Department of Youth & Community Development

DYCD CONNECT

PARTICIPANT TRACKING SYSTEM:

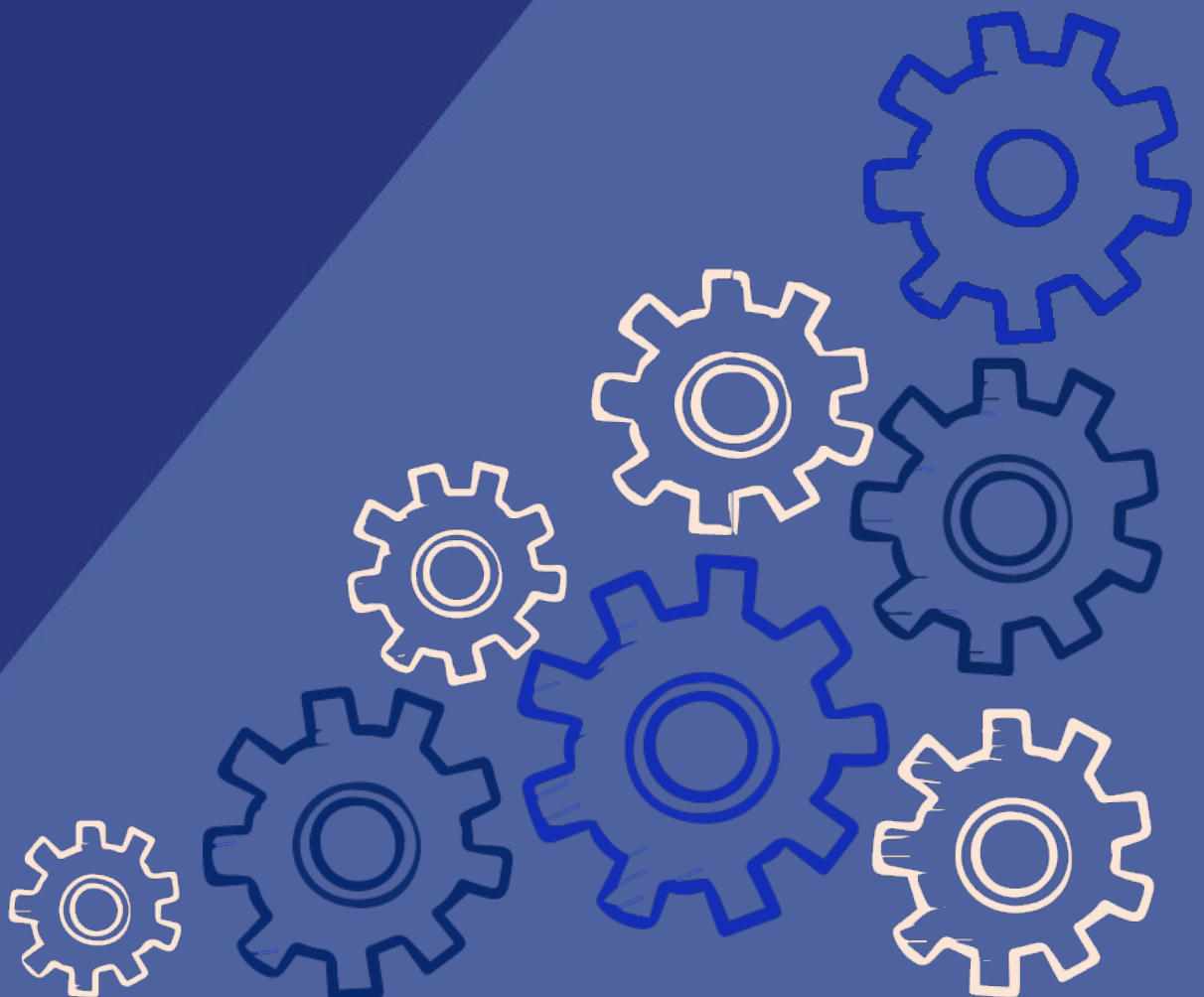### Workforce Innovation and Opportunity Act Participant Intake & Registration Guide
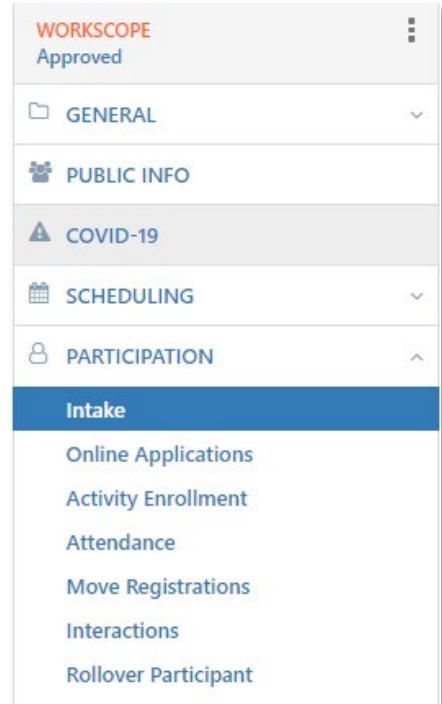
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What is Intake?

Intake refers to the process of registering participants into your program. You may begin intake as soon as your workscope is released to your program.

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: If your program has opted in to receiving participant applications from DiscoverDYCD, you can review those applications in the **Online Applications** page. Additional information is available in the **DiscoverDYCD User Guide**.

WORKSCOPE
Approved

- GENERAL
- PUBLIC INFO
- COVID-19
- SCHEDULING
- PARTICIPATION
  - Intake
  - Online Applications
  - Activity Enrollment
  - Attendance
  - Move Registrations
  - Interactions
  - Rollover Participant

Registrations

These fields provide the participant's status within your program.

Click on +New to start a new intake.

+ NEW **Q**

Participant	Stage	Status	Start Date	Grade	DOB	Program Site
Ethan Jung	Intake	In Progress	9/16/2019		8/8/2008	School Year - FY2020 - S...
Noah Nickelson	Exited	De-enrolled	9/12/2019	6th	9/9/2009	School Year - FY2020 - S...
Sophia Sterling	Accepted	Enrolled	9/12/2019	7th	7/7/2007	School Year - FY2020 - S...

1 - 3 of 3

< 1 > C

Click on a participant's name to open the existing intake form.

Key Buttons

+ NEW Click on this button to start a new intake

Q 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 Stages - Status

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

- **In Progress –** The participant's intake was started but is not yet complete.
- **Intake – CVU Review –** The participant intake was submitted to DYCD for approval
- **Intake – CVU Rejected –** The participant intake returned to provider corrections required
- **Exit Follow-up –** the participant intake receiving follow up services
- **Accepted – Enrolled –** The participant intake accepted and enrolled
- **De-enrolled –** The participant is no longer enrolled in your program. Follow-up services have ended.

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 WIOA section.

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

1) Enter Participant Details
2) Choose Participant (Duplication Check)
3) Choose Application

Basic Participant Details

First, provide the participant's **First Name**, **Last Name**, **Date of Birth**, **Sex at Birth**. You will also provide the **Social Security Number**, which is subject to verification. These five fields are used to identify the participant throughout DYCD Connect. Then, click on **Search.**

◢ New Intake

1. Enter Participant Details

Workscope *	🔒 90339-Learn and Earn-9/1/2019-8/31/2020
Workscope Program Site *	🔒 Edenwald community center 1
First Name *	--
Last Name *	--
Middle Initial	--
Date of Birth *	--
Age	🔒 --
Sex at Birth *	--
Social Security Number *	--

SEARCH

Duplication Check

Upon clicking [SEARCH], DYCD Connect performs a duplication check against the participant's name, date of birth, and social security number. 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:

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].

Completing the Intake

Intake Navigation and Sections

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. As you enter data, remember to frequently 🖫 SAVE your progress.

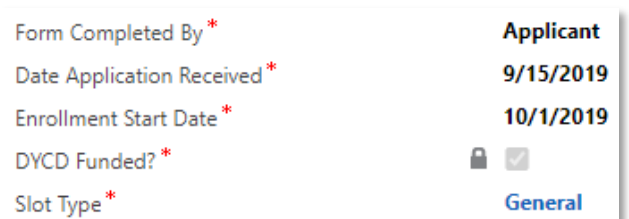## Registration Information

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 the applicant begins receiving services. You must also indicate the **Slot Type** by hovering your mouse over the field, and clicking on 🔍 . This field indicates how the participant will be funded by your DYCD budget.
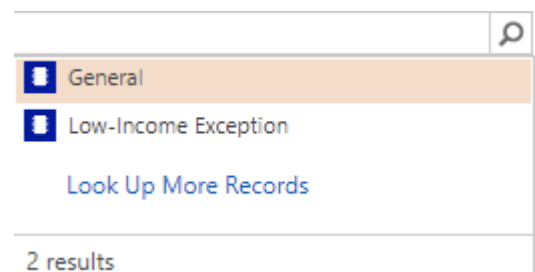
Participant Information

In this section, you will enter demographic information for the applicant, and at least one address as indicated on the Universal Participant Intake Form. Scroll down to see additional questions regarding the participant's **Gender Identity** and **Incoming Referral Source.** All questions marked with a ***** or say **Required** are mandatory. *(*SSN verification fields are not completed by users, this is an automated process. If an SSN is invalid, there will be an error message. The SSN must be updated and the verification process repeated)*

To answer **Primary Language** and **Country of Origin**, hover your mouse cursor over the field and click on 🔍 . 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. 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

Provide the applicant's **Incoming Referral Source** by clicking on the drop down-menu and selecting the appropriate source(s). You may select multiple referral sources.

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.

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

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** & **Subtype** by clicking on the 🔍 icon and selecting the appropriate option. You must also indicate the applicant's **Current Grade, Current Work Status,** and if the participant has an **IEP Diploma** or **Foreign Degree**.

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

Perform a power search by typing * and a keyword or number in the school name

Below **School Information**, you will find additional questions, including sections for **applicant occupational skills, work-related soft skills, and subject(s) in which the applicant requires assistance.** In each section, you may indicate as many skills/subjects that are applicable.

Needs additional assistance to complete an educational program or to secure/ hold employment *
Yes
Eligible to receive a free or reduced price lunch under the Richard B Russell National School Act
--

Applicant occupational skills

Microsoft Office and of Other Office Systems ✕   Answering Phones ✕   Select all that apply

Subject(s) in which the applicant requires assistance

Reading ✕   Math ✕   Select all that apply

Applicant work-related soft skills

Positive attitude ✕   Effective communication ✕   Select all that apply

To add the applicant's **Work History**, click on the ✚ icon**.** A new window will pop up. Enter all required fields noted by the ***** icon.

Sector, Industry, Job Family and **Title** must be completed by clicking on 🔍 . The first ten results appear. You may click on "Look Up More Records" to see more options. Once all fields are entered, click 💾 SAVE to save the Work History record.

Selective Service

All Selective Service questions require a response. This section is applicable for male participants ages 18 and over as a part of eligibility criteria.

Household Information

This section is used to provide information about the participant's household members and income information. Answer **Head of Household Type** and **Housing Type**. Next, add all household members by clicking on the ✛ icon in the **Household Information** grid.

When adding a new household member, a window pops up where you will be able to provide the member's age and relationship to the applicant. In addition, if the household member had income in the last six months, you will need to provide the **Gross Income** and the **Income Source** by clicking on 🔍 . Make sure to 💾 SAVE once all data is entered.

Health Information

Answer the **Health Insurance Status** question. Depending on the response, you may need to provide additional information.

Consents

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

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

General Program Consents

Consent to Participate/Verification of Information Provided *
--
Consent for Emergency Medical Treatment *
--
Participant Consent for Photo/Videotaping *
--
Participant consent for use of original work *
--

Pre-Intake Services
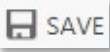
Once you have completed all sections of the Universal Participant Intake Form, the next step is to provide information about the participant's TABE pre-test scores. Pre-tests must be dated within six months of the participant's enrollment start date. Additional information about adding pre-tests is available in the **Participant Services** user guide. *(*Due to COVID-19, test scores are not required at this time. Notification will be shared with providers once this changes*)

In addition, you will need to generate the participant's **Eligibility Rules, Low-Income Criteria, Barriers.** Each generated eligibility item requires a supporting document. You will upload documents securely via the Diona app.

▭ SERVICES ⌃
   Test Scores
▣ REFERRALS
▭ ELIGIBILITY RULES ⌃
   Eligibility
   Barriers
   Low Income Criteria
⟲ REGISTRATION HISTORY
⬆ DOCUMENTS

NOTE: The Documents section of the intake form should only be used for **non-secure documents**, such as proof of goal achievements. **Secure documents should never be uploaded in DYCD Connect.**

Reviewing + Submitting the Intake

Once you have completed all sections of the intake form, make sure to click on 🖫 SAVE in the Intake Menu Bar. You must wait for eligibility documents to be approved by DYCD before you can submit the intake for approval. There are several options to review and submit the intake form.
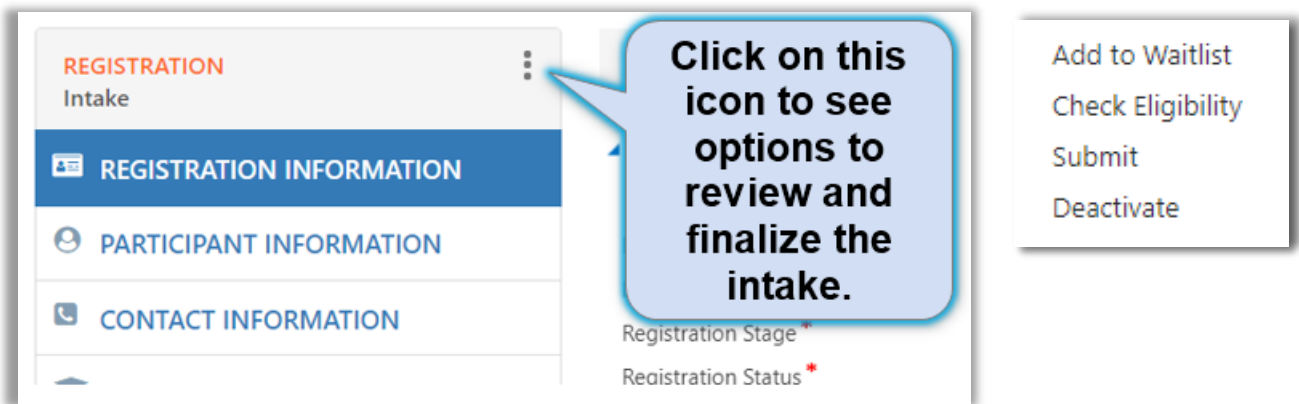
Add to Waitlist

If you would like to add the applicant to the waitlist, you can do so at any time by clicking the ⋮ 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.
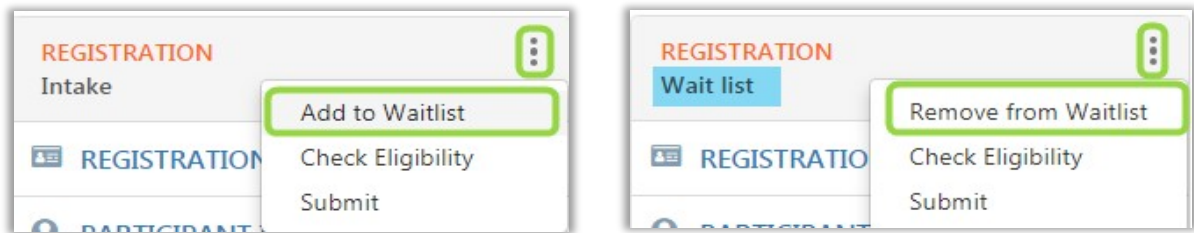
You will notice the Registration stage list on the intake switchboard update from 'Intake' to 'Wait list'. To remove the applicant from the waitlist, click the ⋮ and select **Remove from Waitlist.** To register the applicant, follow the steps in the next section.

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 ⋮ 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.

Example Learn & Earn Validation Summary

❗ Validation Summary ⌃

1. Participant must be a full-time student
2. Primary Address must be within the 5 boroughs of NYC
3. Participant must have at least one barrier.
4. Participant must meet at least one low income criteria.
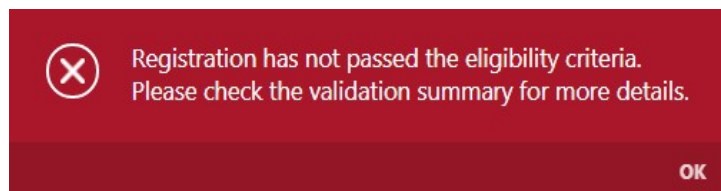5. Participant must complete Reading TABE Pre-Test
6. Participant must complete Mathematics TABE Pre-Test
7. Participant must provide documents for all eligibility rules.

Example Train & Earn Validation Summary

❗ Validation Summary ⌃

1. Primary Address must be within the 5 boroughs of NYC
2. Participant must be a registered for US selective service
3. Participant must not be in school.
4. Participant must be Retired or Unemployed.
5. Participant must complete Reading TABE Pre-Test
6. Participant must complete Mathematics TABE Pre-Test
7. Participant must be Drop Out / Not Drop Out / High School Graduate
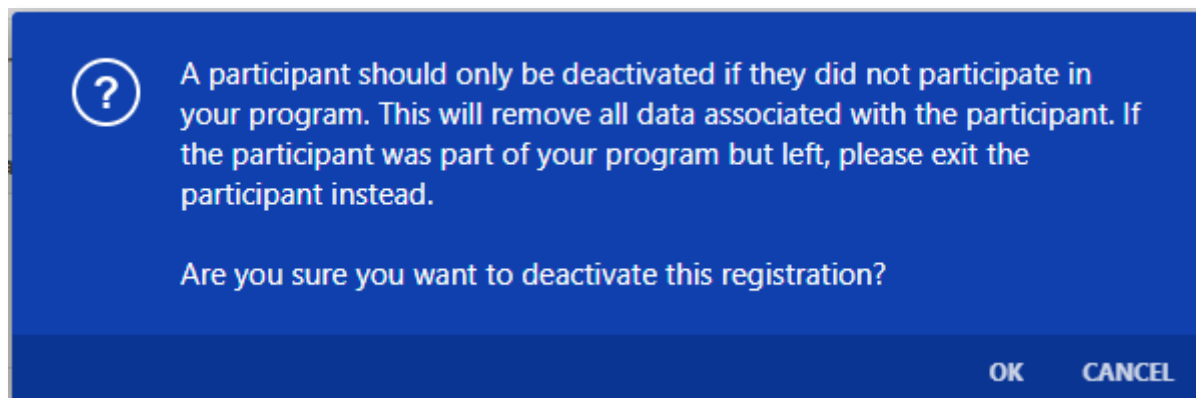8. Participant must meet at least one low income criteria.
9. Participant must provide documents for all eligibility rules.

Deactivate 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.

> (?) A participant should only be deactivated if they did not participate in your program. This will remove all data associated with the participant. If the participant was part of your program but left, please exit the participant instead.
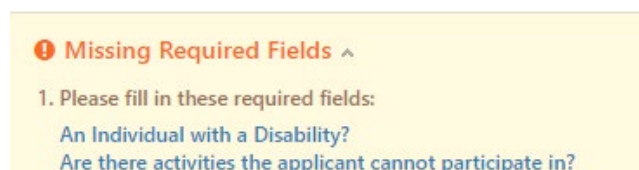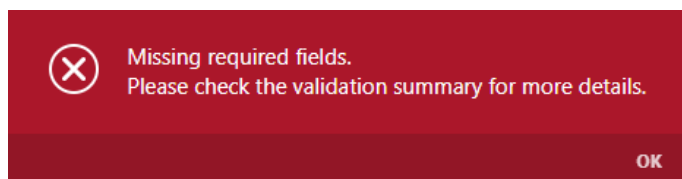>
> Are you sure you want to deactivate this registration?
>
> OK   CANCEL

Register the Applicant

When you have completed the intake, and all documents have been approved, you can register the applicant by clicking the ⋮ icon from the intake switchboard and selecting **Submit.** The system will perform an eligibility check.

REGISTRATION
Intake

Add to Waitlist
Check Eligibility
Submit

REGISTRATION

PARTICIPANT
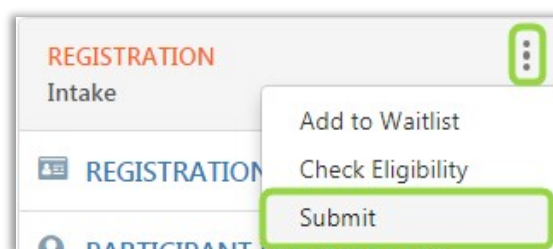
If the applicant is not eligible for the program, the below notice will appear, detailing the reason why the applicant is not eligible. The system will also alert you if required fields were not completed. Click on each link to go directly to the field to enter in missing information.

> (✕) Missing required fields.
> Please check the validation summary for more details.
>
> OK

> ❶ Missing Required Fields ∧
>
> 1. Please fill in these required fields:
>
> An Individual with a Disability?
> Are there activities the applicant cannot participate in?

After all information is complete, save the intake, click ⋮ and select **Submit.** The intake form is submitted to CVU for review and approval. The record can be rejected if any changes are required.

Department of
Youth & Community
Development

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 your workscope by clicking on 　?　 .

Alternatively, you may submit a ticket through the Help Center on the DYCD Connect homepage.