

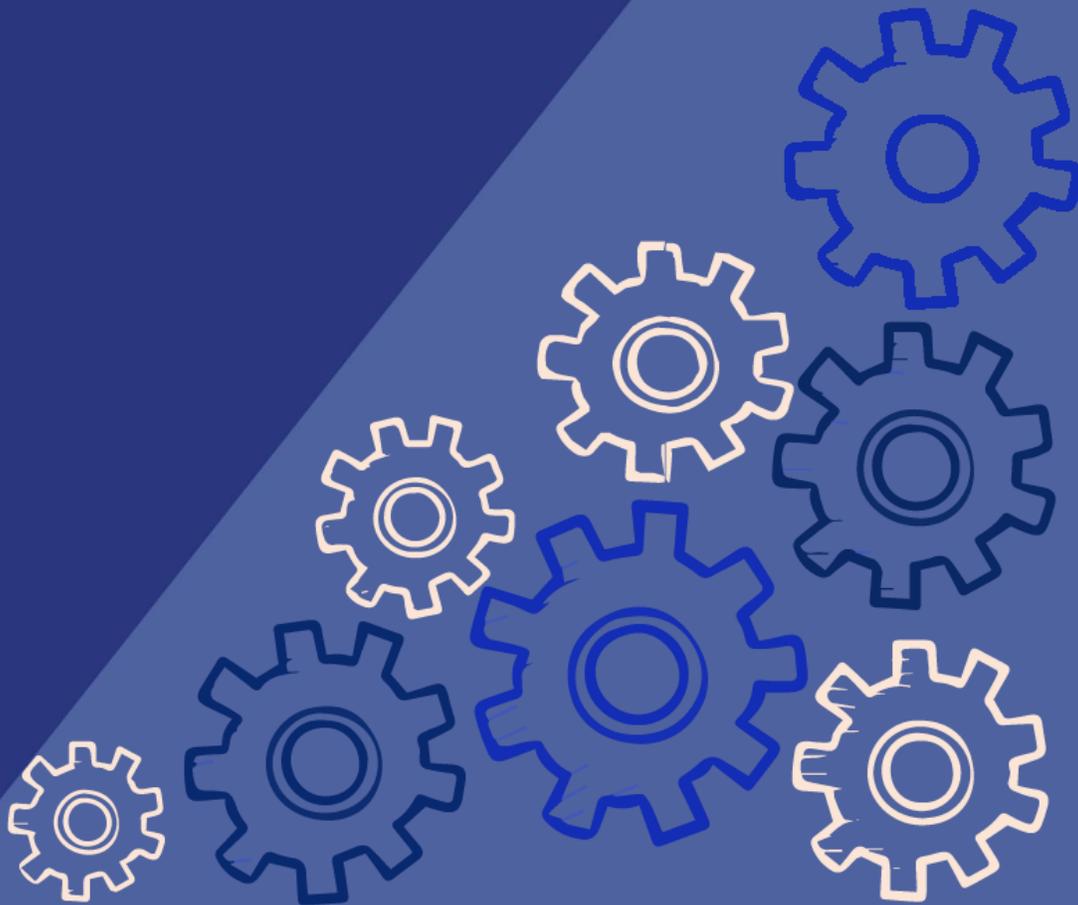


# **DYCD CONNECT**

*PARTICIPANT TRACKING SYSTEM:*

*COMPASS*

*Participant Intake & Registration*



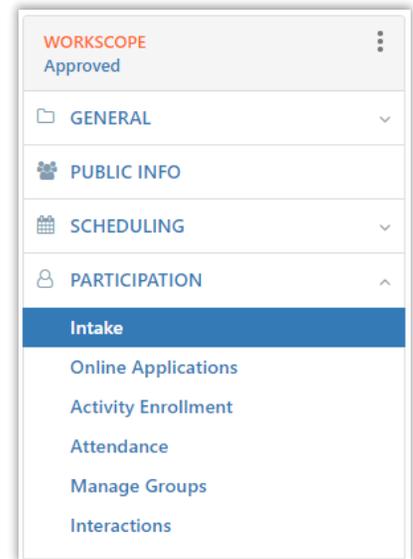
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# What is Intake?

Intake refers to the process of registering program participants in the Participant Tracking System (PTS). NOTE: Intake is distinct from Enrollment which refers to assigning registered participants to activity schedules for the purpose of taking attendance.

Intake is ongoing and begins as soon as the workscope is released to your CBO for completion. NOTE: DYCD does not have to approve your workscope before you begin to register participants.



## The Intake Section

To start the registration process, go to your 'Workscope' in PTS. From 'Workscope Switchboard,' navigate to 'Participation' and click 'Intake.' Here, you will find the list of both 'Completed' ("Enrolled") participants and 'In-Progress' Intakes.

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

Click on +New to start a new intake.

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

| 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... |

**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 Stages

Participants are placed in the following categories, depending on the stage of the intake process you have reached:

- **Accepted:** Participant meets the program’s registration criteria. NOTE: Only Accepted participants count towards your program’s registration numbers.
- **Intake:** Participant intake is *in progress*
- **Wait list:** Participant is currently on the program waiting list
- **Exited:** Participant has been *de-enrolled* and is no longer in the program

## Starting a New Intake

Prior to starting the process, make sure you have completed the participant’s ‘Universal Participant Intake’ Form. For the most recent version, go to the DYCD Connect Document Library. Before you complete the Intake form, click “+NEW” in the ‘Intake Section’ (Page 2) and follow the steps below.

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

## Participant Details

Start by entering 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.’

| 1. Enter Participant Details          |   |
|---------------------------------------|---|
| Workscope *                           | 125 -COMPASS Middle School-9/1/2019-6/30/2020 |
| Workscope Program Site *              | School Year - FY2020 - School of Hard Knocks  |
| First Name *                          | Noah  |
| Last Name *                           | Nickelson                                     |
| Middle Initial                        | --  |
| Date of Birth *                       | 9/9/2009                                      |
| Age                                   | 10  |
| Sex at Birth *                        | Male  |
| Social Security Number                | --  |
| <input type="button" value="SEARCH"/> |   |

## Duplication Check

When you click “Search,” DYCD Connect will perform a Duplication Check. If the participant is new, click ‘Add New Participant.’ If the participant was previously registered in the program, you have the option to click ‘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

If you are registering an existing participant, you may select either ‘Blank Application’ or ‘Copy Existing Intake.’ (NOTE: If you choose ‘Copy Existing Intake,’ it will allow you to carry over most of the details from the previous Intake into the current one.) Then, click “Start Intake.”

**3. Choose Application**

**Blank Application**

Start the intake with a blank application.

**Copy Existing Intake**

|                 |  |
|-----------------|--|
| Registration ID | REG-3454159212                                 |
| Intake Year     | 2020   |
| Intake Stage    | Exited   |
| Program Site    | School Year - FY2020 - School of Hard Knocks   |
| Workscope       | 125 - COMPASS Middle School-9/1/2019-6/30/2020 |

# Completing the Intake

## Intake Navigation and Sections

The 'Intake Switchboard' on the left side of the page lets you navigate through all the sections of the Intake process. Mandatory fields are marked with \* icon or say 'Required' in parentheses, and there is an 'Intake Menu Bar' at the top of the window. NOTE: Regularly save the information you enter by clicking "Save."

The screenshot shows the NYC Department of Youth & Community Development's Intake system. At the top, there's a navigation bar with 'Main Menu' and 'Intake > REG-3115505105 - E...'. Below this is an 'Intake Menu Bar' with buttons for 'SAVE', 'SAVE & CLOSE', 'PROCESS', 'EMAIL A LINK', and 'INTAKE FORM'. On the left is the 'Intake Switchboard' with a list of sections: 'REGISTRATION INFORMATION', 'PARTICIPANT INFORMATION', 'CONTACT INFORMATION', 'EDUCATION/WORK STATUS', 'HOUSEHOLD INFORMATION', 'HEALTH INFORMATION', 'CONSENTS', and 'NOTES & ATTACHMENTS'. The main content area displays 'Registration Information' for Ethan Jung, including fields like Registration ID (REG-3115505105), Start Date (9/16/2019), Age (11), and DOB (8/8/2008). A 'Workscope' section shows details for '-COMPASS Middle School-' with a progress of 9/1/2019-6/30/2020. A 'Workscope Registration Progress' chart shows 10% required registrations (1/10) and 0% over-registrations (0/100). A table below the chart provides a breakdown of registration counts.

| Registration Type                              | Count |
|--|-------|
| Required Registrations                         | 10    |
| DYCD Funded Registrations                      | 1     |
| Non DYCD Funded Registrations                  | 0     |
| Remaining Slots to Meet Required Registrations | 9     |
| Registrations in Progress                      | 1     |
| Registrations in Waitlist                      | 0     |
| Registrations Exited                           | 1     |
| Cumulative Registered to Date                  | 2     |
| Online Applications Pending Action             | 0     |

## Registration Information

Most details on this page will already be in the system, based on basic information entered in your 'Workscope,' but you must complete the following three fields marked with \* icon.

|                             |                 |
|-----------------------------|-----------------|
| Form Completed By *         | Parent/Guardian |
| Date Application Received * | 6/20/2017       |
| Enrollment Start Date *     | 9/11/2017       |

Enrollment Start Date refers to the date from which the applicant may participate in your program. Therefore, you must make sure it is correct. NOTE: Prior to this date, you cannot enroll the participant in activities or take attendance.

Workscope Registration Progress (also available on the 'Basic Information' page of your workscope) shows the progress towards meeting your program's Registration Benchmark.

### DYCD-Funded and Non-DYCD-Funded Participants

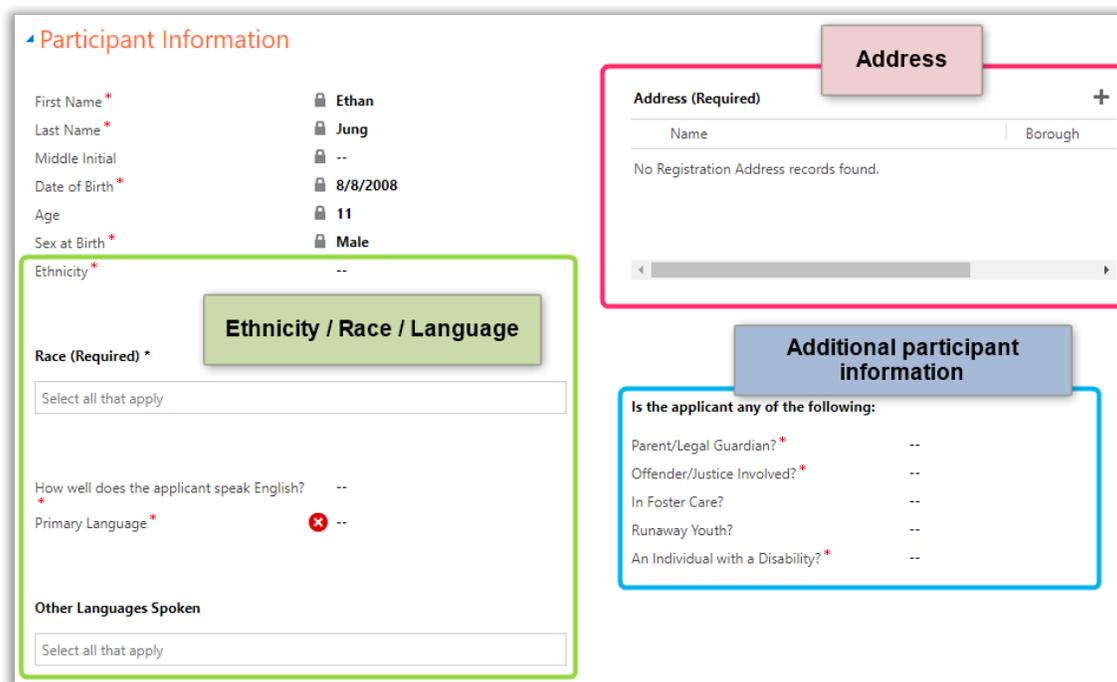
DYCD Funded?   

'DYCD-Funded?' refers to a participant funded *through your DYCD Budget*. Verify that this box is checked off to ensure that the participant will count towards DYCD requirements such as 'Rate of Participation' (RoP). NOTE: If the box above is unchecked, the following notification will appear:

 This registration is marked as non DYCD Funded. It will not count towards your enrollment and RoP goals.

### Participant Information

Here, you must enter the participant's demographic information and at least one address, as indicated on the 'Universal Participant Intake' Form. First, enter your responses to the Ethnicity, Race and Language questions.



**Participant Information**

First Name \*  

Last Name \*  

Middle Initial  

Date of Birth \*  

Age  

Sex at Birth \*  

Ethnicity \*

**Ethnicity / Race / Language**

Race (Required) \*

How well does the applicant speak English?

Primary Language \*  

Other Languages Spoken

**Address**

Address (Required)

No Registration Address records found.

**Additional participant information**

Is the applicant any of the following:

Parent/Legal Guardian? \*

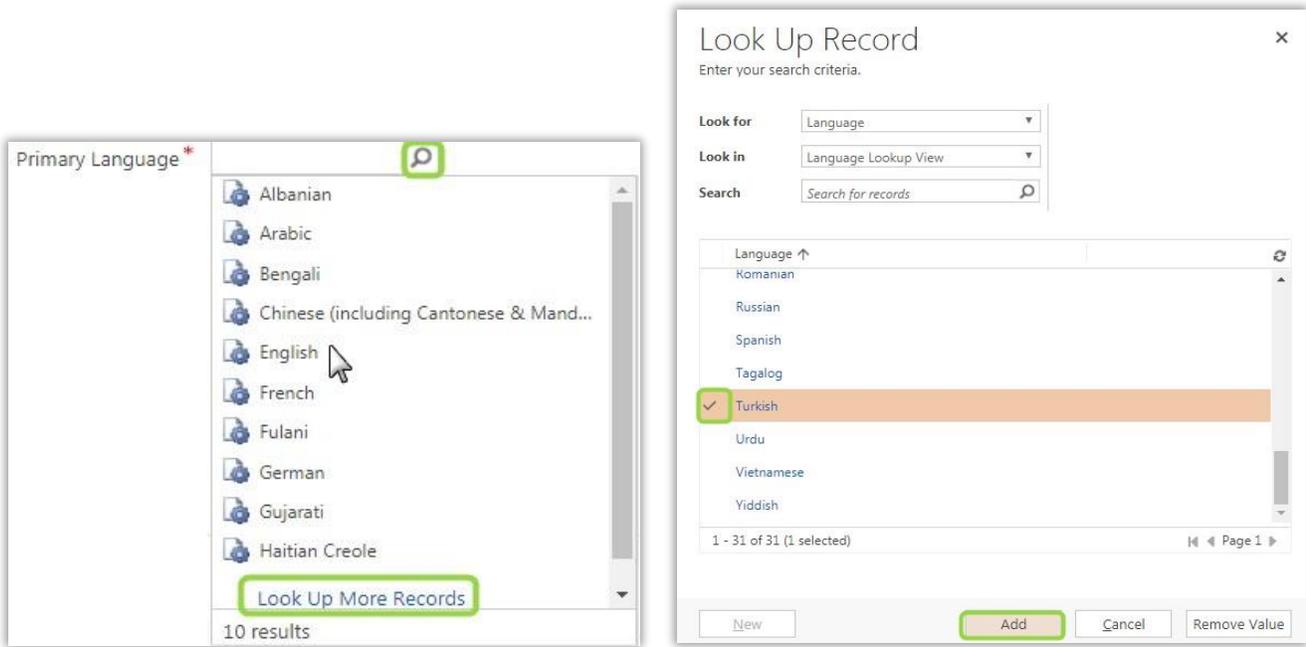
Offender/Justice Involved? \*

In Foster Care?

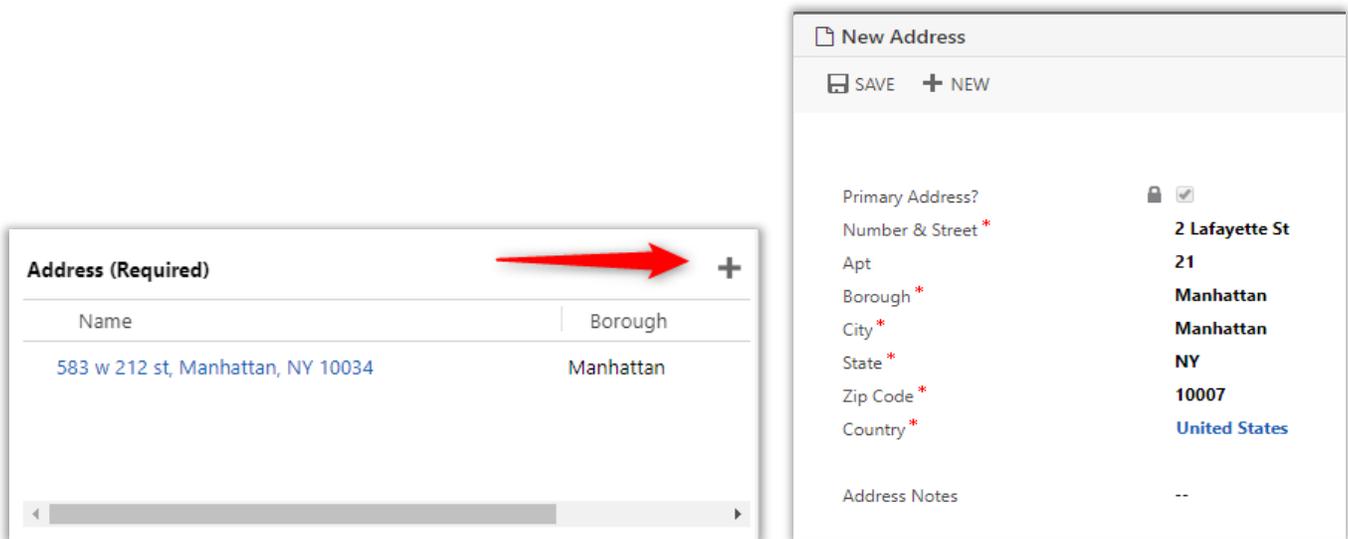
Runaway Youth?

An Individual with a Disability? \*

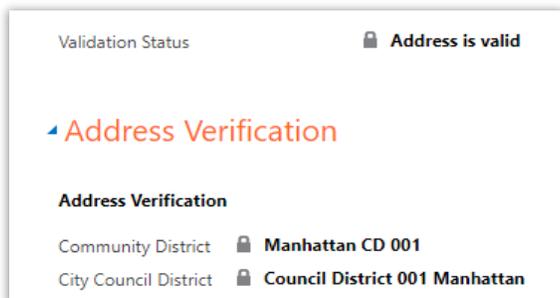
To answer Primary Language, hover your cursor over the field and click the magnifying glass icon to see the first 10 results, which will appear in alphabetical order. Select the participant's primary language if you see it listed. If you do not see it, you can use the Search Bar or click 'Look Up More Records' to scroll through the entire list of languages.



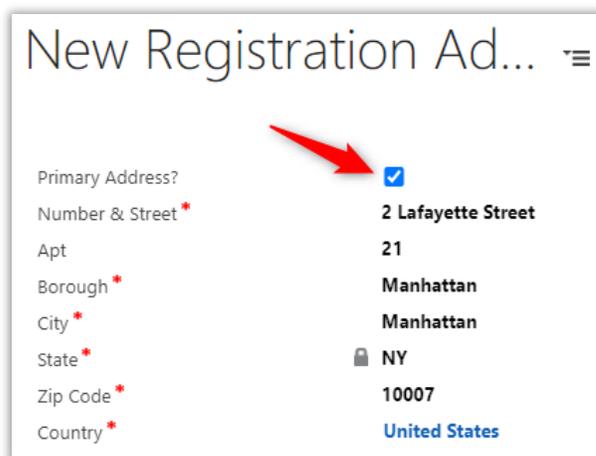
Next, in the Address Section, click the + icon to add a new address. When the overlay appears on your screen, enter the required information. Use 'Address Notes' to capture any additional information.



DYCD Connect automatically verifies if the address entered is valid. You can see the 'Verification Status' details at the bottom of the overlay. Click "Save" and close the overlay.

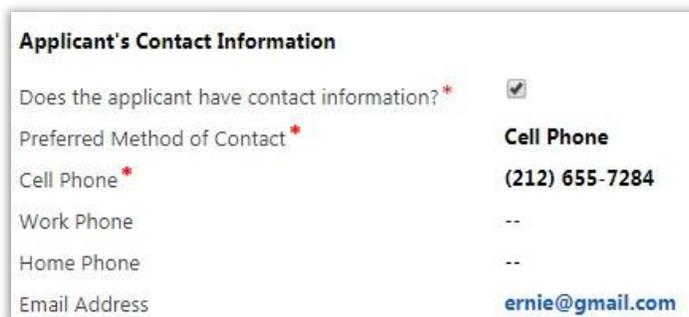


NOTE: You may enter more than one address. The first address entered is selected as the Primary Address. If you need to designate a different primary address, follow the above steps to add a new address, and make sure to check off the "Primary Address?" box.



### Contact Information

If the participant has provided contact information, enter this in the 'Applicant's Contact Information' section. If the participant has no contact information or is not old enough to have contact information, uncheck 'Does the applicant have contact information?' and move to the 'Parent/Emergency Contact' section.



At least one parent or emergency contact is required. To enter 'Parent/Emergency Contact' information, click the + icon.

| 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 |

When the overlay appears on the screen, enter the Contact Details, Contact Method, and Address. Make sure to indicate who is the Primary Contact. The first person entered is automatically checked off as the Primary Contact. When entering additional contacts, the Primary Contact? Box may be checked/unchecked.

**Contact Method**

|                               |                             |
|-------------------------------|-----------------------------|
| Preferred Method of Contact * | <b>Cell Phone</b>           |
| Cell Phone *                  | <b>(718) 111-1111</b>       |
| Work Phone                    | <b>(212) 333-3333</b>       |
| Home Phone                    | --                          |
| Email Address                 | <b>example@fakemail.com</b> |

**Contact Details**

|                               |                                     |
|-------------------------------|-------------------------------------|
| Primary Contact? *            | <input checked="" type="checkbox"/> |
| First Name *                  | <b>Michael</b>                      |
| Last Name *                   | <b>Thomas</b>                       |
| Is Parent/Guardian?           | <input type="checkbox"/>            |
| Relationship To Participant * | <b>Father</b>                       |
| May Pick-up Child?            | <input checked="" type="checkbox"/> |
| Notes                         | --                                  |

A Preferred Method of Contact and at least one contact number and/or email address is required for each parent/ emergency contact

In Address, if the contact lives at the same address as the participant, check 'Same as Participant' to copy the address entered in the Participant Information section. Otherwise, enter the address information. Click "Save" and close the overlay.

**Address**

|                     |                                     |
|---------------------|-------------------------------------|
| Same as Participant | <input checked="" type="checkbox"/> |
| Street              | <b>583 w 212 st</b>                 |
| Apt                 | --                                  |
| Borough             | <b>Manhattan</b>                    |
| City                | <b>Manhattan</b>                    |
| State               | <b>NY</b>                           |
| Zip Code            | <b>10034</b>                        |
| Country             | <b>United States</b>                |

In addition, if there are additional people who can OR cannot pick up the participant, the details should be added to the 'Additional people who MAY or MAY NOT pick-up the child' grid, as indicated in the example below.

**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

Enter the applicant's Student Type, Current Work Status, and Grade.

**Education/Work Status**

|                       |                           |
|-----------------------|---------------------------|
| Student Type *        | <b>Full-Time Student</b>  |
| Educational Level     | <b>Elementary School</b>  |
| Current Work Status * | <b>Employed Full-Time</b> |
| OSIS/Student ID       | --                        |

**Current Grade \***

- (None)
- Pre-K - Elementary School
- K - Elementary School
- 1st - Elementary School
- 2nd - Elementary School
- 3rd - Elementary School
- 4th - Elementary School
- 5th - Elementary School**

If the applicant is a full-time student, you must provide the student's 'School Information' by clicking the + icon in the grid.

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

|               |             |
|---------------|-------------|
| School Name ↑ | School Type |
|---------------|-------------|

No Registration School records found.

An overlay will appear on the screen. Select the 'School Type.' If you choose 'Public School,' you must select from the DOE list of Public Schools. Use the 'Search' bar to find and select the correct school. To quickly find the school, type a \* before a keyword or number in school (see example below). Alternatively, click 'Look Up More Records' for the full list of DOE Schools.

Public School \*

**Tip: Add a \* to your search term to broaden your results**

**\*214**

- P.S. 214
- P.S. 214 Cadwallader Colden
- P.S. 214 Michael Friedsam

**Look Up More Records**

3 results

When selecting a DOE school, the address will auto-populate based on the school selected. Click "Save" and close.

## Household Information

All 'Household Information' questions require a response, and at least one Source(s) of Household Income is required. Note the 'Decline to Answer' option for 'Sources of Household Income' and 'Total Household Income.'

|   |                        |   |   |  |
|---|------------------------|---|---|--|
| Head of Household Type *  | Single Parent – Female | Total Household Income *                  |   |  |
| Housing Type *  | Rent                   | <input type="radio"/> (None)              | <input type="radio"/> \$24,601 - \$28,780 | <input type="radio"/> \$60,001 - \$70,000          |
| Household Size *  | Four                   | <input type="radio"/> \$0                 | <input type="radio"/> \$28,781 - \$32,960 | <input type="radio"/> \$70,001 - \$80,000          |
| <b>Sources of Household Income (Required)</b>   |                        | <input type="radio"/> \$1 - \$12,060      | <input type="radio"/> \$32,961 - \$37,140 | <input type="radio"/> \$80,001 - \$90,000          |
| <input type="checkbox"/> Employment Wages X <input type="checkbox"/> Employment Tax Credit X <input type="checkbox"/> Childcare Voucher X |                        | <input type="radio"/> \$12,061 - \$16,240 | <input type="radio"/> \$37,141 - \$41,320 | <input type="radio"/> \$90,001 - \$100,000         |
| Select all that apply   |                        | <input type="radio"/> \$16,241 - \$20,420 | <input type="radio"/> \$41,321 - \$50,000 | <input type="radio"/> \$100,000+                   |
|   |                        | <input type="radio"/> \$20,421 - \$24,600 | <input type="radio"/> \$50,001 - \$60,000 | <input checked="" type="radio"/> Decline to Answer |

## Health Information

Answer the questions based on information provided by the participant. For most questions, additional information will be needed if you enter 'Yes.'

Does the applicant have any allergies? (food, medication, etc.)

**Yes**

Please provide list of allergies \*

**tree nuts, milk**

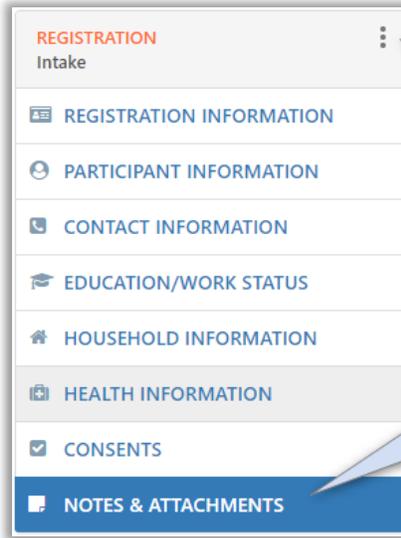
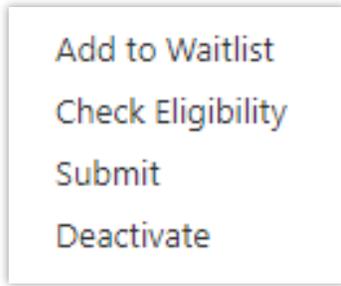
## Consents

- Consents must be completed for all participants
- 'Consent to Participate/Verification of Information Provided' must be confirmed before you can submit the Intake form. For all other consents, you must enter 'Yes' or 'No' (see example below).
- COMPASS Middle School and COMPASS High Programs: These programs must also complete 'Parent Consent for Participation Data Collection.'

|   |            |
|---|------------|
| <b>General Program Consents</b>                               |            |
| Consent to Participate/Verification of Information Provided * | <b>Yes</b> |
| Participant may travel home alone *                           | <b>No</b>  |
| Consent for Emergency Medical Treatment *                     | <b>Yes</b> |
| Participant Consent for Photo/Videotaping *                   | <b>Yes</b> |
| Participant consent for use of original work *                | <b>Yes</b> |

## Reviewing + Submitting the Intake

Once you have completed the Intake Form, click “Save” in the Intake Menu Bar. There are several options for reviewing and submitting the intake form.



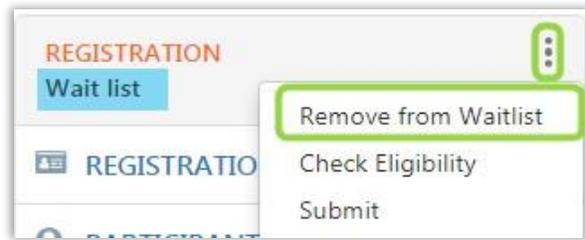
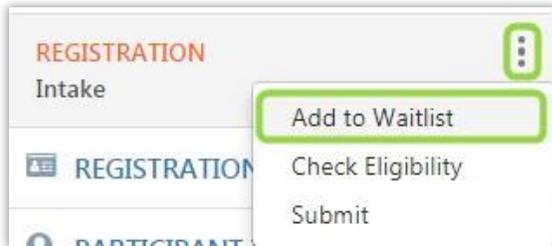
Click on this icon to see options to review and finalize the intake.

Optional: Use this section to add notes and/or attach a document related to this intake.

### Add to Waitlist

If you want to add the participant to the waitlist, you can do this, at any time, by clicking the  on the ‘Intake Switchboard’ and selecting ‘Add to Waitlist.’ You must provide a first name, last name, date of birth, and an address. After you enter the details, the ‘Registration’ list on the ‘Intake Switchboard’ will update from ‘Intake’ to ‘Waitlist.’

To remove the participant from the Waitlist, click the “three dots” icon and select ‘Remove from Waitlist.’ To register the participant, follow the steps set out in the next section.



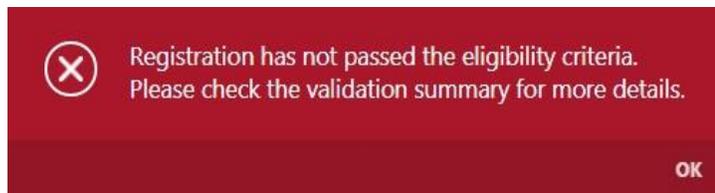
### Check Eligibility

Each DYCD Program has its own eligibility criteria. At any point during the Intake process, you can check whether the participant is eligible, based on the information entered. From the Intake Switchboard, click the three dots icon and ‘Check Eligibility.’

If the participant is eligible based on the information entered, you will see the following confirmation message:



If the applicant is not eligible based on the information entered or information relating to eligibility criteria is missing, you will see the following rejection message:



A Validation Summary will also appear at the top of the Intake window with additional information. For example:

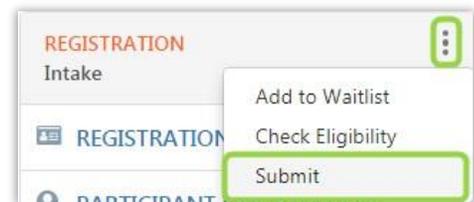


### Deactivate an Intake

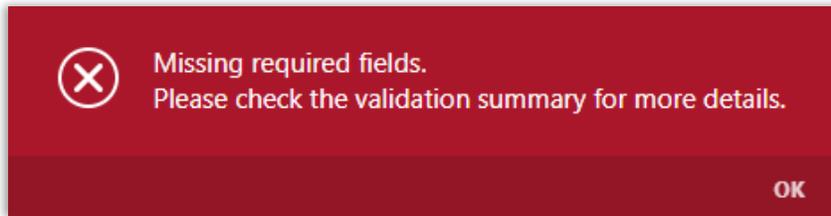
Except for participants with attendance, who must be [Exited](#), you may deactivate (i.e., delete) an Intake created in error.

### Register the Applicant

When you have completed the Intake, you register the participant by clicking the "three dots icon" on the Intake Switchboard and selecting 'Submit.' The system will perform an eligibility check.



If the applicant is not eligible for the program, the following notice will appear:



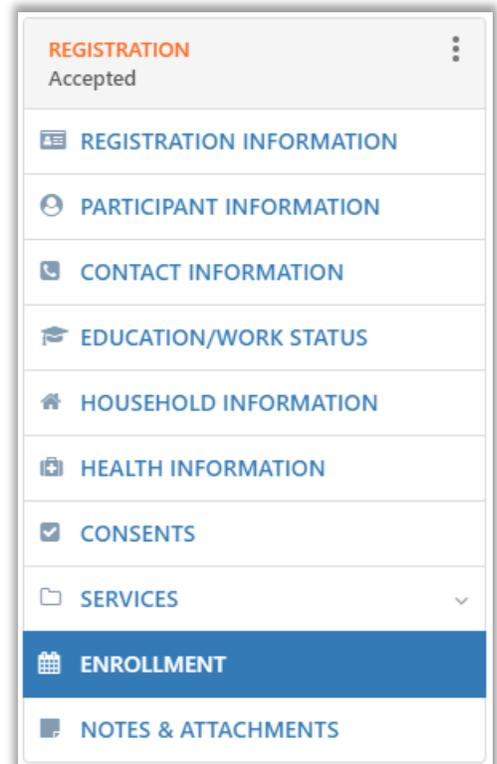
The system will also alert you if any required fields were not completed. Click on each link to go directly to a field where you need to enter missing information.



After all the information is complete, make sure to save your responses in the Intake, and then click the three dots icon to 'Submit' the form. If the participant passes the eligibility check and all required fields have been completed, the Registration Stage will update to 'Accepted,' and you will see the following message:



Once a participant is Accepted and the workscope is approved, you can proceed with enrollment. You can do this from the Activity Enrollment or Manage Groups sections of the Workscope, or directly from the Enrollment page that will now be visible on the Intake Switchboard.

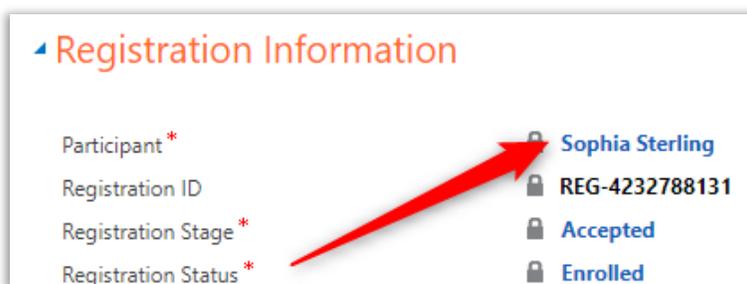


# Updating Participant Information

As the program period progresses, a participant may leave the program or some details may need to be amended. To make updates, open a participant's intake and correct the information. Steps you must take to perform common types of changes are summarized below:

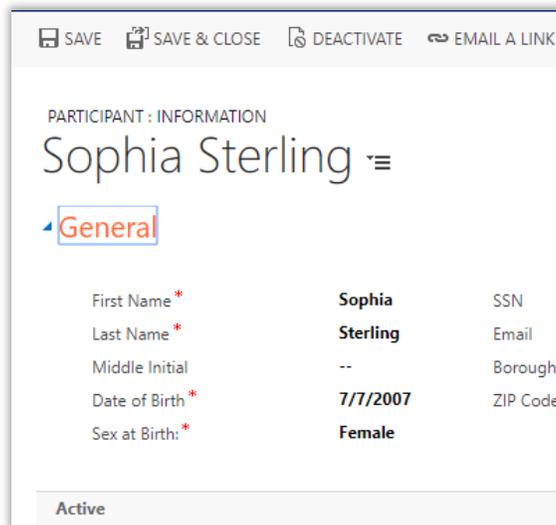
## Changing Name / Date of Birth / Gender

**Step 1:** On the Registration Information page, click on the participant's name in blue text.



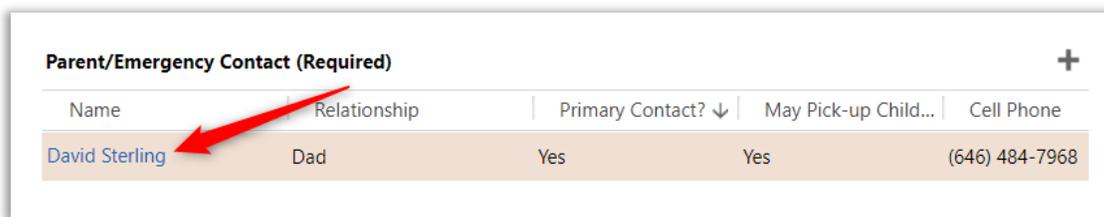
**Step 2:** When the new browser window opens, make the necessary changes, and then click "Save & Close."

**NOTE:** You will not be able to make revisions if the participant is registered at another program site during the same period (Summer, School, or Fiscal Year). Reach out to the DYCD Connect Help Center for additional assistance.



## Changing Parent / Emergency Contact(s)

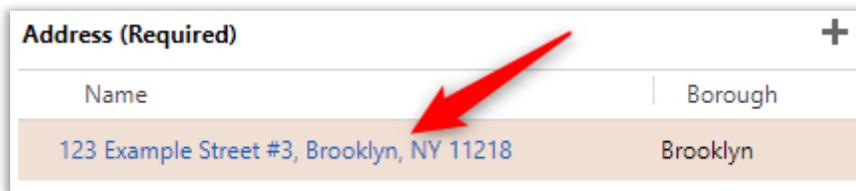
**Step 1:** On the 'Contact Information' page, click the existing contact's name to open the Parent/Emergency Contact overlay.



**Step 2:** Update the information and click “Save.” Alternatively, click “Deactivate” to delete the emergency contact.

### Changing Address

**Step 1:** On the Participant Information page, click on the existing address record to open the address overlay.



| Address (Required) <span style="float: right;">+</span> |          |
|---|----------|
| Name  | Borough  |
| 123 Example Street #3, Brooklyn, NY 11218               | Brooklyn |

**Step 2:** Update the information and click “Save.” Alternatively, click “Deactivate” to delete the emergency contact.

The steps to revise other sections of the intake form are similar to those described above. When you have completed the necessary changes, always click “Save & Close” in the Intake Menu Bar.

### Exiting a Participant

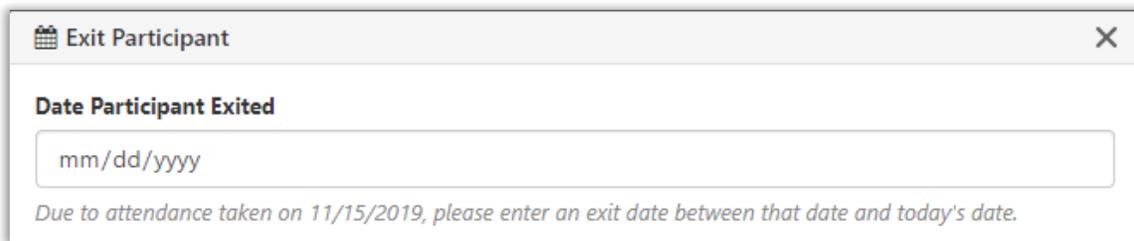
If a participant is no longer part of the program, you may exit the participant in order to de-enroll them from your program. All attendance accumulated by the participant prior to their exit date will count towards your program’s participation goals.



REGISTRATION Accepted ⋮

Exit Participant

Click on the three dots icon at the top of the Intake Switchboard of an Accepted participant, and select “Exit Participant.”



Exit Participant ✕

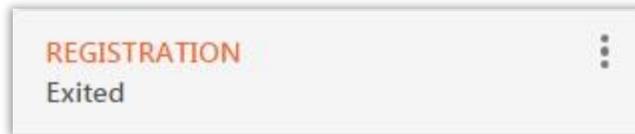
**Date Participant Exited**

mm/dd/yyyy

*Due to attendance taken on 11/15/2019, please enter an exit date between that date and today's date.*

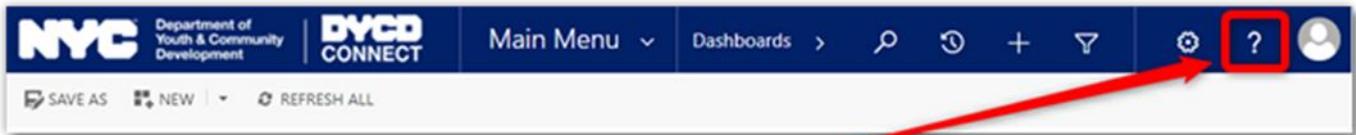
The system will tell you the most recent date of attendance for this participant. Enter the 'Date Participant Exited,' which must be a date after the last day of attendance recorded. Then, click "OK."

Once exited, the 'Registration' stage will be updated to 'Exited.' The participant cannot re-register through the same Intake. If the participant returns to the program, you must submit a new Intake form reflecting a new Enrollment Start Date. However, following the steps on Page 4, you will be able to import some information from the previous Intake.



# 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.

### 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**  **last name**

**phone**  **email**

**organization**

**program area**  **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:**