

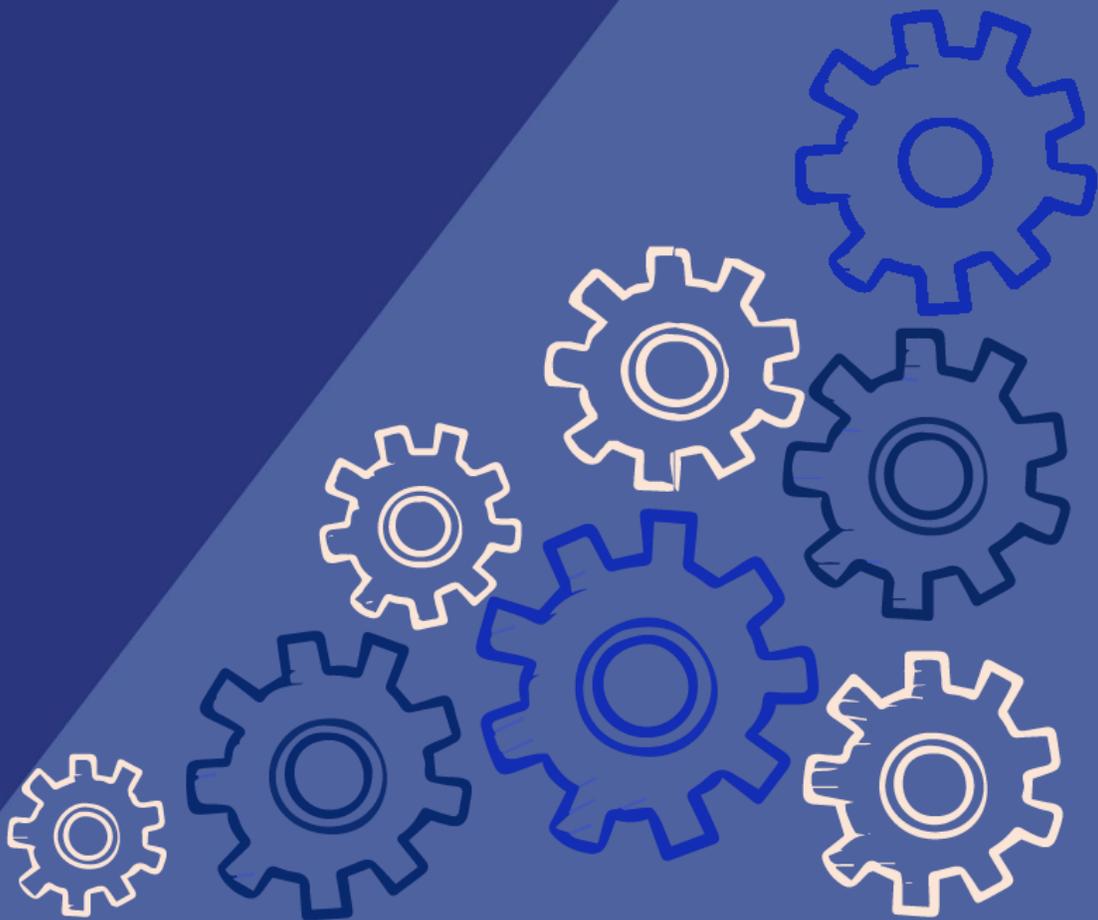


# **DYCD CONNECT**

## *PARTICIPANT TRACKING SYSTEM:*

*CSBG*

*Participant Intake & Registration*

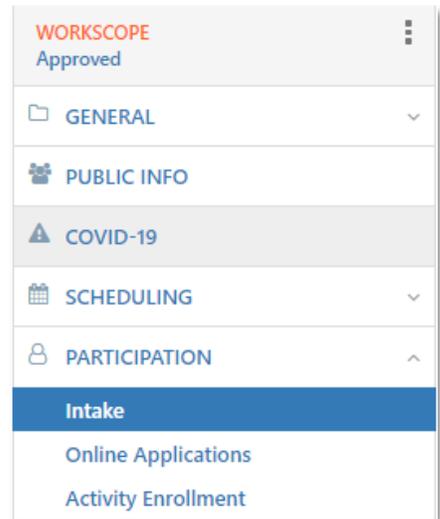


# Table of Contents

<b>What is Intake? .....</b>	<b>3</b>
<b>The Intake Section .....</b>	<b>3</b>
Participant Statuses.....	4
<b>Starting a New Intake.....</b>	<b>4</b>
Duplication Check.....	5
<b>Completing the Intake.....</b>	<b>6</b>
Navigating through the Intake .....	6
<i>Registration Information .....</i>	<i>7</i>
<i>Participant Information.....</i>	<i>8</i>
<i>Contact Information .....</i>	<i>10</i>
<i>Education/Work Status .....</i>	<i>10</i>
<i>Household Information.....</i>	<i>11</i>
<i>Health Information .....</i>	<i>12</i>
<i>Consents .....</i>	<i>12</i>
Services.....	12
<i>Completing the Participant Survey (Fatherhood Prior Involvement providers ONLY).....</i>	<i>13</i>
<i>Completing the Service Plan.....</i>	<i>14</i>
<i>Adding Participant Goals to an Intake .....</i>	<i>14</i>
<i>Adding Report Cards (CSBG High School providers ONLY) .....</i>	<i>16</i>
<b>Reviewing + Submitting the Intake .....</b>	<b>17</b>
<b>DYCD Connect Help Center .....</b>	<b>19</b>

# What is Intake?

All DYCD Program participants must complete an Intake before participating in or receiving services. An intake gathers information from participants and creates a participant profile in DYCD Connect. This profile is used by the system to track enrollment, attendance and other services offered and received. Participant intakes can be completed and accepted as soon as your workscope is released to your program. Intakes may be received in paper format via the Universal Intake Form or online via discoverDYCD.



## The Intake Section

To start a new intake, navigate to your workscope in the Participant Tracking System. Locate the Participation section of the Workscope Switchboard and click on Intake. A list of intakes, both completed and in-progress, will appear.

**Note:** Applications from DiscoverDYCD can be found in the Online Applications section.

820510B-Fatherhood Prior Involvement-4/1/2021-6/30/2022

Participant	Registration ID	Is primary?	Stage	Status	DOB	Program Site	
Harlem Murphy	REG-4114971326	Yes	Accepted	Enrolled	1/1/1998	Fatherhood Prior Involvement	Open
Tim Smith	REG-2685710526	Yes	Accepted	Enrolled	1/1/1980	Fatherhood Prior Involvement	Open
Tom Cruise	REG-36	Yes	Accepted	Enrolled	1/1/1990	Fatherhood Prior Involvement	Open

1 - 5 of 5

**Key Buttons**


Click on this button to start a new intake

Click on this button to search for a participant's name or keyword

These buttons allow you to sort your list of intakes.

## Participant Statuses

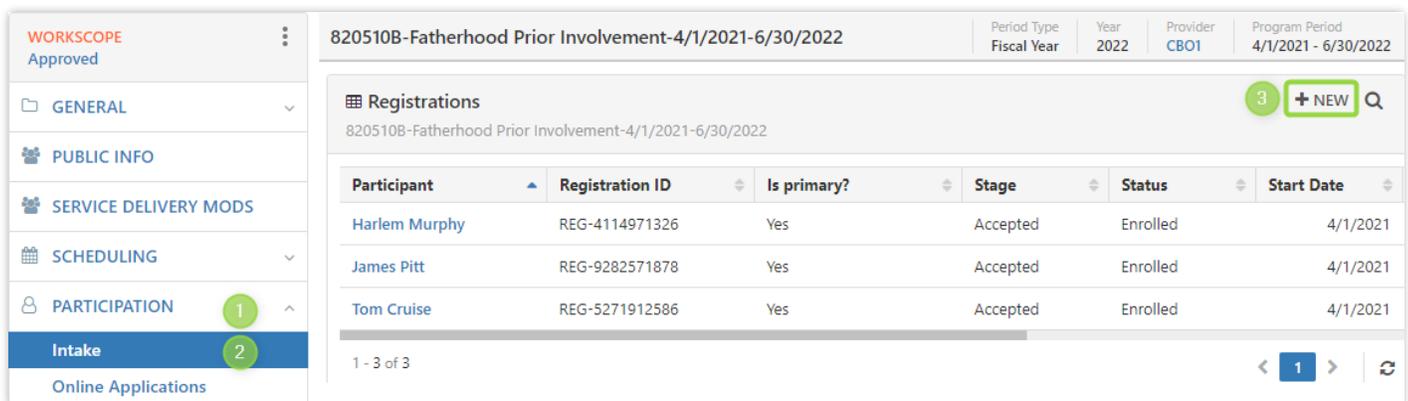
Participants will have the following statuses, depending on the progress of the intake form.

- **Enrolled** – The participant meets your program’s enrollment criteria.
- **In Progress** – The participant’s intake was started, but is not yet complete.
- **De-enrolled** – The participant is no longer enrolled to your program.

## Starting a New Intake

Prior to starting a new intake in the Participant Tracking System (PTS), make sure you have the Universal Participant Intake Form completed for the participant. The current form is available in the **DYCD Connect Document Library** in the CSBG section.

You may create a new intake by navigating through Participation>Intake and clicking on “+NEW”.



Participant	Registration ID	Is primary?	Stage	Status	Start Date
Harlem Murphy	REG-4114971326	Yes	Accepted	Enrolled	4/1/2021
James Pitt	REG-9282571878	Yes	Accepted	Enrolled	4/1/2021
Tom Cruise	REG-5271912586	Yes	Accepted	Enrolled	4/1/2021

## Duplication Check

**New Intake**

**1. Enter Participant Details**

Workscope\* 820510B-Opportunity Youth Support-4/1/2021-6/30/2022

Workscope Program Site\* 58th Street Library Opportunity Youth

First Name\* Noah

Last Name\* Nickelson

Middle Initial --

Date of Birth\* 7/9/2005

Age 16

Sex at Birth\* Male

Social Security Number\* 123456789

This field is exclusive to Opportunity Youth Support workscopes.

On the new intake page, you must type in data to the mandatory fields and click “SEARCH”. This initiates a Duplication Check and searches the DYCD Connect database to see if any participant with the same **First Name, Last Name and Date of Birth** has participated in any other DYCD Program to prevent duplicate entries.

**Note:** For Opportunity Youth Workscopes, the SSN must be verified before participants may be enrolled. The verification process typically takes two business days. If the SSN was correctly provided and was not validated, then please contact your DYCD Program Manager.

**2. Choose Participant**

We have found 1 existing participant(s) with the same **First Name, Last Name, and Date of Birth**. Please review the options below carefully to make the best choice.

  
Add New Participant

First Name	Test
Last Name	Test
MI	
DOB	5/26/2002
Gender	Male
SSN	

  
Register Existing Participant

First Name	Test
Last Name	Test
MI	
DOB	5/26/2002
Gender	Male
SSN	
Borough	
ZIP	
Email	

If a previous participant is found with the same First Name, Last Name and Date of Birth, then you may choose to **Register Existing Participant** to associate this applicant with their previous registration. This will enable you to import data from their previous intake and greatly speed up the intake process.

3. Choose Application

  
Blank Application

Start the intake with a blank application.

  
Copy Existing Intake

Registration ID	REG-2041617232
Intake Year	2022
Intake Stage	Intake
Program Site	Crisis Site
Workscope	9564-Crisis Shelters (HYA)-7/1/2021-6/30/2022

[START INTAKE](#)

You may import data from a previous intake if you choose to Register Existing Participant by selecting **Copy Existing Intake** and then clicking on “START INTAKE”.

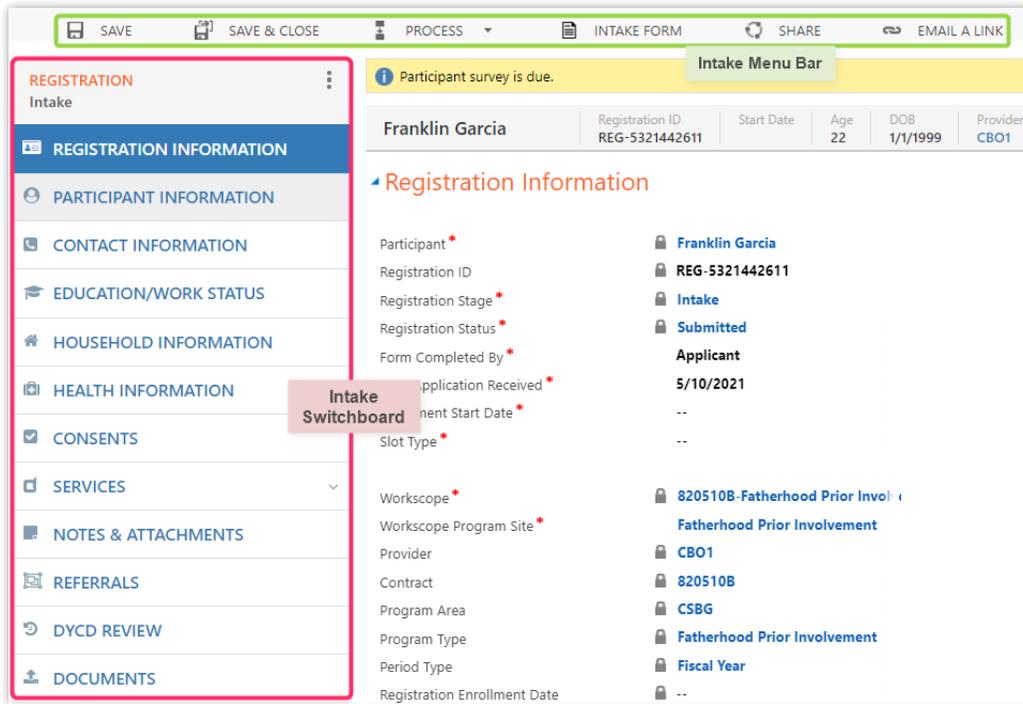
**Note:** While importing data from a previous intake completes data entry on many sections of the intake some sections, such as Consents must be completed again. Additionally, several sections of the intake, such as Contact Information and Health Information should be reviewed to ensure that the data is updated and in alignment with data provided on the universal intake form.

## Completing the Intake

Data entry must be completed on all sections of the intake before you may submit the application to be accepted and enrolled into your program. We recommend regularly using the “SAVE” at the top left of the intake page regularly to ensure that your data is safe from internet issues and errors.

### Navigating through the Intake

You will notice the **Intake Switchboard** on the left side of the page, and can navigate through all intake sections. Mandatory fields are noted by a \* icon or say “**(Required)**” in parentheses. Note the **Intake Menu Bar** at the top of the window, and your **Workscope Registration Progress** on the right side.



## Registration Information

Most of the information on this page will already be completed based on the basic information entered. However, there are four required fields, noted by the \* icon. The **enrollment start date** is the date of the first day that the applicant may attend your program.

Form Completed By *	Applicant
Date Application Received *	5/10/2021
Enrollment Start Date *	6/21/2021
Slot Type *	CSBG

You must also indicate the **Slot Type** by hovering your mouse over the field, and clicking on the “Magnifying Glass”. This field indicates how the participant will be funded by your DYCD budget.



## Participant Information

In this section, you will enter demographic information, an address and family members if they would like them to receive DYCD services as well. Click onto each field and type to complete all mandatory date entry fields marked with \* or say **(Required)**.

The screenshot shows the 'Participant Information' form with several fields highlighted:

- Address (Required)**: A table with columns for Name, Borough, and Primary Address? containing the address '123 William Street, Manhattan, NY 10038'.
- Ethnicity**: 'Hispanic or Latinx'.
- Country of Origin**: 'Costa Rica'.
- Race (Required)**: A dropdown menu with 'Black or African American' selected.
- How well does the applicant speak English?**: 'Fluent/Very well'.
- Primary Language**: 'English'.
- Additional Participant Questions**: A list of questions with 'Yes' or 'No' answers.

Address (Required)		
Name	Borough	Primary Address?
123 William Street, Manhattan, NY 10038	Manhattan	Yes

**Additional Participant Questions**

Does the applicant any of the following:	
Parent/Legal Guardian?	Yes
Offender/Justice Involved?	Yes
In Foster Care?	Yes
Runaway Youth?	No
Veteran?	No
Active Military Personnel?	No
An Individual with a Disability?	No
Receiving ACS Preventative Services?	No

The screenshot shows the 'Primary Language' dropdown menu with a search bar and a magnifying glass icon. The list includes:

- Arabic
- Bengali
- Chinese (including Cantonese & Mandarin)
- English
- French
- Fulani
- German
- Gujarati
- Haitian Creole

A 'Look Up More Records' button is highlighted at the bottom of the list.

To add a **Primary Language** and **Country of Origin**, click on the field and then click on the “Magnifying Glass”. The first 10 alphabetical results appear. If you see the applicant’s primary language, select it from the list. If not, use the search bar or click **Look Up More Records** to view additional languages.

**Applicant's Gender Identity (Select all that Apply) (Required) \***

Male X Select all that apply

Does the applicant identify as transgender? \* No

Applicant's Gender Pronoun \* He/Him/His

Applicant's Sexual Orientation (Select One) \* Heterosexual (straight)

**Family Member** Family Members +

Name	Full Name ↑	Date of Birth	Gender ↑	Relation To Pa...
No Registration records found.				

Click on “+” in the Family Member component to add family members. This will lead you to a new intake page for each additional family member that you would like to sign up for DYCD services. **If entering family members, complete participant information, service plan and goals for each family member.**

To add an address, click on the “+” at the top right of the address component.

2 Lafayette Street #21, Manhattan, NY 10007

SAVE + NEW DEACTIVATE

Primary Address?

Number & Street \* 2 Lafayette Street

Apt 21

Borough \* Manhattan

City \* Manhattan

State \* NY

Zip Code \* 10007

Country \* United States

Address Notes --

Validation Status  Address is valid

**Address Verification**

Community District  Manhattan CD 001

City Council District  Council District 001 Manhattan

NTA  MN25

NDA  Out of NDA

NYCHA Resident

Town/Area  Battery Park City-Lower Manhattan

X-Coordinate  0982417

Y-Coordinate  0197728

Geo Message  --

High Poverty Area

Census Track  1502

Next, click on the “+” button to add a new address. An overlay will appear on your screen. If the participant does not have an address, you may enter in the address of your program site. DYCD Connect automatically verifies if the address entered is valid. Once you are done, click on “SAVE”.

After adding an address, you may scroll down to review if your participant will be counted towards your NDA residency requirement. Justification is needed for addresses that are out of the contract’s NDA.

## Contact Information

If the Applicant has contact information, enter it in the Applicant's Contact Information section. Otherwise, uncheck the box and move on to the **Parent/Emergency Contact** section.

Does the applicant have contact information? \*

**Applicant's Contact Information**

Does the applicant have contact information? \*

Preferred Method of Contact \* **Cell Phone**

Cell Phone \* **(212) 655-7284**

Work Phone --

Home Phone --

Email Address **ernie@gmail.com**

At least one parent/emergency contact is required. To enter **Parent/Emergency Contact** information, click on "+". An overlay will appear on your screen. Enter the information required, then click "SAVE". The contact's name should appear in the grid.

Parent/Emergency Contact (Required) <span style="float: right;">+</span>						
Name	Relationship	Primary Contact? ↓	May Pick-up Child?	Cell Phone	Work Phone	Home Phone
Nathan Jung	Father	Yes	Yes			(646) 111-2222

If you are entering multiple Parent/Emergency contacts, start with the primary contact. The **Primary Contact?** field will be automatically checked for the first person entered.

## Education/Work Status

Enter the applicant's **Student Type**, Current Work Status and state if their resume is on file.

Education/Work Status

Student Type \* **Not in School**

Educational Level **Community College**

Current Work Status \* **Unemployed (Short-term, 6 months or less)**

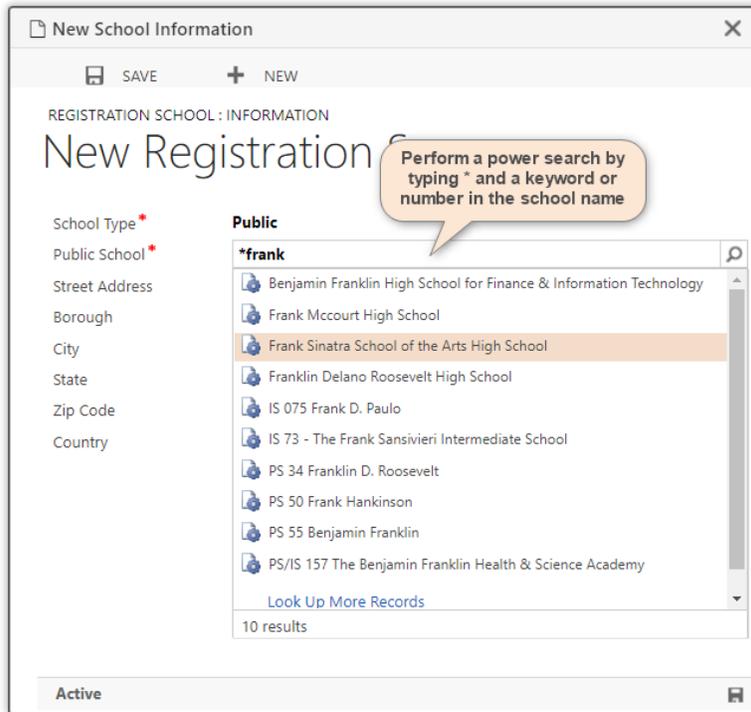
Is your resume on file with this provider? **Yes**

If the participant is a full-time student, you may enter the participant's **School Information** by clicking on the "+" icon.

**School Information (Required for Full-Time Student)** +

School Name ↑	School Type
No Registration School records found.	

You may find a school by completing a power search as shown below.



## Household Information

This section is used to provide information about the participant's household members and income information. Click each field and then type the appropriate responses from the intake form.

**NOTE:** For all CSBG programs, justification for over income is needed for participants over the allowable income threshold.

The screenshot shows a form titled "Household Information". It contains several fields with their values: "Head of Household Type\*" is "Two Parent Household", "Housing Type\*" is "Rent", "Household Size\*" is "Three", and "Annual Income Amount\*" is "90,000". Below these fields is a section titled "Sources of Household Income (Required)". It has a dropdown menu with "Affordable Care Act Subsidy" selected and a "Select all that apply" button. A callout bubble points to this section with the text "All sources of income should be included". Below this section are two questions: "Do you want to be contacted with information about signing up for free financial education?\*" with a "Yes" response, and "How would you like to be contacted?\*" with the response "Via this provider". A second question is identical: "Do you want to be contacted with information about child support and arrears programs?\*" with a "Yes" response, and "How would you like to be contacted?\*" with the response "Via this provider".

## Health Information

This entire section consists of Yes and No questions. If yes is responded, then additional information is often required to further explain the health issue or situation.

The screenshot shows the 'Health Information' section of a form, divided into two columns. The left column is titled 'Health Information' and contains the following questions and responses: 'Does the applicant have any allergies? (food, medication, etc.)' with a 'Yes' response and a list of allergies 'Dust, Pollen, Peanuts'; 'Does the applicant have asthma?' with a 'No' response; 'Does the applicant have special health care needs?' with a 'No' response; 'Does the applicant take medication for any condition or illness?' with a 'No' response; and 'Are there activities the applicant cannot participate in?' with a 'No' response. Below these are two text input fields for additional health information and accommodations. The right column is titled 'Health Insurance Status' and contains the question 'Does the applicant have health Insurance?' with a dropdown menu showing 'Yes' selected. Below this is a section titled 'What kind of health insurance does the applicant have? (Check all that Apply, Required)' with a list of options: Medicaid, Medicare, State Children's Health Insurance Program, State Health Insurance for Adults, Military Health Care, Direct-Purchase, Employment Based (checked), and Decline to Answer.

## Consents

Consents must be completed for all applicants. Please note that consents may vary by program type. The **Consent to Participate/Verification of Information Provided** and **Participant attests that income information is true** must be granted in order to submit the intake. For all other consents, a response of 'yes' or 'no' must be entered.

The screenshot shows the 'Consents' section of a form. It is titled 'Consents' and contains a section for 'General Program Consents'. The following items are listed with their responses: 'Consent to Participate/Verification of Information Provided\*' with a 'Yes' response; 'Consent for Emergency Medical Treatment\*' with a 'Yes' response; 'Participant Consent for Photo/Videotaping\*' with a 'Yes' response; 'Participant consent for use of original work\*' with a 'Yes' response; 'Participant attests that income information is true\*' with a 'Yes' response; and 'Participant Consent to Share Data for DYCD Referrals\*' with a 'Yes' response.

## Services

The services section of the intake is designed to setup a Service Plan with Goals. CSBG Fatherhood Prior Involvement programs are required to complete the Participant Survey. CSBG High Schools programs are required to enter report card information in the services section.

**Note:** For Fatherhood Prior Involvement worksopes, the initial survey must be completed during enrollment or within 10 days of enrollment.

The screenshot shows the 'SERVICES' section of a form. It is titled 'SERVICES' and contains a list of items: Survey, Service Plan, Goals, Interactions, Benchmarks, Outcomes, and Report Cards.

## Completing the Participant Survey (Fatherhood Prior Involvement providers ONLY)

CSBG Fatherhood Prior Involvement programs can navigate through Services>Survey and click on open to access the participant survey.

The screenshot shows a web application interface for managing participant surveys. On the left is a navigation menu with categories like REGISTRATION, PARTICIPANT INFORMATION, CONTACT INFORMATION, EDUCATION/WORK STATUS, HOUSEHOLD INFORMATION, HEALTH INFORMATION, CONSENTS, SERVICES, and Service Plan. The 'SERVICES' category is expanded, showing 'Survey' with a green circle containing the number '2'. The main content area displays a notification 'Participant survey is due.' and a table of surveys for 'Franklin Garcia'. The table has columns for Survey, Survey Created Date, Survey Date, Survey Type, and Survey Status. One survey, 'Survey 1', is listed with a status of 'Draft' and a green circle containing the number '3'. An 'Open' button is highlighted with a green box next to the '3'.

Survey	Survey Created Date	Survey Date	Survey Type	Survey Status
Survey 1	5/11/2021		Initial	Draft

Respond to all questions of the survey and click complete at the top right to mark it as completed.

The screenshot shows the survey completion interface. At the top right, there are 'SAVE' and 'COMPLETE' buttons. A callout bubble points to the 'COMPLETE' button with the text: 'You may save your data entry by clicking here and return later to complete the survey.' Another callout bubble points to the 'COMPLETE' button with the text: 'Click here when you have responded to all of the questions in the survey to complete it.' The survey question is: '1. With whom does the child live with now?' with radio button options: 'Lives with mother', 'Lives with father', 'Foster care arrangement – with relative', 'Foster care – with non-relative', 'Lives with other family member', 'Lives with both father and mother', 'Split custody between mother and father', and 'Other'. A green box highlights the first option, 'Lives with mother', with the text: 'Click here to respond to questions'. Below the question, there is a partially visible question: 'You in contact with the Mother / Guardian?'.

## Completing the Service Plan

**Service Plan**

**Participant Goals**

Initial Assessment\*

Long Term Goals\*

Individual Service Plan\*

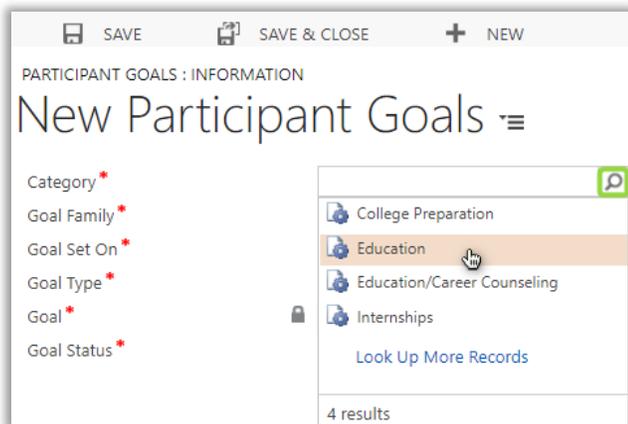
The Service Plan section contains a series of short answer sections for you to complete based on your Case Management training. Respond to each field and then click “SAVE” at the top left of the page to complete the entry.

## 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”.

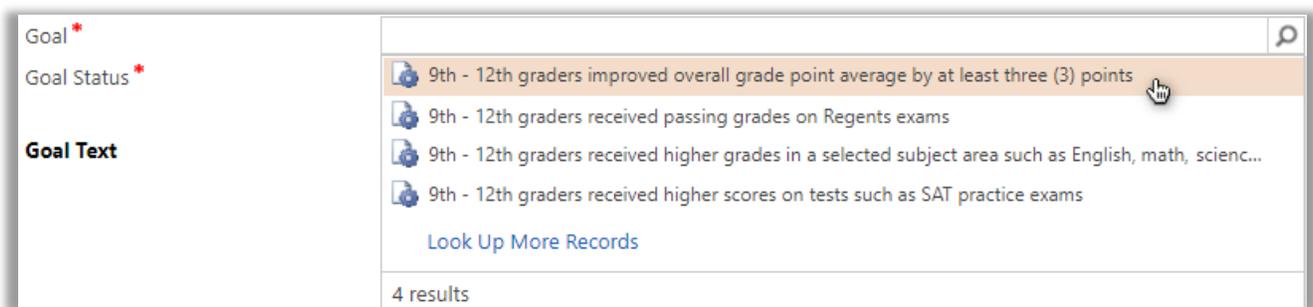
The screenshot shows the 'Goals' section of the intake form for Patrick Lam. The left sidebar has 'Goals' selected (2). The main area shows four text input fields for 'Initial Assessment\*', 'Long Term Goals\*', 'Individual Service Plan\*', and 'Re-assessment', each containing the text 'Refer to Case Management Training.' (3). A callout bubble points to these fields: 'Click to type in responses to each of these short response fields.' (4). Below the form is a '+NEW' button (5) and a table of existing goals.

Participant Goal	Category	Goal Set On
Increased engagement, availability and responsibility in relations...	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



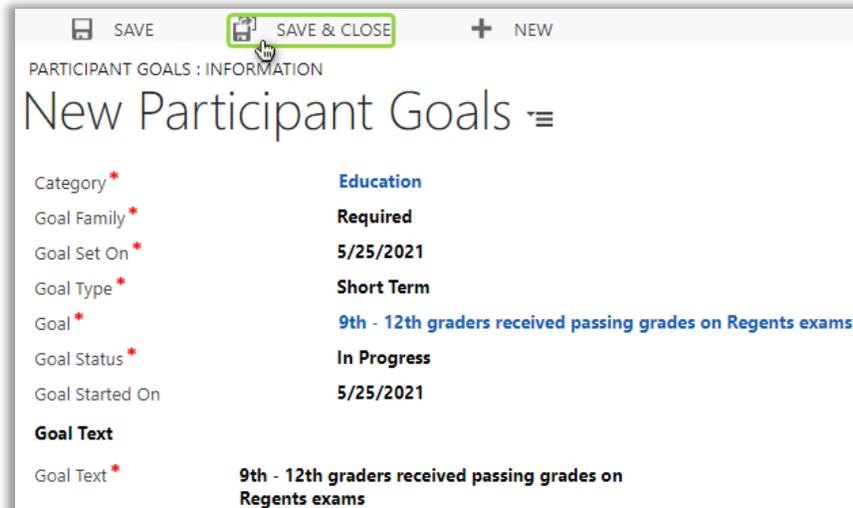
**Step 2:** Click on the category field, and then the magnifying glass to see the available categories for the goal. Click to select the appropriate option.

**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.



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

**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 & CLOSE”.



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**

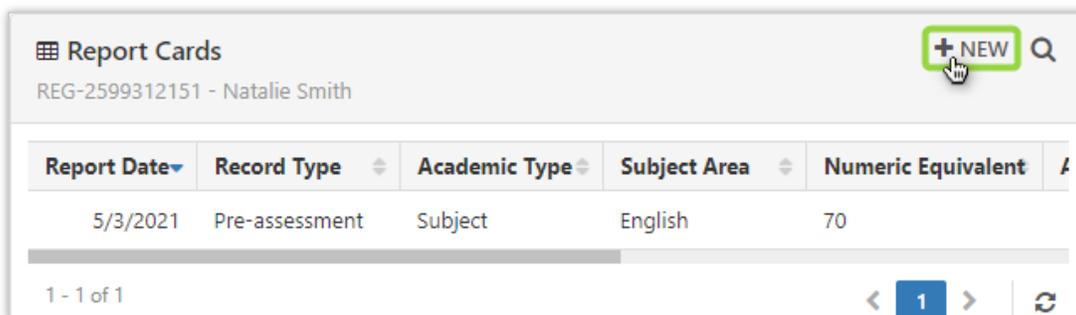
Goal Started On **5/25/2021**

**Goal Text**

Goal Text\* **9th - 12th graders received passing grades on Regents exams**

### Adding Report Card Grades (CSBG High School providers ONLY)

CSBG High School providers are required to enter report card grades. Grades are used as Pre-Assessments, Re-assessments and to mark Achievements for specific subjects, exams or overall GPA. To add a new report card grade, navigate through Services>Report Cards and click on "+NEW".

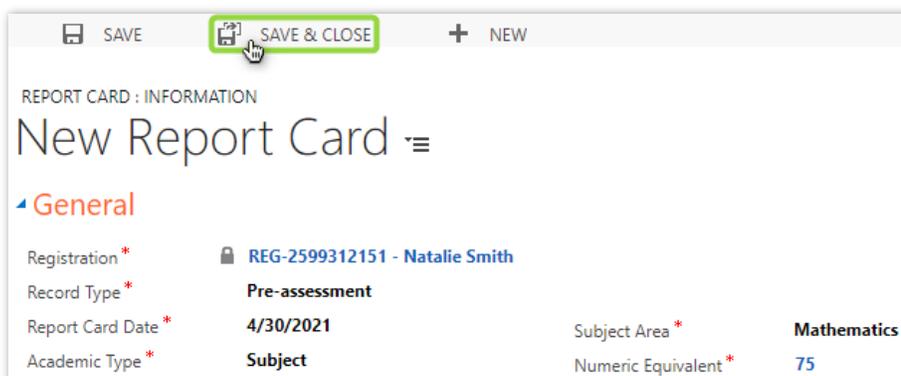


Report Cards **+NEW** 🔍

REG-2599312151 - Natalie Smith

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

1 - 1 of 1



SAVE   **SAVE & CLOSE**   + NEW

REPORT CARD : INFORMATION

## New Report Card

**General**

Registration\* **REG-2599312151 - Natalie Smith**

Record Type\* **Pre-assessment**

Report Card Date\* **4/30/2021**

Academic Type\* **Subject**

Subject Area\* **Mathematics**

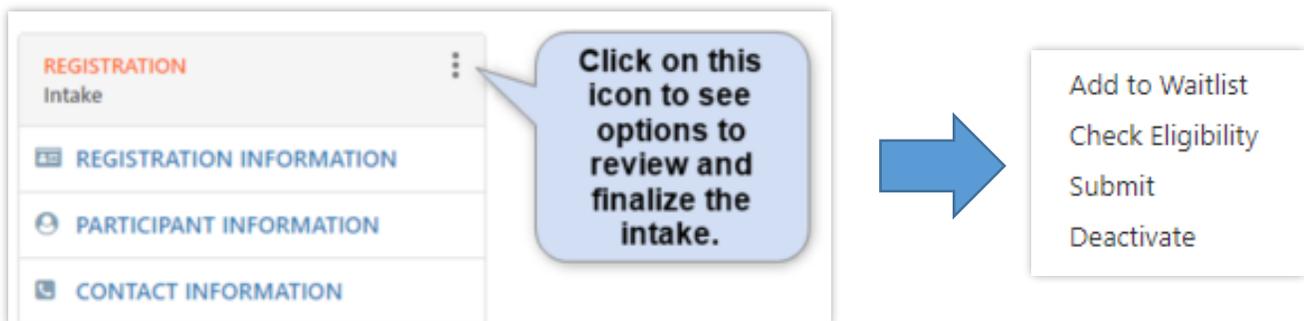
Numeric Equivalent\* **75**

The Report Card page will change according to the report type selected to display the appropriate fields for data entry. Click on each field to type a response and then click "SAVE & CLOSE".

**Note:** For Number Equivalent, you should type in a number and then select it from the drop-down option to add it to the field.

## Reviewing + Submitting the Intake

Once you have completed all sections of the intake form, be sure to click on “SAVE” in the Intake Menu Bar. Then, you may click on the “Three Dots Icon” at the top right of the intake switchboard to continue actions on the entire intake.



Nearly every action below, when completed, will result in a status change for the participant’s intake.

- **Add to Waitlist** – this option adds participants to a waitlist in the event that your program is currently operating at maximum capacity.
- **Check Eligibility** – this option will make the system review all fields on the intake for completion and run an eligibility check based on the data provided to ensure that they may join your program.

**NOTE:** This is the only option that will not trigger a status change for the intake.

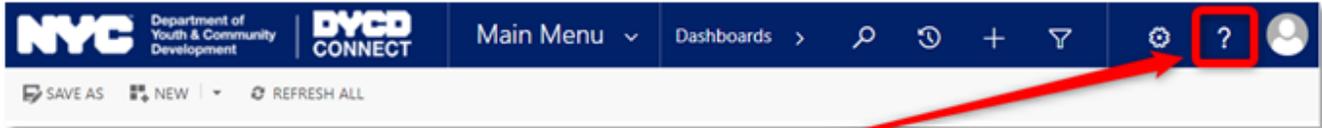
- **Submit** – this option will submit the intake application for final review by the system. If all data entry has been completed, then the participant will be accepted into your program.
- **Deactivate** – this option will delete the entire intake. This is typically used when a duplicate intake was created do delete the duplicate.

The following actions will only appear for Online Applications. When a status change is completed on an online application, the DYCD Connect system sends an automated email to the applicant to inform them of the update.

- **Pending Info** – If an online application is missing data, then this option may be selected to indicate that you have reviewed the intake and are in the process of contacting the applicant to collect any missing information.
- **Decline Participant** – this option is used to decline online applicants that do not meet the criteria for your program

# 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.

### DYCD RESOURCE CENTER

DYCD Connect is the main resource center to help organizations communicate and coordinate with the communities they serve.

- DYCD WEBSITE**  
View DYCD's public website for information about our funded programs.
- CB CAPACITY BUILDING**  
DYCD invests in building the capacity of nonprofit organizations as a strategy to help ensure that youth and families receive high-quality services.
- HELP CENTER**  
Having trouble? Send a message to our support team through the Help Center.
- F.A.Q**  
Read Frequently Asked Questions to learn more about DYCD Connect.

### DYCD HELP CENTER

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.

**first name** Enter your first name      **last name** Enter your last name

**phone** Enter your phone number      **email** Enter your e-mail address

**organization** Select an Organization

**program area** Select a Program Area      **program type** Select a Program Type

I am a DYCD employee

Select if you need operational or technical help:

**NEED TECHNICAL ASSISTANCE?**  
If you are having a technical issue related to logging in, accessing your services, or experiencing a bug, contact the technical help desk

**NEED OPERATIONAL ASSISTANCE?**  
Having trouble performing your existing operations using the new systems and tools within DYCD connect? Get in touch with a program specialist

**Detailed Description:**  
Enter a detailed description