NYC Department of Youth & Community Development

DYCD CONNECT

PARTICIPANT TRACKING SYSTEM:

COMPASS

Intake & Registration

Table of Contents

Key Terms

What is an Intake?

Intake: a digital record of participant that is used to store various types of participant data

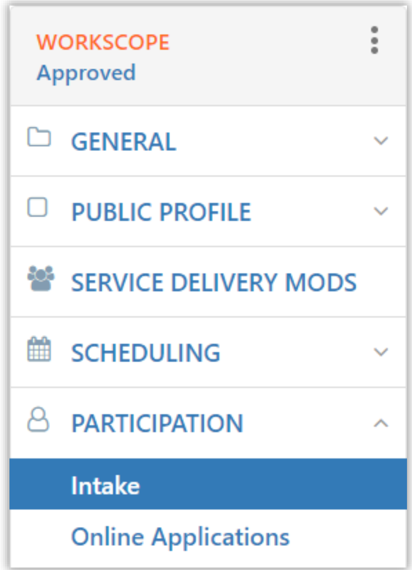
How do you Complete an Intake?

Intake Switchboard: a navigation panel, located on the left side of the intake, that enables users to quickly navigate through the various sections of the intake

Power Search: a search function that can be used to complete a keyword search on any field that has a magnifying glass icon on it. To begin a power search, type a *, a keyword, and then hit enter on your keyboard

Ex. To find I.S.73 The Frank Sansivieri School you may type *73 or *frank to quickly find it.

Purpose of this Guide



This guide outlines the process of submitting participant intakes on DYCD Connect, using information from the Universal Intake Forms for COMPASS Programs. It also describes how to review and take actions on Online Applications received from discoverDYCD.

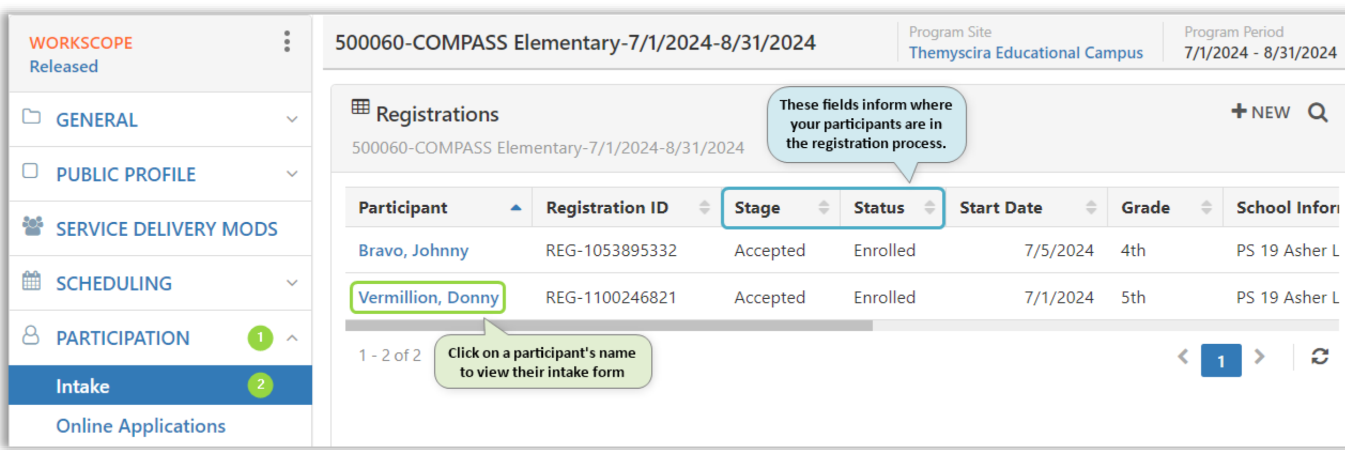
What is an Intake?

All providers must complete an **intake** on the workscope for all participants before providing services. The intake collects participant data and creates a profile in DYCD Connect, which tracks enrollment, attendance, and services.

You can complete intakes in the Participation>Intake section of your workscope after the workscope is released to your program. Intakes can be received in paper form through the Universal Intake Form, or online via discoverDYCD.

Intake Section Basics

In the Intake section, data is stored in the Registrations table. All accepted participants will have their intake saved here. Applications from discoverDYCD first appear in the Online Applications section, but are transferred to the Registrations table once the participant is accepted.



Key Buttons

+ NEW — 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.

Intake Stage

On the Registrations table, Participants will display the following stage depending on the completion of their intake.

- **Intake**: The participant intake is partially completed
- **Accepted:** The participant intake is complete.
- **Wait list:** The participant intake may or may not be complete, but the program is currently at capacity and so the participant may not be accepted at this time.
- **Exited:** Participant intake was completed, services may have been delivered, but the participant is no longer attending programming

Intake Status

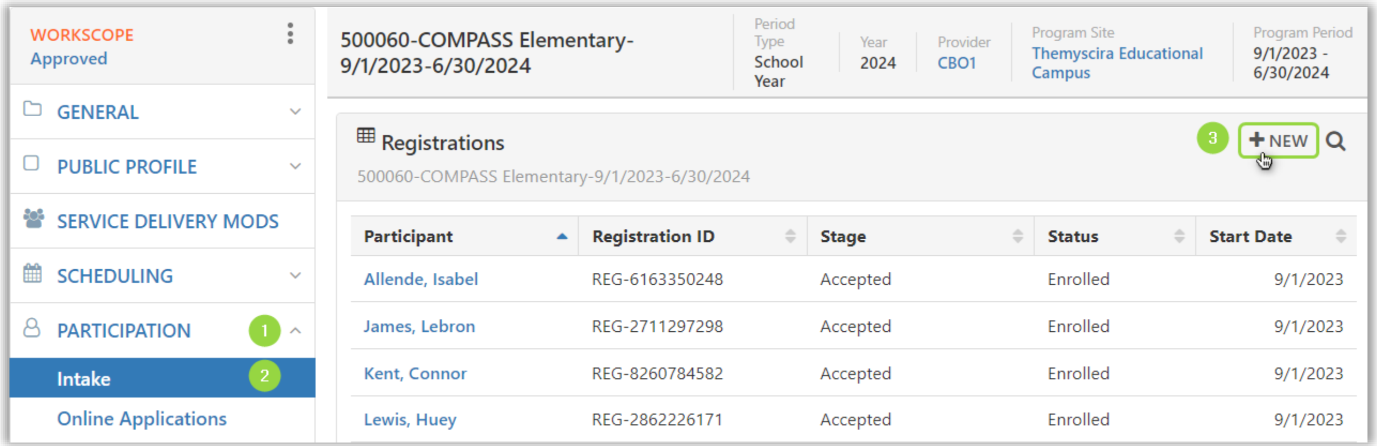
On the Registrations table, participants will have the following statuses, depending on if they may be enrolled into programming.

- **In Progress:** Registration is not complete and so the participant cannot be enrolled yet
- **Enrolled:** The participant is registered and may be enrolled into programming
- **De-enrolled:** The participant was registered, but is no longer attending your program

How do you Submit a New Intake?

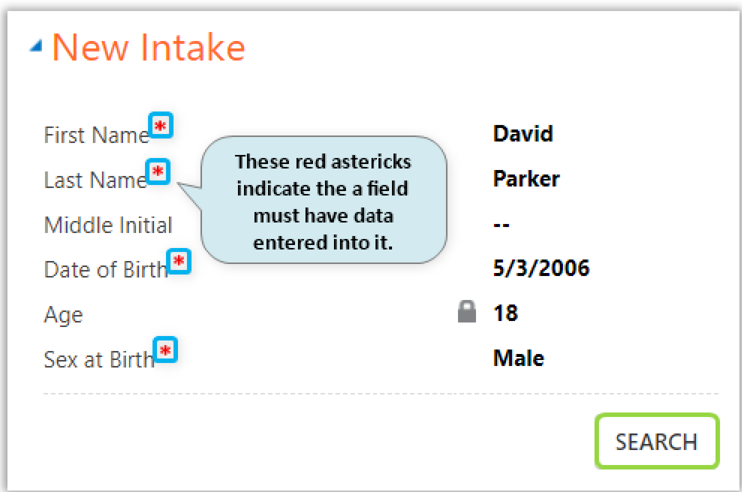
Prior to starting a new intake in the Participant Tracking System (PTS), make sure you have received a completed Universal Participant Intake Form from the participant. The current form is available in the DYCD Connect Document Library.

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



Duplication Check

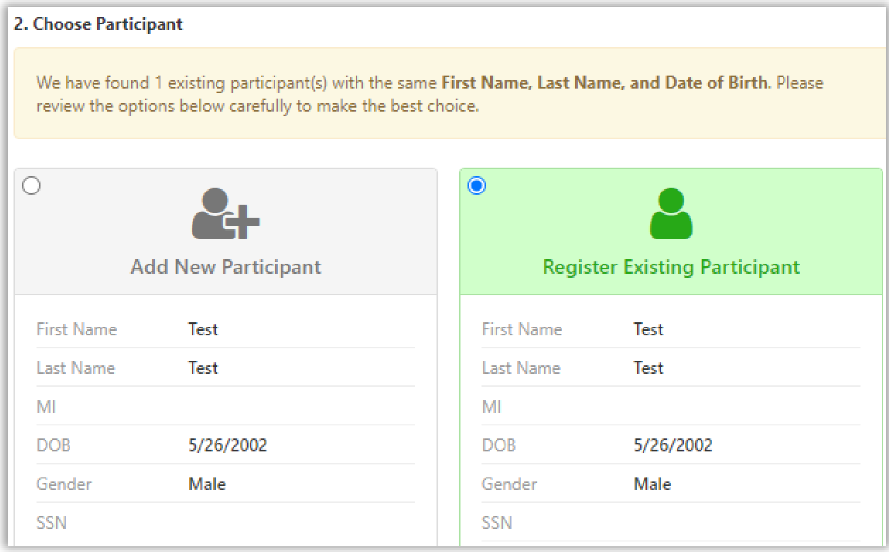
On the new intake page, you must type data into the mandatory fields and then click "SEARCH". This initiates a system scan that searches for participants with the same First Name, Last Name, Date of Birth and Sex at Birth.



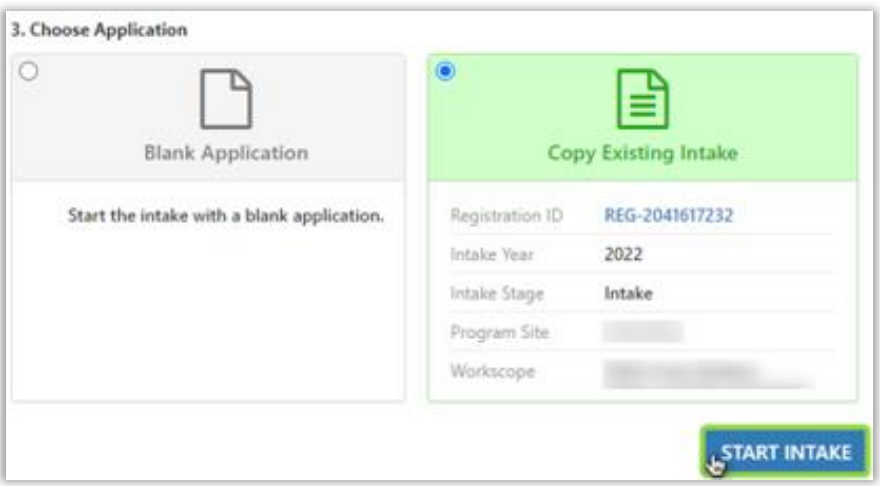
If a match is found, then you may register a returning participant and import data from their previous intake to expedite the intake process. If a match is not found, then you will need to register a new participant.

Registering a Returning Participant

If an existing participant is found, click on “Register Existing Participant” to associate this applicant with their previous registration. This will enable you to import data from their previous intake.



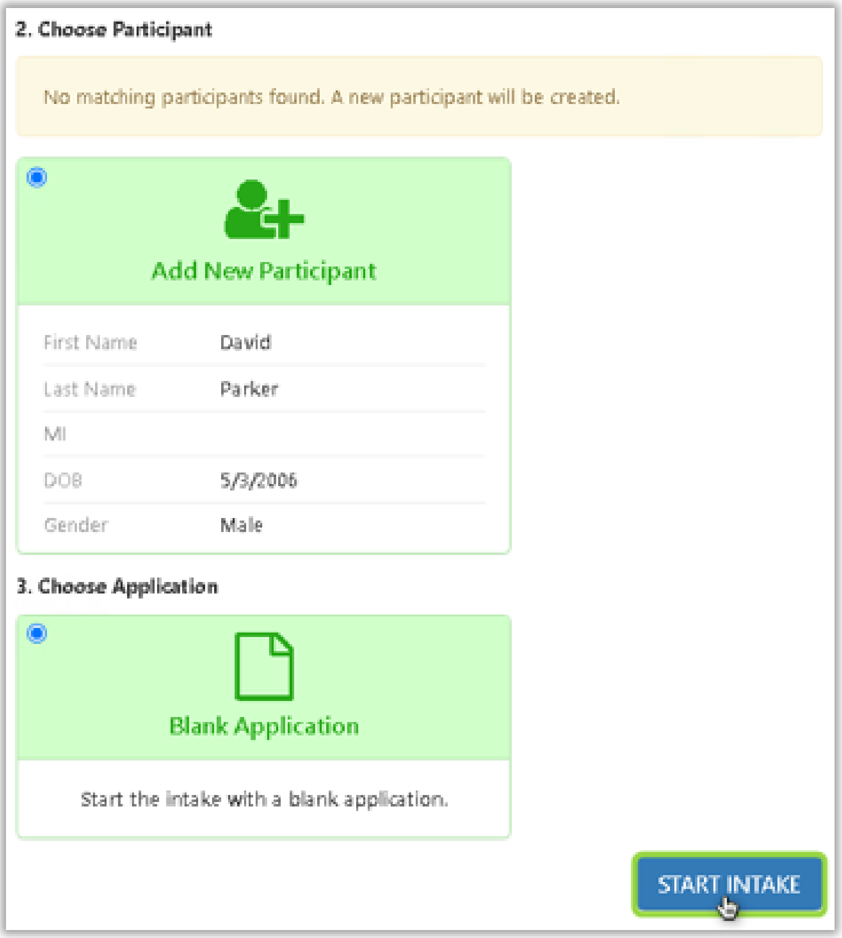
If you would like to import data from a previous intake, click on “Copy Existing Intake,” and then click on “START INTAKE.”



While importing data from a previous intake populates many sections of the intake, some sections, such as Consents, must be completed again. Providers must review intake sections to ensure that the data is accurate and aligns with the information provided on the participant’s Universal Intake Form.

Registering a New Participant

If an existing participant is not found after completing the Duplication Check, then you will have to register a new participant on your workscope. The system will select "Add New Participant" and "Blank Application" by default for Steps 2 and 3. You will need to click on "START INTAKE" to begin your new registration.



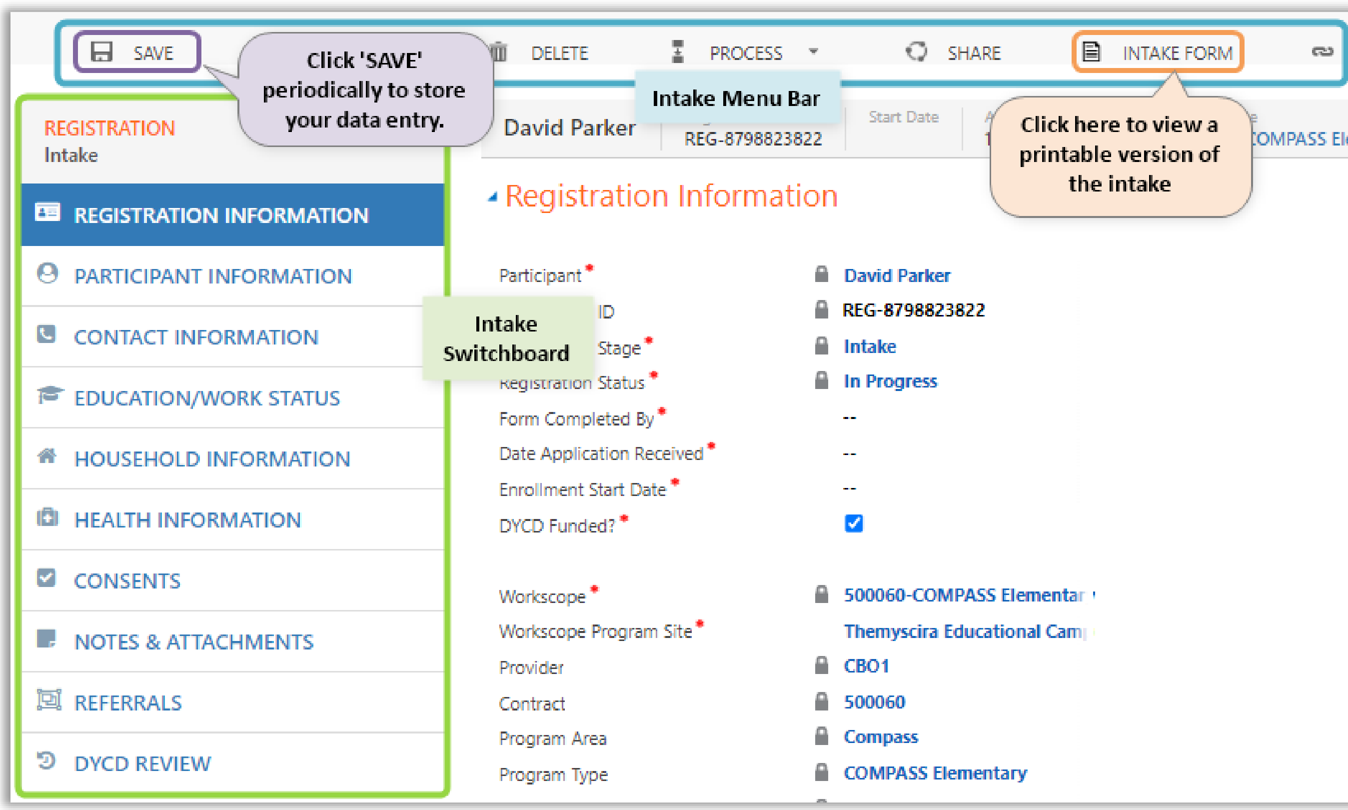
How do you Complete an Intake?

Using data from the Universal Application, providers must complete data entry on all required fields on the intake before it may be submitted for review. As providers complete data entry, it is highly recommended to periodically save by clicking on the "SAVE" button at the top-left of the page. This ensures that data entry is stored on the system.

Navigating through the Intake

The **Intake Switchboard**, located on the left side of the intake page, may be used to quickly navigate through the various sections of the intake. Mandatory intake fields are noted by an * icon or say "(Required)" in parentheses.

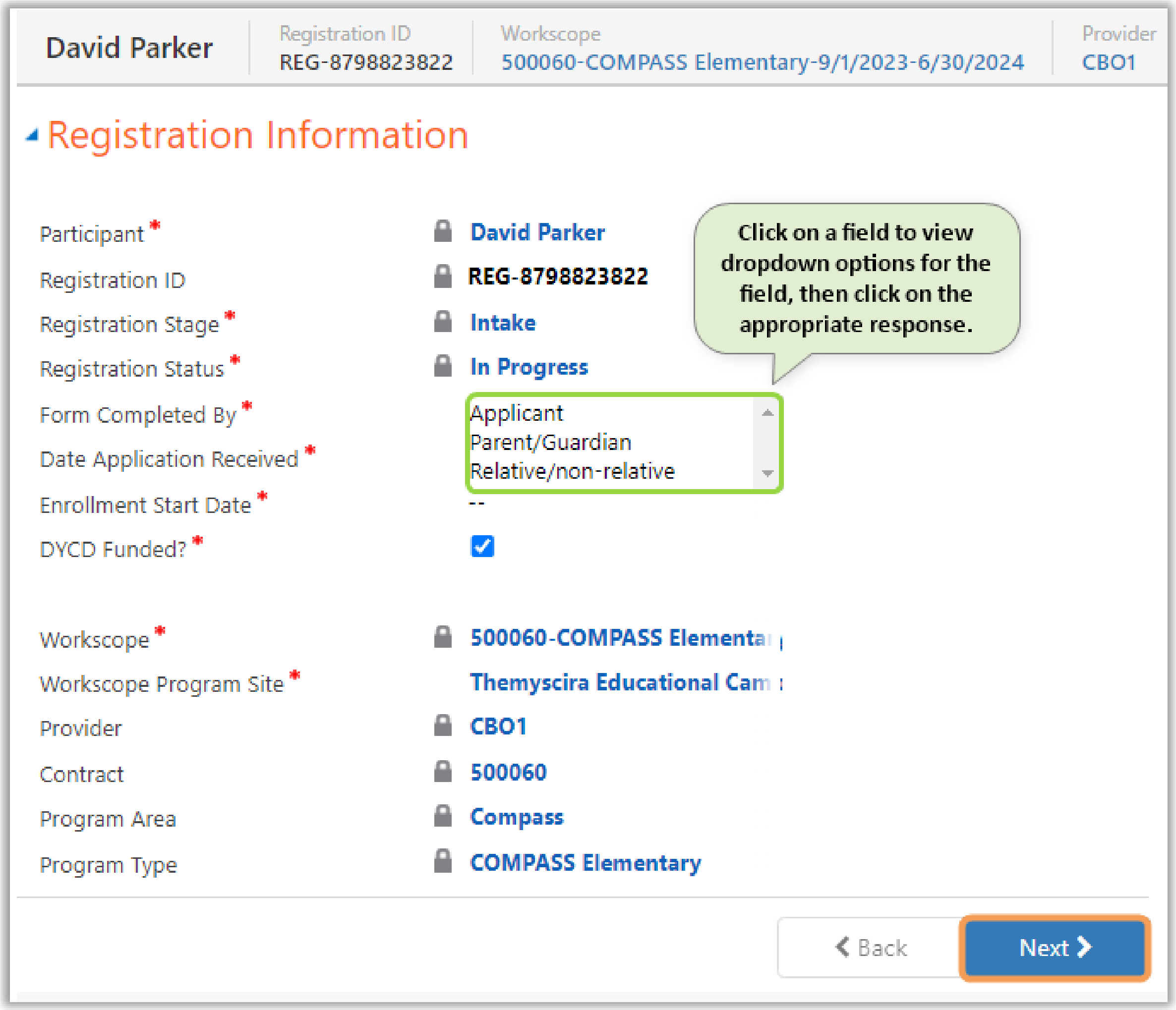
The Intake Menu Bar allows for specific actions on the intake. For example, providers may click on the "Intake Form" button to view a printable version of the participant intake.



Registration Information

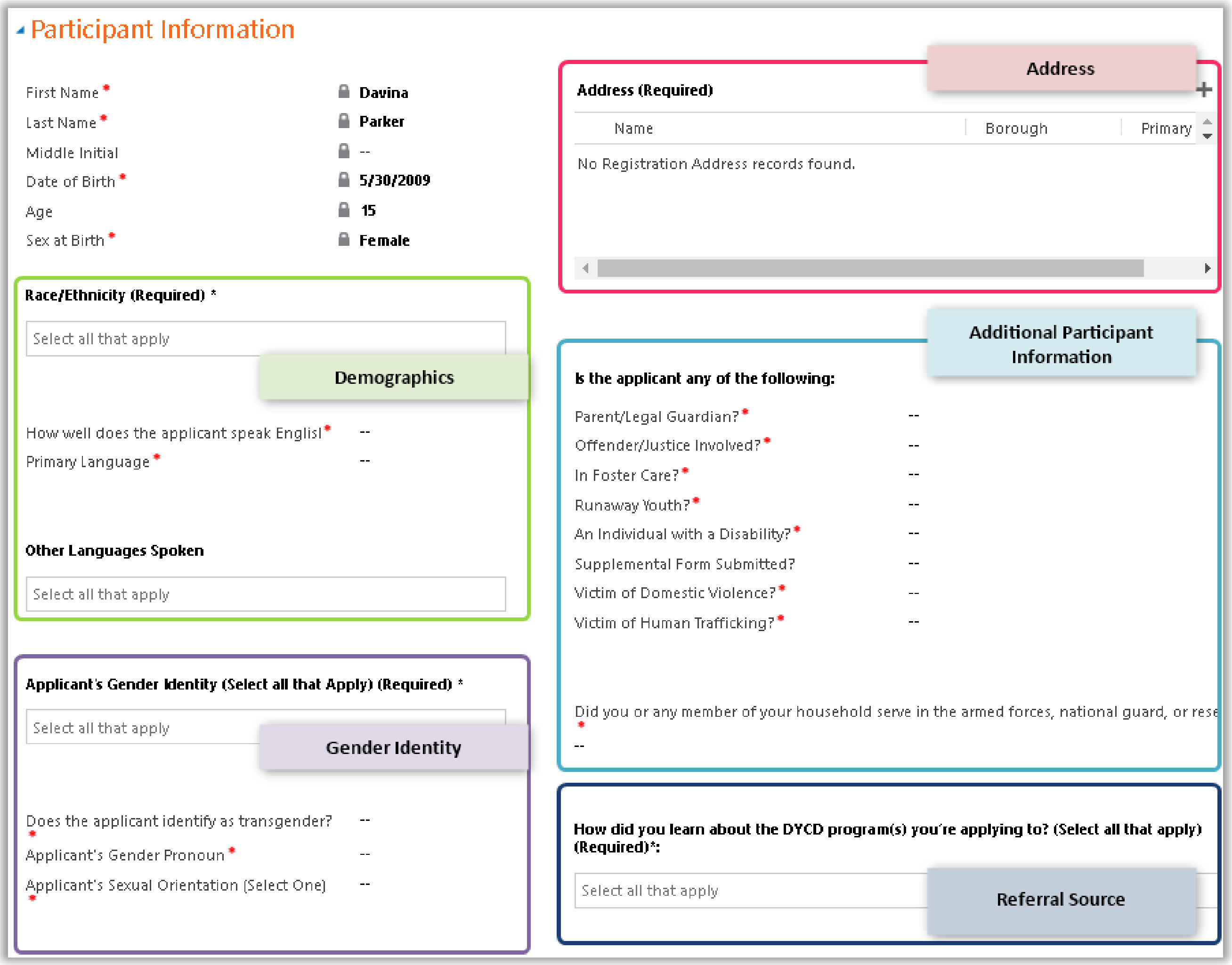
Throughout each intake section, you will click on fields to select from a dropdown list of appropriate responses for each field, or click to type responses directly into them.

After completing data entry on a section, you may use the switchboard or click the “Next” button at the bottom right of the page to navigate to the next section of the intake.

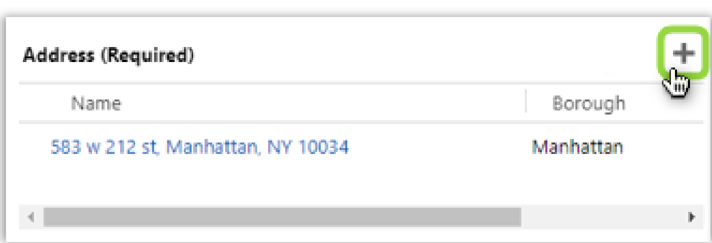


Participant Information

In this section, you will enter various types of demographic information, an address, respond to the gender identity questions, and list a referral source. Your responses may trigger additional fields to appear, requesting additional information.



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

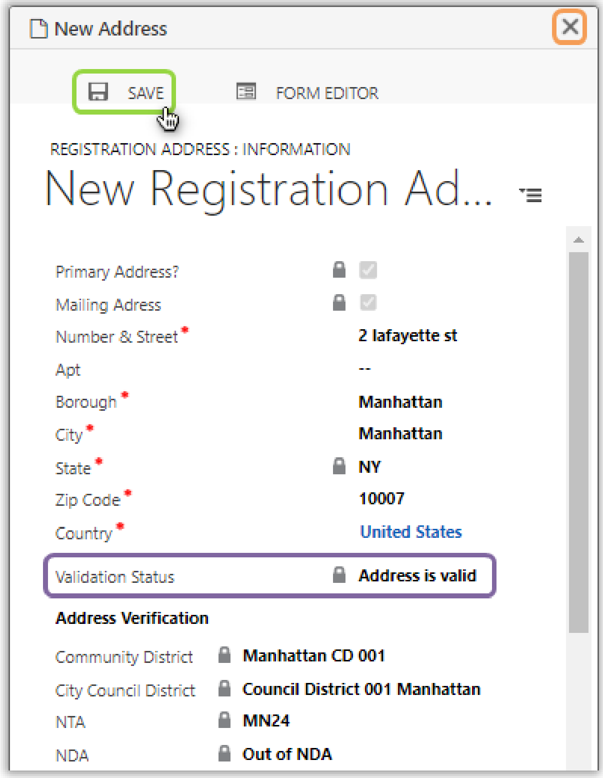


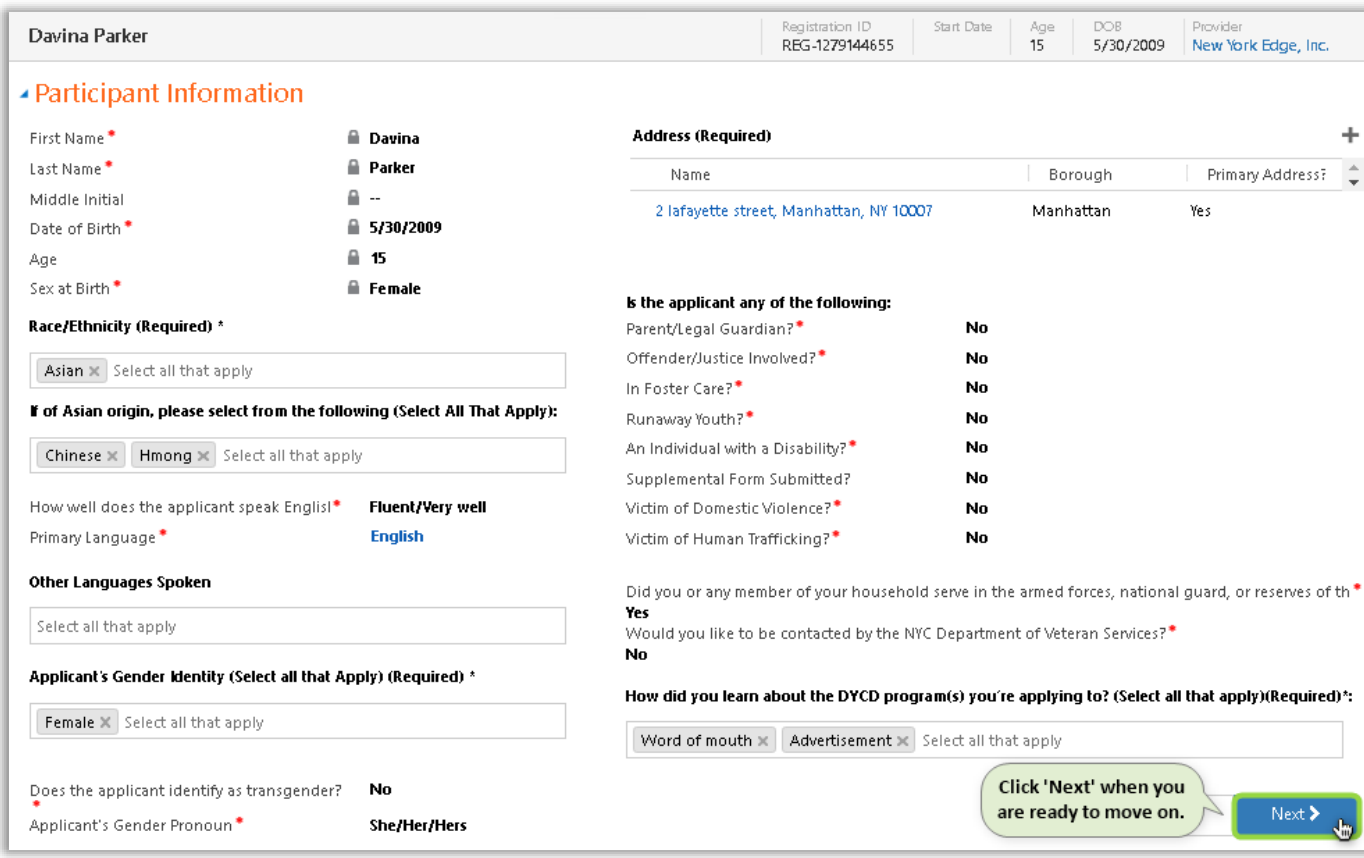
Department of Youth & Community Development

On the popup overlay, click to type data into each field. After selecting a borough, the system will auto-fill the zip code if the addressed is recognized as a valid address. Then, you may review the Address Verification information at the bottom of the overlay.

If the address is valid, click “SAVE” at the top-left of the overlay to add the address to the intake. Then, click the “X” at the top right to exit the overlay.

For all remaining fields, click on all fields or magnifying glass icons to access dropdown options and select options for all mandatory fields. Once data entry is completed, click “Next” at the bottom right to navigate to the next section.





Contact Information

In this section, providers will enter in contact information for the applicant and at least one parent or emergency contact. At minimum, an email address must be provided. If the participant is under 14 years of age, the system will request the Parent/Guardian's email address.

Youth is under age 14

Contact Information

Applicant's Contact Information

Cell Phone *	**(718) 111-1111**
Preferred Method of Contact	**Cell Phone**
Home Phone	--
Parent/Guardian E-mail *	**mrogers@fakeemail.com**

Youth is age 14+

Contact Information

Applicant's Contact Information

Cell Phone *	**(929) 333-2221**
Preferred Method of Contact *	**Cell Phone**
Home Phone	--
E-mail *	**spicyaaliyah@gmail.com**

To enter Parent/Emergency Contact information, click on "+" and enter the information on the overlay.

Parent/Emergency Contact (Required)

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, the first contact you list will be marked as the Primary Contact.

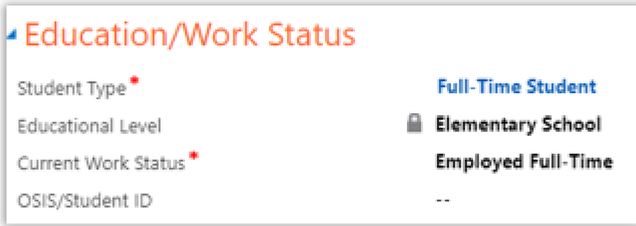
On the Universal Intake Form, you may also receive information denoting additional people who may or may not pick up the child. Use the following table to list them:

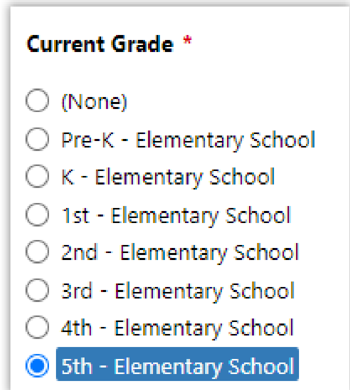
Additional people who MAY or MAY NOT pick-up the child

Name of Person ↑	May Pick-up Child? ↑	Relationship	Phone
Sandy Thomas	Yes	Child Care Provider	(718) 455-3456
Tony M.	No	Friend of the family	

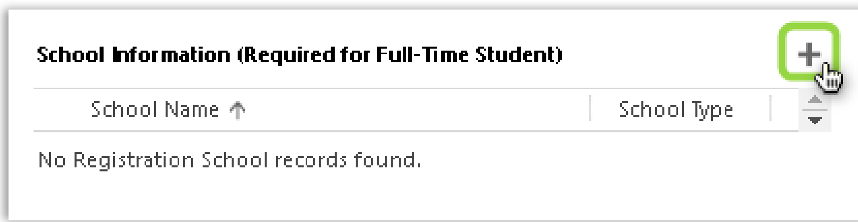
Education/Work Status

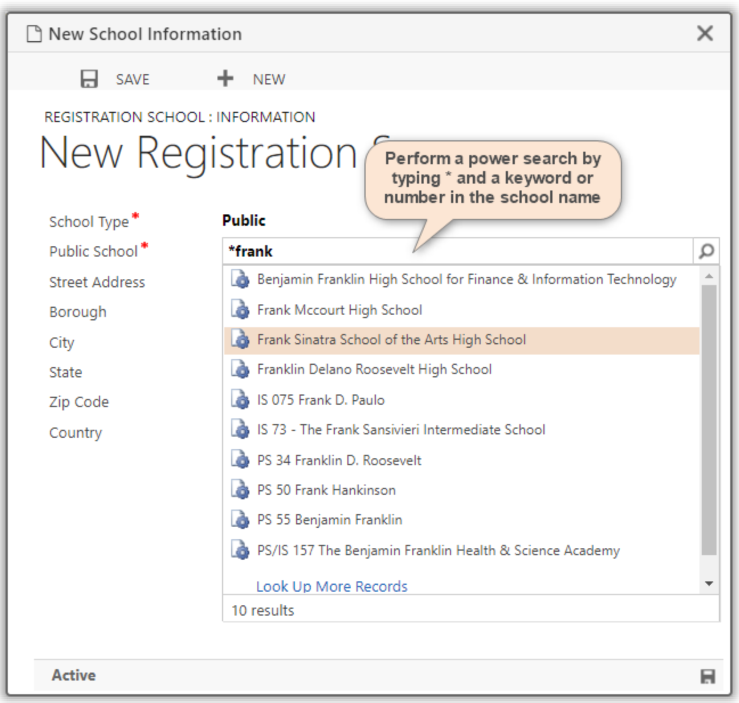
In this section, providers will enter school and work details related to the participant. Select the appropriate responses using the information provided in the Universal Intake Form.





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



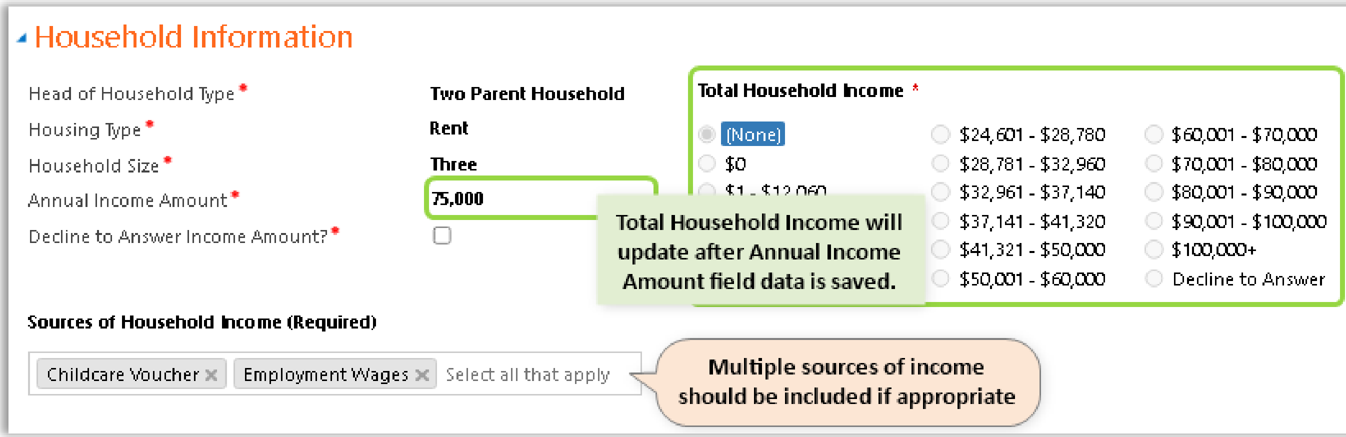


You may find a school by clicking on the magnifying glass icon and clicking on "Look Up More Records" to access the school overlay. Alternatively, you may run a power search by typing *, a keyword, and pressing enter on your keyboard.

Ex. If your school's name is IS73 - The Frank Sansivieri Intermediate School, then you may consider *73 or *frank as power search options and then click enter on your keyboard to quickly find the school's name in the drop-down options.

Household Information

This section collects information about the participant's household and income. Click each field, and then select the appropriate responses based on information provided in the Universal intake form.

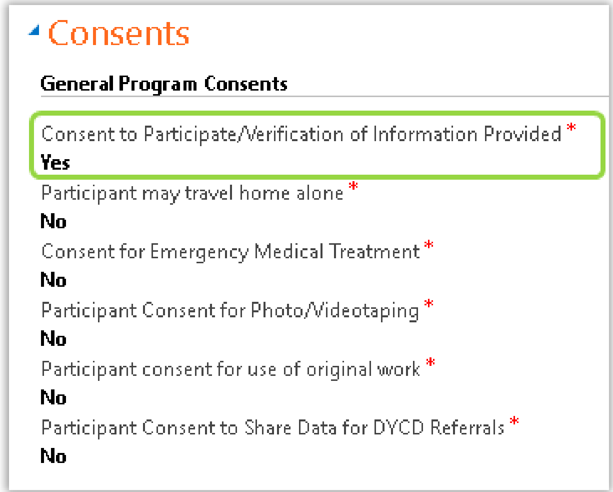


Health Information

In this section, health-related data is stored. Select "Yes", "No" or "Decline to Answer" for all fields in this section. If "Yes" is selected, then additional fields may appear to collect more information to further explain the health issue or situation.

Consents

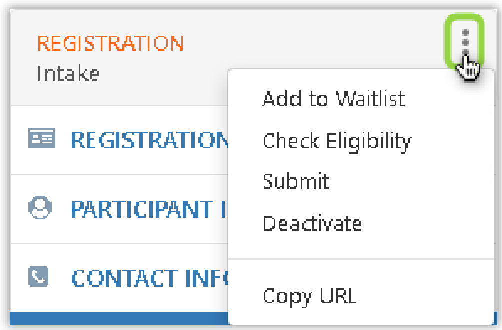
This section collects consent information from the participant for various privileges. The “Consent to Participate/Verification of Information Provided” must be received to submit the intake**.** All other consents may be marked as “Yes” or “No.”



Note: The types of consents requested may vary across the COMPASS programs, but the procedure to respond to them will remain the same.

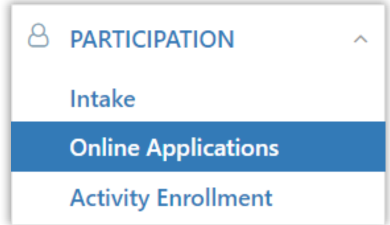
What Actions can you Complete on an Intake?

Once you have completed data entry in all sections of the intake, click “SAVE” in the Intake Menu Bar. Then, click on the “Three Dots Icon” at the top right of the intake switchboard to take actions on the intake.



- **Add to Waitlist** – this option adds participants to a waitlist on your workscope. This is used when your program is at maximum capacity and cannot support another participant. When a seat opens, there is an option to remove participants from the waitlist. This action will prompt the intake form to revert to the intake/submitted status, allowing you to submit and enroll the youth into the program.
- **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.
- **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 multiple intakes were accidentally created for the same participant.

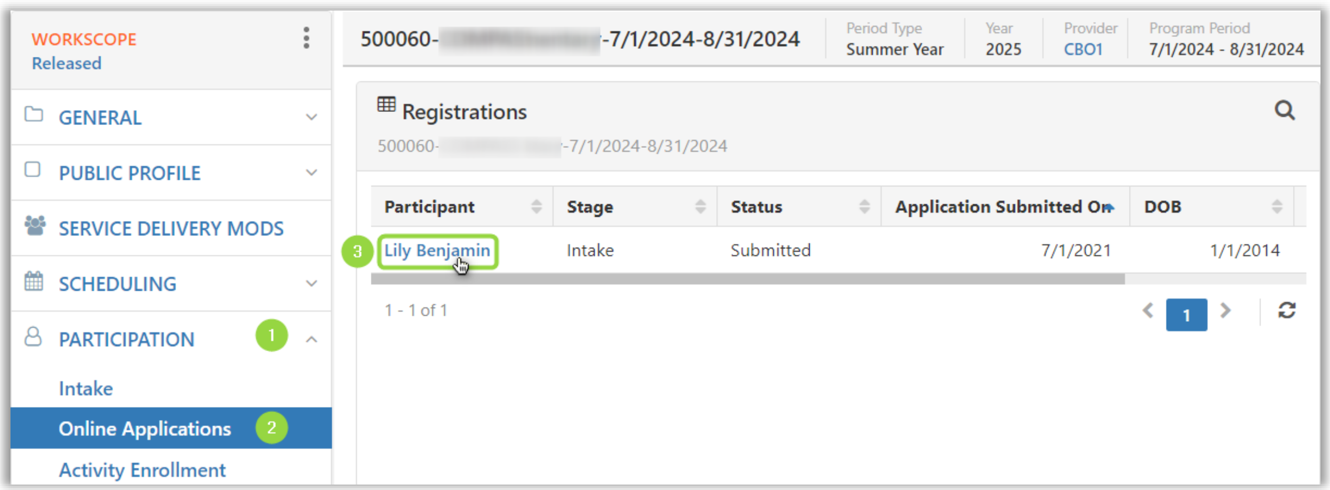
How do you Respond to Online Applications?



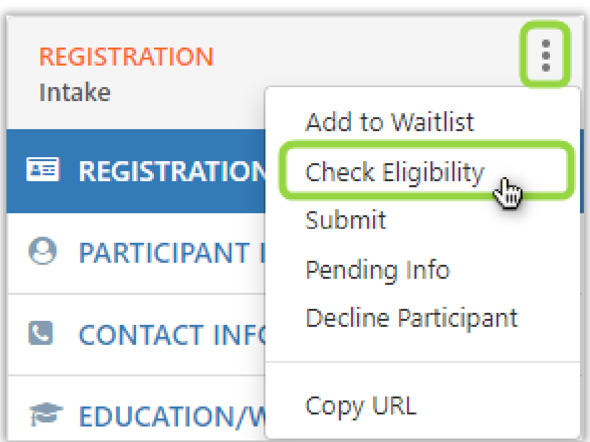
If your program receives intake applications through discoverDYCD, then they will appear in the Online Applications sub-section of the workscope under Participation.

Reviewing & Taking Actions on Online Applications

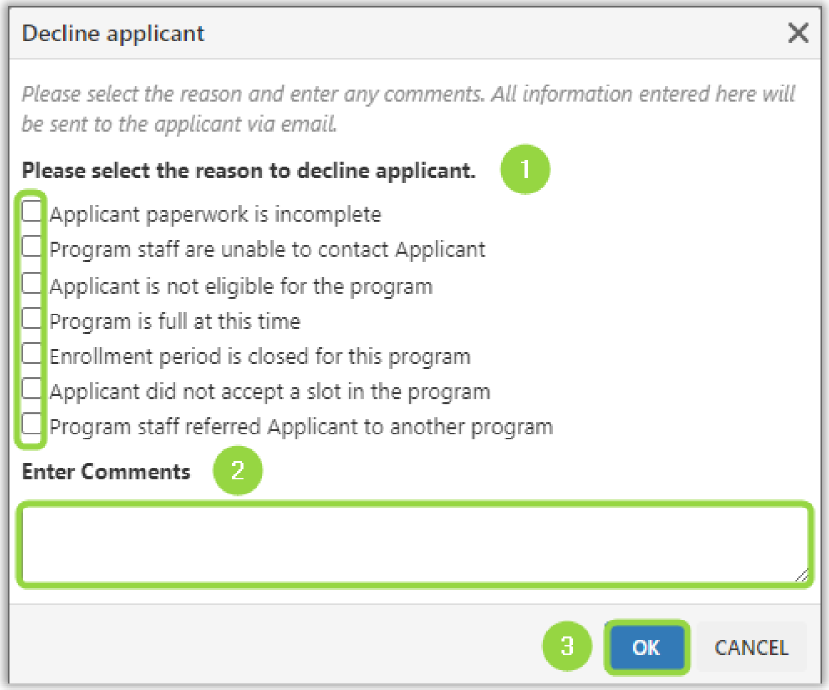
STEP 1: Navigate through Participation>Online Applications and click on a participant's name to view their application.



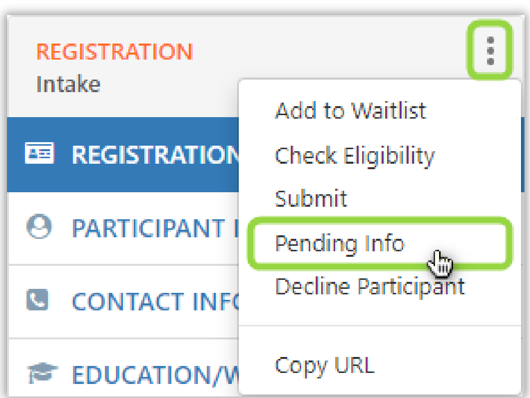
STEP 2: Click on the "Three Dots Icon" and select "Check Eligibility" to see if the participant is eligible to join your program based on the information provided.



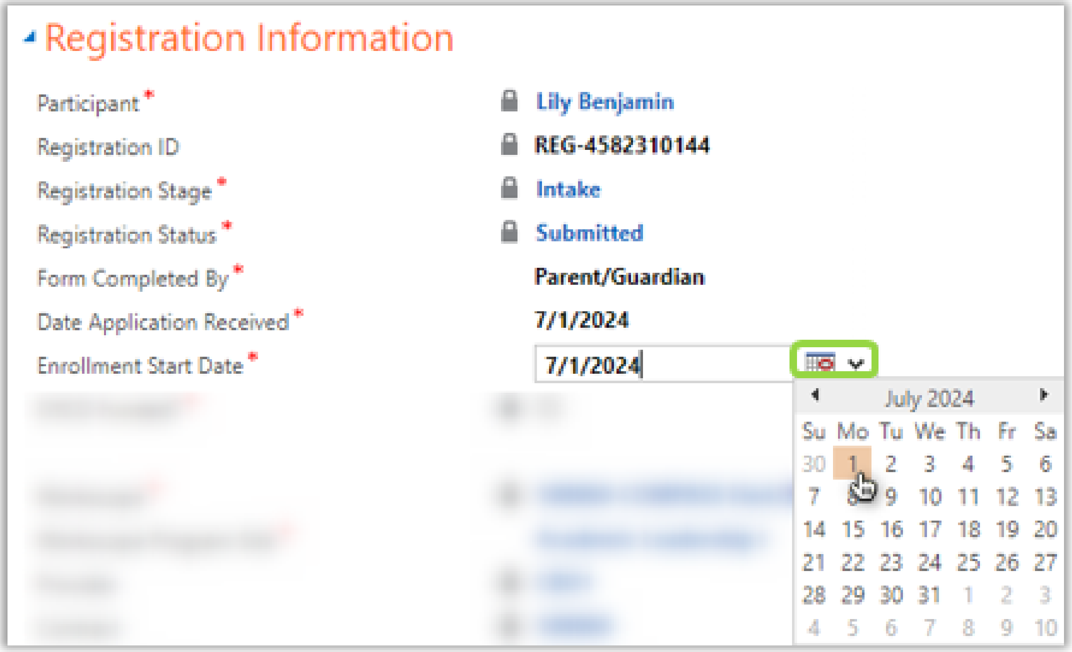
STEP 2B: If the participant is ineligible, then click “Decline Participant” from the options under the “Three Dots Icon”. Then, select the reason to decline the applicant, add any additional comments at the bottom, and then click “OK” to decline the application.



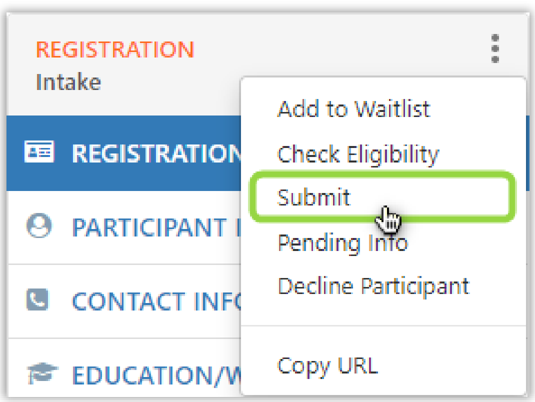
STEP 3: If the participant is eligible to join your program, then review the sections of the intake to review the data submitted to ensure that it is accurate. If any information is missing, then you may set the status of the intake to “Pending Info” via the “Three Dots Icon” menu. Then, contact the applicant to gather the missing information so that you may update the intake.

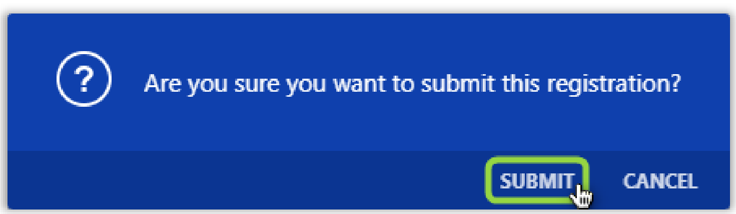


STEP 4: If all the data provided looks accurate, then you may add the “Enrollment Start Date” for the participant to denote when they may begin attending your program.



STEP 5: Click the “Three Dots Icon,” and then click on “Submit.” In the pop-up window that appears, click on “Submit” to confirm the intake is ready for submission.





How do you Update Participant Information?

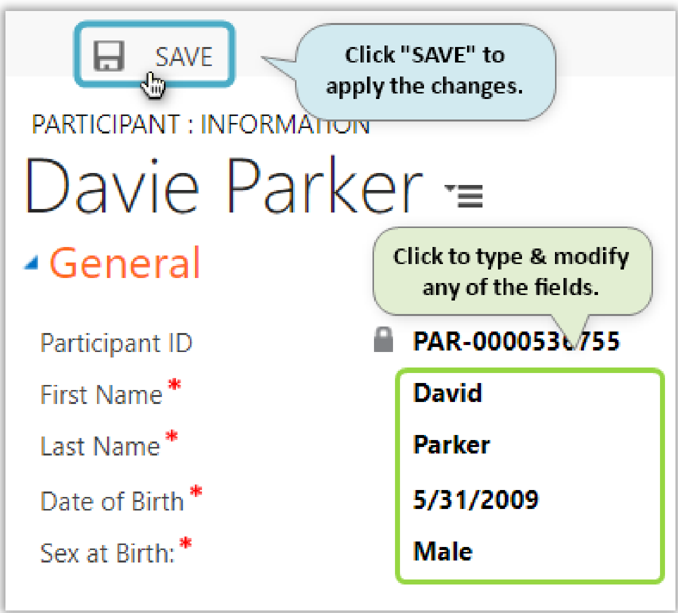
As the program period progresses, COMPASS providers may need to update intake information. Some common updates are correcting participant names & date of birth, as well as updating contact information.

Updating Name / Date of Birth / Gender

Step 1: In the Registration Information section, click on the participant's name in blue text.

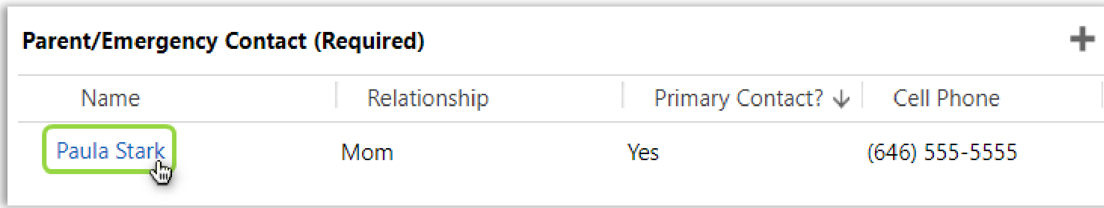
Step 2: When the new browser window opens, make the necessary changes, and then click "Save & Close."

Note: You will not be able to make modifications if the participant is registered at another program site during the same period (Summer, School, or Fiscal Year). In this situation, reach out to the DYCD Connect Help Center for additional assistance.

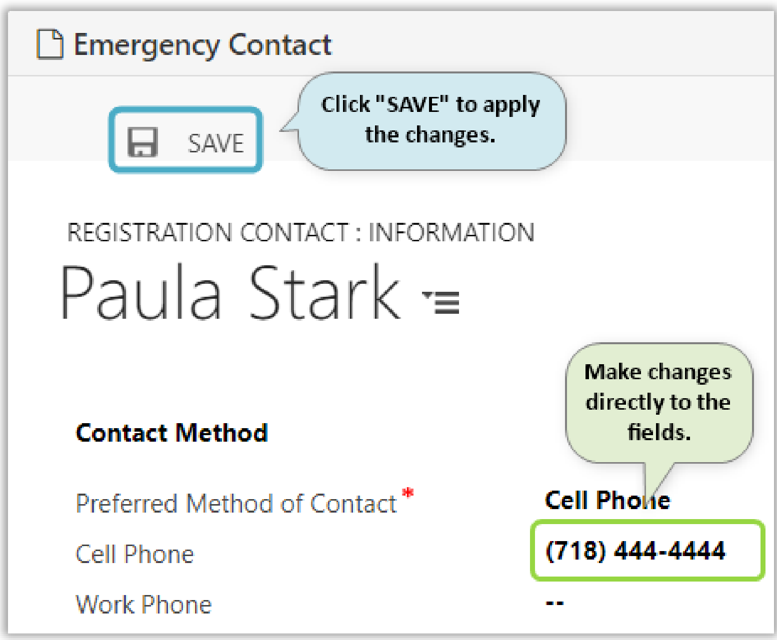


Updating Parent / Emergency Contact(s)

Step 1: In the Contact Information section, click on the contact's name to open their information page.

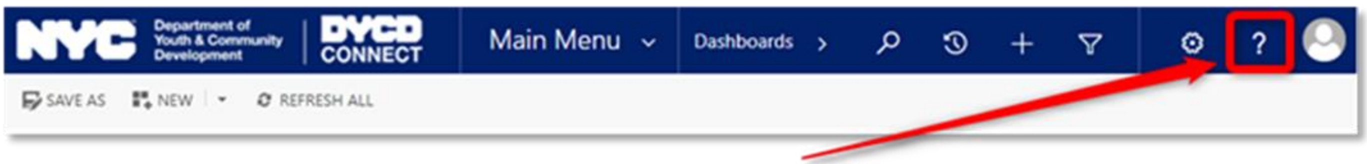


Step 2: Update the information and then click "SAVE" to apply the changes.



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.