labels. Enter the position number in the space provided. Then click on 'Create Labels' to review and print your labels. Please use Avery 5160 or compatible for printing mailing labels, and Avery 8366 or compatible for printing file folder labels. If you accidentally close the preview window, or if you want to print another set of the same labels, you can click on 'View/Print Labels' to view and print the labels again.

Start Printing Labels in Position Number:

Print:

Close

View/Print Labels



## Tips

- When printing mailing and file folder labels, review the instructions noted on the Position Labels on the Page and View/Print window.
- Use Avery 5160 (or compatible) labels when printing mailing labels.
- Use Avery 8366 (or compatible) labels when printing file folder labels.

# SUPPORT

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[WWW.21CCLC.COM](http://WWW.21CCLC.COM)