



DYCD CONNECT

PARTICIPANT TRACKING SYSTEM:

CSBG

Activities & Services

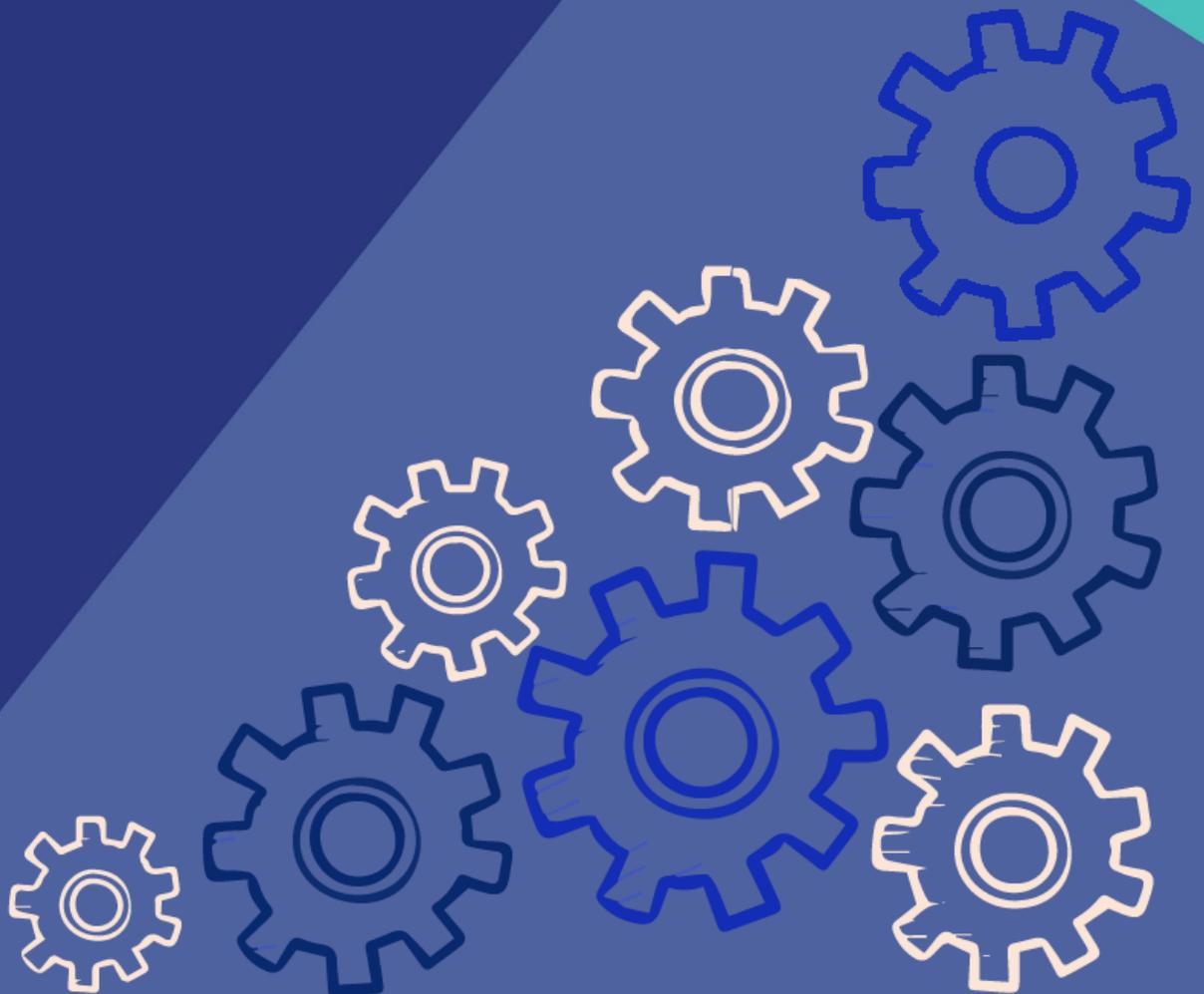


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Key Terms

Activity Section

Primary Category: identifies the general type and focus of an activity. The field selected classifies all participant hours as this type of hour.

Secondary Category: further expands on the primary category to describe an activity

Schedule Section

Occurrence: describes whether the activity will meet Once, Daily, Weekly, or Monthly

Max Attendance: refers to the maximum number of participants allowed to participate in a session or class

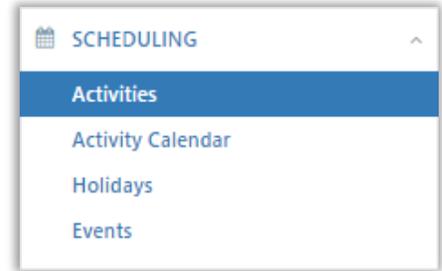
Total Hours: a calculated field that lists how many activity hours a schedule contributes towards your workscope required activity hours

Deactivation Section

Deactivation: the process of deleting an activity, schedule, participant, etc. from DYCD Connect

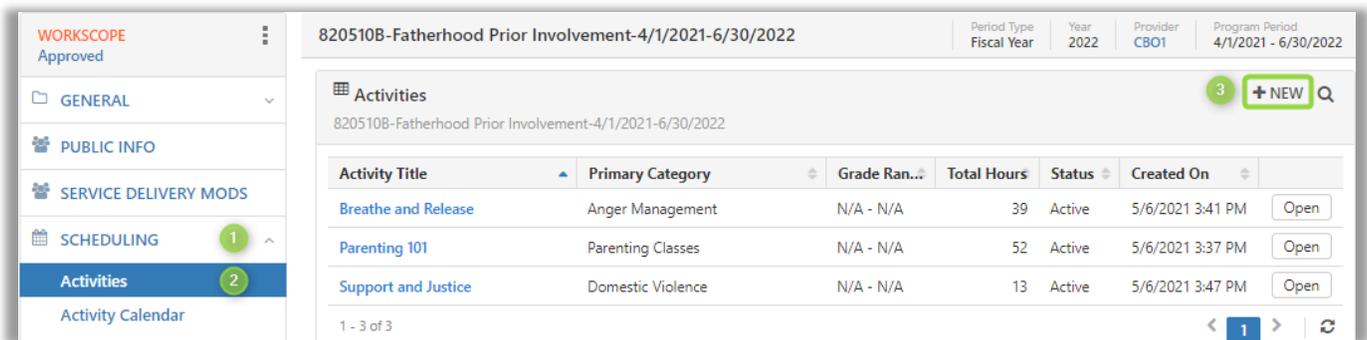
What are Activities on DYCD Connect?

Activities are used to store programmatic data on DYCD Connect. The data stored largely aims to answer the questions, “What happens in your program and why?” Community Services Block Grant (CSBG) providers will create activities and schedule them as group sessions or interactions for service tracking. The Activities sub-section is located under Scheduling.



Creating an Activity

Step 1: From Scheduling, click on Activities and then click **NEW**.



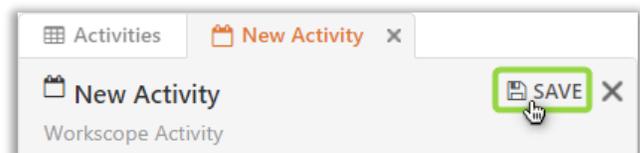
Step 2: Type in a Title for your activity and select a [Primary Category](#). Also, select a [Secondary Category](#) if applicable.

A screenshot of a form for creating an activity. It has three main sections: 'Title *' with a text input field containing 'Parenting 101'; 'Primary Category *' with a dropdown menu showing 'Parenting Classes'; and 'Secondary Category' with a dropdown menu showing 'Dealing with anger'.

Step 3: Provide a description for the activity. This should align with the selected primary and secondary category.

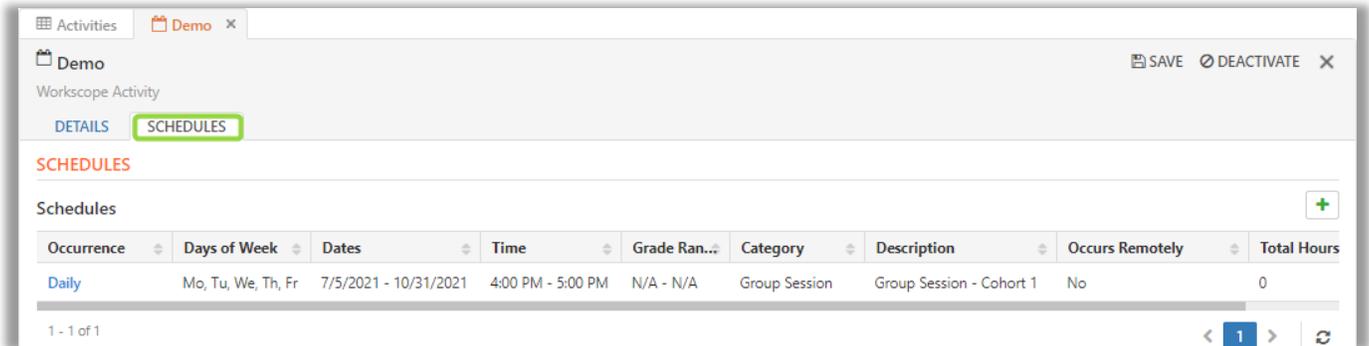
A screenshot of a form for creating an activity, showing the 'Description *' field. The field is a text area with the placeholder text 'This activity aims to...'. There is a small icon in the bottom right corner of the text area.

Step 4: Click **SAVE** at the top of the page and then add Tags to your activity at the bottom of the page.



What is a Schedule?

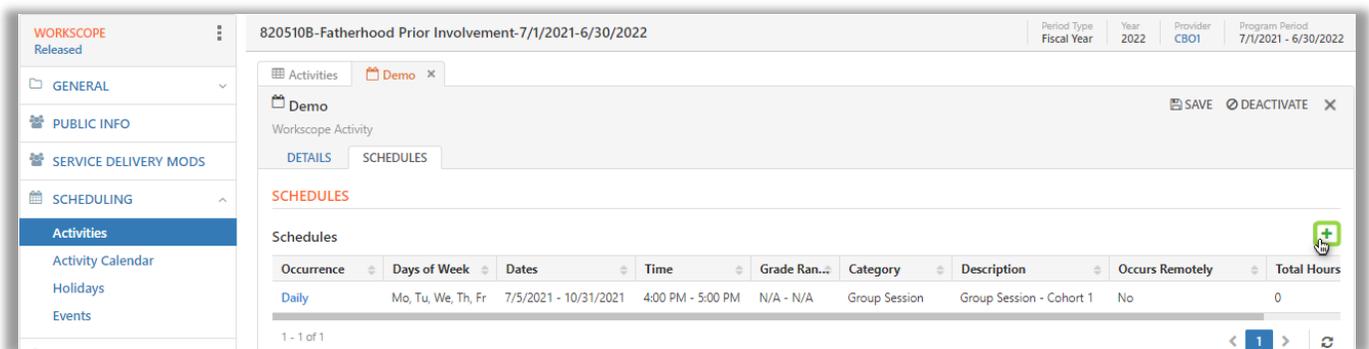
Schedules are associated with activities and define when an activity will take place and whether is a group session or a scheduled interaction.



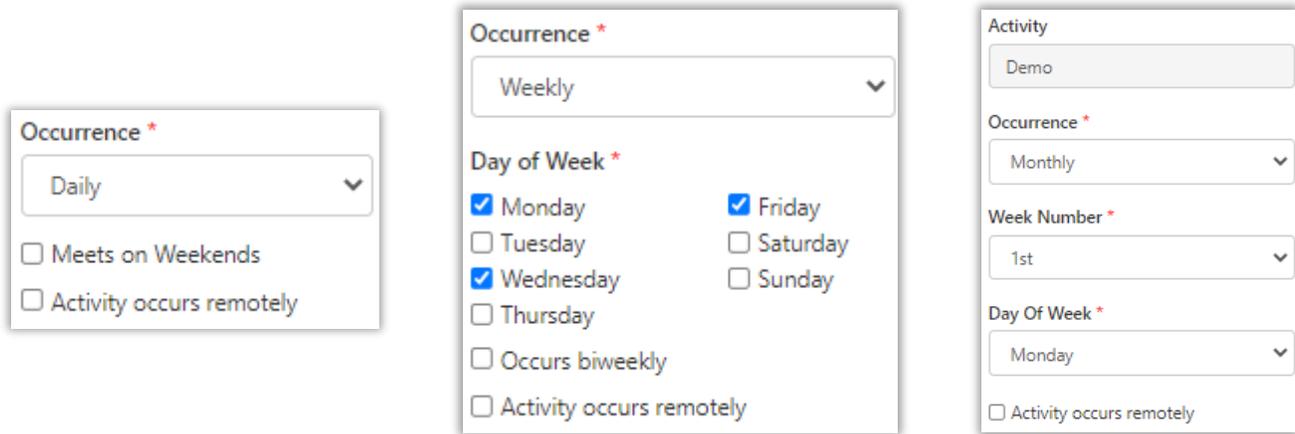
Multiple sessions for an activity should be represented by additional schedules added to a single activity. A unique schedule should be added for unique days/times the activity occurs and for unique participants with identifying schedule descriptions.

Creating a Schedule before a Workscope is Approved

Step 1: From the Schedules tab of the activity that you would like to schedule, click .



Step 2: Select the schedule Occurrence from the drop-down options. You may also denote if the schedule meets remotely on all occurrence types.

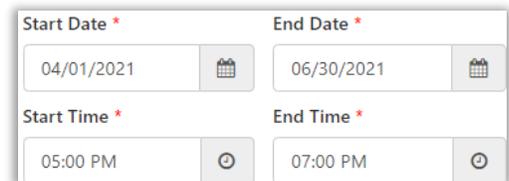


For a daily occurrence you may denote if the schedule meets on weekends.

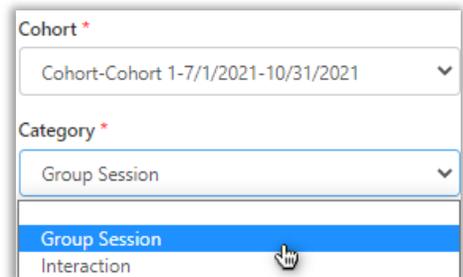
For a weekly occurrence you must set the days of the week the schedule meets and may denote if meeting biweekly.

For a monthly occurrence you must also select the week number and day of the week.

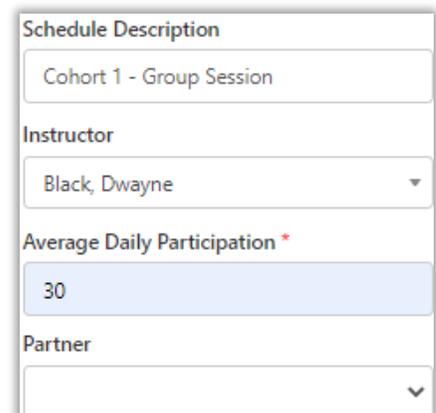
Step 3: Complete the details section by clicking on the respective fields and typing in the data.



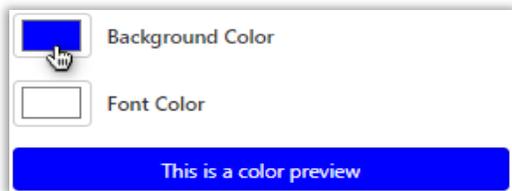
Step 4: Select the Cohort and Category for the schedule from the dropdown options.



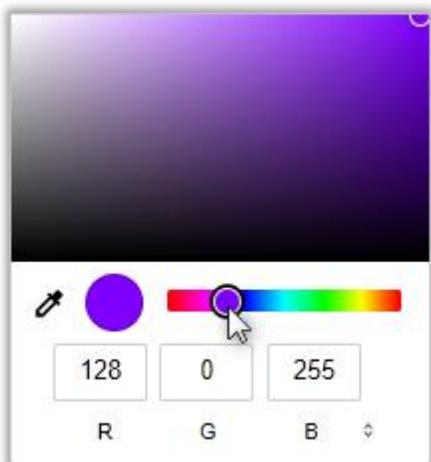
Step 5: Type in a Schedule Description and Average Daily Participation for the schedule. You may also add an instructor and/or partner that assist with the schedule from the available dropdown options if applicable.



Step 6 (Optional): Color Code your schedule.

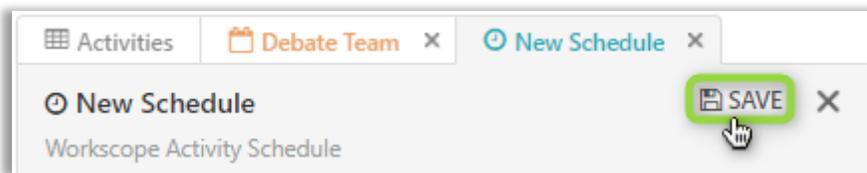


Click on a colored box to modify the color of schedules on the activity calendar.

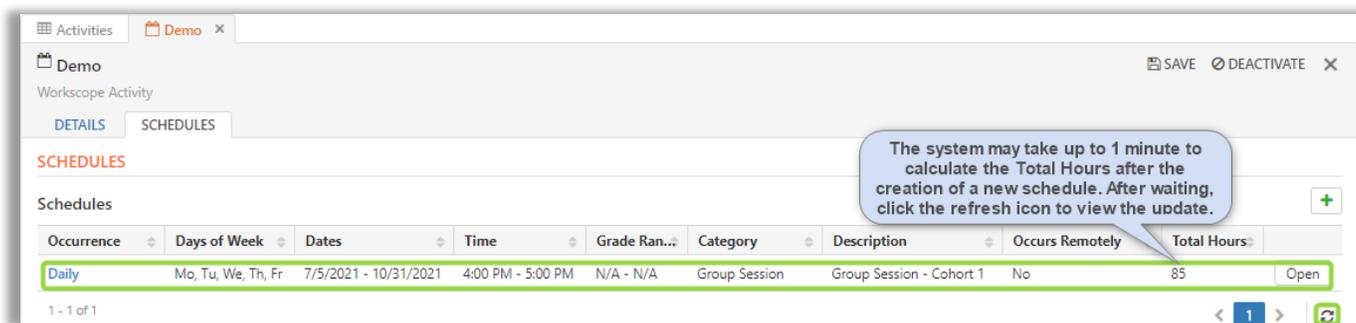


Click and drag to adjust the circular sliders to your preferred color or type in the RGB numbers. Then, click on the Workscope Activity Schedule Page, away from the pop-up box, to save.

Step 7: Click  at the top right of the Workscope Activity Schedule page & confirm the schedule.



Your schedule will appear in the Schedules tab of the workscope activity and display **Total Hours**.



Creating a Schedule after a Workscope is Approved

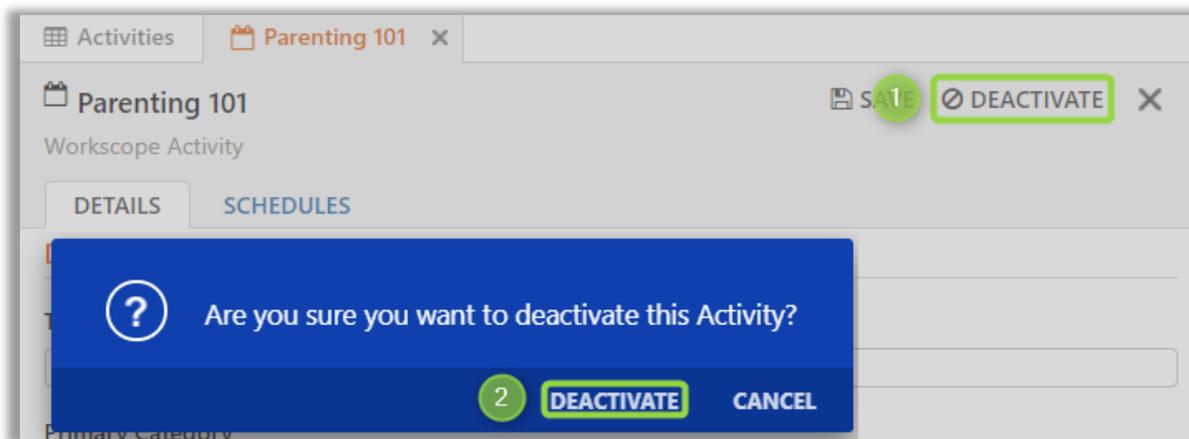
After your workscope has been approved, you must complete a schedule unlock request for newly created activities to add a schedule. This enables  and allows you to begin schedule setup on the Workscope Activity Page. Once there, you may create a schedule.

Deactivations

The process of deleting items from DYCD Connect is called a deactivation. For activities and schedules, the process differs depending on the stage of the workscope.

Deactivations before a Workscope is Approved

Before your workscope has been approved, you may [deactivate](#) or delete an activity by clicking deactivate on the Workscope Activity page. This will also remove all schedules of the activity.



You may also choose to deactivate individual schedules by navigating to the Workscope Activity Schedule page, clicking on deactivate and confirming the deactivation.

Deactivations after a Workscope is Approved

After your workscope has been approved, you must complete a schedule unlock request for the activity or schedules that you would like to deactivate. Then, you must navigate to the specific activity or schedule and the option will appear. You will be unable to deactivate a schedule if there is any attendance or enrollments completed. Similarly, you will be unable to deactivate an activity if any associated schedules have this data saved.

Services

After a participant is accepted and enrolled you will begin service tracking. The service tracking process will vary by program area, but all programs will log participant goals, interactions, benchmarks, outcomes and for programs offering group sessions, attendance. For Fatherhood Prior Involvement worksopes, post-intake participant surveys must be completed before you may proceed to logging interactions and attendance.

Completing the Post-Intake Participant Survey

Step 1: From a participant's accepted intake, navigate through Services>Survey and click Open to access the participant's survey.

The screenshot shows a participant profile for Patrick Lam. The left sidebar contains navigation options: REGISTRATION INFORMATION, PARTICIPANT INFORMATION, CONTACT INFORMATION, EDUCATION/WORK STATUS, HOUSEHOLD INFORMATION, HEALTH INFORMATION, CONSENTS, SERVICES (with a green circle '1'), Survey (with a green circle '2'), and Goals. The main content area shows a yellow banner with two information icons and messages: 'Participant survey is due.' and 'Participant interaction and attendance is lock due to incomplete initial survey.' Below this is a table with columns: Survey, Survey Created Date, Survey Date, Survey Type, and Survey Status. A row for 'Survey 1' is shown with a green circle '3' and an 'Open' button next to it. The 'Survey Status' column shows 'Draft'.

Step 2: Complete the survey as shown below.

The screenshot shows the survey form for 'Survey 1'. At the top right, there are 'SAVE' and 'COMPLETE' buttons. A callout bubble points to the 'SAVE' button: 'You may click Save to log your responses and return to the survey later.' Another callout bubble points to the 'COMPLETE' button: 'Click Complete when you have finished the survey.' The survey content includes a section titled 'Co-Parting' and two questions. Question 1 is '1. With whom does the child live with now?' with radio button options: 'Lives with mother' (selected), 'Lives with father', 'Foster care arrangement – with relative', 'Foster care – with non-relative', 'Lives with...', 'Lives with...', 'Split', and 'Other'. A callout bubble points to the radio buttons: 'Click on the circles to mark a response and continue scrolling down until all questions are answered.' Question 2 is '2. How frequently are you in contact with the mother / Guardian?' with radio button options: 'No contact' (selected), 'Less than Monthly', 'Monthly', 'Weekly', and 'Daily'.

Adding Participant Goals to an Intake

Step 1: From a participant's accepted intake, navigate through Services>Goals and respond to the short answers regarding participant goals. Once completed, click Save at the top left of the page and you may proceed to adding Participant goals by clicking on **+ NEW**.

4 SAVE SAVE & CLOSE PROCESS INTAKE FORM SHARE EMAIL A LINK

REGISTRATION Accepted

REGISTRATION INFORMATION PARTICIPANT INFORMATION CONTACT INFORMATION EDUCATION/WORK STATUS HOUSEHOLD INFORMATION HEALTH INFORMATION CONSENTS SERVICES 1 Survey Goals 2 Interactions Benchmarks Outcomes ENROLLMENT NOTES & ATTACHMENTS

Participant survey is due.
Participant interaction and attendance is lock due to incomplete initial survey.

Patrick Lam Registration ID REG-0342610785 Start Date 4/1/2021 Age 22 DOB 1/1/1999 Workscope 8205108-Fatherhood Prior Involvement-4/1/2021-6/30/2022 Provider CBO1

Participant Goals

Initial Assessment* Refer to Case Management Training. 3

Long Term Goals* Refer to Case Management Training. 3

Individual Service Plan* Refer to Case Management Training. 3

Re-assessment Refer to Case Management Training. 3

Participant Goals REG-0342610785 - Patrick Lam

Click here to add participant goals to the table below. + NEW 5

Participant Goal	Category	Goal Set On
Increased engagement, availability and responsibility in relationsh...	Engagement	5/7/2021
Increased financial support by providing material (clothes, food, e...	Financial	5/7/2021
Secured child care payments (e.g day care)	Benefits Coordination a...	5/3/2021

1 - 3 of 3 < 1 > ↻

SAVE SAVE & CLOSE + NEW

PARTICIPANT GOALS : INFORMATION

New Participant Goals

Category* Goal Family* Goal Set On* Goal Type* Goal* Goal Status*

College Preparation
Education
Education/Career Counseling
Internships

Look Up More Records

4 results

Step 2: Click on the category field, and then the magnifying glass to see the available categories for the goal. Click to select the appropriate option.

Step 3: From Goal Family, click to set whether the goal is required or optional. Also, enter the Goal Set On date and click to set the Goal Type as Short term.

Goal Family*	Required
Goal Set On*	5/25/2021
Goal Type*	Short Term

Step 4: Select the goal, in accordance with the category set earlier, from the available options.

Goal*	
Goal Status*	
Goal Text	<ul style="list-style-type: none"> 9th - 12th graders improved overall grade point average by at least three (3) points 9th - 12th graders received passing grades on Regents exams 9th - 12th graders received higher grades in a selected subject area such as English, math, scienc... 9th - 12th graders received higher scores on tests such as SAT practice exams <p>Look Up More Records</p> <p>4 results</p>

Step 5: Click to set the Goal Status as “Not Started” or “In Progress”. If “In Progress” is selected, you will be prompted to add a date for Goal Started On. Then, click .

 SAVE
 SAVE & CLOSE
 NEW

PARTICIPANT GOALS : INFORMATION

New Participant Goals ☰

Category*	Education
Goal Family*	Required
Goal Set On*	5/25/2021
Goal Type*	Short Term
Goal*	9th - 12th graders received passing grades on Regents exams
Goal Status*	In Progress
Goal Started On	5/25/2021
Goal Text	
Goal Text*	9th - 12th graders received passing grades on Regents exams

Adding Global and Scheduled Interactions to an Intake

Step 1: From a participant's accepted intake, navigate through Services>Interactions and click **+ NEW**.

The screenshot shows the participant profile for Natalie Smith (REG-2599312151). The left sidebar contains a menu with 'SERVICES' highlighted, and 'Interactions' is selected within it. The main content area shows the 'Interactions' table with columns for Interaction Type, Interaction Schedule, Interaction Date, and Time. The table is currently empty, displaying 'No records found' and '0 - 0 of 0'. A '+ NEW' button is visible in the top right corner of the table area.

Step 2: Click to enter data on all fields in accordance to your case management training and then click **SAVE** at the top right of the table.

The screenshot shows the 'New Interaction' form. The form is titled 'New Interaction' and has a 'SAVE' button in the top right corner. The form fields are as follows:

- Participant ***: REG-2599312151 - Natalie Smith-Primary
- Staff**: Black, Dwayne
- Interaction Category ***: Schedule
- Interaction Date ***: 05/25/2021
- Start Time ***: 04:00 PM
- End Time ***: 05:00 PM
- Interaction Schedule ***: Internship-GR -Internships-W
- Comments**: We discussed...

Note: When selecting Interaction Category, if Schedule is selected (to represent data entry for a scheduled interaction), then the Interaction Schedule field appears and you must select the corresponding schedule during which the interaction took place.

Adding Report Cards to the Intake

Step 1: From a participant's accepted intake, navigate through Services>Report Cards and click **+ NEW**.

The screenshot shows the 'Report Cards' section of a system. On the left is a navigation menu with 'Report Cards' highlighted. The main area displays a table with the following data:

Participant	Report Date	Record Type	Academic Type	Subject Area	Numeric Equivalent
Natalie Smith	5/3/2021	Pre-assessment	Subject	English	70

At the top right of the table area, there is a '+ NEW' button highlighted with a green box. The table shows '1 - 1 of 1' records.

Step 2: Click to complete data entry on all fields and then click **SAVE & CLOSE**.

The screenshot shows the 'New Report Card' form. The 'SAVE & CLOSE' button is highlighted with a green box. The form fields are as follows:

- Registration: REG-2599312151 - Natalie Smith
- Record Type: Achievement report card
- Report Card Date: 5/25/2021
- Academic Type: Subject
- Subject Area: Mathematics
- Numeric Equivalent: 100 (selected from a dropdown menu)

The dropdown menu for 'Numeric Equivalent' is open, showing options 0, 1, 100, 11, and 13. The value 100 is highlighted. Below the dropdown, it says '10 results'.

Note: Depending on the Academic Type selected, the report card fields will update to show corresponding data fields.

Updating Benchmarks in the Intake throughout the Program Year

Benchmarks may be updated throughout the program year as they are met. Some benchmarks will be automatically achieved as through system processes as data is entered into in the Participant Tracking System (Ex. the “Participant was enrolled” benchmark was updated after enrollment was completed for the participant).

Step 1: From a participant’s accepted intake, navigate through Services>Benchmarks.

REGISTRATION Accepted

Natalie Smith

Registration ID: REG-2599312151 | Start Date: 5/3/2021 | Age: 15 | DOB: 1/1/2006 | Workslope: 820510B-High School-4/1/2021-6/30/2022 | Provider: CBO1

Benchmarks [SAVE] [RELOAD]

REG-2599312151 - Natalie Smith

Benchmarks [Search]

- 1** Participants submit report card for review
Education
Benchmark Achieved? No [dropdown]
Achievement Date [calendar]
- 2** Participant was enrolled
Benchmark Achieved? Yes [dropdown]
Achievement Date 05/03/2021 [calendar]

Click here to select 'Yes' from dropdown when a benchmark is achieved.

Can be modified after the benchmark is marked as achieved.

Benchmarks numbered in green have been achieved.

Step 2: Review data entry for accuracy. You may click on the fields to modify them if necessary.

Benchmarks [SAVE] [RELOAD]

REG-2599312151 - Natalie Smith

Benchmarks [Search]

- 1** Participants submit report card for review
Education
Benchmark Achieved? Yes [dropdown]
Achievement Date 05/25/2021 [calendar]
- 2** Participant was enrolled
Benchmark Achieved? Yes [dropdown]
Achievement Date 05/03/2021 [calendar]

DYCD Connect Help Center

If you have any questions or concerns, please submit a ticket or help request to the DYCD Connect Help Center. You may navigate to the Help Center directly from the banner at the top of DYCD Connect by clicking on the question mark as shown below.



Alternatively, you may submit a ticket through the [Help Center](#) on the DYCD Connect homepage.

A screenshot of the 'DYCD RESOURCE CENTER' homepage. The page has a light blue header with the title 'DYCD RESOURCE CENTER'. Below the header, there is a paragraph: 'DYCD Connect is the main resource center to help organizations communicate and coordinate with the communities they serve.' The main content area features four cards: 'DYCD WEBSITE' (with a link icon), 'CAPACITY BUILDING' (with 'CB' icon), 'HELP CENTER' (with a speech bubble icon and a red border), and 'F.A.Q' (with a question mark icon). The 'HELP CENTER' card contains the text: 'Having trouble? Send a message to our support team through the Help Center.'

A screenshot of the 'DYCD HELP CENTER' form. The page has a light blue header with the title 'DYCD HELP CENTER'. Below the header, there is a paragraph: 'The DYCD help center is where you can find resources to help with the technical and operational issues you may come across. Here you can contact DYCD support directly or look into additional resources and guides that can help you move forward with your tasks.' The form contains several input fields: 'first name' (with a person icon), 'last name' (with a person icon), 'phone' (with a phone icon), 'email' (with an envelope icon), 'organization' (a dropdown menu), 'program area' (a dropdown menu), and 'program type' (a dropdown menu). There is a checkbox labeled 'I am a DYCD employee'. Below these fields, there is a section titled 'Select if you need operational or technical help:' with two options: 'NEED TECHNICAL ASSISTANCE?' and 'NEED OPERATIONAL ASSISTANCE?'. Each option has a brief description of the type of issue it covers. At the bottom, there is a 'Detailed Description:' label and a text input field.