NYC Department of Youth & Community Development

DYCD CONNECT

PARTICIPANT TRACKING SYSTEM:

Workforce Innovation & Opportunity Act Workscope Development Guide

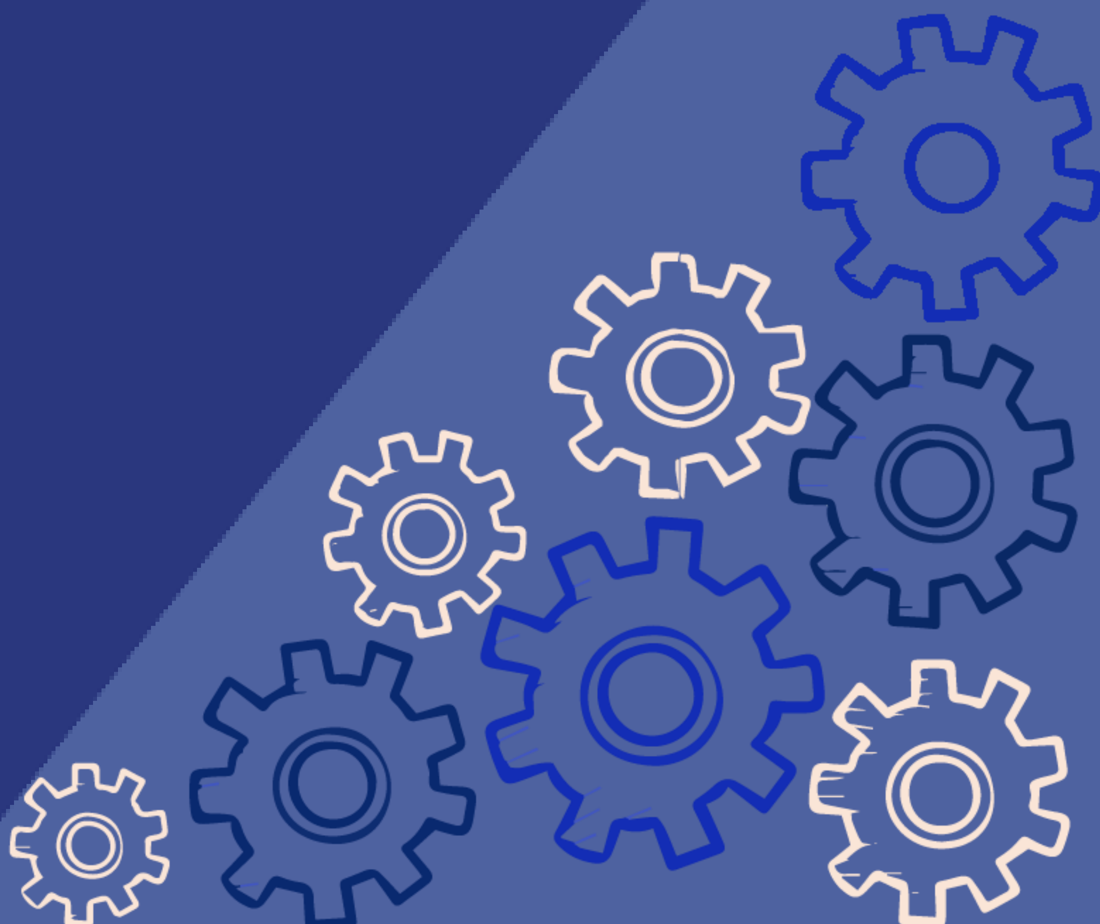


Table of Contents

Key Terms

Understanding the Workscope

Workscope:	an entity on DYCD Connect used to store data specific to a DYCD program that takes place throughout a program period
Switchboard:	a navigation panel that enables you to transition between sections of an entity that contains data classified into multiple sections

Completing the Workscope

Validations:	the minimum requirements that must be met to submit an entity

Professional Development

Open:	term used to designate that participants will attend program on the day of the professional development
Closed:	term used to designate that participants will not attend program on the day of the professional development
Deactivate:	deleting an item on DYCD Connect

Scheduling Section

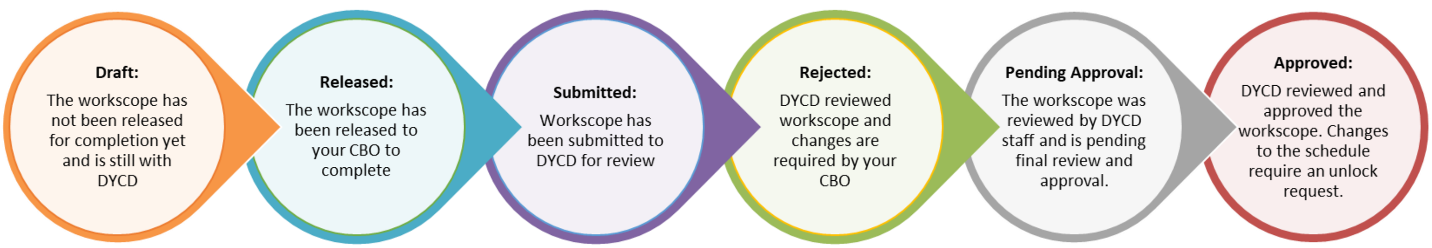
Regular Programming:	refers to the set of re-occurring schedules or classes in your workscope
Non-DOE Holiday:	refers to whether the holiday you are creating is an approved Department of Education (DOE) holiday
Open Holiday:	refers to whether your program will offer programming on this day
Power Search:	a search feature, built into all PTS search bars, that is initiated with a * and a keyword or key sequence ex. *Director
Total Hours:	the amount of activity hours a schedule provides to the workscope

Understanding the Workscope

The workscope is your program's plan for a specific period of time. WIOA programs complete and submit a workscope each fiscal year. It is reviewed and approved by your DYCD Program Manager. The workscope is the center of the DYCD Connect Universe. Nearly all work your program will be doing in DYCD Connect is connected to your workscope.

How will I know when my workscope is ready to complete?

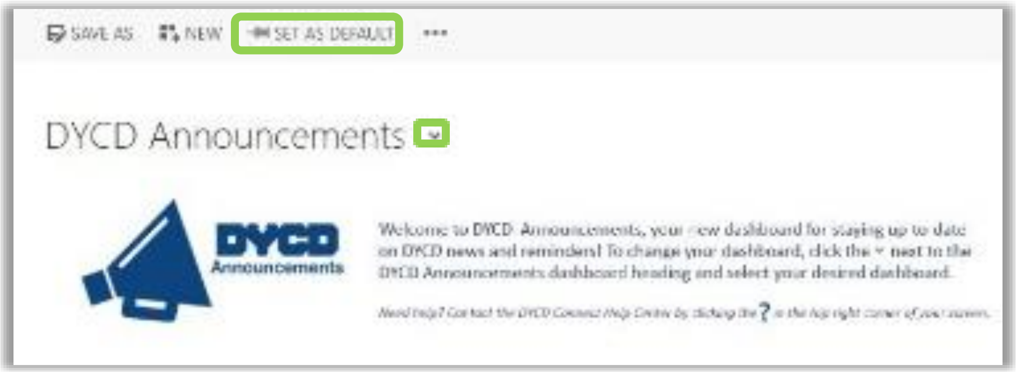
The workscope transitions through multiple stages before it is approved. Initially, providers receive the workscope in the Released stage. Providers must complete data entry in several sections of the workscope and then submit it to DYCD for review by DYCD Program Managers. After reviewing, the workscope will be returned to providers in the approved stage or rejected with rejection notes. The workscope should be approved before on-site programming begins for the program year.



NOTE: there is an automated/system-generated email that is sent to any users with access to the workscope when the workscope is released.

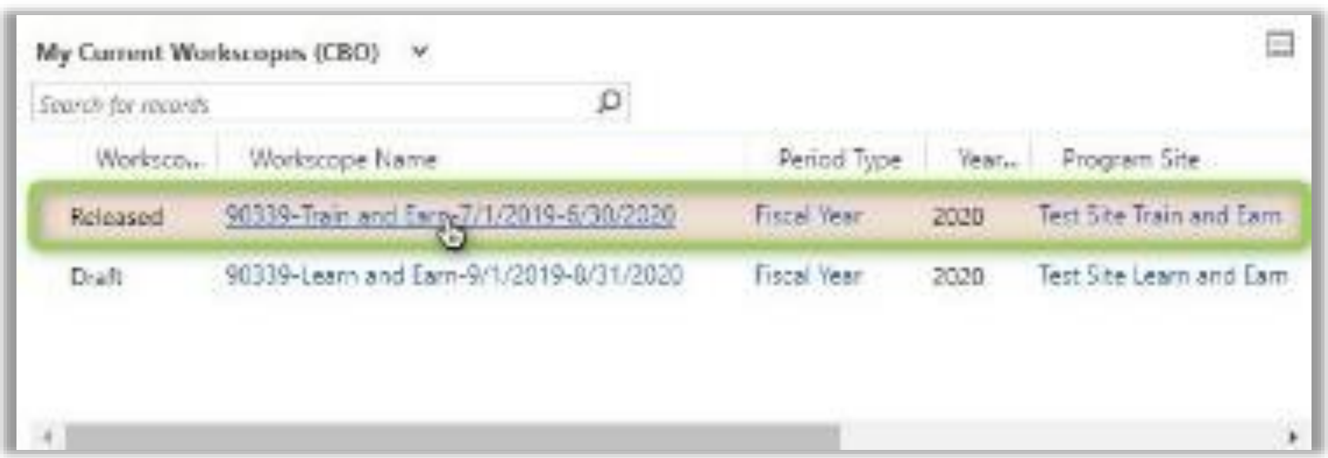
Navigating to Your Workscope

You may log onto the Participant Tracking System (PTS) using your DYCD Connect account from the DYCD Connect Homepage. Upon logging into PTS, the first screen you should see is the 'DYCD Announcements' page. This dashboard provides important news and reminders from DYCD.



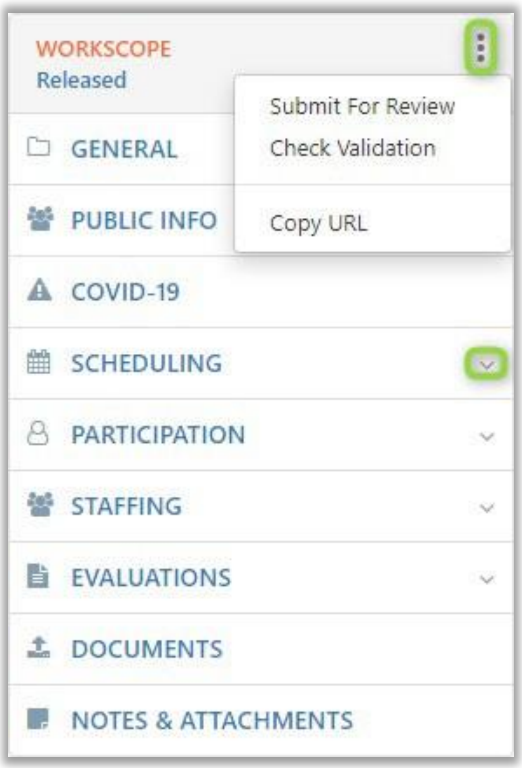
You may access your released workscope by navigating to the ‘WIOA PTS Dashboard’ in PTS/EMS.

1. Click on next to the title of the dashboard at the top left of the page.
2. Click on ‘WIOA PTS Dashboard’ from the drop-down options.
3. Click on the Workscope Name to open your workscope.



NOTE: If your workscope does not appear in the list, make sure you have been assigned access by a Provider Admin at your CBO. Additional information is available in the [User Access Guide](#).

The Workscope Switchboard



Upon opening the workscope, you will see a navigation pane on the left side of your screen. This is called the workscope switchboard. It will help you navigate through the various sections of the workscope.

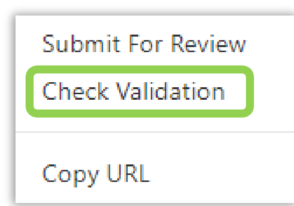
Key Buttons

Triggers options to submit and review the workscope

Toggles additional sub-sections of the workscope

Completing the Workscope

When your workscope is released, providers must complete data entry and meet the minimum program requirements or workscope validations. This may be reviewed anytime by clicking on from the workscope switchboard and "Check Validation". At a minimum, WIOA providers must complete the Program Design, Partnerships, Scheduling and Staffing sections to submit the workscope.

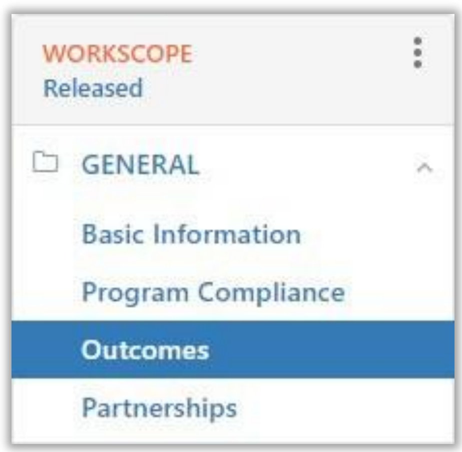


Workscope Validation Summary Sample

NOTE: Your DYCD Program Manager may request additional information beyond what is listed in the workscope validations. Consult with your Program Manager for any questions about filling out the workscope.

Completing the General Section

In the General section of your workscope, you must complete the Outcomes sub-section.



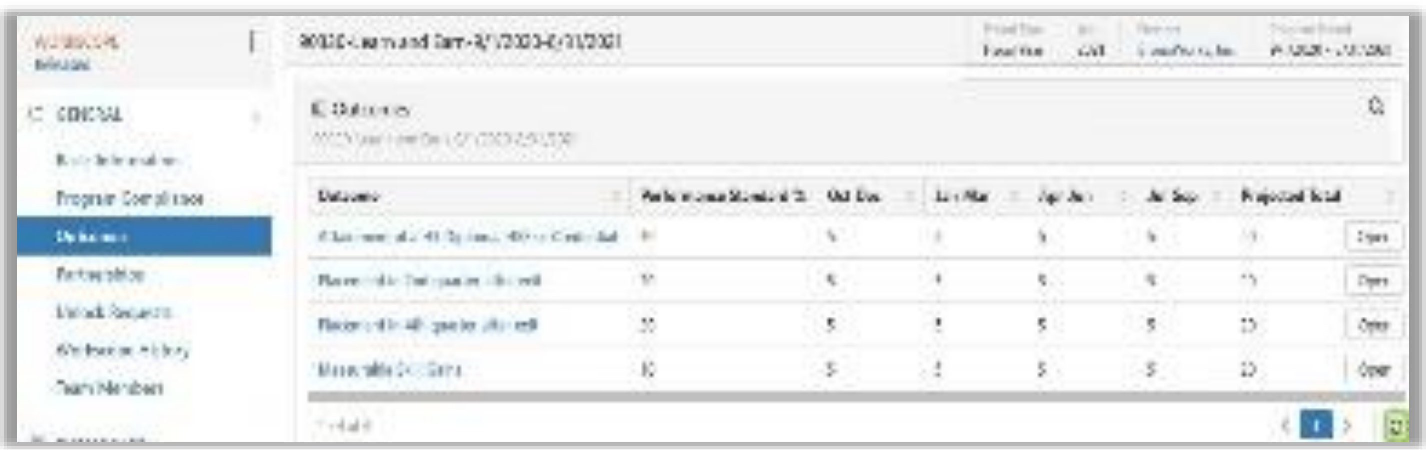
Adding Projected Outcomes

The Outcomes sub-section is used to enter your projected outcomes for the year in quarters.

Step 1: From the workscope, navigate through General>Outcomes.

Step 2: Click on each field to complete. Then, SAVE & CLOSE. Repeat for each outcome.

Step 3: Click the refresh icon at the bottom right to manually refresh the table.

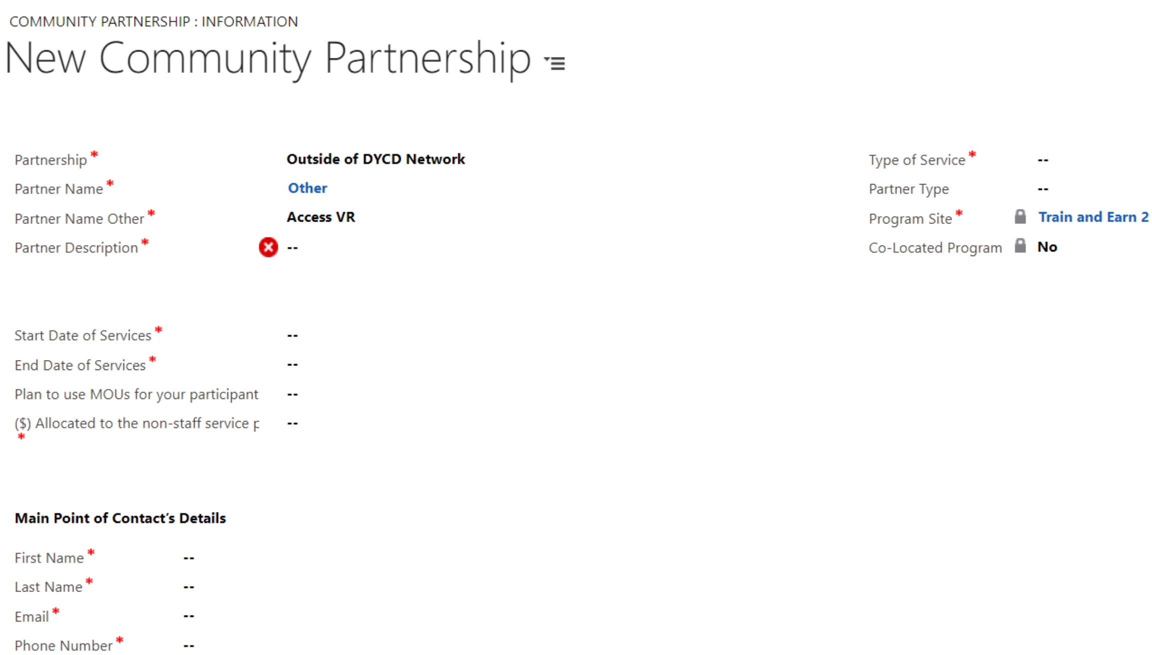


Adding Partnerships

The partnerships section of the workscope allows you to list consultants, subcontractors and in-kind partners you collaborate with to provide quality programming. Partners may be from within or outside of the DYCD network.

Step 1: From the General tab, click on Partnerships and then click at the top right of the Partnerships table.

Step 2: Select the Partnership type from the dropdown options. If you select **Outside of DYCD Network** and cannot find the Partner from the list; select "Other" and then type the Partner Name. Finally, type a brief description of services provided in the partnership description.



Step 3: Complete the rest of the required (*) data entry fields. Click "Save & Close" to create and add the Partner.

Step 4*: **For Within DYCD Network Partners,** select your partner from the DYCD Network. Click "Save" at the top of the table.

Do note: some partnerships, like Access VR, must be added to your workscope before it can be approved

Completing the Scheduling Section

In the Scheduling section, providers must add Activities and Schedules to reflect all program offerings at your program site to participants. Activities store programmatic data to help DYCD understand what happens in your program and why. Activities must be scheduled in accordance with your regularly occurring classes. Together, all the activities and schedules created on the workscope define your regular programming.

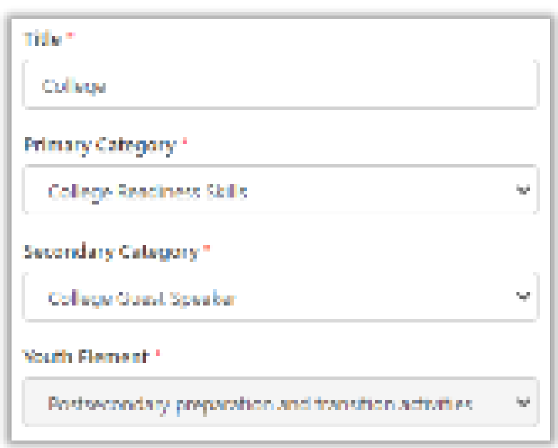
Adding Activities to the Workscope

Activities are used to store programmatic data on DYCD Connect. The data stored largely aims to answer the questions, “What happens in your program and why?” The Activities sub-section is located under Scheduling.

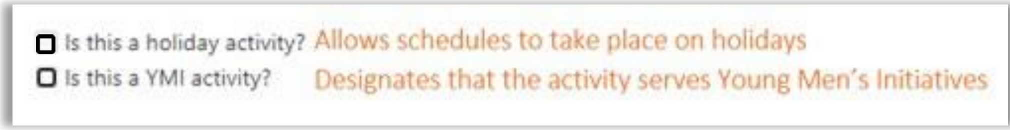
Step 1: From Scheduling, click on Activities and then click + NEW

.

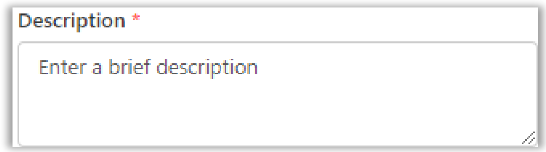
Step 2: Type in a Title for your activity and select the appropriate Primary Category & Secondary Category. If you have questions about whether your activity fits in a certain primary category, then please contact your DYCD Program Manager for guidance. The Youth Element will be auto completed by the system.



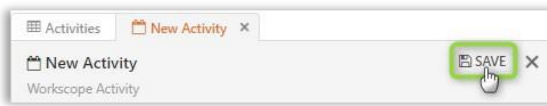
Step 3: Set any special designations for the activity, if applicable. (*If it is a holiday activity, the checkbox must be selected before any schedule are added as the date of the schedule sets automatically)



Step 4: Descriptions should be 1-3 sentences stating what participants will do and the goal of the activity. Make sure the description aligns with the selected primary category.



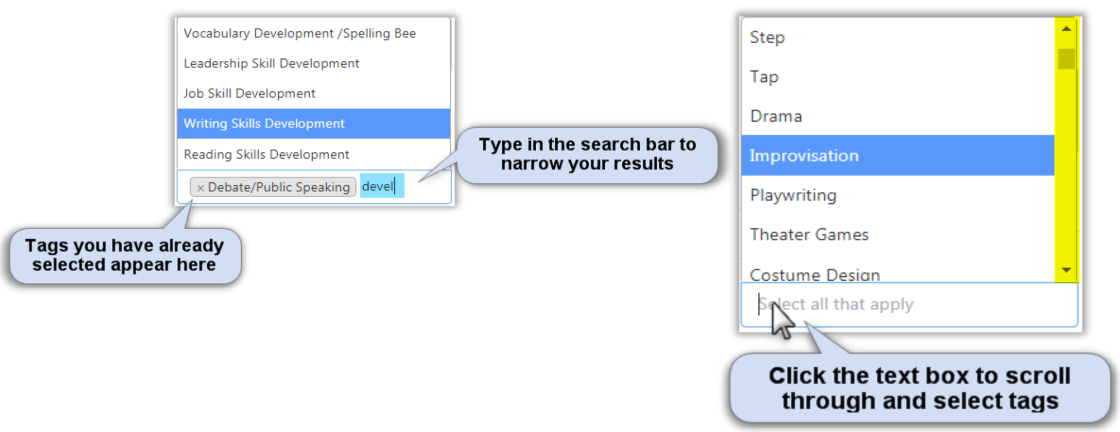
Step 5: Click SAVE at the top of the page and then add Tags to your activity at the bottom of the page.



Step 6: After saving the activity add Tags to the activity.

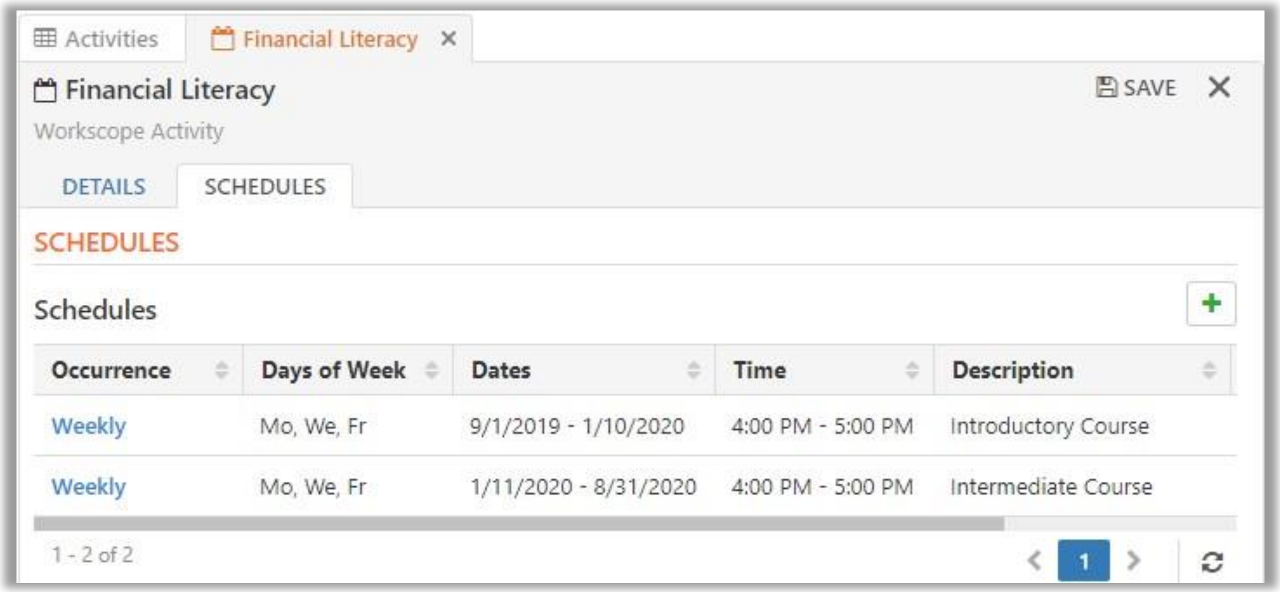
What is a Tag?

A tag is a descriptive word or phrase that provides additional details about an activity. This additional information is used to plan events and help DYCD conduct targeted outreach for special initiatives and pilots. It is recommended to select 2-3 tags per activity. *(*Tags make activities searchable on discoverDYCD and will be displayed under activities/services sections*)



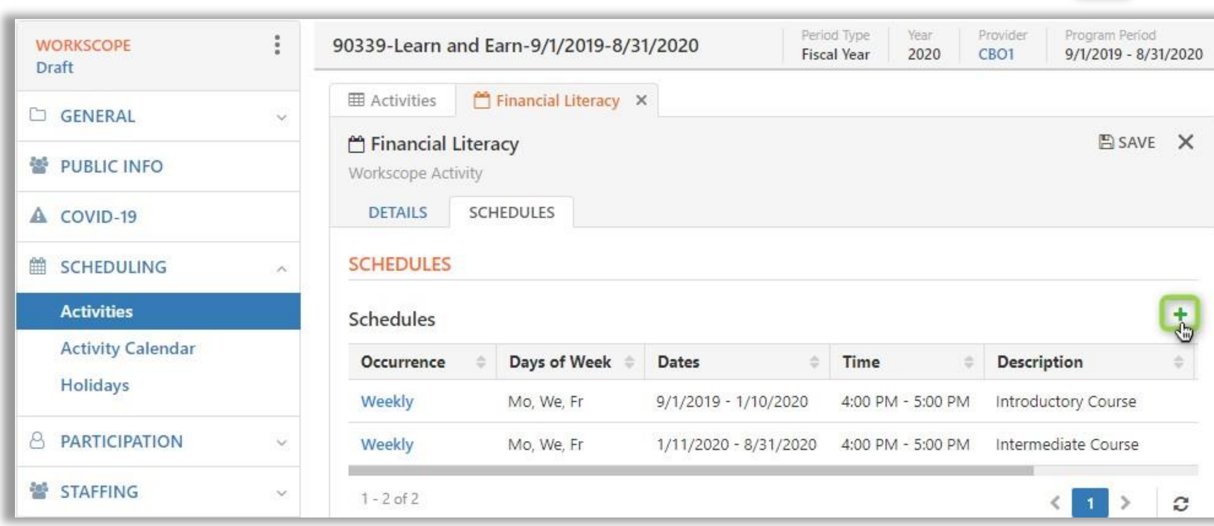
What is a Schedule?

Schedules are associated with activities and represent your on-site programming on DYCD Connect. They define when an activity will take place, what grades will attend the schedule, and the maximum number of participants allowed for enrollment into a schedule.



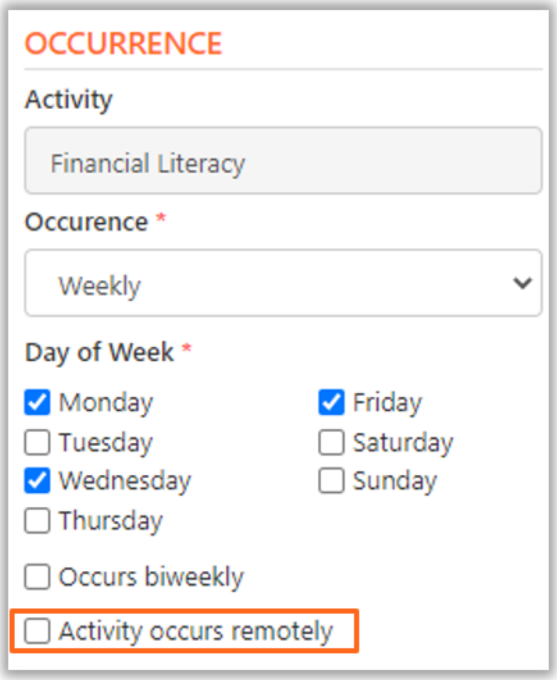
Multiple classes for an activity should be represented by additional schedules added to a single activity. A unique schedule should be added for unique days/times the activity occurs and for unique participants with identifying schedule descriptions.

Adding a Schedule to an Activity

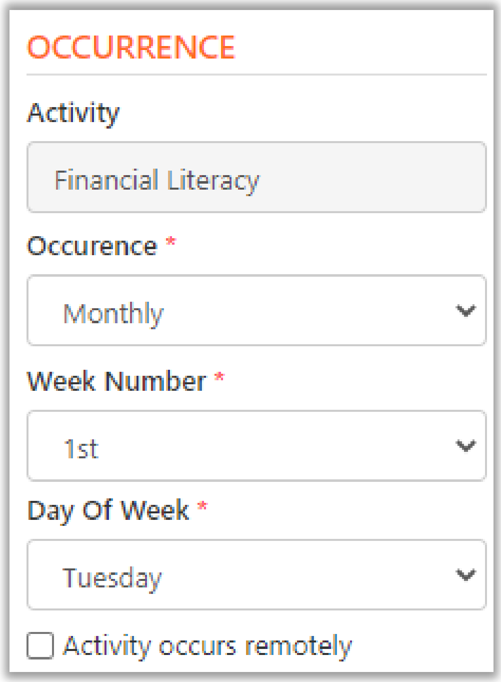


Step 1: From the Schedules tab of the activity that you would like to schedule, click +.

Step 2: Select the schedule [Occurrence]() from the drop-down options.

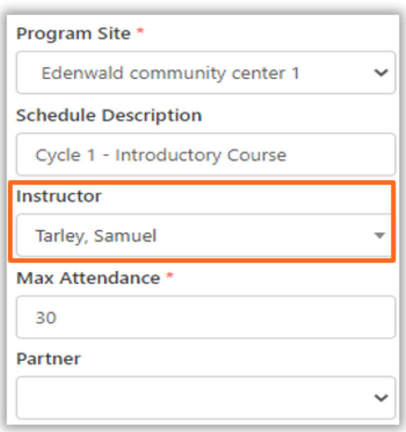


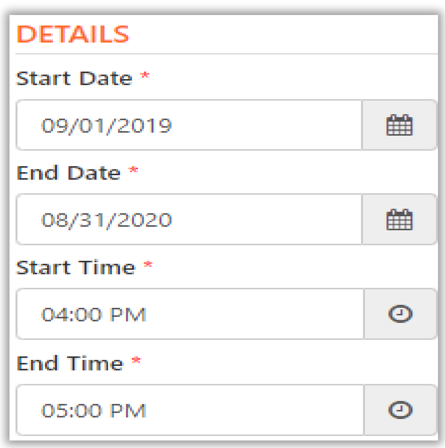
For a weekly occurrence you must also set the days of the week the schedule meets. *(*indicate if activity occurs remotely)*



For a monthly occurrence you must also select the week number and day of the week.

Step 3: Complete the details section by clicking on the respective fields and typing in the data or selecting from the drop-down options. *(*be sure to identify the instructor)*



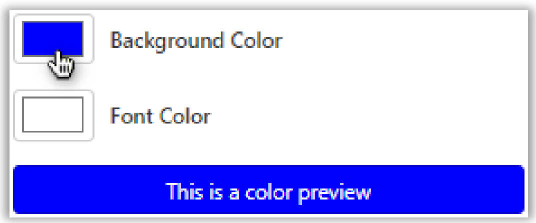


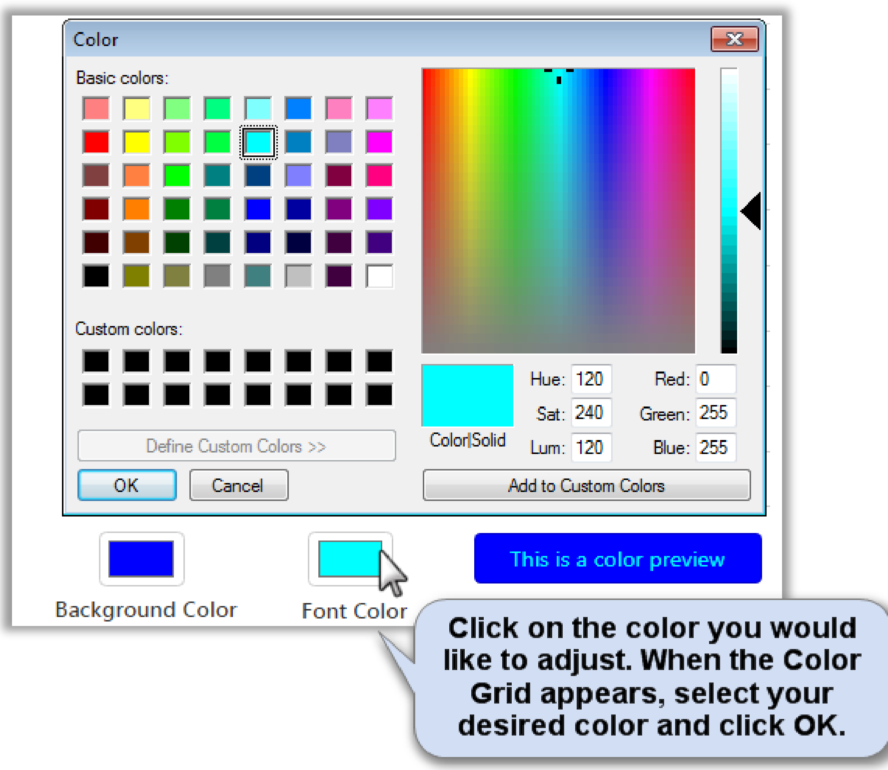
Step 4: Add the **Max Attendance** for the schedule.

We highly recommend adding a **Schedule Description** as they help differentiate between schedules associated with the same activity.

Step 5 (Optional): Color Code your schedule.

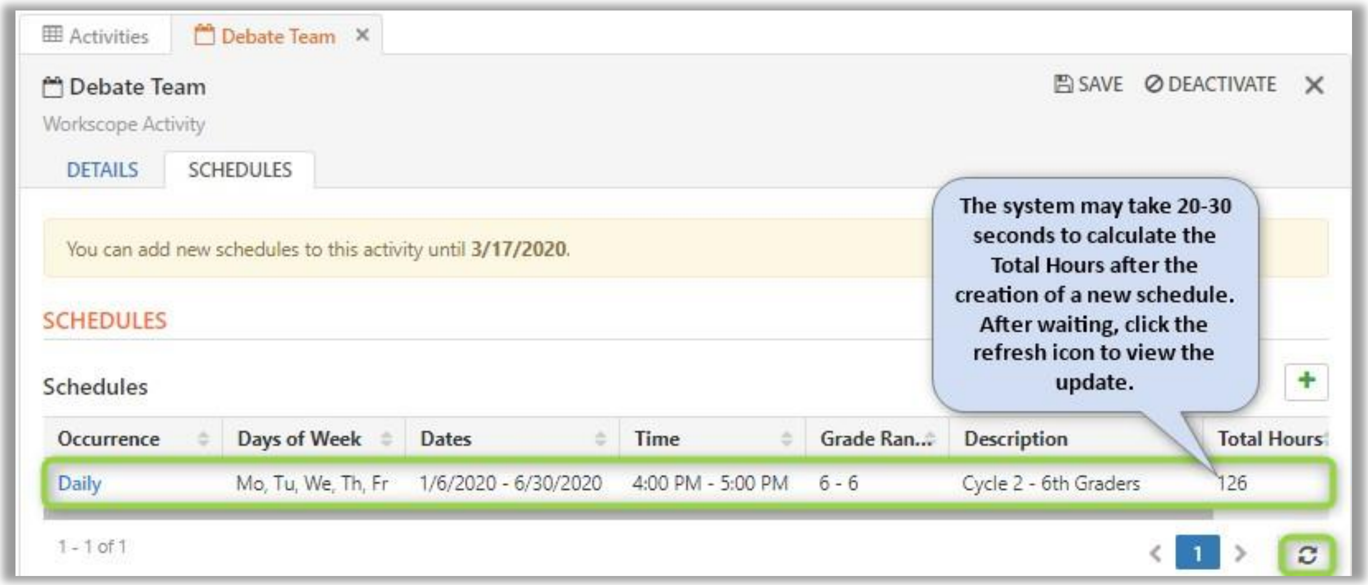
This optional feature allows you to color-code the appearance of your schedules on the activity calendar and in reports. Click on a colored box to load the color options.





Step 6: Click “Save” at the top right of the Workscope Activity Schedule page & confirm the schedule.

Your schedule will appear in the Schedules tab of the workscope activity and displays **Total Hours**



Completing the Staffing Section

The Staffing section of the workscope holds all information related to staff, including your staffing plan, staff names and contact information, clearance dates, and contacts for your program.

Staffing Plan

The staffing plan provides an outline of staff associated with your program. This plan should mirror the budget submitted in HHS Accelerator, the Citywide budgeting platform. You also have the opportunity to add any additional staff not listed on the budget (e.g.: volunteers or staff not paid through your DYCD budget). You must first add titles to your staffing plan and then associate provider contact information to identify everyone operating your program in their respective roles.

Staffing Requirements

# Staff	Title ↑	Requirement	Staff Type	Hou
1	Accountant/Bookkeeper	Recommended	Full-time Staff	
1	Administrative Assistant	Recommended	Full-time Staff	
1	Administrator	Recommended	Full-time Staff	
1	Case Manager	Required	Full-time Staff	
1	Case Worker	Recommended	Full-time Staff	
1	Coach	Recommended	Full-time Staff	
1	Counselor	Recommended	Full-time Staff	
1	Education Specialist	Required	Full-time Staff	
1	Employment Specialist	Recommended	Full-time Staff	
1	Fiscal Officer	Required	Full-time Staff	

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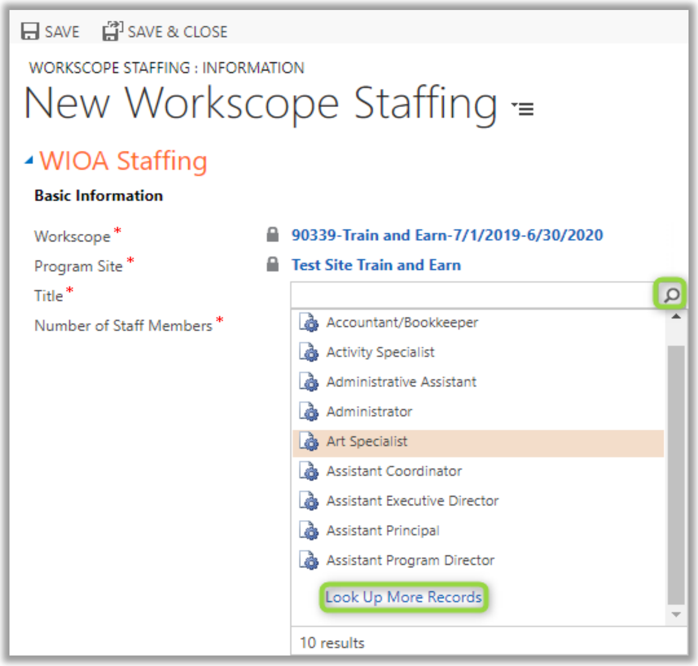
If you'd like a list of the required and recommended staffing roles, please contact your DYCD PM or navigate to the Staffing Requirements section under Program Compliance.

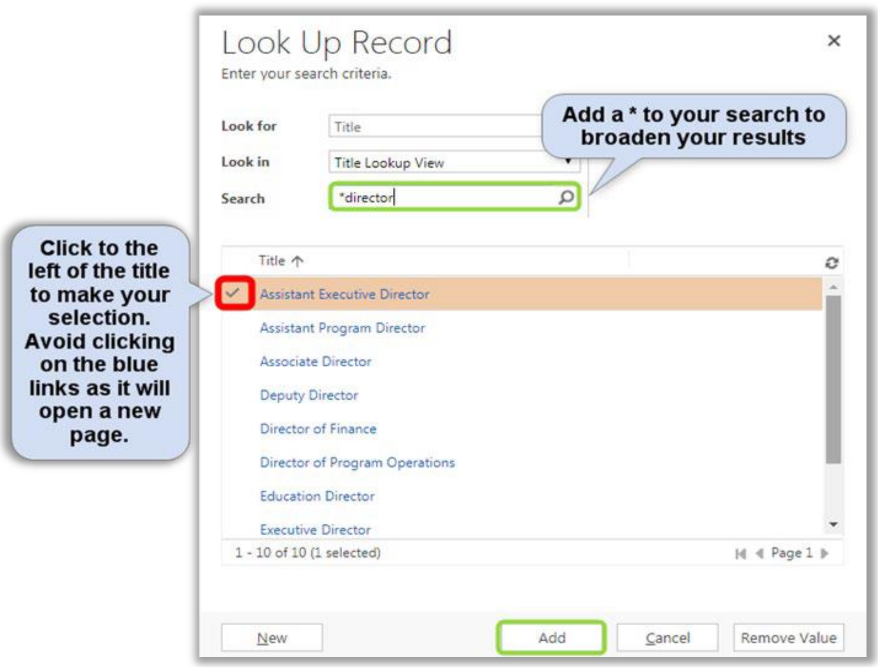
Adding a Title to Your Staffing Plan

Step 1: From Staffing, click on the Staffing Plan sub-section and then + NEW at the top right of the page.

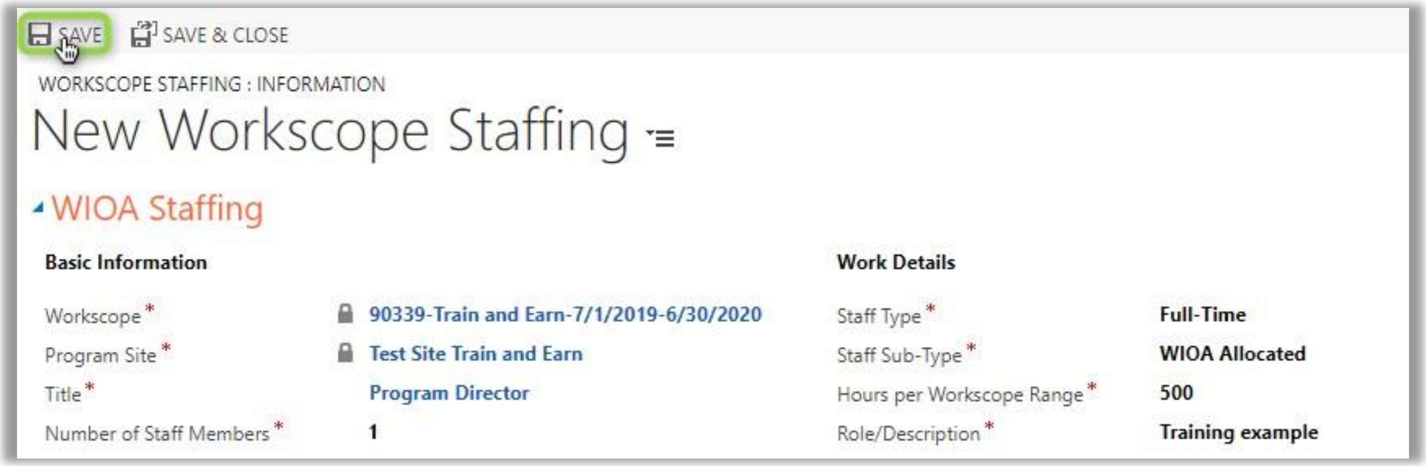
Step 2: Click on the Title field, then the icon at the end of the row to view a drop-down option for a title. Click the appropriate title or on 'Look Up More Records' to view the complete list of all available titles.



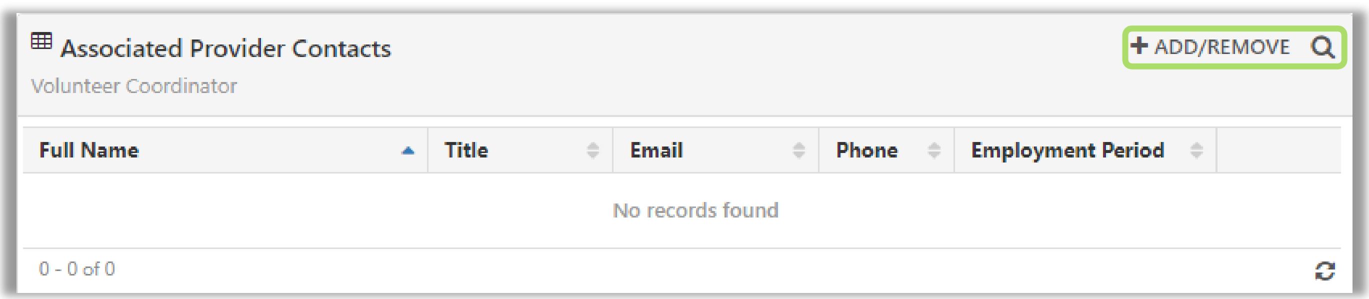
Step 2*: If you chose to 'Look Up More Records', then click to the left of the title and then click Add



Step 3: Complete data entry on the remaining fields and click SAVE at the top left of the page. Be sure that the data entered aligns with submissions on HHS Accelerator.

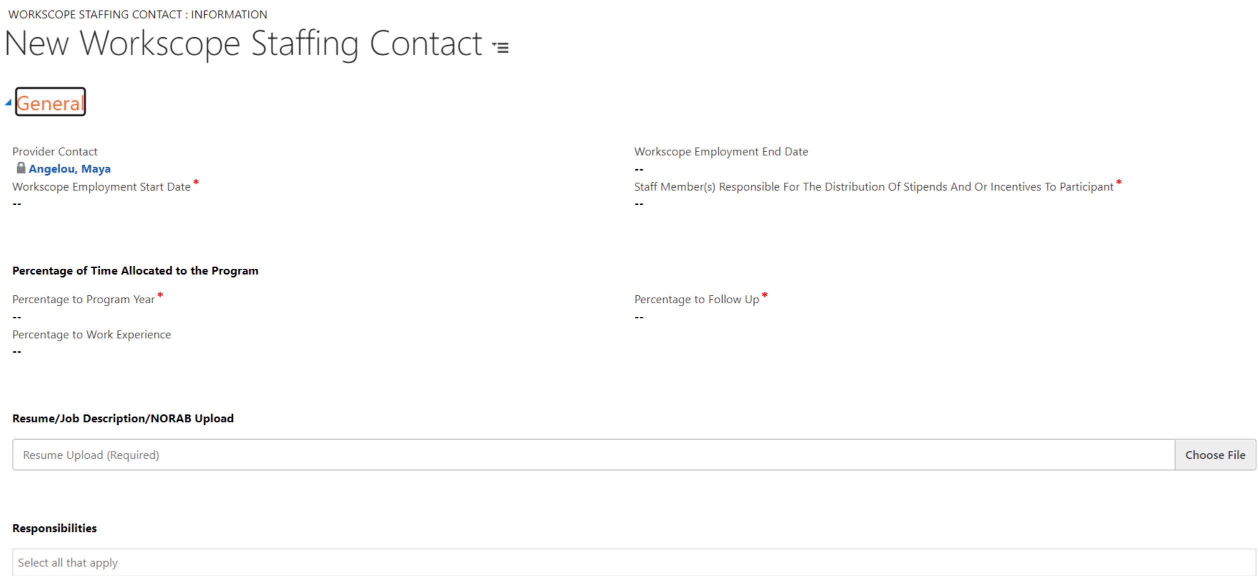


Step 4: After saving, the Associated Provider Contacts table will appear. Click ADD/REMOVE to associate a staff member to the title.



Step 5: Select all contacts to be associated to the role and click SAVE.
Staff can be associated to your staffing plan at any time. During the initial workscope completion, you will only need to complete the staffing plan. If a contact/staff does not appear in the drop down click NEW and proceed from Step 2 of [adding a new contact](#) as shown below.

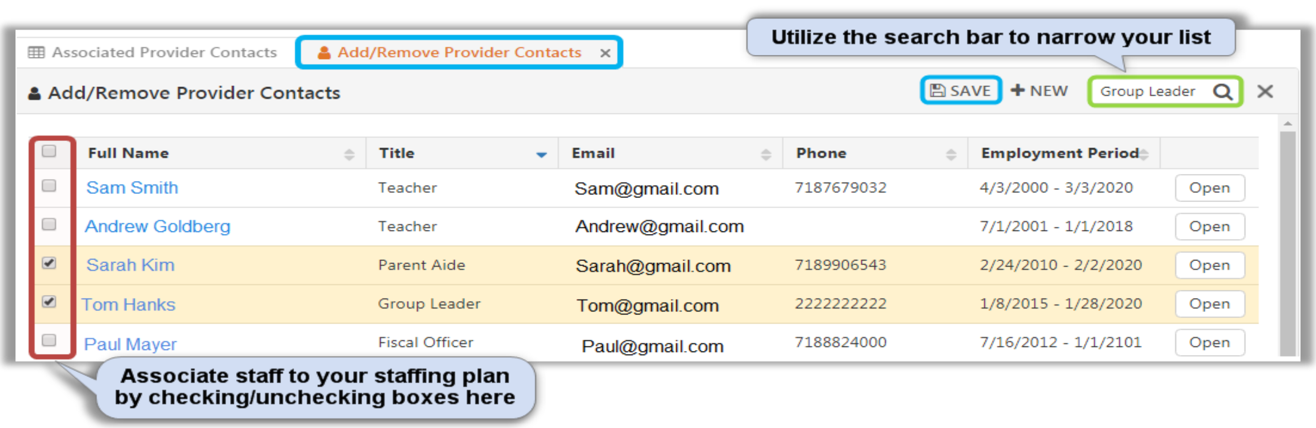
Step 6: Once a contact has been associated with a role, a red "i" icon will appear next to their name, informing you of additional fields to be completed. Opening up the staffing contact page, you should begin completing the required data entry. For "Percentage of Time Allocated", be sure that these percentages match what is listed in the Work Experience Tracker and HHS. Also, the contact's resume/job description/ NORAB should be uploaded as one PDF file, not multiple files. This document should be the most up to date and current information possible for each staff.



Once all required fields are filled in, hit save & close, and you should see the red "i" icon disappear.

Contacts

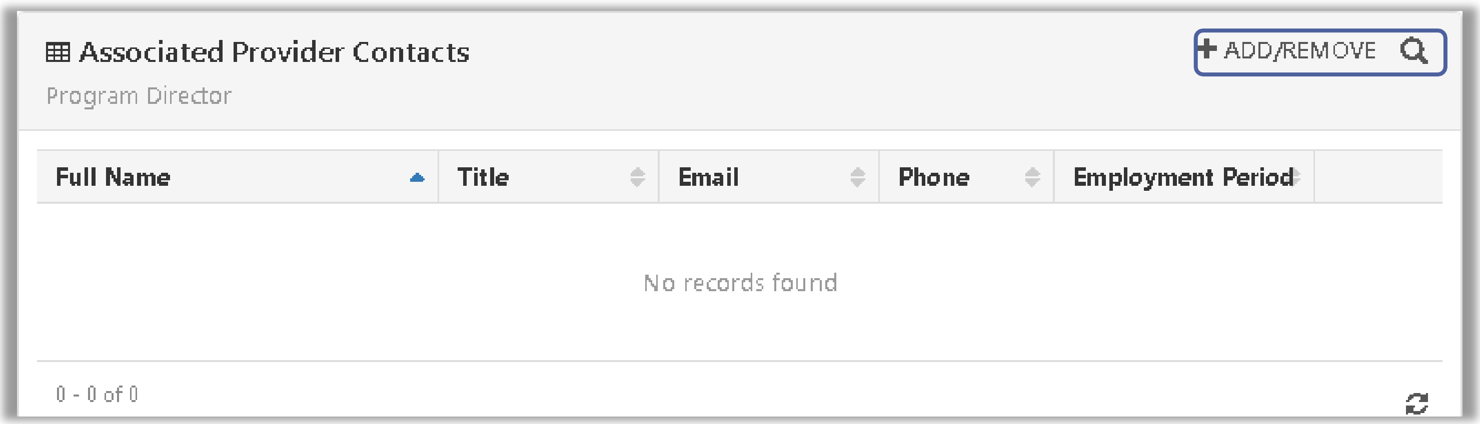
The contacts section documents the key contacts for your program. When completing your workscope, your workscope contacts should include the required titles that is outlined in the



Program Compliance section of your workscope under Staffing Requirements which may include the following staff:

- Case Manager
- Education Specialist
- Fiscal Officer
- Job Developer
- Program Director

You should also add any additional staff who serve as key points of contact for your program. In the Contacts section of the Switchboard, click + ADD/REMOVE

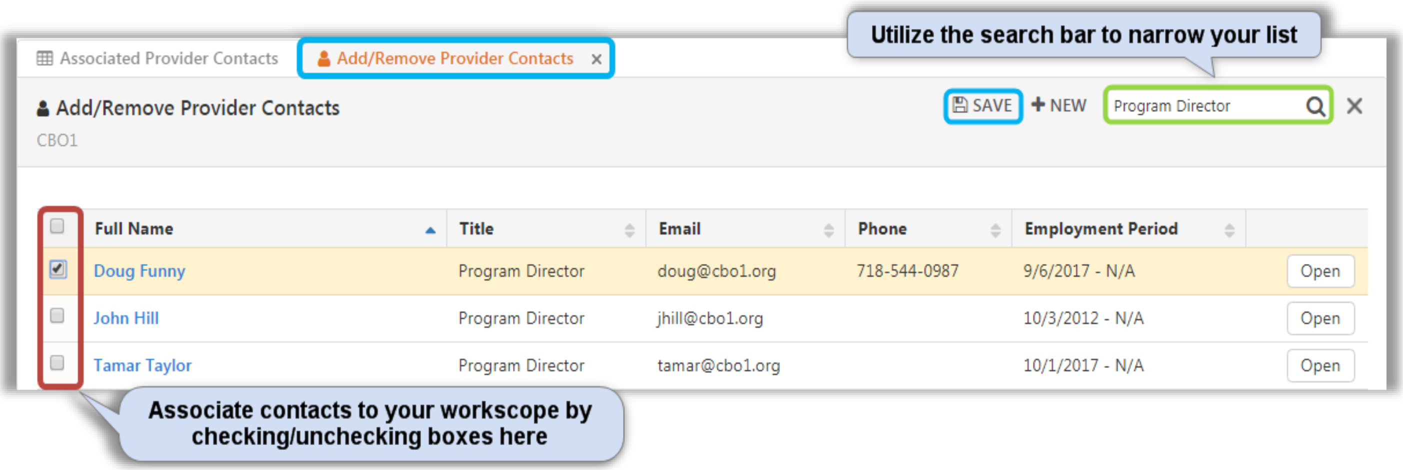


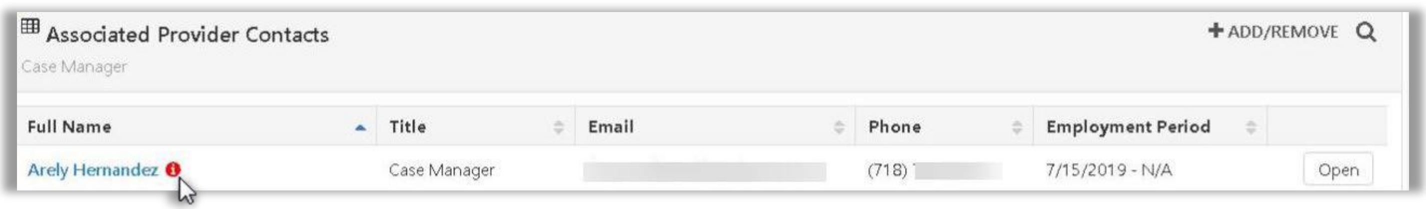
Within the Contacts screen, you will notice a new tab open called ‘Add/Remove Provider Contact’. This will display a list of staff who are associated to your CBO. Staff listed here may be associated to multiple workscopes/programs. This list may be centrally managed by the Provider or can be maintained at the site level.

Click Save and to return to the previous screen and see the full list of contacts you have added. Repeat until you have added all relevant contacts to your list. If the staff member is not reflected on the list, click + NEW to add a new person.

Adding a New Contact

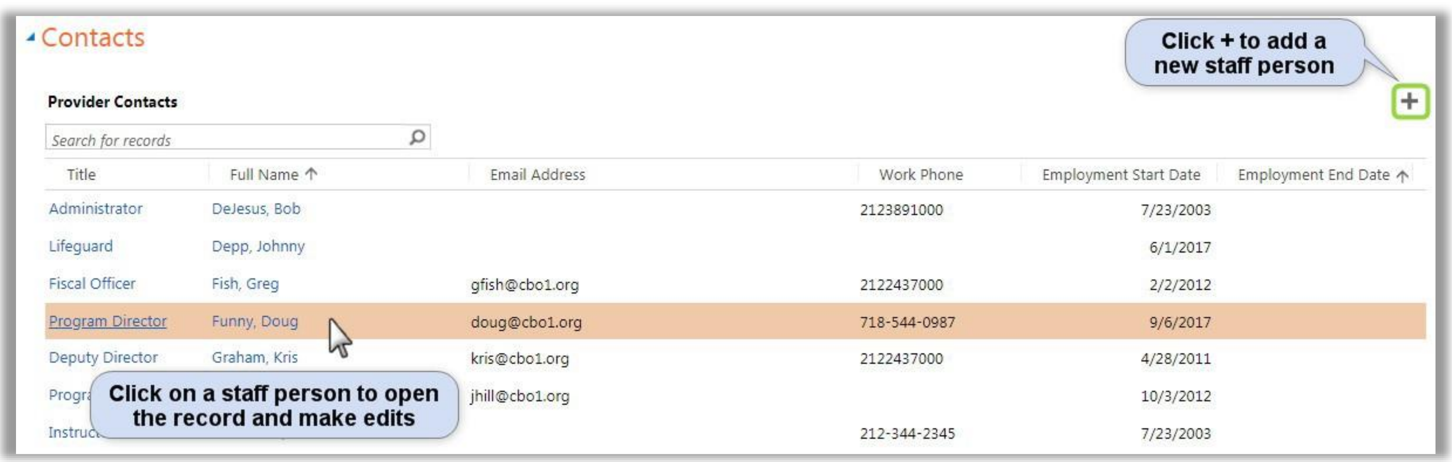
When adding a new contact, it is important to use DYCD Connect Equivalent Titles as it may be used to send targeted emails by DYCD for email communications. In particular, the Executive Director and Program Director titles are especially important to have updated regularly.



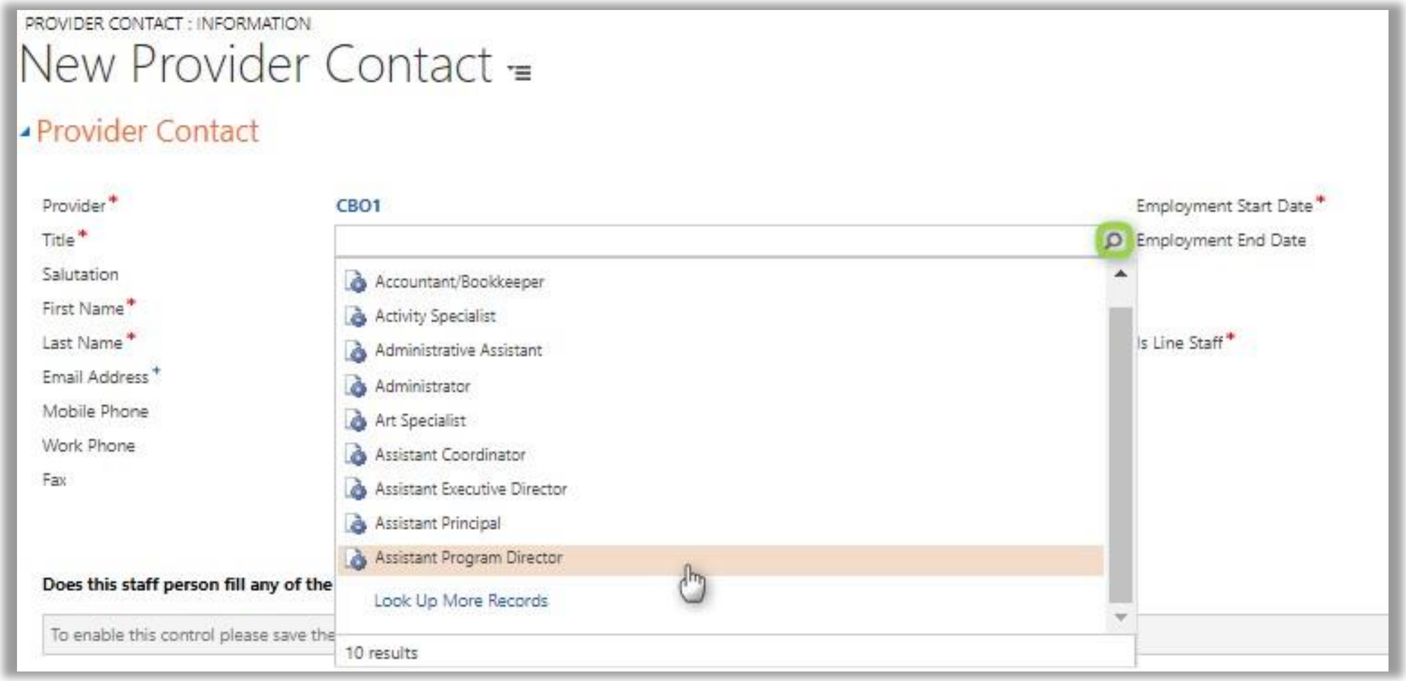


*(*Complete the information for each staff required. The following icon appears if a staff are missing information)*

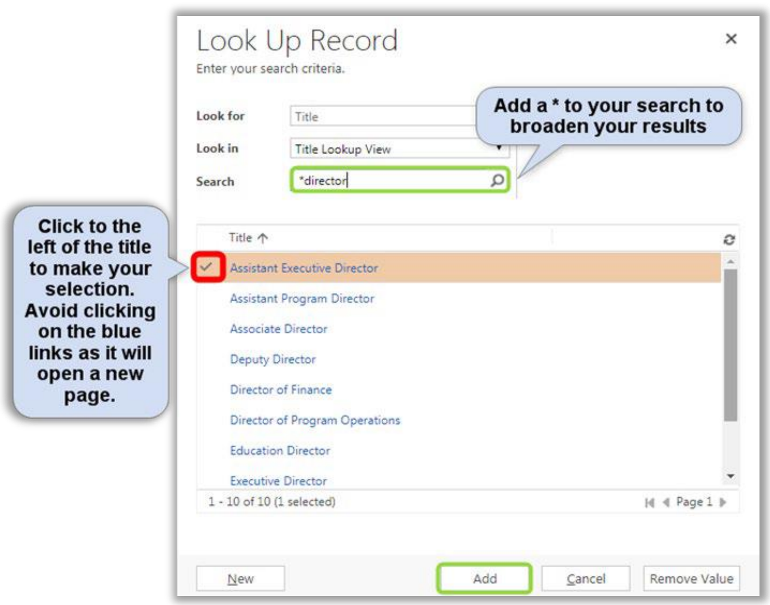
Step 1: From Contacts in the Provider page click .



Step 2: Click on the Title field, then magnifying glass icon at the right to view drop-down options for title. You may click ‘Look Up More Records’ to view the complete list of all available titles.



Step 2*: If you chose to ‘Look Up More Records’, then click to the left of the title & click Add .



Step 3: Complete data entry for the mandatory fields (noted with red stars) and click 

at the top left of the page to unlock the remainder of the Provider Contact: Information page.

DO NOTE: At least one point of contact is required for each WIOA Staff. Also, any email provided must be Provider based and the phone number should not be duplicated elsewhere.

Step 4: Complete the remaining fields by selecting from the drop-down options and save.

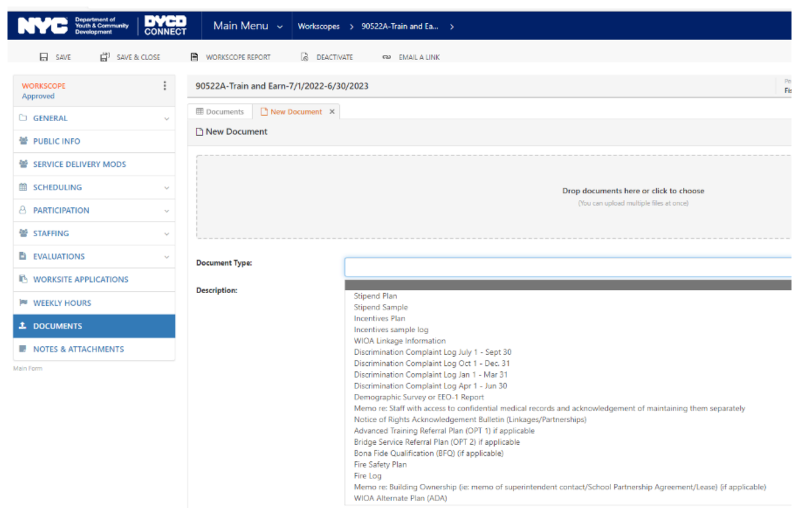
Opt into DYCD Communications

Staff can also select the types of communications they would like to receive from DYCD and its partners. To receive communication, a valid email address must be entered.

NOTE: Certain staff will be included on communication regardless of selections made. For example, performance letters will always be sent to the Executive Director, Fiscal Officer and On-Site Program Director.

Workscope Documentation Upload

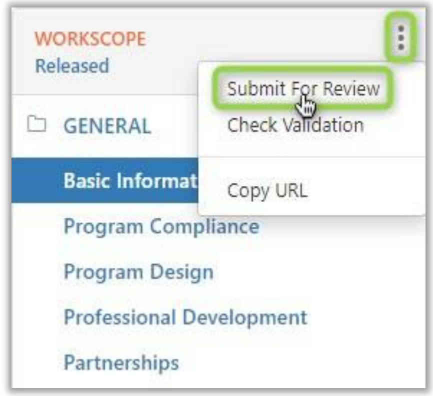
The Workscope is not completed and cannot be submitted without first adding required documentation. Your DYCD PM can provide you a list of the all the required documents.



Submitting the Workscope

After completing the General, Scheduling and Staffing sections of the workscope you may proceed to submit the workscope.

At the top right of workscope switchboard, click on the 3 dots and click on ‘Submit For Review’. Confirm on the pop-up window and your workscope will be submitted.



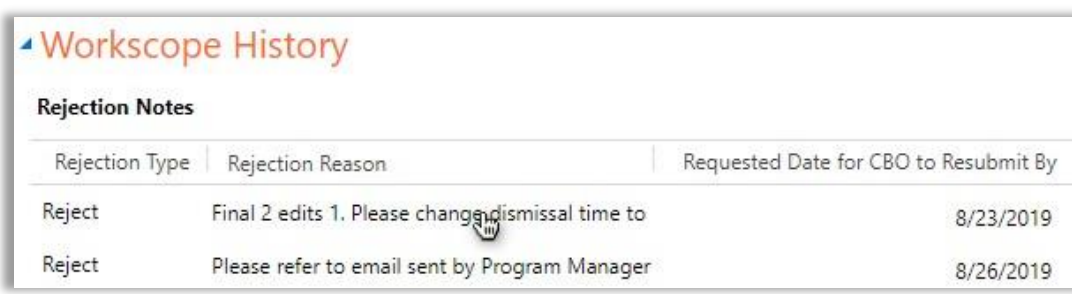
A successful submission will be designated with an update to workscope stage to display ‘Submitted’.

What if your Workscope is Rejected?

If your workscope is returned to you rejected, then it typically means that you have been informed to make a few changes to the workscope before you can have it approved.

Click on Rejected at the top of the workscope to navigate to the rejection notes.

Double click on a row to review the rejection notes and then make the necessary changes to re-submit the workscope.

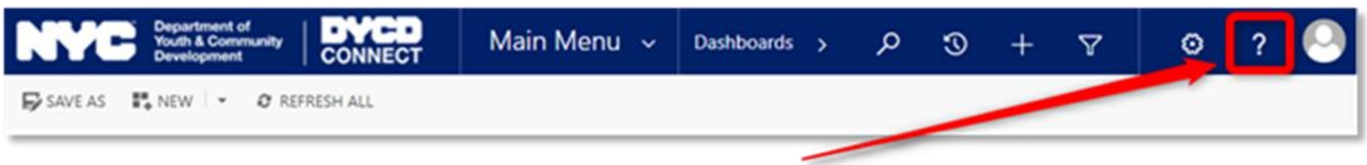

Workscope History

Rejection Notes

Rejection Type	Rejection Reason	Requested Date for CBO to Resubmit By
Reject	Final 2 edits 1. Please change dismissal time to	8/23/2019
Reject	Please refer to email sent by Program Manager	8/26/2019

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.