



DYCD CONNECT

PARTICIPANT TRACKING SYSTEM:

*Immigrant Services
Intake & Registration*



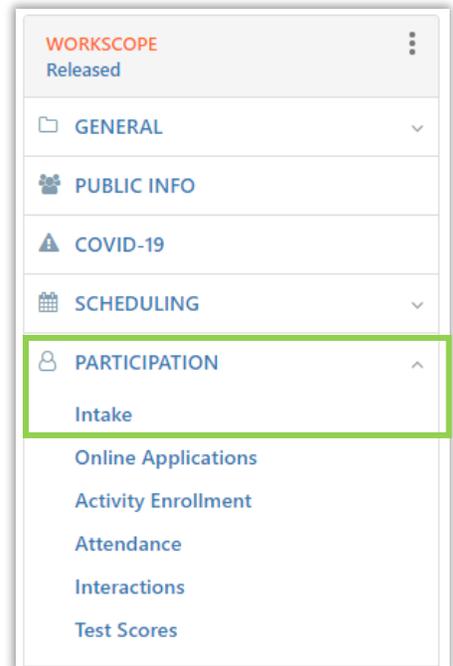
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What is Intake?

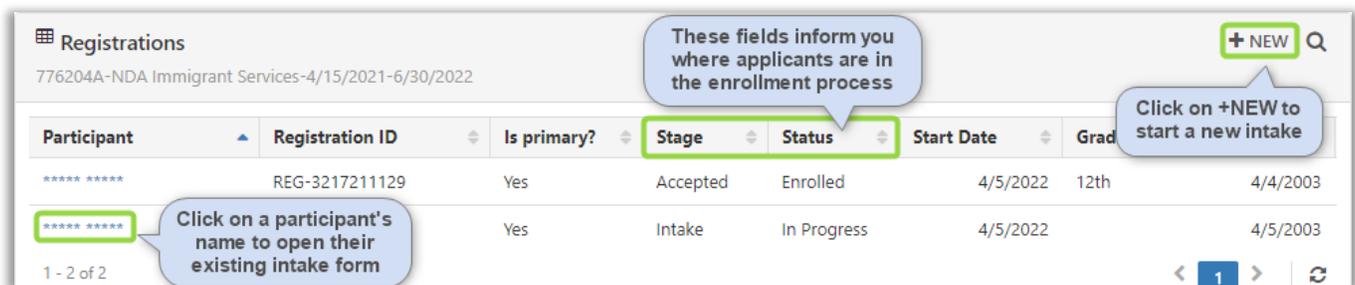
Intake refers to the process of registering participants into your program. Intake is different from enrollment, which refers to assigning your registered participants to activity schedules in order to take attendance.

You may begin intake as soon as your workscope is released to your program, but you cannot complete applications until the workscope is approved by DYCD.



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.



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 organize your list of intakes in alphabetical or chronological order. Click again to organize in reverse order.

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

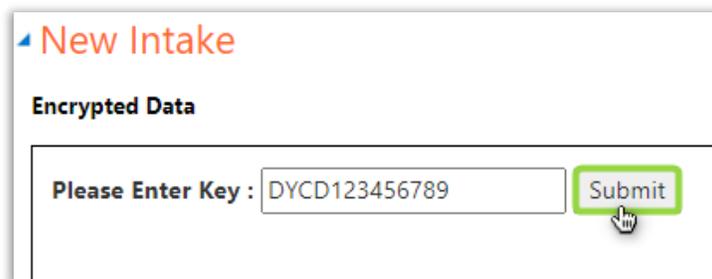
Prior to starting a new intake in the Participant Tracking System (PTS), make sure you have the Participant Intake Form completed for the participant. The most recent version form is available in the DYCD Connect [Document Library](#), in the Literacy & Immigrant Services section.

By clicking on +NEW in the Intake Section (pg. 2), a new window will open. There are four steps to complete before you can complete the intake form.

- 1) Enter your Encryption Key
- 2) Enter Participant Details
- 3) Choose Participant (Duplication Check)
- 4) Choose Application

Entering your Encryption Key

The encryption key is a security feature that protects identifying information on an intake. You must enter your provider-specific Encryption Key to begin an intake on the system. You may contact your Provider Admin if you need access to your workscope’s key.



The screenshot shows a web form titled "New Intake". Under the heading "Encrypted Data", there is a text input field with the value "DYCD123456789" and a green "Submit" button. A mouse cursor is pointing at the button.

Basic Participant Details

First, enter your unique program site encryption key and click enter. Next, provide the participant’s “First Name”, “Last Name”, “Date of Birth” and “Sex at Birth”. These four fields are used to identify the participant throughout DYCD Connect. Then, click “Search”.

New Intake

1. Enter Participant Details

Workscope * 776204A-NDA Immigrant Services-4/15/2021-6/30/2022

Workscope Program Site * Center for Family Life-07/01/2020-07/01/2021

First Name * David

Last Name * Benassi

Middle Initial --

Date of Birth * 7/1/2003

Age 18

Sex at Birth * Male

SEARCH

Duplication Check

Upon clicking “Search”, DYCD Connect performs a duplication check. If this is a new participant, you will only have the option to “Add New Participant”. If this participant has a previous record in DYCD Connect, you will also have the option to “Register Existing Participant”, and the following notification will appear:

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 | Noah |
| Last Name | Nickelson |
| MI | |
| DOB | 9/9/2009 |
| Gender | Male |
| SSN | |

Select this option if the participant you are entering is **NOT** the same participant, and you want to proceed with adding a new participant

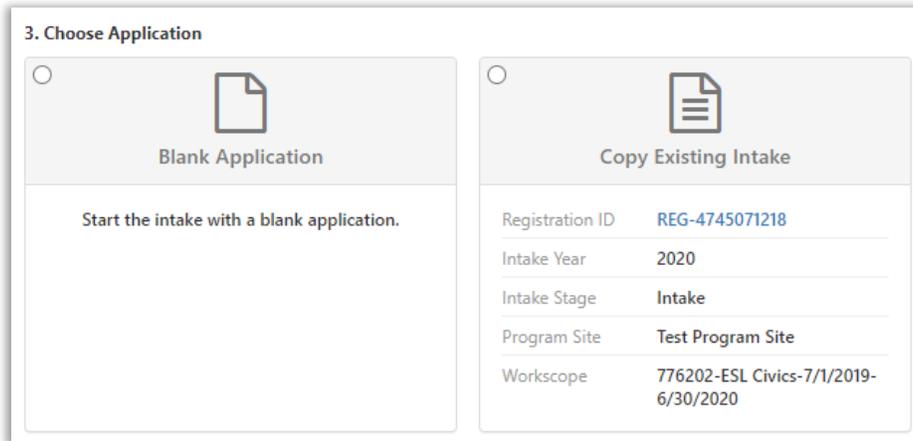

Register Existing Participant

| | |
|------------|-----------|
| First Name | Noah |
| Last Name | Nickelson |
| MI | |
| DOB | 9/9/2009 |
| Gender | Male |
| SSN | |
| Borough | |
| ZIP | |
| Email | |

Select this option if the participant you are entering is the same participant that is already in the Participant Tracking System.

Choose Application

You will have the option to start a “Blank Application”, or “Copy Existing Intake” if you are registering an existing participant. By copying the existing intake, you can carry over most of the information from the previous intake into the current one. Then, click on “Start Intake”.

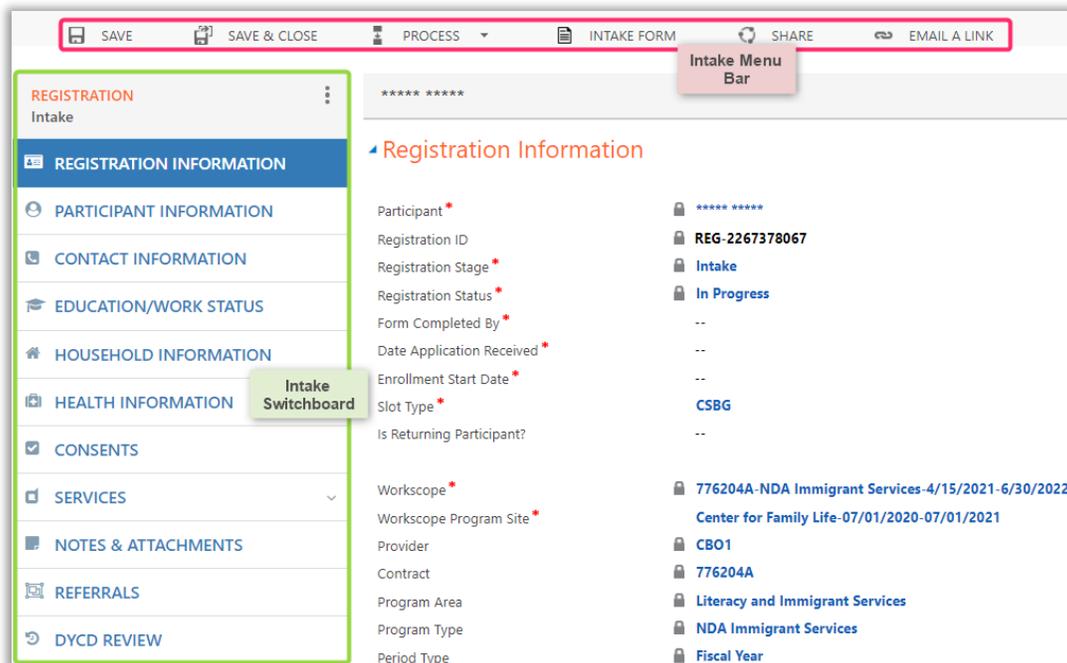


| 3. Choose Application | |
|--|---|
| <input type="radio"/> Blank Application | <input type="radio"/> Copy Existing Intake |
| Start the intake with a blank application. | |
| | Registration ID: REG-4745071218 |
| | Intake Year: 2020 |
| | Intake Stage: Intake |
| | Program Site: Test Program Site |
| | Workscope: 776202-ESL Civics-7/1/2019-6/30/2020 |

Completing the Intake

Intake Navigation and Sections

The Intake Switchboard on the left side of your page is now accessible for navigation. Mandatory fields on all sections are noted by a * icon or say “(Required)”. As you enter data, remember to frequently save your progress via the “Save” button in the Intake Menu Bar at the top of the page.



| Registration Information | |
|-----------------------------|--|
| Participant * | ***** |
| Registration ID | REG-2267378067 |
| Registration Stage * | Intake |
| Registration Status * | In Progress |
| Form Completed By * | -- |
| Date Application Received * | -- |
| Enrollment Start Date * | -- |
| Slot Type * | CSBG |
| Is Returning Participant? | -- |
| Workscope * | 776204A-NDA Immigrant Services-4/15/2021-6/30/2022 |
| Workscope Program Site * | Center for Family Life-07/01/2020-07/01/2021 |
| Provider | CBO1 |
| Contract | 776204A |
| Program Area | Literacy and Immigrant Services |
| Program Type | NDA Immigrant Services |
| Period Type | Fiscal Year |

Registration Information

Most of the information on this page will already be completed based on your selected workscope and basic information entered. However, there are five required fields, noted by the * icon, and one optional field. (“Is Returning Student?”) The “enrollment start date” is the date the applicant may attend your program.

| | |
|-----------------------------|------------------|
| Form Completed By * | Applicant |
| Date Application Received * | 6/28/2021 |
| Enrollment Start Date * | 6/28/2021 |
| Slot Type * | CSBG |
| Is Returning Participant? | No |

You must also indicate the participant’s “Slot Type”. This indicates if/how the participant will be funded by your DYCD budget. To fill in the Slot Type, click on the “magnifying glass” icon to see the slot types applicable to your program type.

Slot Type *

CSBG
+

Look Up More Records

1 result

Participant Information

In this section, you must enter demographic information for the applicant, and at least one address as indicated on the Universal Participant Intake Form.

First, complete “Ethnicity”, “Race”, “Language”, and “Applicant’s Gender Identity” questions. Click to select responses for each of these fields from the drop-down options.

Participant Information

| | |
|---|--|
| <p>First Name * *****</p> <p>Last Name * *****</p> <p>Middle Initial --</p> <p>Date of Birth * 7/1/2003</p> <p>Age 18</p> <p>Sex at Birth * Male</p> <p>Ethnicity * --</p> <p>Country of Origin * --</p> <p>Race (Required) * Ethnicity/Race/ Language</p> <p style="border: 1px solid #ccc; padding: 2px;">Select all that apply</p> <p>How well does the applicant speak --</p> <p>Primary Language * --</p> <p>Other Languages Spoken</p> <p style="border: 1px solid #ccc; padding: 2px;">Select all that apply</p> | <div style="border: 2px solid #f44336; padding: 5px; margin-bottom: 10px;"> <p>Address (Required) +</p> <p style="border-bottom: 1px solid #ccc; margin-bottom: 5px;">Name</p> <p>No Registration address records found.</p> <p style="text-align: center; background-color: #ffe0b2; padding: 5px; margin-top: 5px;">Address</p> </div> <div style="border: 2px solid #00bcd4; padding: 5px;"> <p style="text-align: center; background-color: #e0f2f1; padding: 2px;">Additional Participant Information</p> <p>Is the applicant any of the following:</p> <p>Parent/Legal Guardian? * --</p> <p>Offender/Justice Involved? * --</p> <p>In Foster Care? * --</p> <p>Runaway Youth? --</p> <p>Veteran? * --</p> <p>Active Military Personnel? * --</p> <p>An Individual with a Disability? * --</p> <p>Receiving ACS Preventative Serv * --</p> </div> |
|---|--|

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

Select all that apply

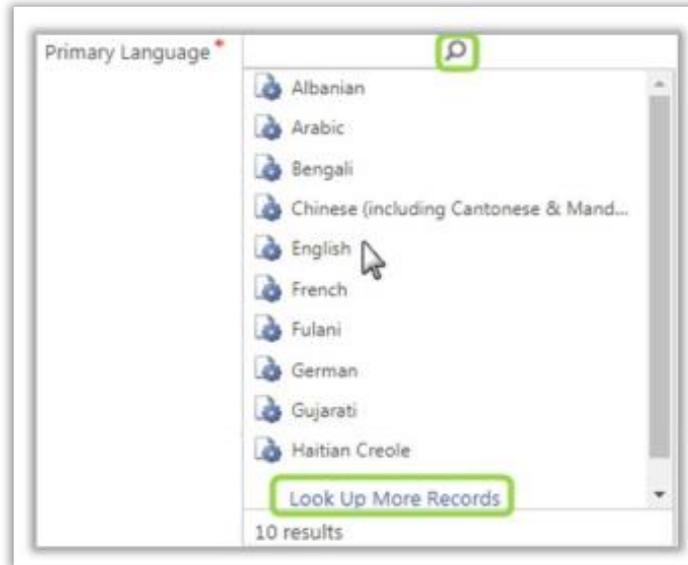
Gender Identity/
Sexual Orientation

Does the applicant identify as transgender? * --

Applicant's Gender Pronoun * --

Applicant's Sexual Orientation (Select One) * --

To answer “Primary Language” and “Country of Origin”, hover your mouse cursor over the field and click on the “magnifying glass” icon. 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.



Next, click on the + button to add a new address. An overlay will appear on your screen. Participants must reside at a valid NYC address. DYCD Connect automatically verifies if the address entered is valid. Once you are done, click on “Save”.

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

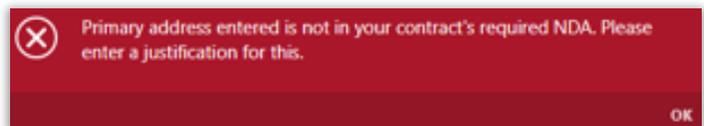
Country* United States

Address Notes --

Validation Status Address is valid

Note for Neighborhood Development Area (NDA)

Contracts: At least 80% of participants must reside in your contracts Community District. If a participant resides outside of the NDA, the below message will appear. You may still register the participant, but you must provide a justification for DYCD.



| | |
|---------------------|--|
| Validation Status | <input checked="" type="checkbox"/> Address is valid |
| Service Area Match? | <input checked="" type="checkbox"/> No |
| Justification* | <input checked="" type="checkbox"/> -- |

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.

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**

Does the applicant have contact information? *

To enter “Parent/Emergency Contact” information, click the + icon. An overlay will appear on your screen. Enter the information required. If the contact lives at the same address as the applicant, check ‘Same as Participant’. Otherwise, enter the address in the space provided. Click “Save” and close.

Parent/Emergency Contact (Required) +

| Name | Relationship | Primary Contact? ↓ | Cell Phone | Work Phone | Home Phone |
|-------------|--------------|--------------------|----------------|------------|------------|
| ***** ***** | Mom | Yes | (000) 000-0000 | | |

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 “Last Grade”. You must also indicate if the participant has an IEP Diploma or Foreign Degree.

Student Type * **Not in School**

Educational Level **High School**

Current Work Status * **Employed Part-Time**

Has IEP Diploma? * **No**

Has Foreign Degree? * **No**

Household Information

For “Income Amount”, enter a whole number without a \$ symbol. The system will automatically calculate the participant’s total household income based on the income amount provided. Under “Sources of Household Income”, indicate as many sources of household income as are applicable.

NOTE: CSBG-funded participants must meet poverty guidelines as a condition of eligibility into your program. If the calculated total household income exceeds these guidelines, you must provide a “Poverty Guideline Justification” for DYCD.

Household Information

Head of Household Type* **Single Parent – Female**

Housing Type* **Own**

Household Size* **Two**

Income Amount* **30,000**

Sources of Household Income (Required)

Affordable Care Act Subsidy Employment Wages

Supplemental Nutrition Assistance Program (SNAP) Select all that apply

Total Household Income *

(None) \$0 \$1 - \$12,060 \$12,061 - \$16,240 \$16,241 - \$20,420 \$20,421 - \$24,600 \$24,601 - \$28,780 \$28,781 - \$32,960 \$32,961 - \$37,140 \$37,141 - \$41,320 \$41,321 - \$50,000 \$50,001 - \$60,000 \$60,001 - \$70,000 \$70,001 - \$80,000 \$80,001 - \$90,000 \$90,001 - \$100,000 \$100,000+ Decline to Answer

Poverty Guideline Justification

Use this field to provide a justification for meeting the poverty guideline required for eligibility into your program.

Do you want to be contacted with information about signing up for free financial education? *
No

Do you want to be contacted with information about child support and arrears programs? *
No

Health Information

Answer the questions with the information provided by the applicant. Most questions are optional, with the exception of the participant’s “Health Insurance Status.” Depending on the response, you may need to provide additional information.

Health Insurance Status

Does the applicant have health insurance? *
Yes

What kind of health insurance does the applicant have? (Check all that Apply)

Medicaid

Medicare

State Children’s Health Insurance Program

State Health Insurance for Adults

Military Health Care

Direct-Purchase

Employment Based

Decline to Answer

Consents

Consents must be completed for all applicants. Please note that consents may vary by program type. “Consent to Participate/Verification of Information Provided” and “Participant attests that income information is true” must be acknowledged and marked ‘yes’ to submit the intake. For all other consents, a response of ‘yes’ or ‘no’ must be entered.

Consents

General Program Consents

Consent to Participate/Verification of Information Provided *
Yes

Consent for Emergency Medical Treatment *
No

Participant Consent for Photo/Videotaping *
No

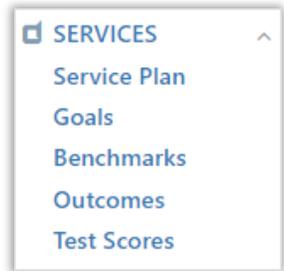
Participant consent for use of original work *
No

Participant attests that income information is true *
Yes

Participant Consent to Share Data for DYCD Referrals *
No

Pre-Intake Services

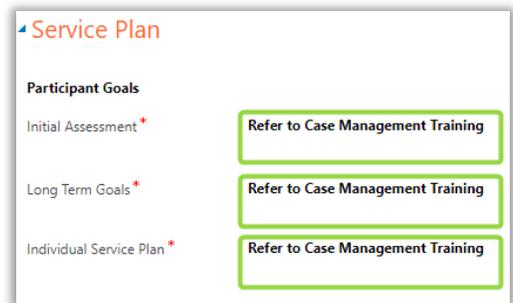
Once you have completed all sections of the intake form, the next step is to provide information regarding the participant’s goals while attending your program, as well as the participant’s scores from when they were pre-tested. Both of these tasks should be completed in the “Services” section of the intake form, in “Service Plan” and “Test Scores”.



Service Plan

You will use the Service Plan section to provide information regarding:

- The participant’s initial assessment
- Long-term goals while attending your program
- The participant’s Individual Service Plan (ISP)

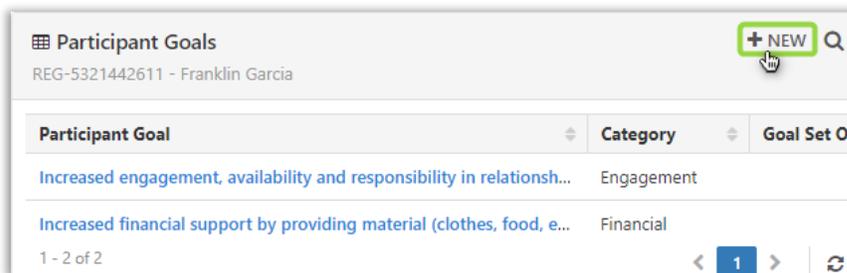


The Service Plan section contains a series of short answer sections for you to complete based on your Case Management training. Respond to each field and then click “Save” at the top left of the page to complete the entry. For additional guidance about performing an initial assessment and creating an Individual Service Plan (ISP), please review the resources available in the DYCD Connect Document Library under Literacy & Immigrant Services.

Adding Participant Goals

Participant goals can be added to by clicking on +NEW in the Goals section. Note the following as you add goals:

- For Immigrant Families, each Participant and Family member must have at least 1 goal and at least one person must have the self-advocacy goal
- Choose the goal most closely related to your participant’s goal(s). If unsure of the appropriate selection, then contact your DYCD Program Manager

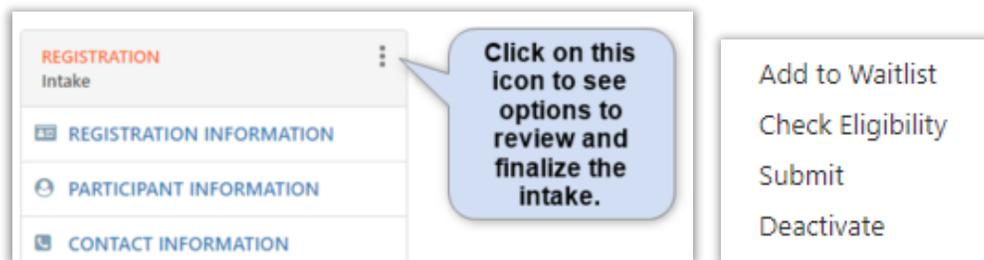


Click through each field and respond to each mandatory field marked with a *. Then, click “Save and Close” when complete to add the goal.

| PARTICIPANT GOALS : INFORMATION | |
|---------------------------------|---|
| <h2>New Participant Goals</h2> | |
| Category * | Employment/Career/Vocational |
| Goal Family * | Required |
| Goal Set On * | 4/30/2021 |
| Goal Type * | Short Term |
| Goal * | Employed in a career-advancement related program |
| Goal Status * | In Progress |
| Goal Started On | 5/5/2021 |
| Goal Text | |
| Goal Text * | Employed in a career-advancement related program who entered or transitioned into a position that provided increased income and/or benefits |

Reviewing + Submitting the Intake

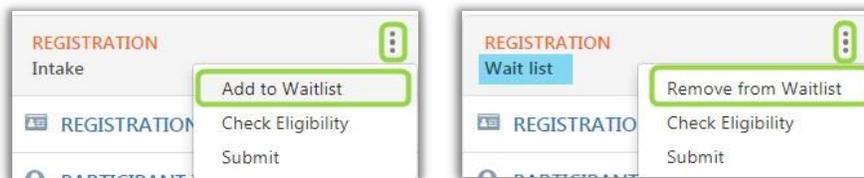
Once you have completed all sections of the intake form, including goals and pre-test information, make sure to click on “Save” in the Intake Menu Bar. There are several options to review and submit the intake form.



Add to Waitlist

If you would like to add the applicant to the waitlist, you can do so at any time by clicking the “three dots” icon from the intake switchboard and selecting “Add to Waitlist”. To add an applicant to the waitlist, a first name, last name, date of birth, and an address must be provided.

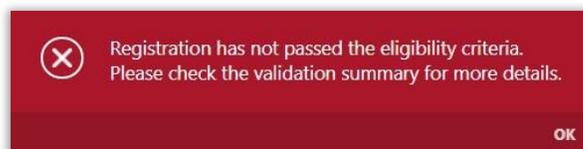
You will notice the Registration stage list on the intake switchboard update from 'Intake' to 'Wait list'. To remove the applicant from the wait list, click the "three dots" icon and select "Remove from Waitlist." To register the applicant, follow the steps in the next section.



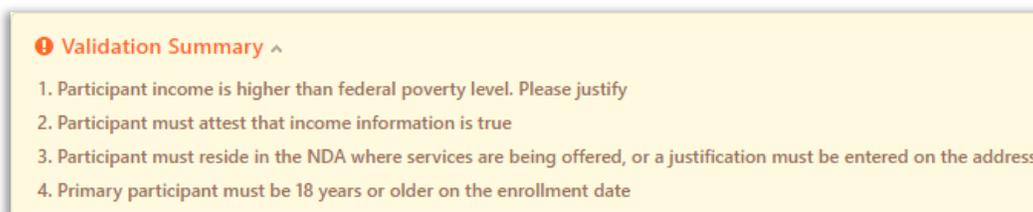
Check Eligibility

Each DYCD Program has its own eligibility criteria. At any point during the intake process, you can check if the applicant is eligible based on information entered. From the intake switchboard, click the "three dots" icon and "Check Eligibility".

- If the applicant is eligible for the program based on information entered, you will see the following:
- If the applicant is not eligible based on the information entered, or if you are missing information related to the eligibility criteria, you will see the following message:



Additionally, a validation summary will appear at the top of the intake with additional information.

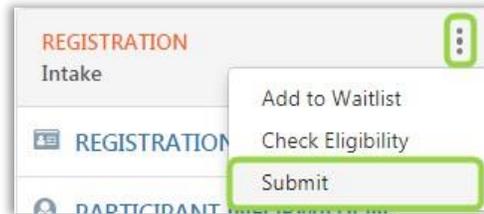


Deactivating an Intake

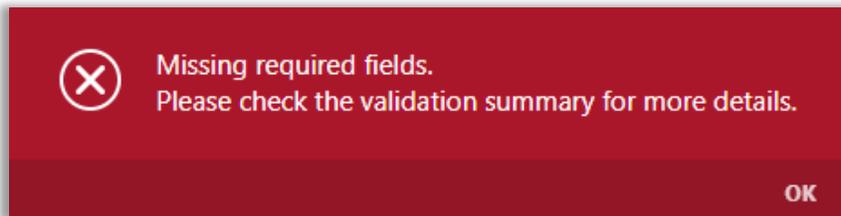
You may deactivate (delete) an intake for a participant who never attended your program, or whose intake was created in error. However, any participants with attendance cannot be deactivated. If attendance was taken in error, you must delete all associated attendance before deactivating an intake.

Register the Applicant

When you have completed the intake, you can register the applicant by clicking the “three dots” icon from the intake switchboard and selecting “Submit”. The system will perform an eligibility check.



If the applicant is not eligible for the program, the below notice will appear, detailing the reason why the applicant is not eligible.



The system will also alert you if required fields were not completed. Click on each link to go directly to the field to enter in missing information.



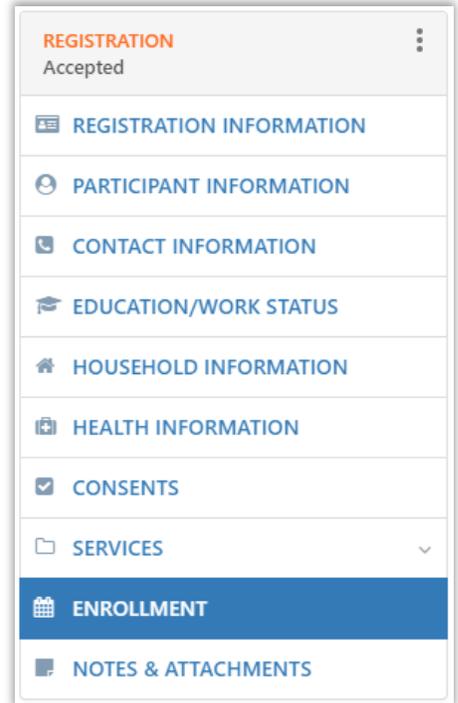
After all information is complete, save the intake, click the “three dots” icon and select “Submit”. If the applicant passes the eligibility check and all required fields are completed, the registration stage will update to “Accepted”, and you will see the message below.



Enrollment

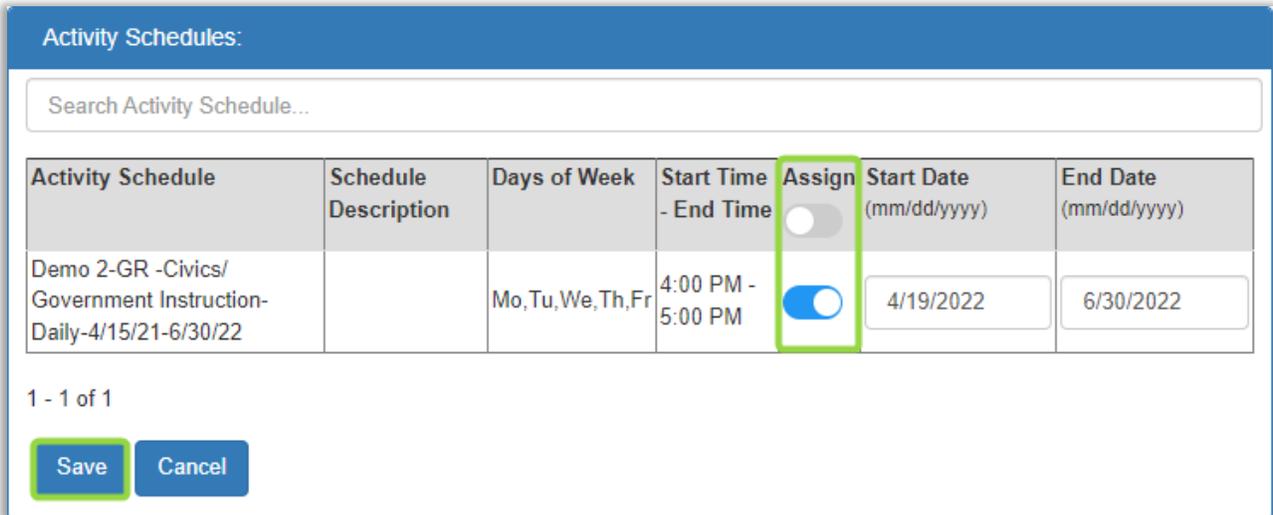
Once the participant is 'Accepted', and your workscope is approved, you can proceed with enrolling your participants.

- 1) Click on "Enrollment" in the Intake Switchboard.
- 2) Click on "Assign Activity Schedules" to view all schedules the participant is eligible to attend, based on activities and schedules you have set up in your workscope.
- 3) Click on the Assign dial to select activity schedules this participant will attend.
 - Clicking the Assign dial at the top of the column header will assign all eligible schedules.
 - You may also modify the "Assignment From" or "Assignment To" dates, which indicate the first and last day that the participant will attend each activity.



The screenshot shows a sidebar menu for a participant's profile. At the top, it says "REGISTRATION Accepted". Below this are several menu items: "REGISTRATION INFORMATION", "PARTICIPANT INFORMATION", "CONTACT INFORMATION", "EDUCATION/WORK STATUS", "HOUSEHOLD INFORMATION", "HEALTH INFORMATION", "CONSENTS", "SERVICES", "ENROLLMENT" (which is highlighted in blue), and "NOTES & ATTACHMENTS".

- 4) Once you are done, click on the blue "Save" button at the bottom of the page.

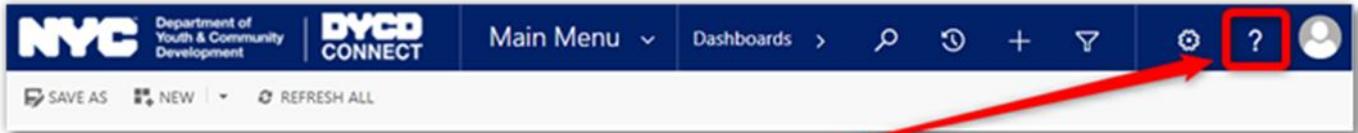


The screenshot shows the "Activity Schedules" interface. At the top, there is a search bar labeled "Search Activity Schedule...". Below the search bar is a table with the following columns: "Activity Schedule", "Schedule Description", "Days of Week", "Start Time - End Time", "Assign", "Start Date (mm/dd/yyyy)", and "End Date (mm/dd/yyyy)". The "Assign" column contains a toggle switch, which is currently turned on (blue) and is highlighted with a green box. Below the table, it says "1 - 1 of 1". At the bottom, there are two buttons: "Save" (highlighted with a green box) and "Cancel".

| Activity Schedule | Schedule Description | Days of Week | Start Time - End Time | Assign | Start Date (mm/dd/yyyy) | End Date (mm/dd/yyyy) |
|---|----------------------|----------------|-----------------------|-------------------------------------|-------------------------|-----------------------|
| Demo 2-GR -Civics/ Government Instruction-Daily-4/15/21-6/30/22 | | Mo,Tu,We,Th,Fr | 4:00 PM - 5:00 PM | <input checked="" type="checkbox"/> | 4/19/2022 | 6/30/2022 |

DYCD Connect Help Center

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



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

