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AS21 HANDBOOK

FOR OPERATING AFTERSCHOOL21 DATA PROGRAM MANAGEMENT SOFTWARE

UPDATED: 07/27/2022

TRAINING DATE

LOCATION

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Table of Contents

GETTING STARTED

CONFIGURING YOUR COMPUTER

The AfterSchool 21 system is compatible with the most recent versions of Google Chrome, Microsoft Edge, and Mozilla Firefox.

1

ENTER THE WEB ADDRESS IN THE RIGHT PLACE

Ensure that the web address is entered into the browser address bar, not a Search bar such as Google.

2

ADD YOUR AS21 SITE AS A FAVORITE

Make it easy to get back to your site by bookmarking or favoriting it in your browser.

3

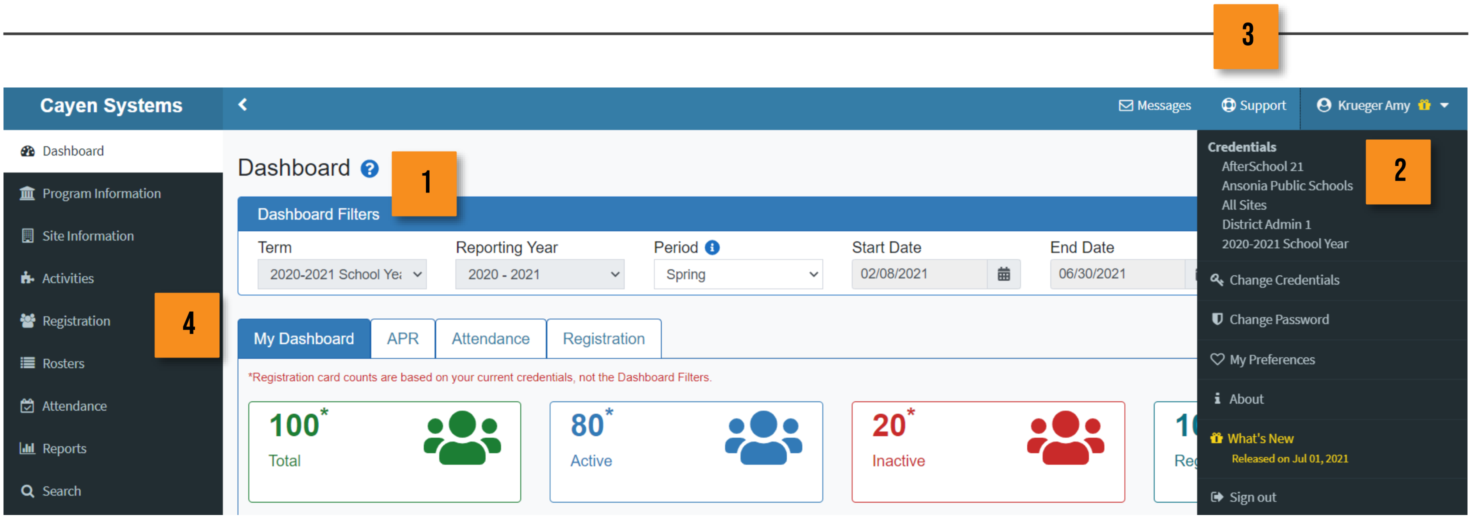
TURN OFF POP-UP BLOCKERS

Pop-ups are used throughout the system when saving information. If these pop-ups are blocked, the information you enter may not save correctly.

- For Chrome:
  - From the menu in the upper-right corner click Settings. From the menu on the left click Privacy and Security. Click the Site Settings section. Click Pop-ups and redirects. Slide the toggle at the top of the screen so that it is set to Allowed.
- For Edge:
  - From the menu in the upper-right corner click Settings. At the top left of the menu click the Privacy & Security tab (the lock icon). Scroll down to the Security section. Under Block Pop-Ups, click the toggle and set to Off.
- For Firefox:
  - From the menu in the upper-right corner click Options. Click the Privacy & Security tab on the left of the screen. Scroll down to the Permissions section. Uncheck the box for Block Pop-Up Windows.

NAVIGATION

IMPORTANT SYSTEM FEATURES



1

DASHBOARD

The customizable dashboard allows users to select key information they would like to see when the first connect to the system.

2

MY PROFILE

The My Profile area contains information specific to your account. Change your password. View version update information in What's New. Use Change Credentials to view other Sites or Terms.

3

SUPPORT

Submit help requests, access an electronic version of this handbook, view training videos, or contact us.

4

NAVIGATION BAR

Use the vertical navigation bar to move through the system. The white highlighting indicates the section of the system in which you are currently working.

TERMINOLOGY

A GLOSSARY OF TERMS USED IN THIS HANDBOOK

APR

The APR or Annual Performance Report is the set of data submitted to the US Department of Education via the 21APR federal database to show what took place in your program during a reporting year.

REGISTERED / ATTENDEE

Registered participants are people that have a registration form on file with your program. Attendees are participants that are not registered – commonly used for adults and family members of registered participants.

REPORTING PERIOD

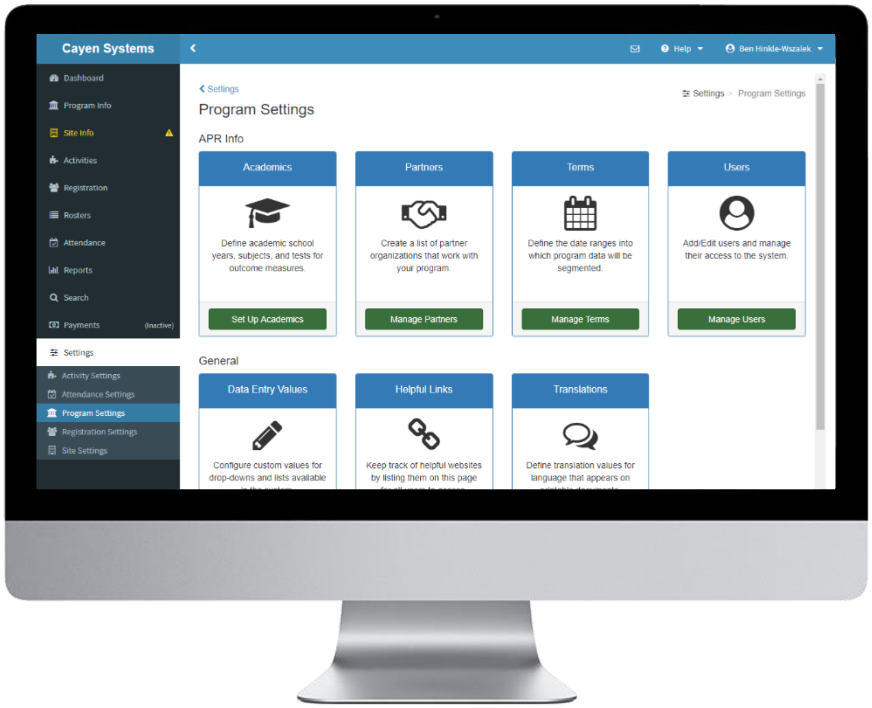
There are multiple reporting periods (e.g. Summer, School Year, Full Year) associated with each APR reporting year. The reporting year BEGINS with the summer reporting period, then continues through the fall and spring reporting periods.

ROSTERS

Rosters are lists of participants and can be used to print paper attendance sheets for recording participation. Rosters can be associated with specific sessions being offered at a site or can be established for a custom group of participants.

TERM

A Term is a date range that defines when your after-school program is in operation. Typically, Terms align with the APR reporting year.



PROGRAM SETUP

Program Setup describes configuring the software to align with your program, district, and site.

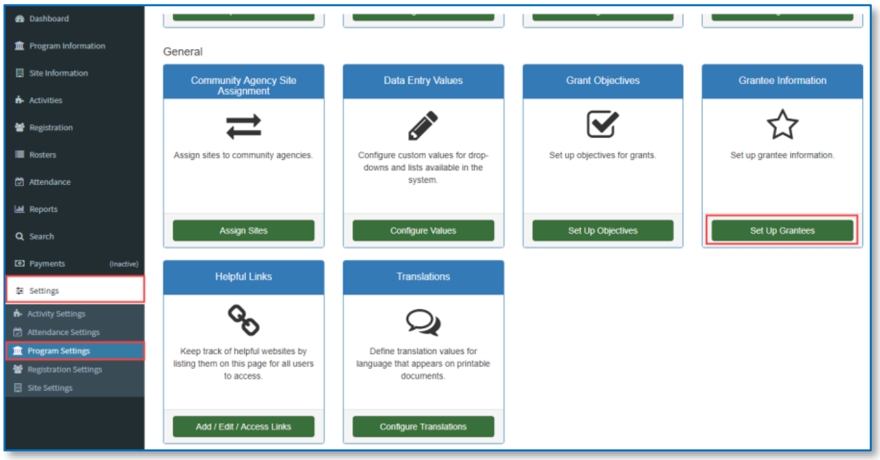
- ✔ Enter Grantee Details (pg #8)
- ✔ Add Objectives (pg #10)
- ✔ Add a Term (pg #11)
- ✔ Add / Edit Users (pg #12)
- ✔ Add / Edit Community Partners (pg #14)
- ✔ Identify Board Members (pg #16)

IMPORTANT NOTES ABOUT WORKING IN THIS SECTION

- Change Credentials and connect to ALL SITES when modifying Program Settings.
- Many districts have more than one associated grant. Make sure you are working with the right grant when modifying grantee information.
- Save data entry time and improve the accuracy of academic information by sending data from your Student Information System to Cayen Systems via our secure data uploads site (https://datauploads.datapropeller.com).

ENTER GRANTEE DETAILS

Details related to grants will appear on the annual performance report and should be reviewed and updated annually, as needed.

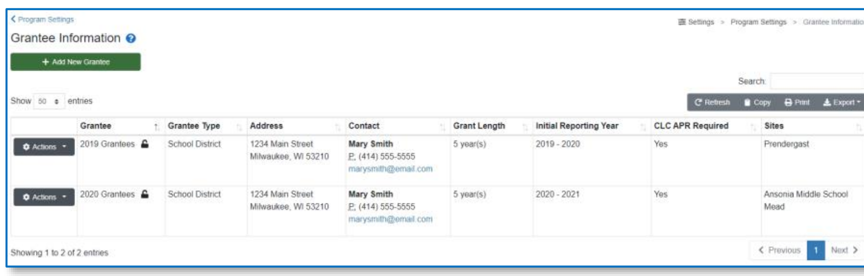


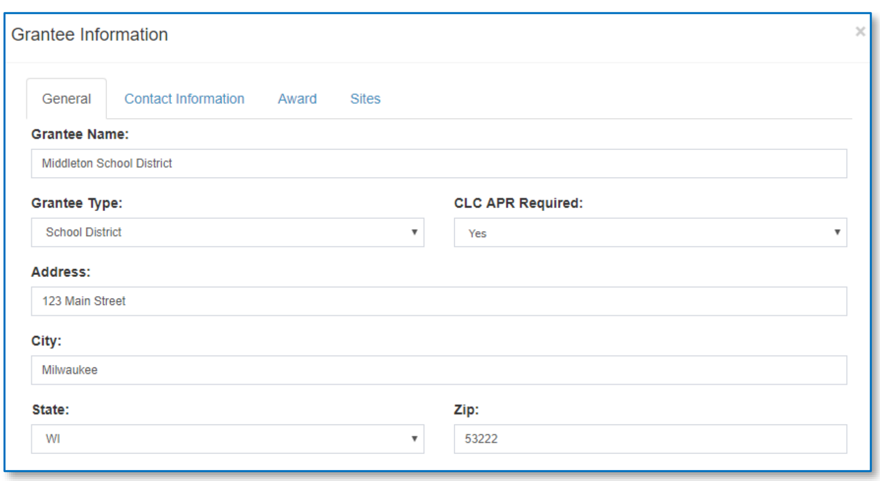
Set up District / Grants

1. In your left-hand navigation menu, click 'Settings' → 'Program Settings'
2. Locate the 'Grantee Information' Card
3. Click 'Set Up Grantees'

Set up Grantees

4. If sites have been assigned to a Grantee, this will show in the list
5. You will get a 'Warning' message if there are any sites that are not assigned to a Grantee
6. Click 'Add New Grantee', at the top of the screen, to create a new Grantee
7. Complete the fields under all tabs (see below), then click 'Save'



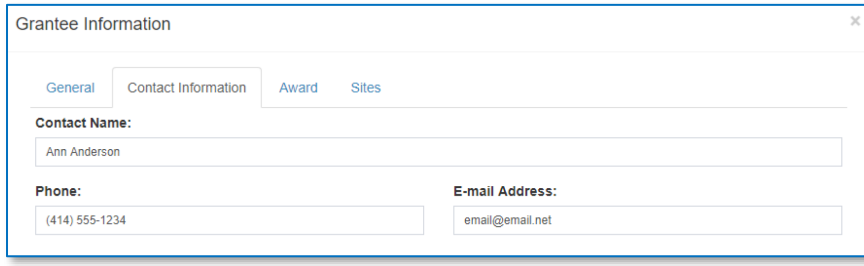


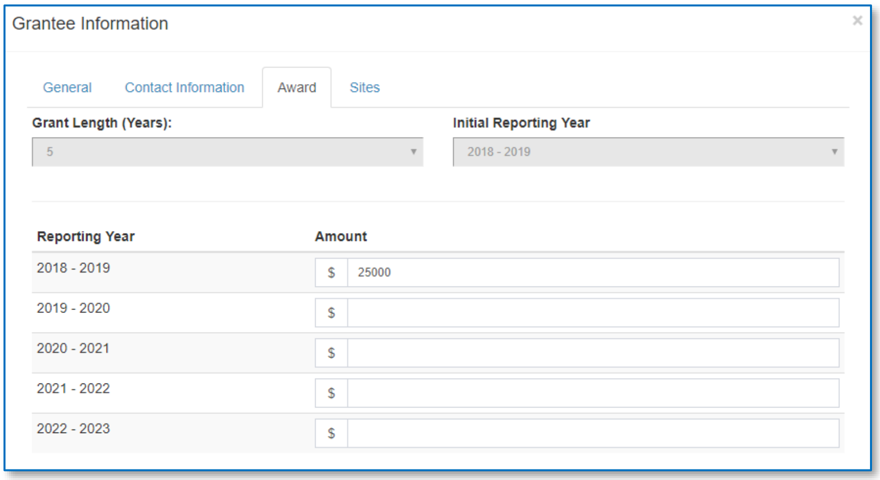
Grantee Setup – General Tab

8. Complete the fields
9. If CLC APR Reporting is required, set the field to 'Yes'
10. Click 'Save' at the bottom of the screen

Grantee Setup – Contact Information Tab

1. Enter the Grantee contact information, ‘Name’, ‘Phone’, and ‘Email Address’
2. Click ‘Save’ at the bottom of the screen



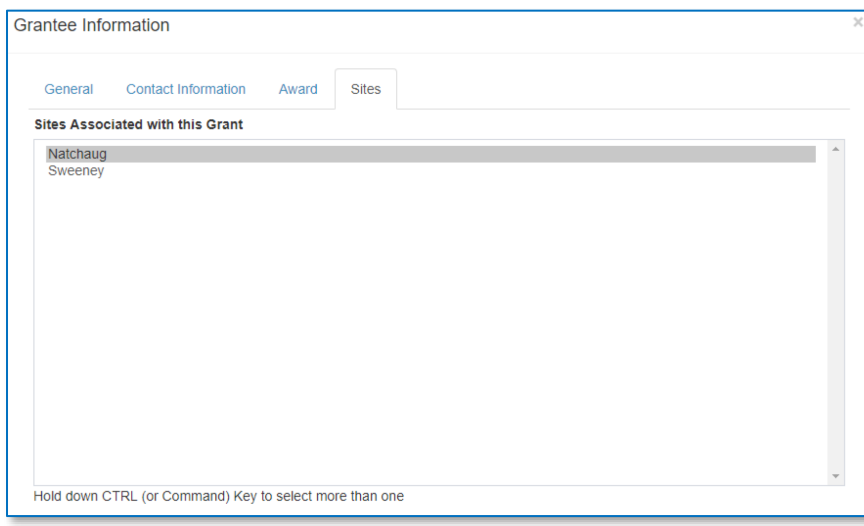


Grantee Setup – Award Tab

1. Select the ‘Grant Length’ and ‘Initial Reporting Year’
2. Enter the amount awarded for the current and past years only, leaving future year information blank
3. Click ‘Save’ at the bottom of the screen

Grantee Setup – Sites Tab

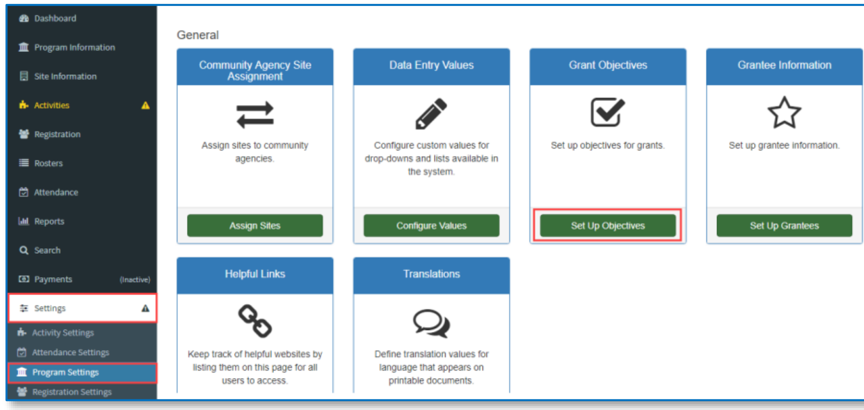
1. Select the site(s) associated with this Grant
2. Hold down the CTRL (Apple) key to select more than one site.
3. Click ‘Save’ at the bottom of the screen

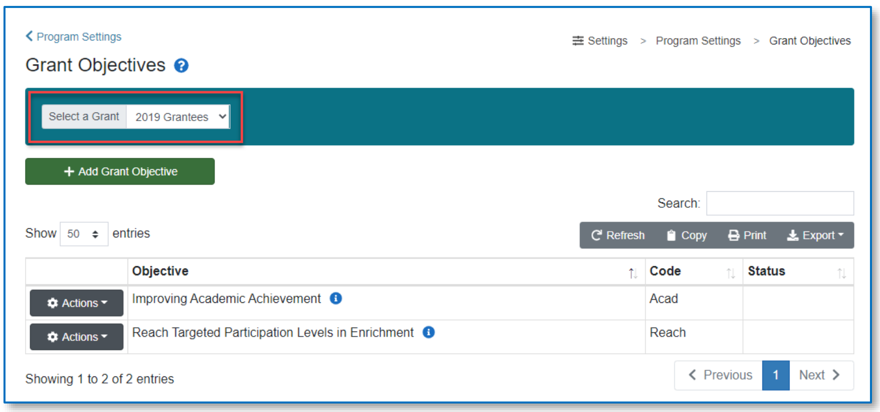


ADD OBJECTIVES

Set Up Objectives

1. In your left-hand navigation menu, click 'Settings' → 'Program Settings'
2. Locate the 'Grant Objectives' Card
3. Click 'Set Up Objectives'





Set Up Objectives

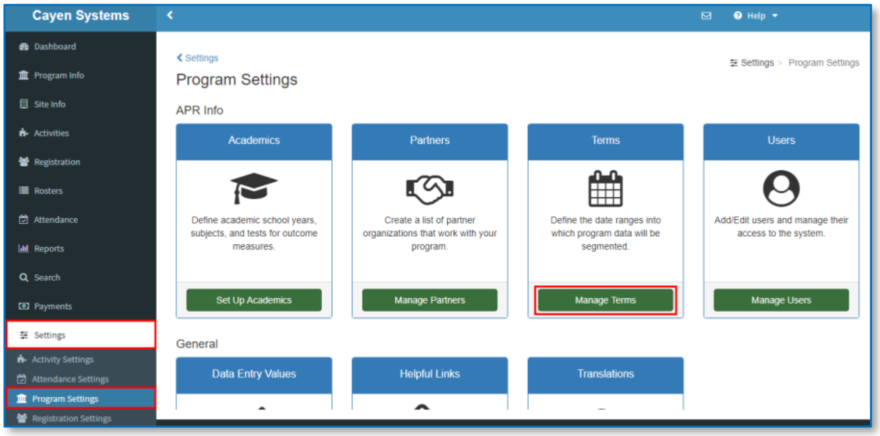
1. Select the appropriate Grantee from the drop-down
2. Click 'Add Grant Objective'
3. Enter the Objective Information
4. Click 'Save'

Notes

- Objectives that have been linked to an activity or used in a previous term cannot be deleted. However, they can be renamed (if needed).
- At least one objective must be entered in order to set up activities in your sites.

ADD A TERM

Terms are used to define the date range of your program. Typically for 21st CCLC programs, the term should begin with the summer program and end with the spring program.

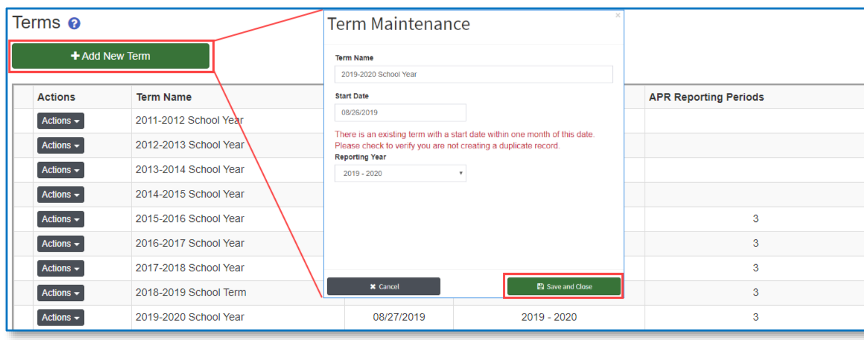


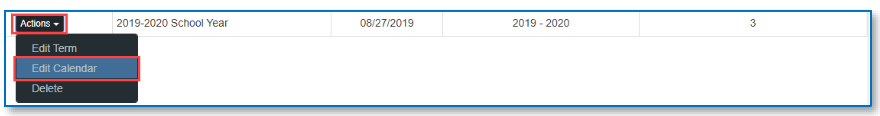
Manage Terms

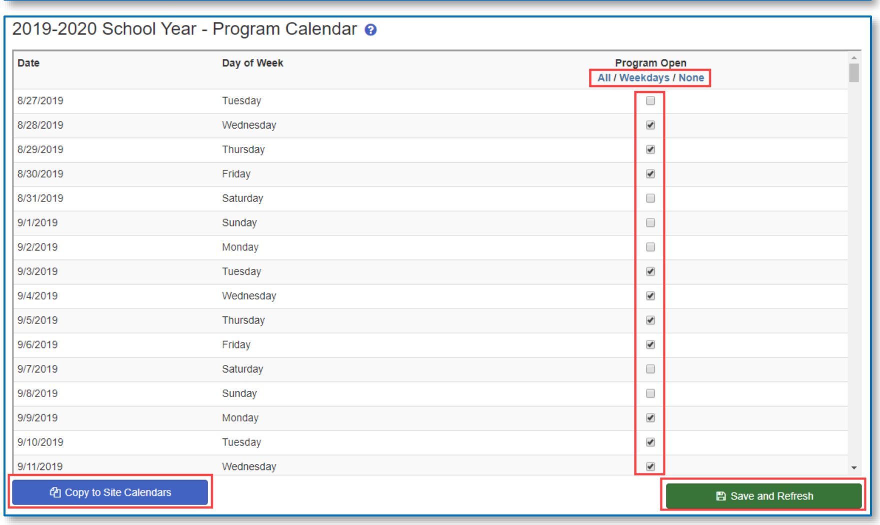
1. In your left-hand navigation menu, click 'Settings' → 'Program Settings'
2. Locate the 'Terms' Card
3. Click 'Manage Terms'

Add a Term

1. Click 'Add New Term' at the top of the screen
2. Enter the 'Term Name', 'Start Date', and select the 'Reporting Year'
3. Click 'Save and Close'







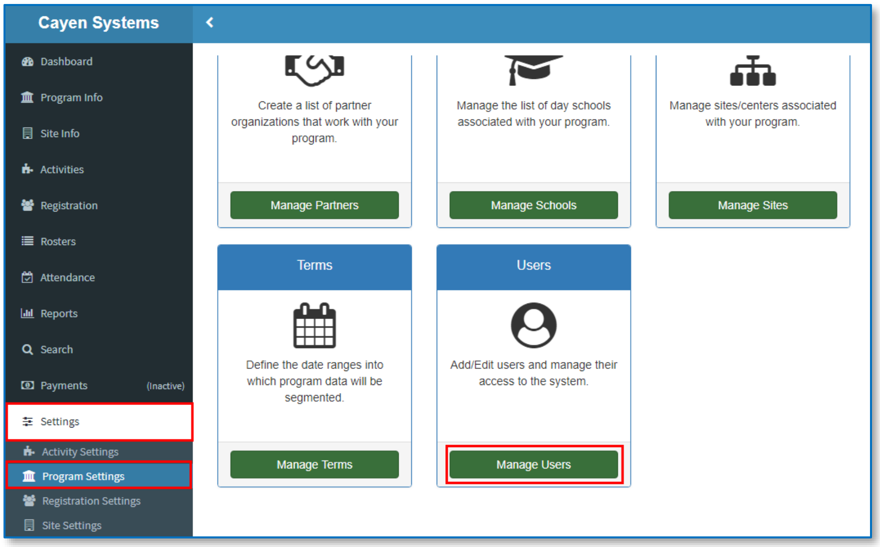
Set Up Calendar

1. Click the Actions button next to the term
2. Click 'Edit Calendar'
3. Click "All", "Weekdays", or "None" to quickly apply the option to the Program Open check boxes.
   Or check the boxes individually to select days that the program is open
4. Click 'Save and Refresh'
5. Click 'Copy to Site Calendars'
6. Check the box(es) to select the site(s) to copy the Calendar to
7. Click 'Save'

- If a New Term has a Start Date within one month of an existing term, a warning message will display to ensure that a duplicate term is not being created.
- Setting up a term calendar, then copying it to your sites can save time when setting up activities and sessions.

ADD USERS

Anyone who needs to access this system should have their own login and password.

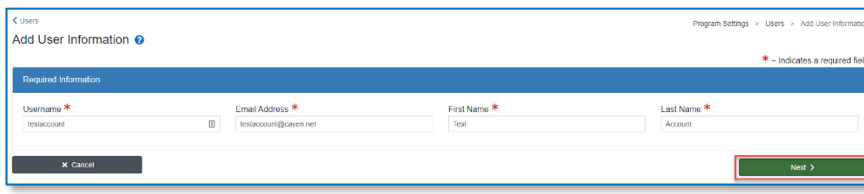


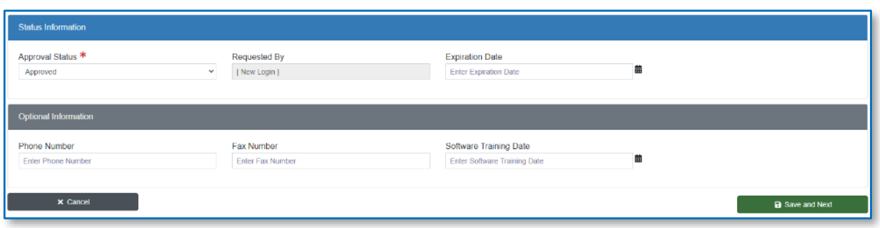
Manage Users

1. In your left-hand navigation menu, click 'Settings' → 'Program Settings'
2. Locate the 'Users' Card
3. Click 'Manage Users'

Add a User

4. Click 'Add New' at the top of the screen
5. Enter the person's username, email, and name
6. Click 'Next'



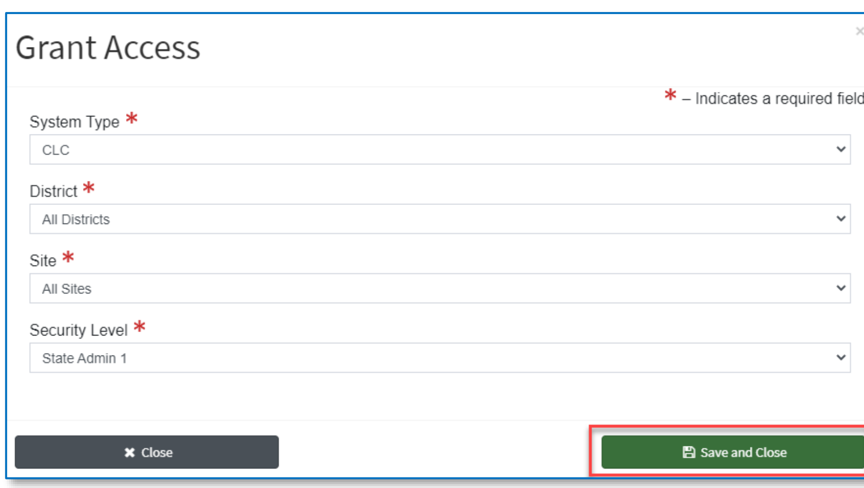


Add a User

7. Set the Status Information and add any Optional Information
8. Click 'Save and Next'

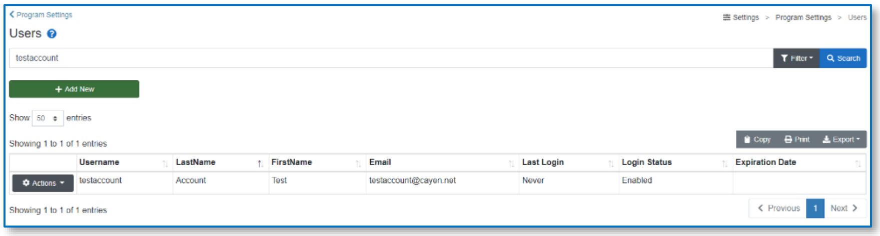
Add a User

9. Select the appropriate system type, district (if applicable), site (if applicable), and security level for the user, based on their job function/ responsibility
10. Click 'Save and Close' to close the Grant Access modal
11. Click 'Save and Close' at the bottom of the Add User Information screen



EDIT A USER

Reasons for editing a user: enable/disable their access due to hiring/termination or update contact information.



Edit a User

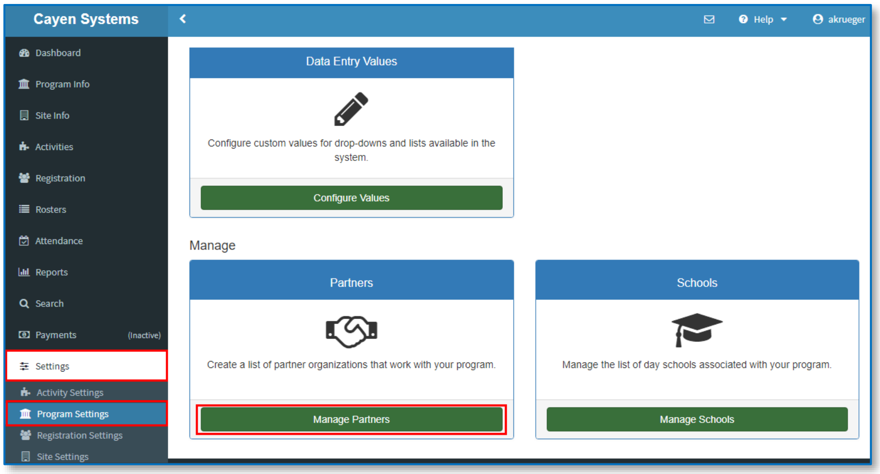
1. Locate the user you wish to edit using the Search bar at the top of the screen
2. Click the ‘Actions’ button and select ‘Edit’
3. Edit the user record as needed
4. Click ‘Save and Close’ when finished

Notes

- A user can only be **deleted** if they do not have related data. However, they can be **disabled**.
- You can modify a user’s access to districts, sites, and/or security levels (based on your own access) by clicking Grant Access in the user’s record and assigning additional values or by clicking the Remove Access button next to a specific access record.

ADD/EDIT PARTNERS

A partner is a business or community agency other than the grantee actively contributing to the 21st CCLC-funded project. Information about partners is required on the APR.

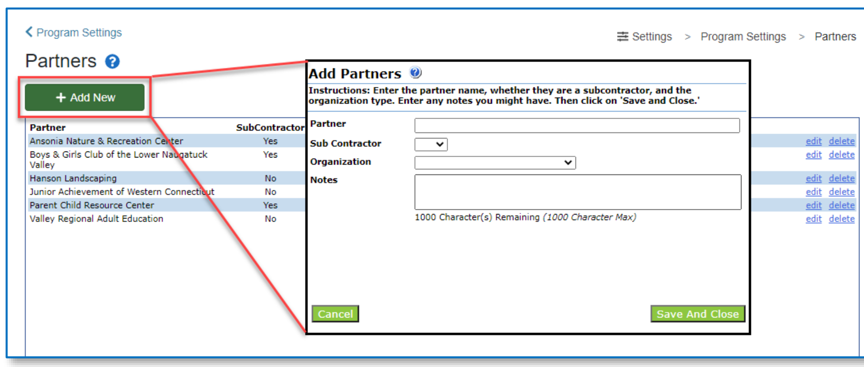


Manage Partners

1. In your left-hand navigation menu, click 'Settings' → 'Program Settings'
2. Locate the 'Partners' card
3. Click 'Manage Partners'

Add Partners

4. Click 'Add New' at the top of the screen
5. Enter the Partner's information
6. Click 'Save and Close'



Tips

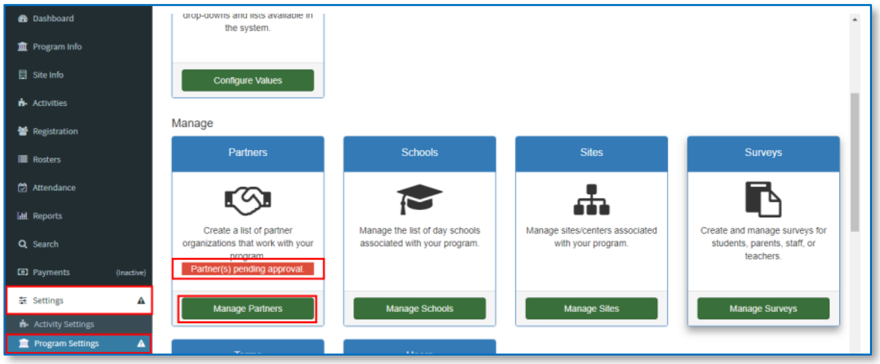
- Try to avoid creating duplicate entries. This can lead to confusion if different sites begin to enter multiple partners when, in fact, there should only be one.
- A partner would be added as a sub-contractor if you pay for at least a portion of the services, goods, etc. provided.

Notes

- Partners that are entered in the district's partner list can later be selected by a site. The site has the option to enter additional information to detail the contributions made to their site in a specific term.

REVIEW PENDING PARTNER REQUESTS

If a site requests a new partner, an alert message will show on the Partners card to notify you that there are pending requests. We'll see how sites request partners in Part 2: Site Setup.

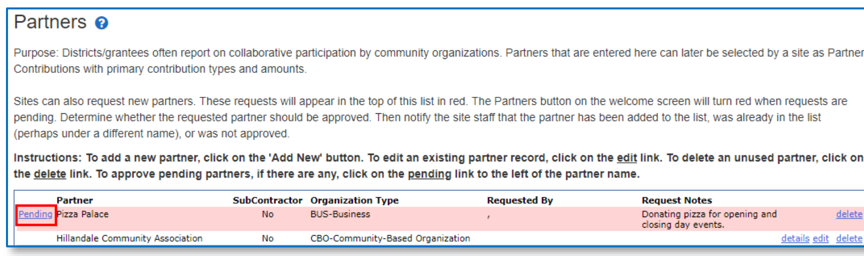


Review Pending Partner Requests

1. In your left-hand navigation menu, click 'Settings' → 'Program Settings'
2. Locate the 'Partners' card
3. Click 'Manage Partners'

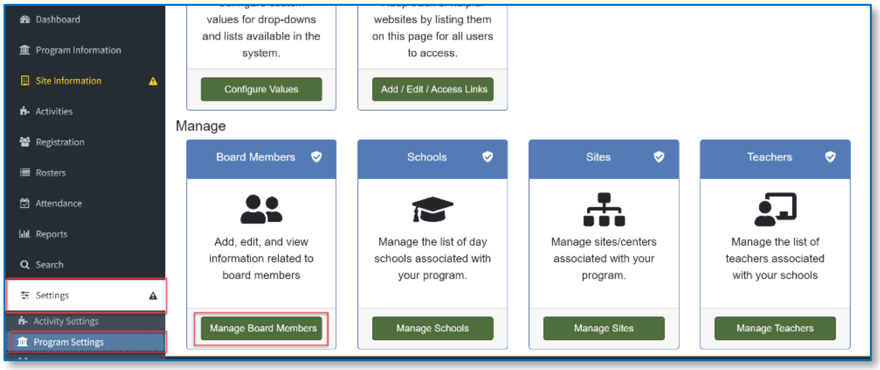
Approve Pending Partners

1. Click the 'Pending' link to the left of the pending partner
2. Set the drop-down to 'Approved'
3. Click 'Save and Close'



IDENTIFY BOARD MEMBERS

Create a list of the members of your program's advisory board.

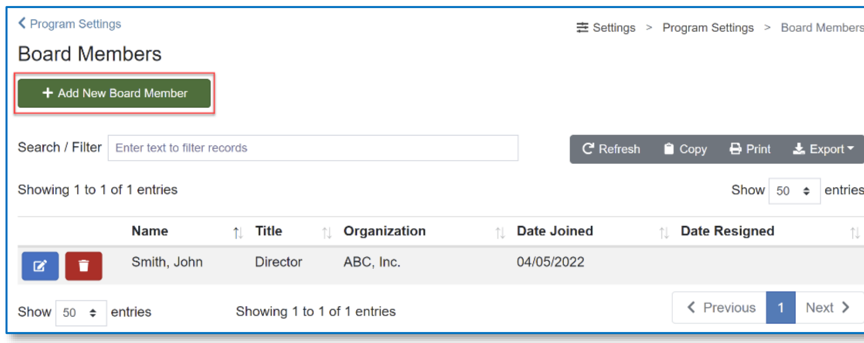


Enter Board Member Information

1. In your left-hand navigation menu, click 'Settings' → 'Program Settings'
2. Locate the 'Board Members' card
3. Click 'Manage Board Members'

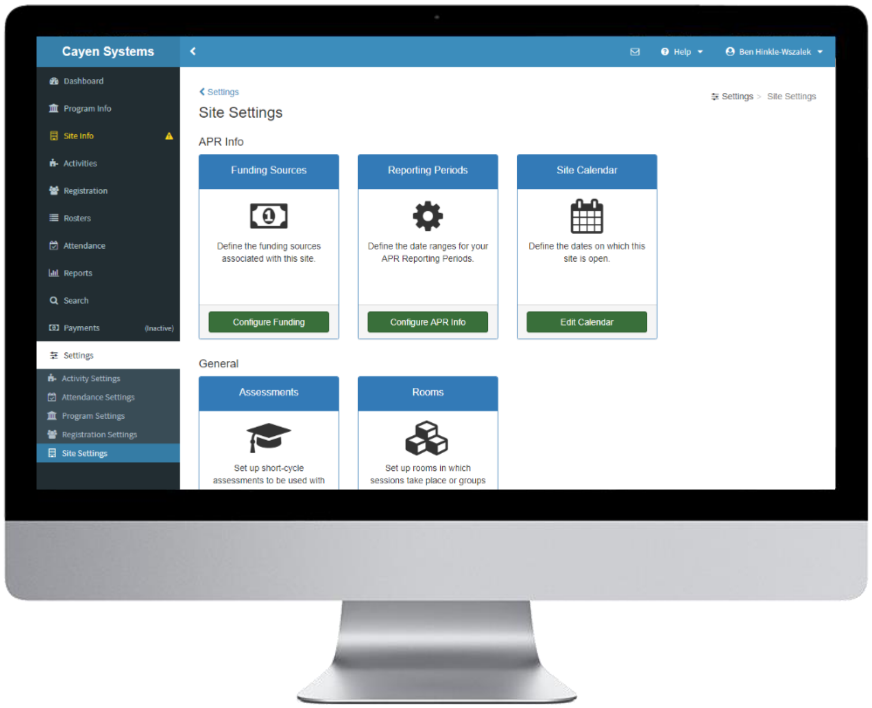
Enter Board Member Information

4. Click 'Add Board Member' at the top of the screen.
5. Complete the fields
6. Click 'Save and Close



Notes

- Board Members must be entered prior to recording Advisory Board Meetings.



SITE SETTINGS

At the start of every term, critical information needs to be defined for each site within a program. The Site Settings section shows how to configure this information.

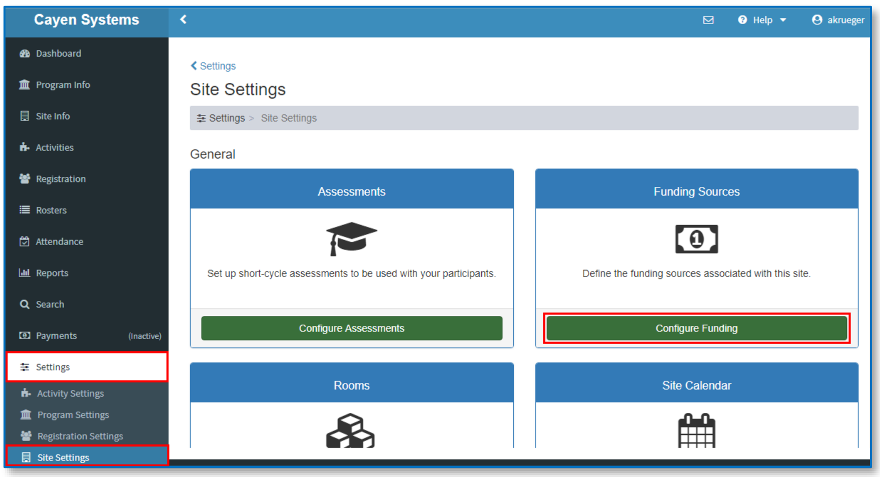
- ✔ Add / Edit Funding Sources (pg #18)
- ✔ Add / Edit APR Reporting Periods (pg #19)
- ✔ Edit Site Calendar (pg #20)

IMPORTANT NOTES ABOUT WORKING IN THIS SECTION

- Change Credentials and connect to a specific site when modifying Site Settings.
- While some of these settings may be the same across a program, Site Settings must be configured for each active site individually.

ADD/EDIT FUNDING SOURCES

By adding funding sources, including 21st CCLC funding, you can associate them to your activity sessions and generate reports for those specific funders, including the APR.

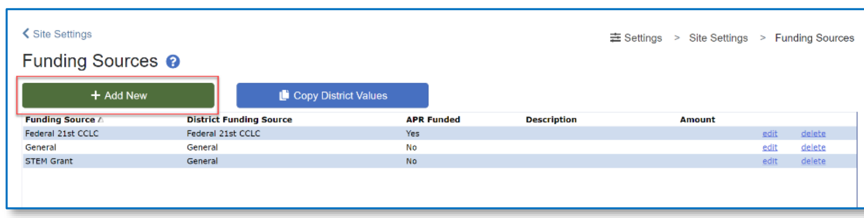


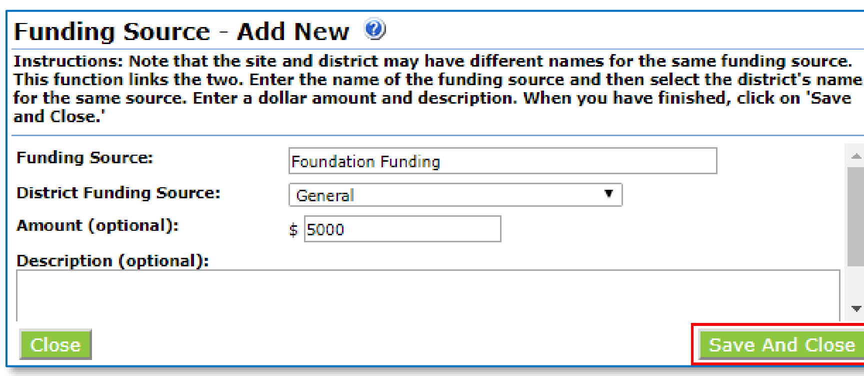
Configure Funding

1. In your left-hand navigation menu, click 'Settings' → 'Site Settings'
2. Locate the 'Funding Sources' card
3. Click 'Configure Funding'

Add a Funding Source

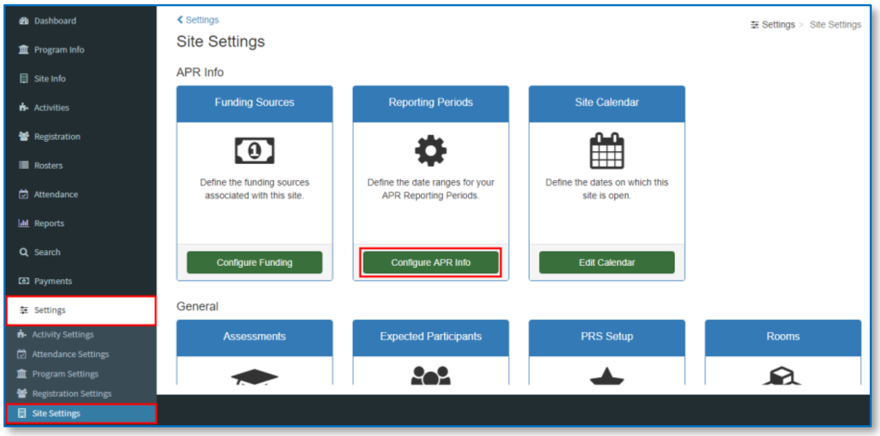
1. Click 'Add New' at the top of the screen
2. Enter the 'Funding Source'
3. Select the District Funding Source from the drop-down. Remember that the Site and the District may have different names for the same funding source
4. Enter a dollar amount, if known
5. Click 'Save and Close'





ADD/EDIT APR REPORTING PERIODS

Reporting periods specify the dates for which information will be collected and aggregated for the annual performance report.

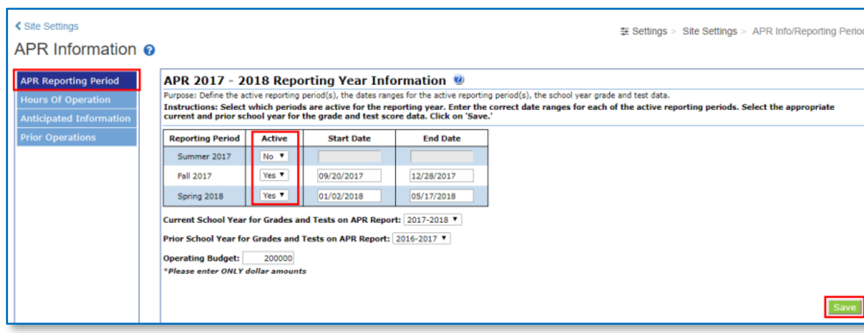


Add APR Reporting Periods

1. In your left-hand navigation menu, click ‘Settings’ → ‘Site Settings’
2. Locate the ‘Reporting Periods’ card
3. Click ‘Configure APR Info’

Configure Reporting Year Info

4. Set the Active column to ‘Yes’, for the periods which are active
5. Enter the ‘Start Date’ and ‘End Date’ for the active periods
6. Select the current and prior school year for grade and tests
7. Enter the ‘Operating Budget’ for this Site
8. Click ‘Save’



Tips

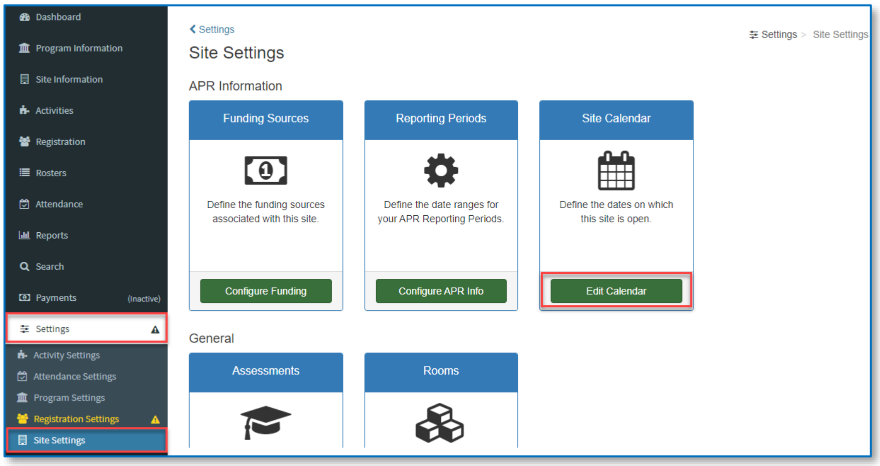
- When entering date ranges for reporting periods, it is best to make sure there are no gaps between the end date of one period and the start date of the next period.

Notes

- If a site is not active for a reporting period (e.g. Summer 2019), the Active field should be set to No. The start and end dates will not need to be entered for that period.

EDIT SITE CALENDAR

Site calendars can be established to assist with scheduling activities and sessions.

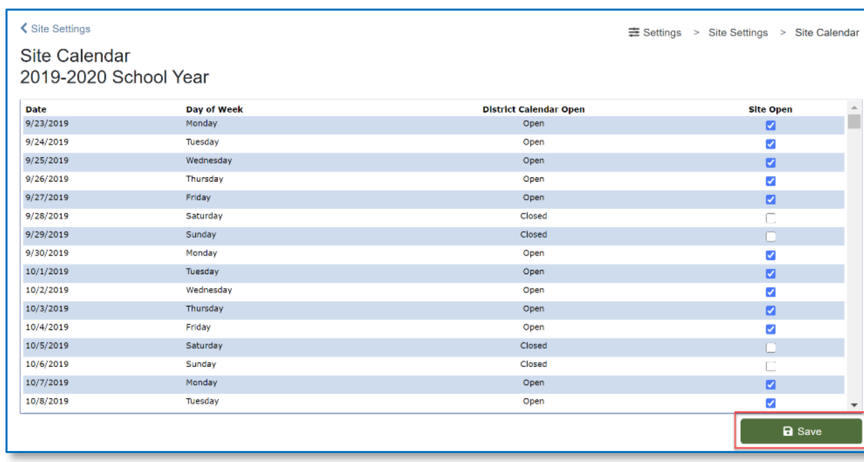


Edit Site Calendar

1. In your left-hand navigation menu, click 'Settings' → 'Site Settings'
2. Locate the 'Site Calendar' card
3. Click 'Edit Calendar'

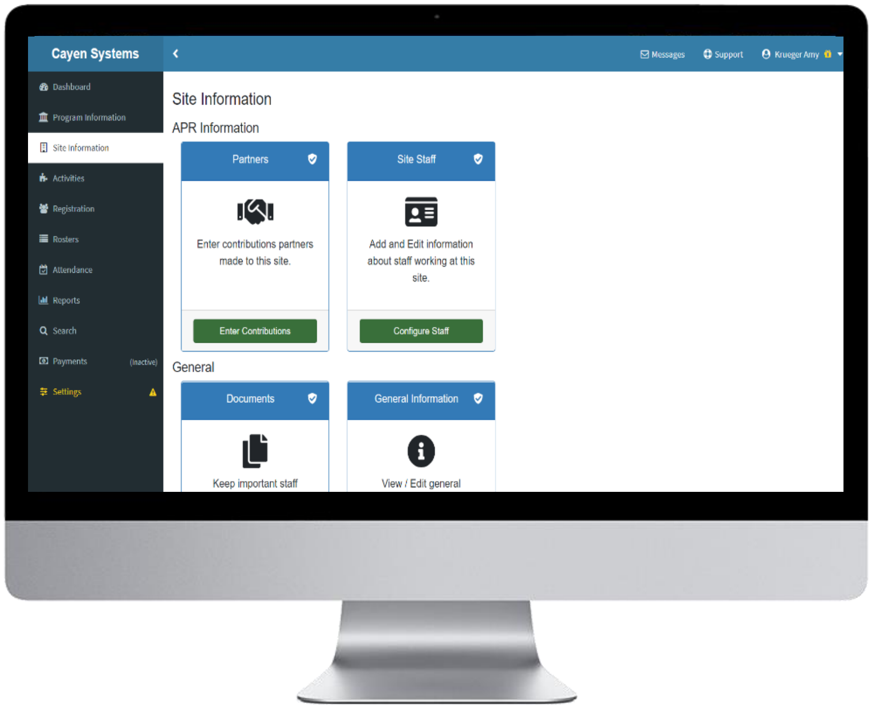
Set the Days Open

4. Check the boxes in the 'Site Open' column to indicate dates in which this site anticipates being open.
5. Click 'Save'



Notes

If a site is closed due to inclement weather or some other unforeseen event, the calendar does NOT need to be updated. The system will assume the site was closed if no attendance was entered for that date.



PROGRAM INFORMATION

The Program Information section houses information specific to a District. Unlike Program Settings, values may need to be added or updated in Program Information over a reporting year.

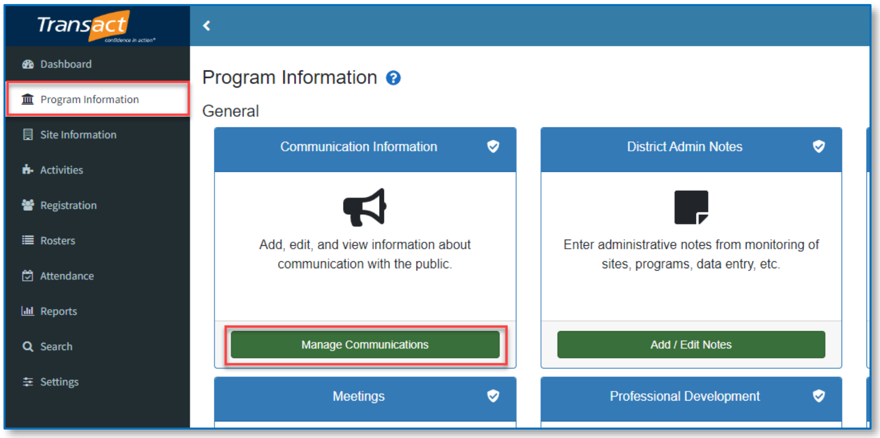
- ✔ Add / Edit Communication Information (pg #22)
- ✔ Add / Edit Fundraising Information (pg #23)
- ✔ Enter Meeting Details (pg #24)
- ✔ Enter Professional Development Details (pg #23)

IMPORTANT NOTES ABOUT WORKING IN THIS SECTION

- Change Credentials and connect to a specific district when modifying Program Information.
- “All Sites” records will not appear if you are connected to a specific site in Change Credentials.

ADD/EDIT COMUNICATION TYPES

Document types of communication sent from your organization.

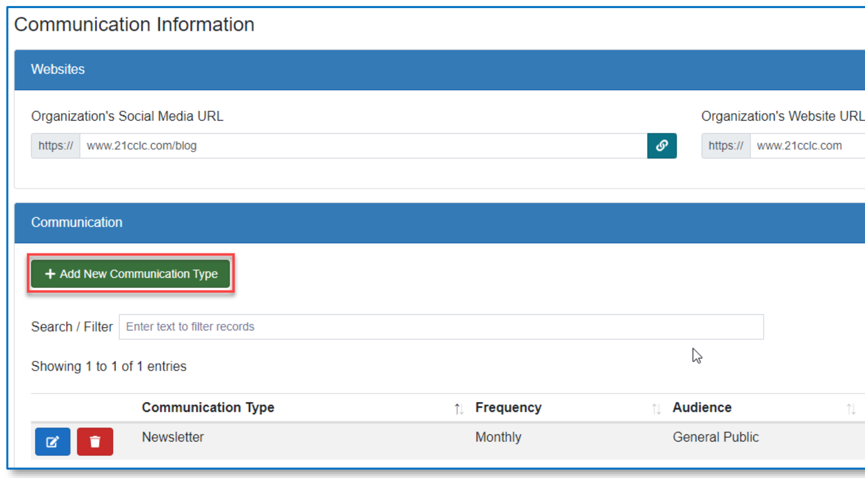


Add / Edit Communication Types

1. In your left-hand navigation menu, click ‘Program Information’
2. Locate the ‘Communication Information’ card
3. Click ‘Manage Communications’

Add / Edit Communication

4. Click ‘Add New Communication Type’
5. Enter the Communication type, Frequency, Count of communications to date, Audience, and Description
6. Click ‘Save and Close’

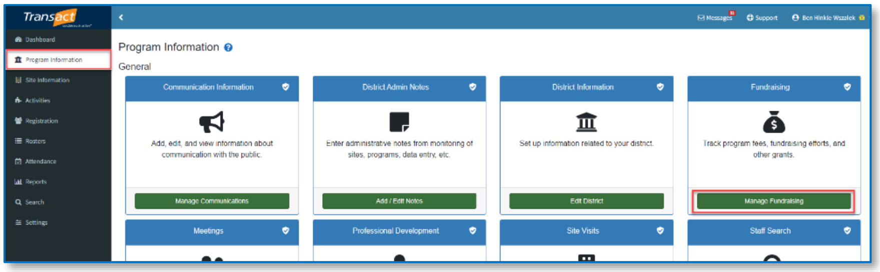


Notes

- URLs for your program’s social media and organization website can also be entered in the Communication Information section.

ADD/EDIT FUNDRAISING INFORMATION

Enter information about the fundraising efforts of your program.

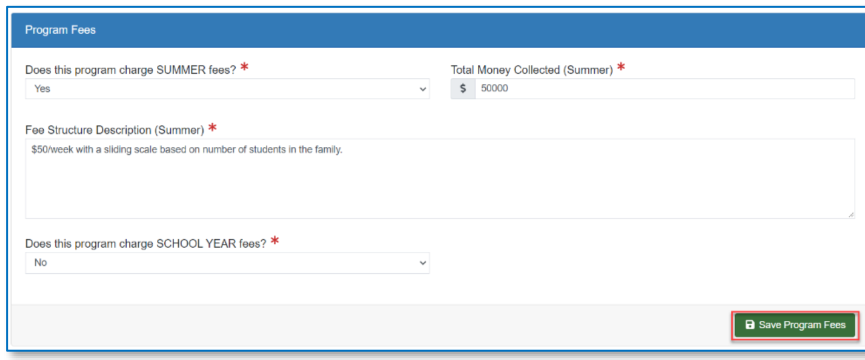


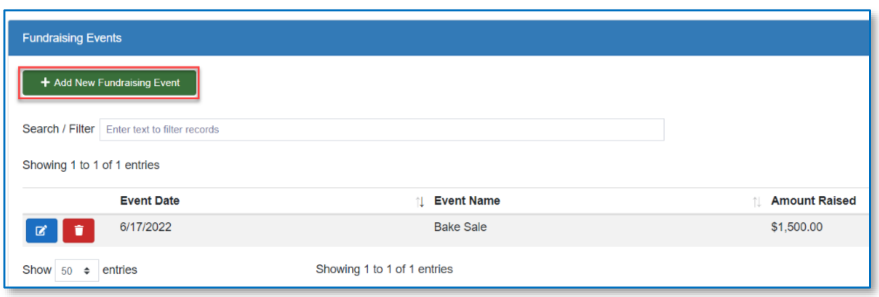
Add / Edit Fundraising Information

1. In your left-hand navigation menu, click 'Program Information'
2. Locate the 'Fundraising Information' card
3. Click 'Manage Fundraising'

Update Program Fees Information

4. Enter details in the Program Fees section of the screen
5. Click 'Save Program Fees'



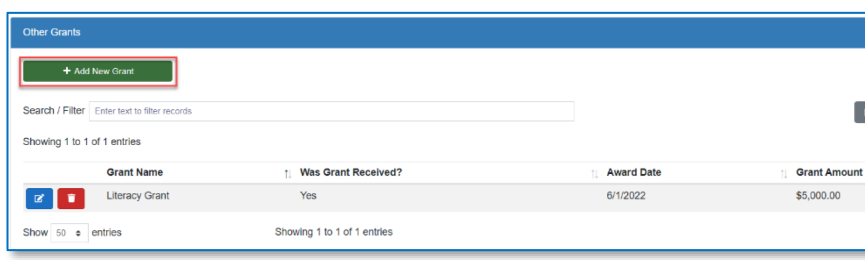


Enter Fundraising Events

10. Click 'Add New Fundraising Event'
11. Enter the Event Date, Event Name, and Amount Raised
12. Click 'Save and Close'

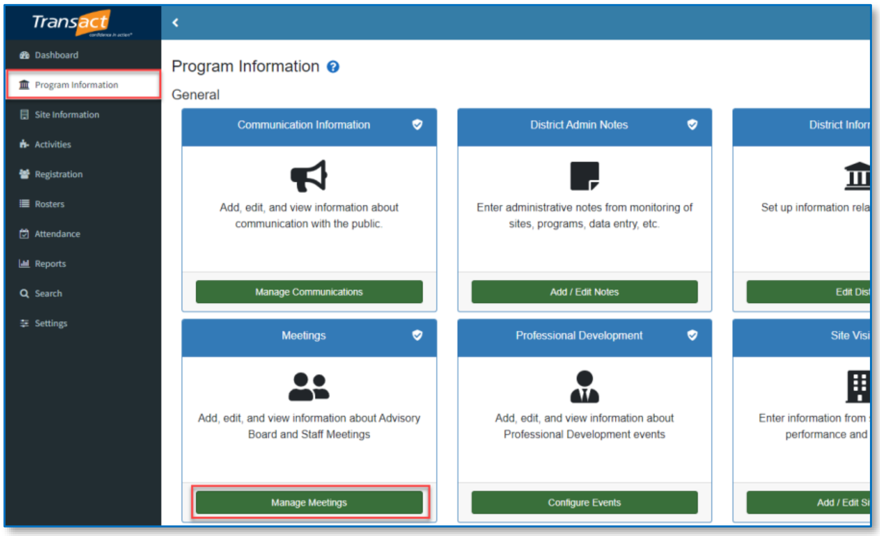
Enter Other Grants

6. Click 'Add New Grant'
7. Enter the Grant Name, Was Grant Received, and Description.
8. If the Grant was received, also enter the Award Date and Grant Amount
9. Click 'Save and Close'



ENTER MEETING DETAILS

Document staff and advisory board meetings.

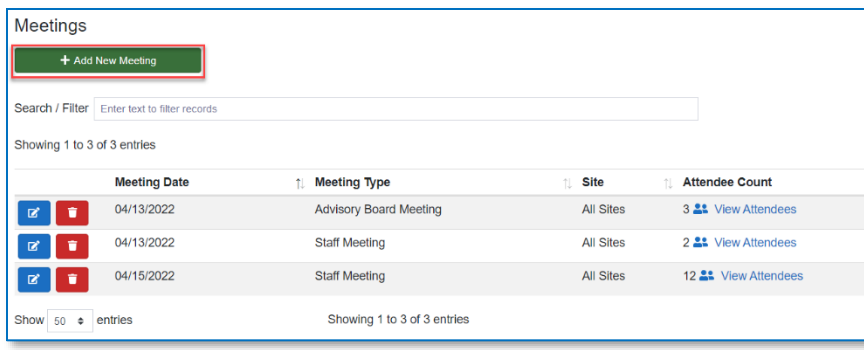


Enter Meeting Details

1. In your left-hand navigation menu, click 'Program Information'
2. Locate the 'Meetings' card
3. Click 'Manage Meetings

Enter Meeting Details

4. Click 'Add New Meeting'
5. Enter the Meeting Date, Meeting Type, and Meeting Summary
6. Select the people that attended the meeting
7. Click 'Save and Close'

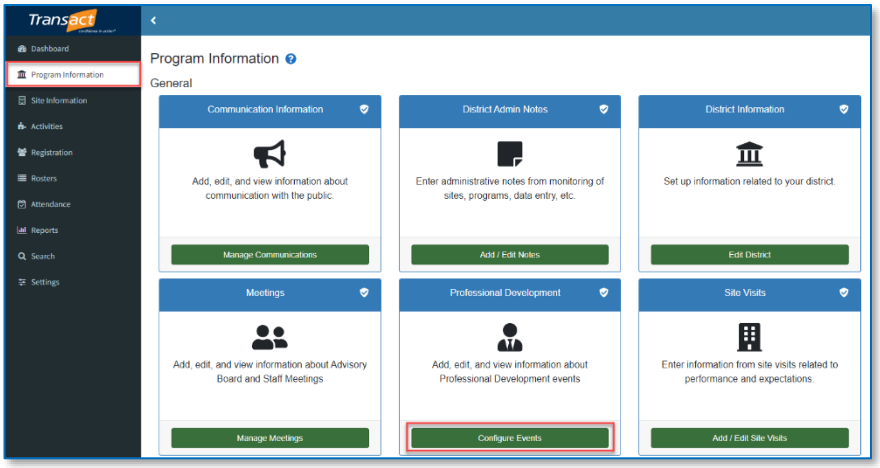


Notes

- The list of available Meeting Attendees is based on the selected Meeting Type. Staff Meetings will display a list of staff entered in Site Info -> Site Staff. Advisory Board Meetings will display a list of board members entered in Settings -> Program Settings -> Board Members.
- Site Staff or Board Members that were not active on the date in which the meeting took place will not appear in the list of available Meeting Attendees.

ENTER PROFESSIONAL DEVELOPMENT DETAILS

Schedule professional development events and document staff participating in those events.

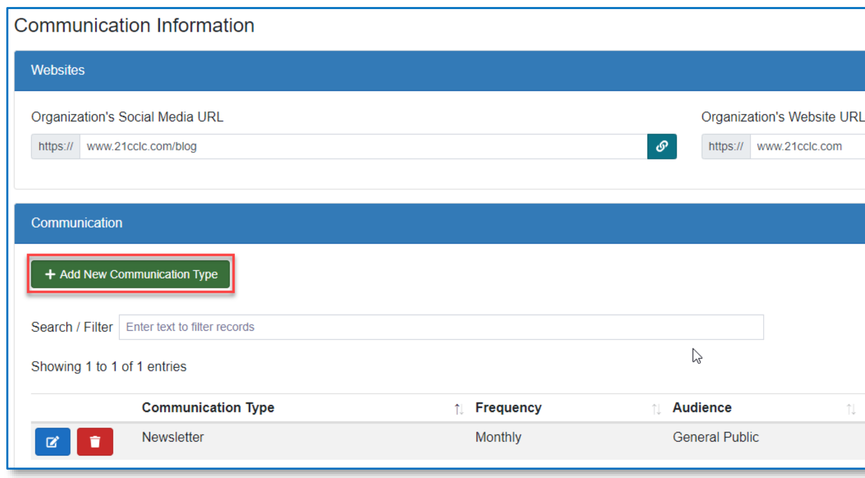


Add / Edit Professional Development Events

1. In your left-hand navigation menu, click 'Program Information'
2. Locate the 'Professional Development' card
3. Click 'Configure Events'

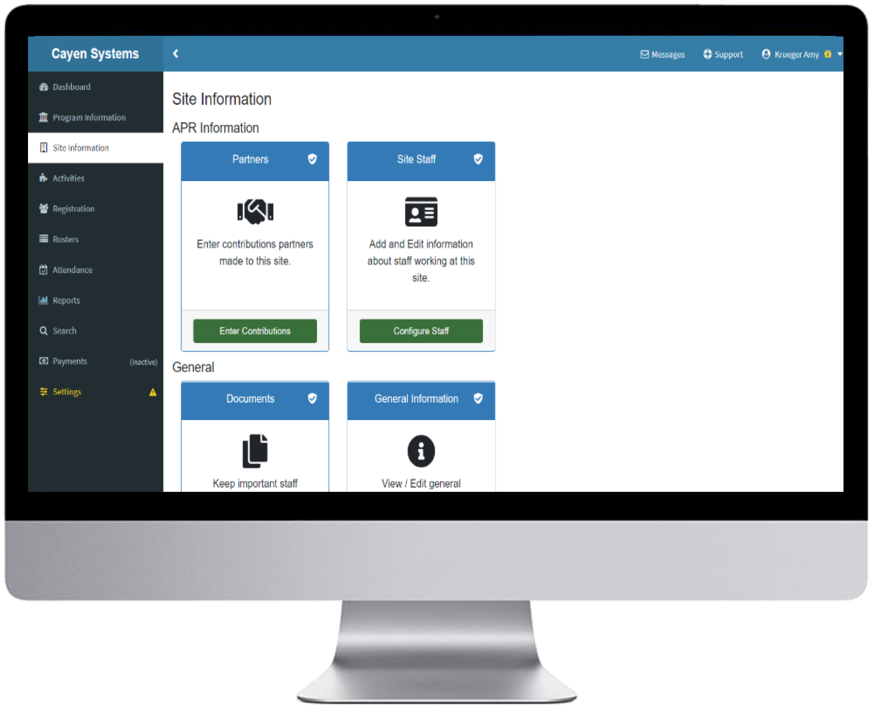
Add / Edit Communication

4. Click 'Add New Event'
5. Enter the Event Type, Event Name, Event Date, and Length in Hours
6. Select the Event Attendees
7. Click 'Save and Close'



Notes

- The Event Attendees will display a list of staff entered in Site Info -> Site Staff.
- Site Staff that were not active on the date in which the meeting took place will not appear in the list of available Event Attendees.



SITE INFORMATION

The Site Information section houses information specific to a single site. Information here is critical to Annual Performance Reporting. Unlike Site Settings, values may need to be added or updated in Site Information over a reporting year.

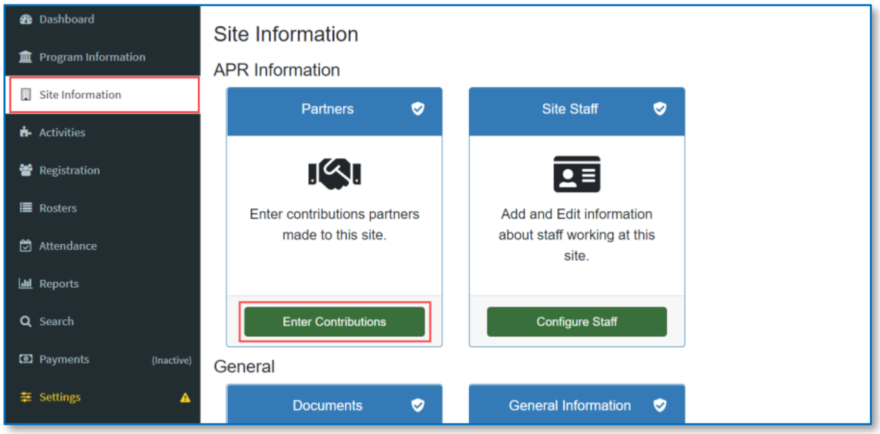
- ✔ Add / Edit Partner Contributions (pg #27)
- ✔ Add / Edit APR Site Staff (pg #28)
- ✔ Enter Staff APR Information (pg #29)

IMPORTANT NOTES ABOUT WORKING IN THIS SECTION

- Change Credentials and connect to a specific site when modifying Site Information.
- While some of these values may be the same across a program, Site Information must be configured for each active site individually.

ADD/EDIT PARTNER CONTRIBUTIONS

Partners that worked with each site within a term will be reported on the annual performance report.

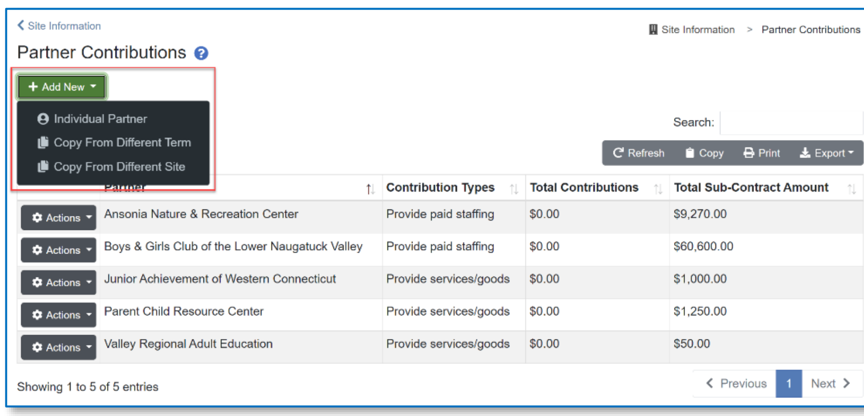


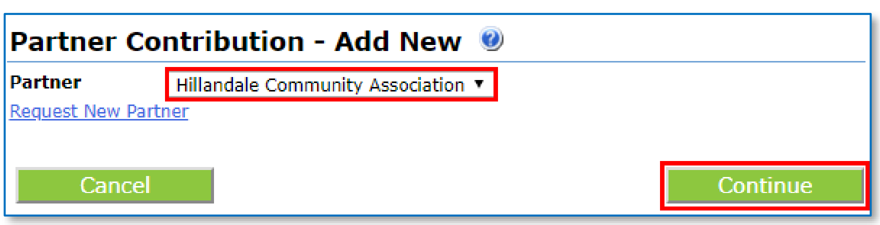
Enter Partner Contributions

1. In your left-hand navigation menu, click 'Site Information'
2. Locate the 'Partners' card
3. Click 'Enter Contributions'

Copy Partners

4. If working with the same partners from a different term or site, click 'Add New,' then 'Copy From Different Term' or 'Copy From Different Site'
5. From the drop-down, select the term or site from which you would like to copy partners
6. Check the box(es) next to the partner(s) you would like to add
7. Click 'Copy'





Add New Partners

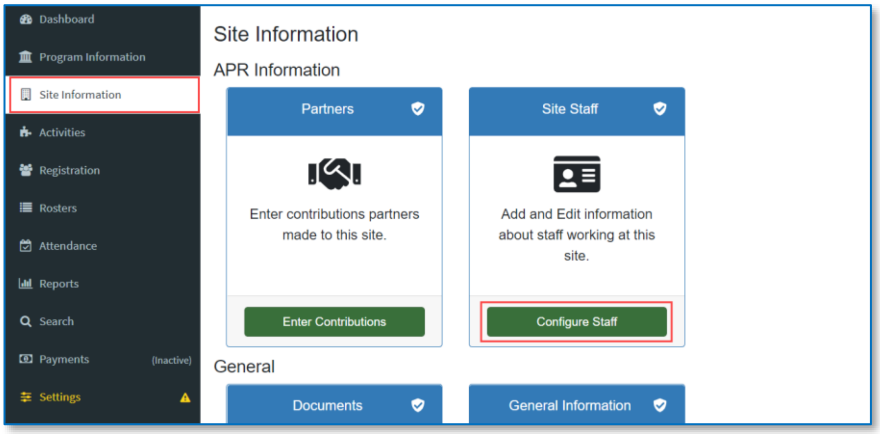
1. Click 'Add New,' then 'Individual Partner'
2. Select a Partner from the drop-down menu
3. Click 'Continue' (This will add the selected partner to your list of active partners)

Notes

- Specific contributions can also be tracked including contribution type, contribution amount, and sub-contract amount.

ADD/EDIT STAFF

Information about site staff is required for the annual performance report. Site staff can also be associated with activities as session leaders.

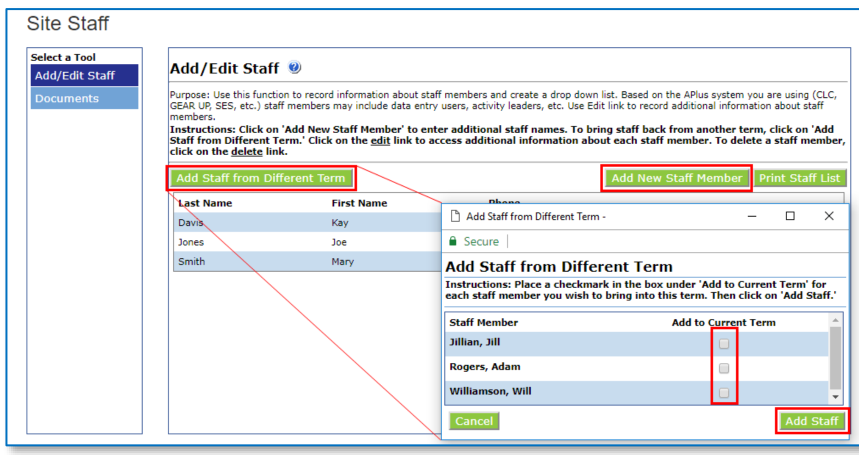


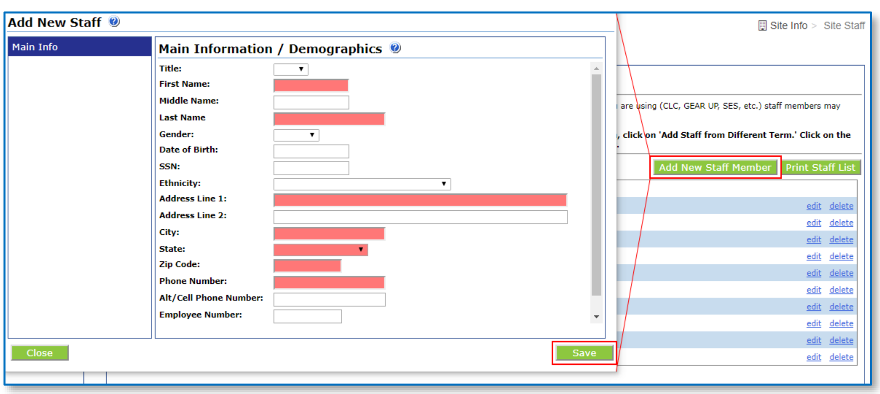
Configure Staff

1. In your left-hand navigation menu, click 'Site Information'
2. Locate the 'Site Staff' card
3. Click 'Configure Staff'

Add Staff from Different Term

1. If working with the same staff from a different term, click 'Add Staff From Different Term'
2. Check the box next to the staff member you would like to bring back from a prior term
3. Click 'Add Staff'



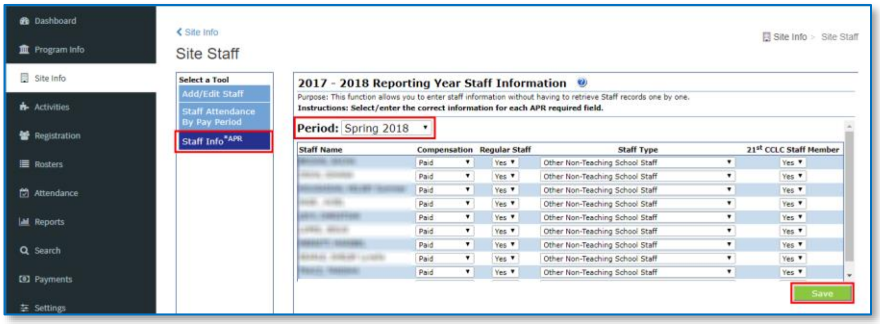


Add New Staff Member

1. Click 'Add New Staff Member'
2. Complete the required fields
3. Click 'Save'

ENTER STAFF APR INFORMATION

Staff information is required for each reporting period (summer, fall, and spring) for which a site is active in an APR reporting year.

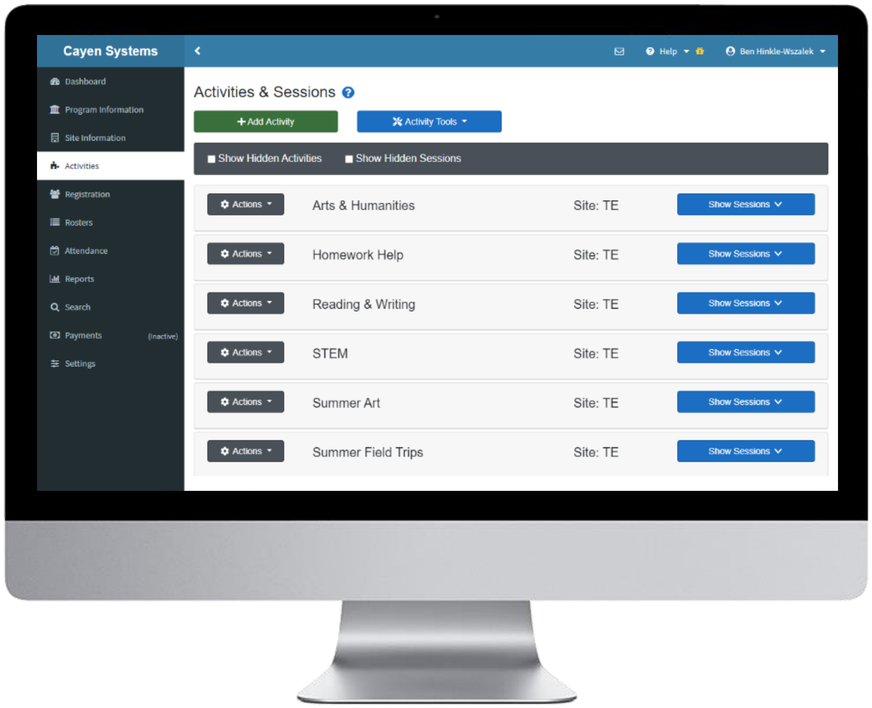


Enter APR Related Staff Info

1. Click ‘Staff Info *APR’ in the left, blue menu
2. Select the Period you wish to view
3. Complete the fields of information for all staff members listed on the APR Staff Info screen
4. Click ‘Save’

Notes

- Be sure to enter APR information for each of the active reporting periods for the site.
- If a staff member did not work at the site during a reporting period, set ‘Compensation’ to ‘Not Active’
- Regular Staff are staff with a set schedule.
- 21st CCLC Staff Members will be included in counts on the Annual Performance Report.



ACTIVITIES / SESSIONS

Activities are general programming and services accessible within a site. STEM, Homework Help, and Snack are examples of Activities. Sessions are the specific offerings of those Activities. New sessions should be established for different groups of participants being served on different dates or times.

✔ What are activities and sessions? (pg #31)

✔ Add Activities (pg #32)

✔ Add Sessions (pg #33)

IMPORTANT NOTES ABOUT WORKING IN THIS SECTION

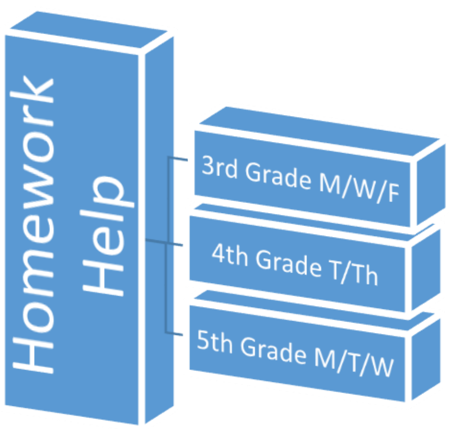
- Activities should only be copied from a prior term if no changes to the categorization of the activity are needed.
- Grant Objectives and Funding Sources must be set up before adding Activities.
- Activities can be copied from one Site to another. However, site-specific information such as Session Leaders and Funding Sources will need to be assigned to the Activity once it has been copied to another Site.

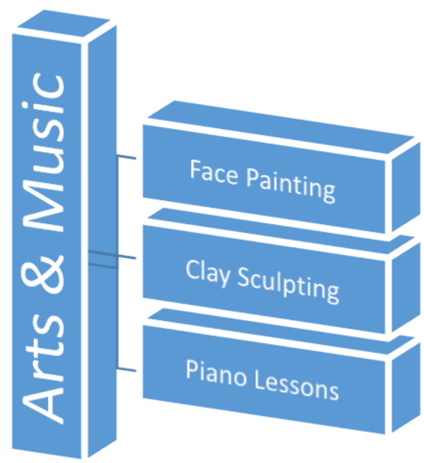
WHAT ARE ACTIVITIES AND SESSIONS?

Explanation of Activities/Sessions
When setting up your Activities and Sessions, think about a college course. The general course may be Chemistry; however, there will be multiple offerings of that course based on date, time, location, teacher, or grade level.

Below are two examples of Activities and Sessions.

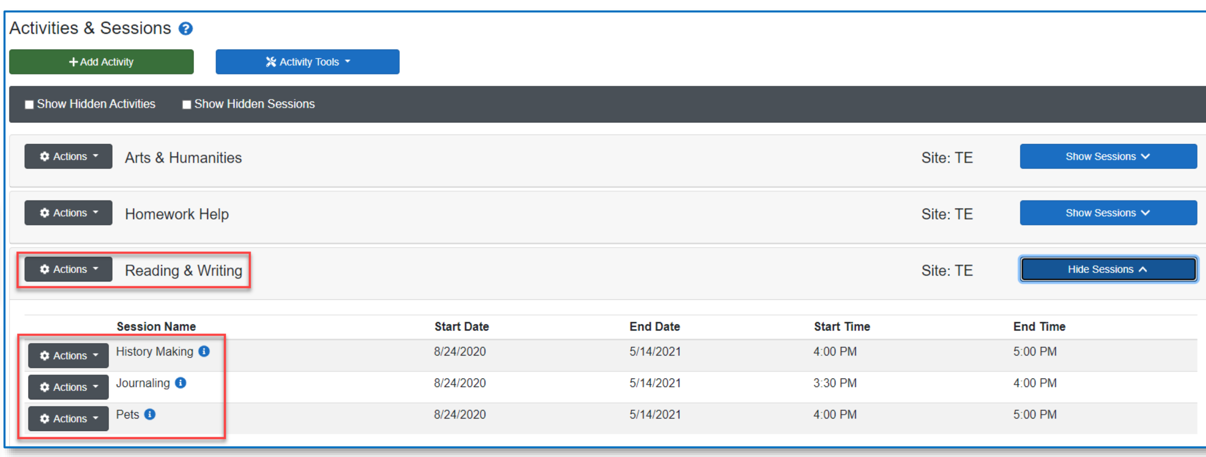
Activity **Sessions** **Activity** **Sessions**



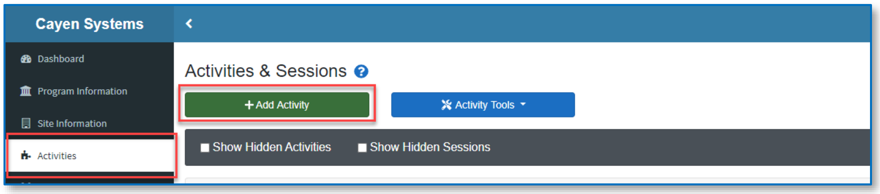


Here is the Activity in AS21

Here are the Sessions within that Activity



ADD AN ACTIVITY



Add Activities

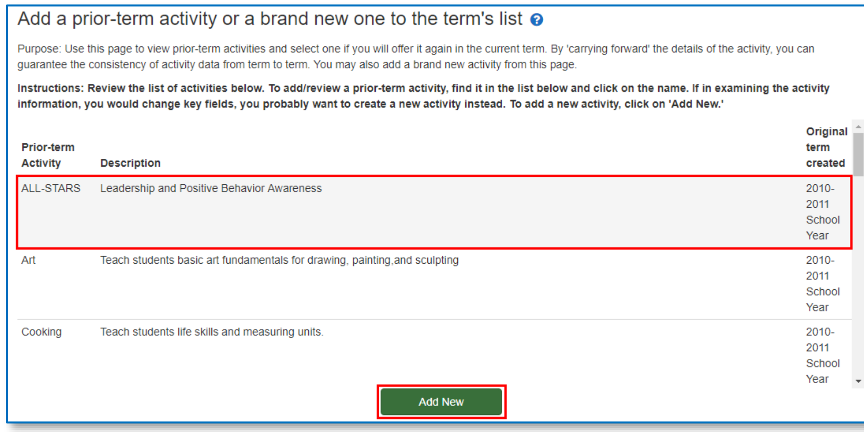
1. In your left-hand navigation menu, click 'Activities'
2. Click 'Add Activity'

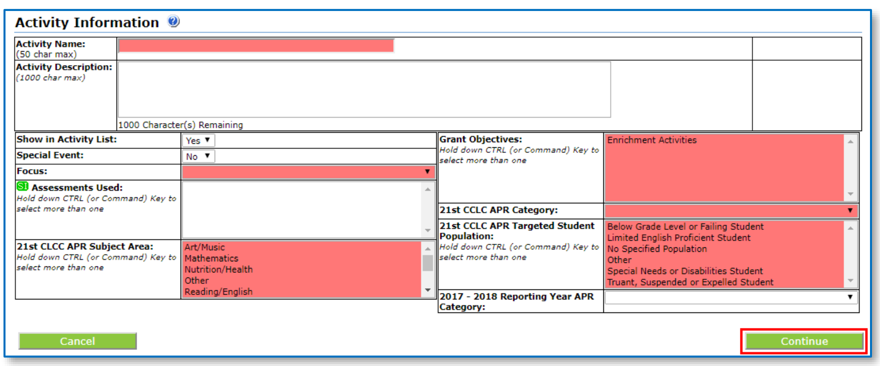
Choose Prior-Term Activity OR Add New

1. If you have offered the EXACT SAME Activity in a prior term, double-click on that activity in the list of Prior-Term Activities. Click 'Continue' to create the activity for the current term

OR

1. If entering an activity that HAS NOT been offered at your site in the past, click 'Add New'





Enter Activity Information

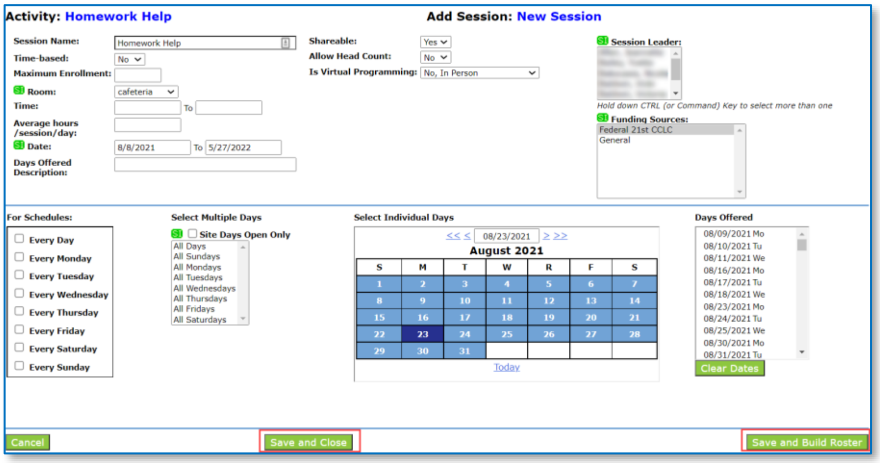
2. Enter the required information to categorize the activity for reports
3. Click 'Continue' to save the activity

Notes

- When adding an activity from a prior term, some field values may not be editable.
- The reporting Year APR Category selection will determine the area of the APR in which information from an activity will be counted.

ADD A SESSION

Once the activity has been created, you will need to establish at least one session of that activity.

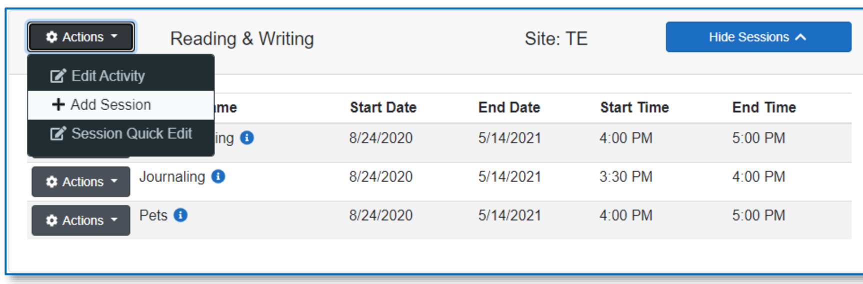


Enter Activity Information

1. Name the session. The session name will default to 'New Session.' Be sure to rename with a useful name to avoid confusion when viewing reports
2. Complete all required fields
3. Click 'Save and Close'

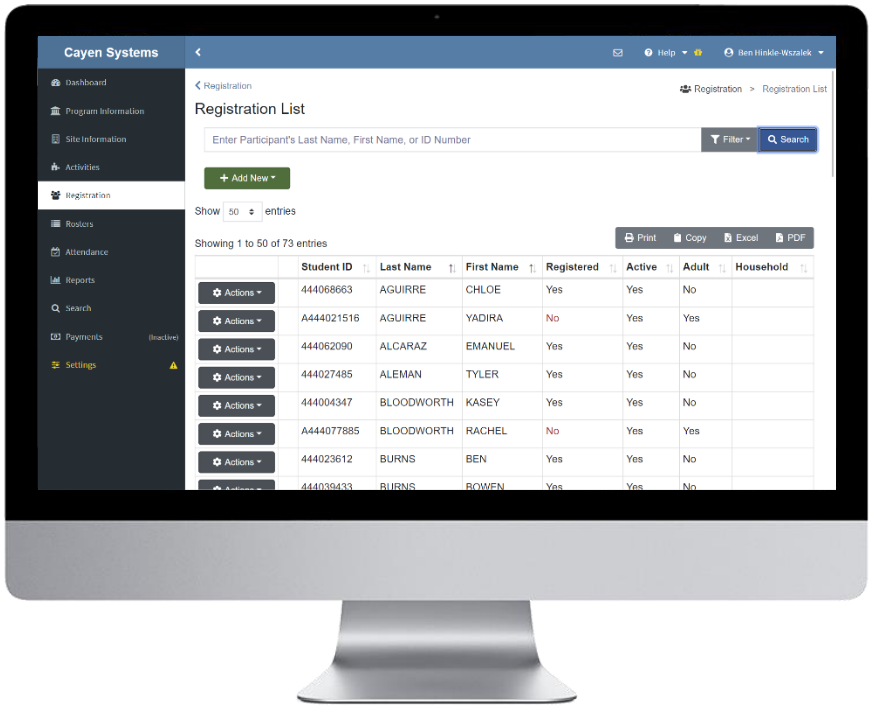
Add Additional Sessions

1. Add more sessions as needed. After adding the first session for an activity, you can add additional sessions to the activity
2. From the Activities screen, find the Activity to which you need to add a session
3. Click the 'Actions' button next to the Activity name
4. Click 'Add Session'
5. Complete all fields
6. Click 'Save and Close'



Tips

- Be sure to select the appropriate funding source for each session. Only information with sessions funded by 21st CCLC will appear on the Annual Performance Report.
- If multiple similar sessions are being offered for an activity, it may be easier to Copy the session and edit the copy rather than setting up a whole new session from scratch.
- If the session is offered virtually (e.g., via a web session, a recording, or a take-home packet) indicate this by selecting 'Yes, Virtual Programming' from the "Is Virtual Programming" field.
- Virtual sessions that are marked as 'Live' will not show when entering virtual session headcounts. Live virtual session attendance should be recorded in the same manner as in-person sessions.



REGISTRATION

Information related to the people being served at a site can be found in Registration. Participant demographics, academic information, emergency contact information, and more can be stored in a registration record.

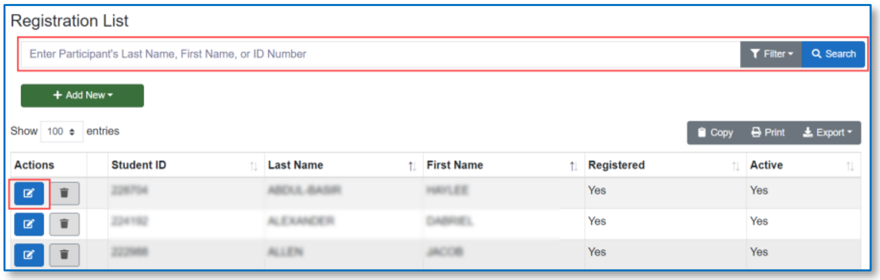
- ✔ Registration overview (pg #35)
- ✔ Quick add from pre-registration list (pg #36)
- ✔ Quick add from a prior term (pg #37)
- ✔ Add individual participants (pg #38)

IMPORTANT NOTES ABOUT WORKING IN THIS SECTION

- Use the alphabet bar or Find Person options to locate an individual participant.
- Save data entry time and improve the accuracy of participant information by sending data from your Student Information System to Cayen Systems via our secure data uploads site (https://datauploads.datapropeller.com)

REGISTRATION OVERVIEW

Information about participants needs to be collected for various reports, including the 21st CCLC annual performance report.

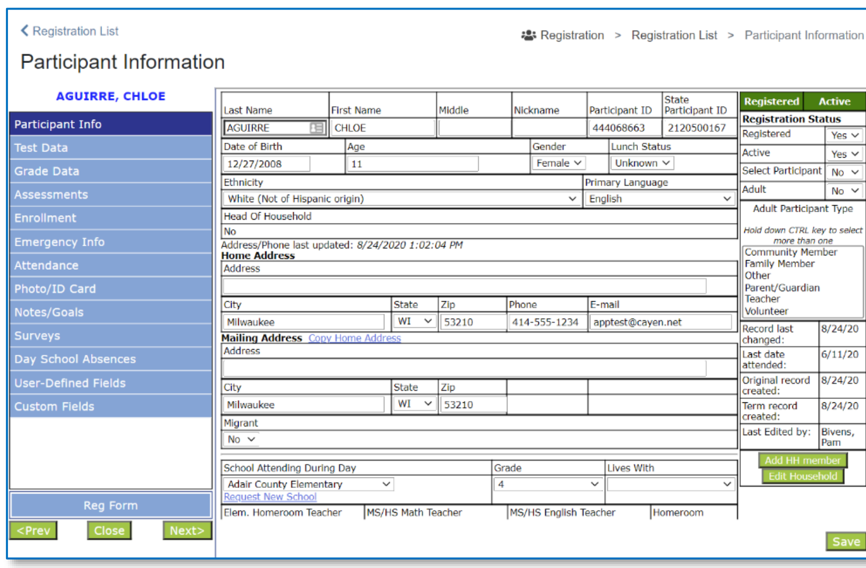


Edit a participant

1. In your left-hand navigation menu, click 'Registration,' then click 'Manage Participants'
2. Locate the participant using the search bar or click 'Search' with no value in the search bar to see all participants
3. Click the edit button in the Actions column next to their name

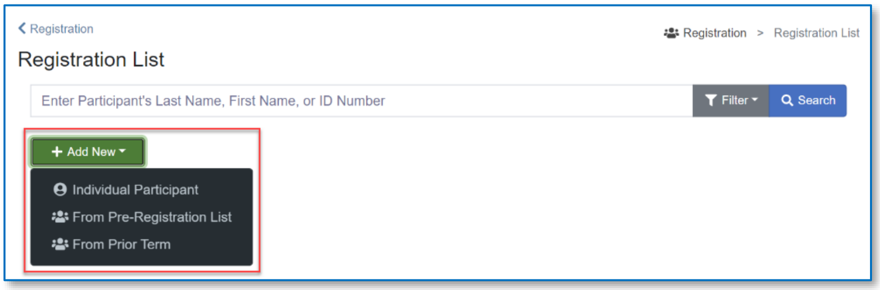
---

1. View and update information as needed.
   - Participant demographics are found on the Participant Info tab. Additional data can be located on the other blue tabs within the Registration record.
2. Click 'Save'



ADD STUDENTS FROM THE PRE-REGISTRATION LIST

Student demographic and contact information can be exported from your school district's student information system and sent to TransACT to create a pre-registration list.

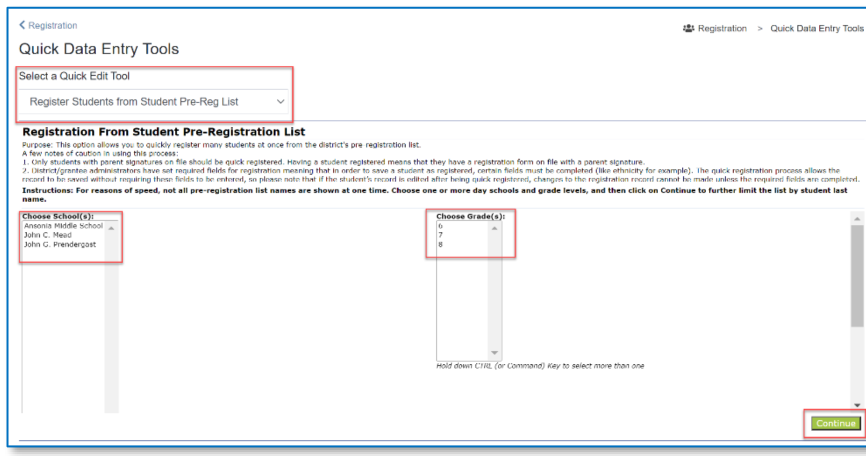


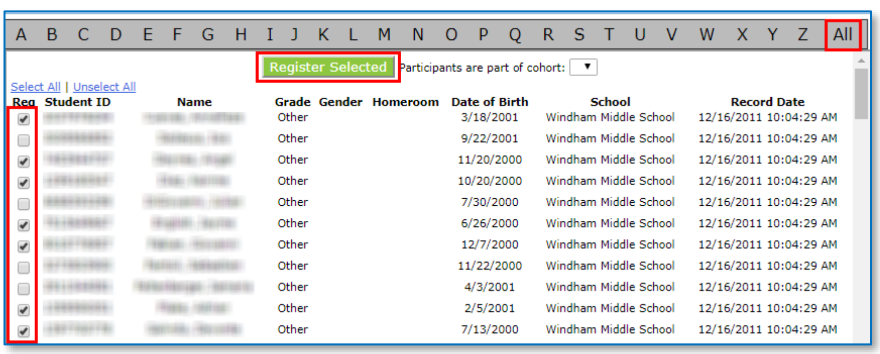
Add Students from Pre-Registration List

1. In your left-hand navigation menu, click 'Registration'
2. Click 'Manage Participants' in the Registration List card
3. Click 'Add New' then 'From Pre-Registration List'

Add Students from Pre-Registration List

4. Click your school under the Choose School(s) column
5. Click the appropriate grade levels under the Choose Grade(s) column
6. Click 'Continue'





Tips

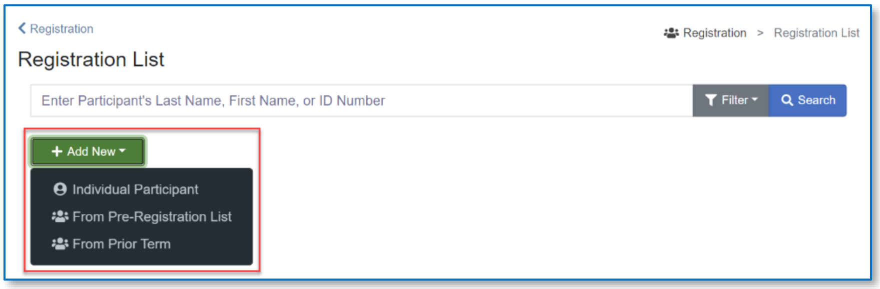
When selecting participants, the 'Record Date' indicates the date on which the student information system data was imported into AS21. Verify that the student data is from a recent import prior to registering them.

Add Students from Pre-Registration List

7. Click 'All' at the end of the alphabet bar to display the entire student pre-registration list of available participants to register
8. If you have a large number of participants, you can filter the list by selecting a letter
9. Select the participants to register by clicking in the box next to each participant's name under the Reg column or click the blue 'Select All' link.
10. Click 'Register Selected' once you have selected the participants you wish to register

ADD PARTICIPANTS FROM PRIOR TERM

If participants were served by a site in a prior term and have returned, their information can be pulled forward into the new term, saving considerable time.

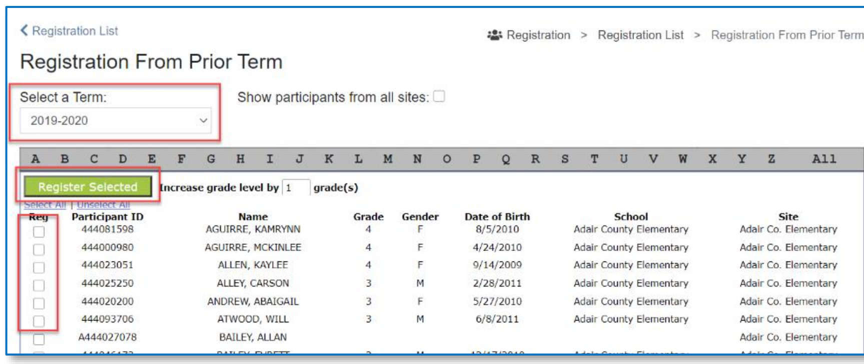


Add Students from Prior Term

1. In your left-hand navigation menu, click 'Registration'
2. Click 'Manage Participants' in the Registration List card
3. Click 'Add New' then 'From Prior Term'

Add Participants from Prior Term

4. Select the Term from the drop-down and click 'All' on the alphabet bar. A list of participants from the term selected will appear
5. Check the boxes for the participants that you would like to bring to the new term
6. Click 'Register Selected' once you have selected the participants you wish to register

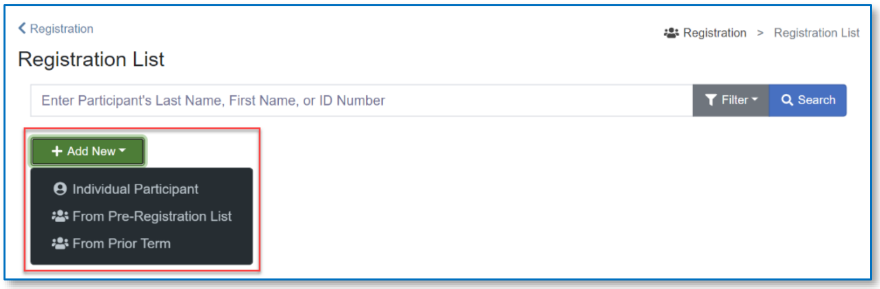


Notes

- When adding a participant from a prior term, you may need to modify the 'Increase grade level by # grade(s)' field accordingly.
- Some demographic information may need to be updated after participants are registered – namely school and teacher values.
- Participants that attended other sites in your district in a prior term can be located by checking the box labelled 'Show participants from all sites.'

ADD INDIVIDUAL PARTICIPANTS

If a site does not have access to a student pre-registration list or prior term records or if a new participant joins a program mid-year, they will need to be added individually as a new participant.

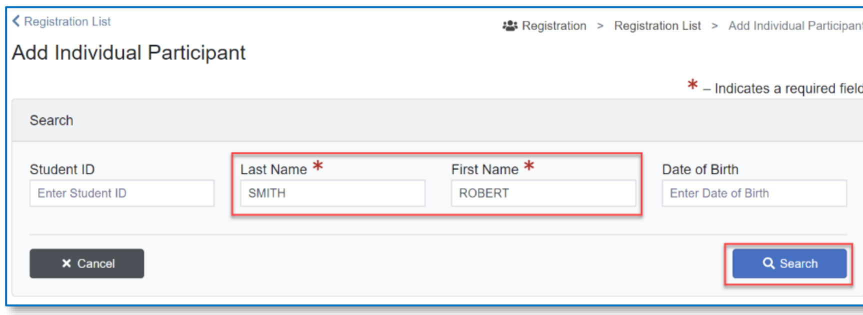


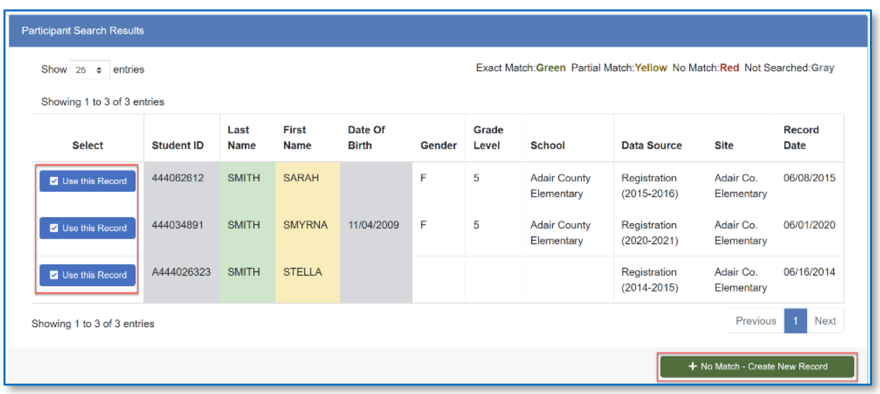
Add Individual Participant

1. In your left-hand navigation menu, click 'Registration'
2. Click 'Manage Participants' in the Registration List card
3. Click 'Add New' then 'Individual Participant'

Add Individual Participant

4. Enter the all or part of the participant's Last and First Name, Student ID, and Date of Birth (if available)
5. Click 'Search'





Add New Participants

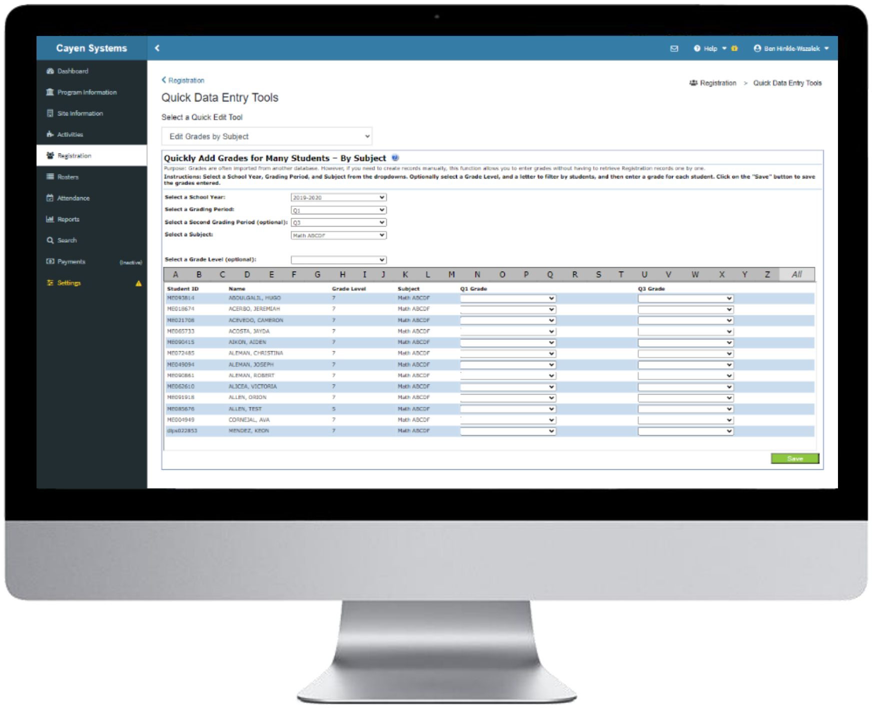
6. If the desired Participant shows in the Search results, click 'Use this Record.' Review and update the Registration record then click 'Save'
7. If the desired Participant is not displayed, click 'No Match – Create New Record'. Enter the participant's information then click 'Save'

Tips

- This process uses pop-up windows to validate information being entered. Ensure that your computer's pop-up blockers are disabled to avoid issues when saving.

Notes

- The add new participant search will hunt for matching records in your site for the current and prior terms, your district for the current and prior terms, and your student pre-registration list.



QUICK EDIT TOOLS

Data entry can be a tedious process. The Quick Edit Tools allow users to efficiently review and update critical information associated with their participants.

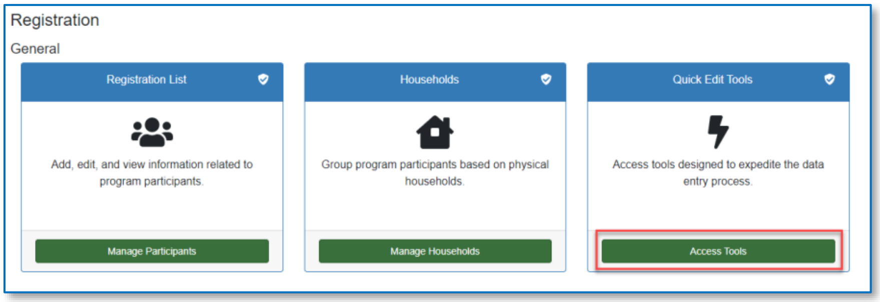
- ✔ Fill in missing demographics (pg #40)
- ✔ Add / Edit test scores (pg #40)
- ✔ Add / Edit grades by student (pg #41)
- ✔ Add / Edit APR outcomes (pg #41)
- ✔ Print surveys / enter survey responses (pg #41)

IMPORTANT NOTES ABOUT WORKING IN THIS SECTION

- Save frequently when working with any of the quick edit tools.
- Save data entry time and improve the accuracy of academic information by sending data from your Student Information System to TransACT via our secure data uploads site (https://datauploads.datapropeller.com)

QUICK EDIT TOOLS

The quick edit tools section allows you to enter data more efficiently. The images in this guide may be slightly different than your screen. Please get in touch with your program administrator with questions.

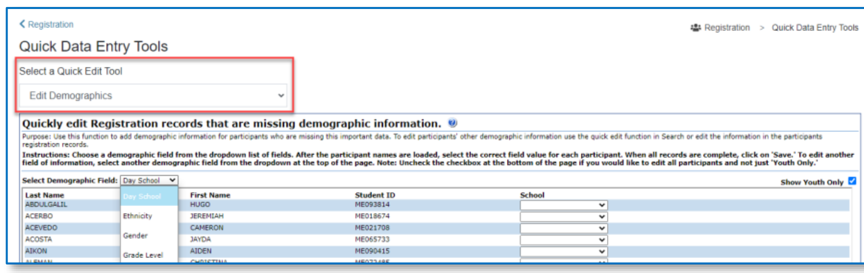


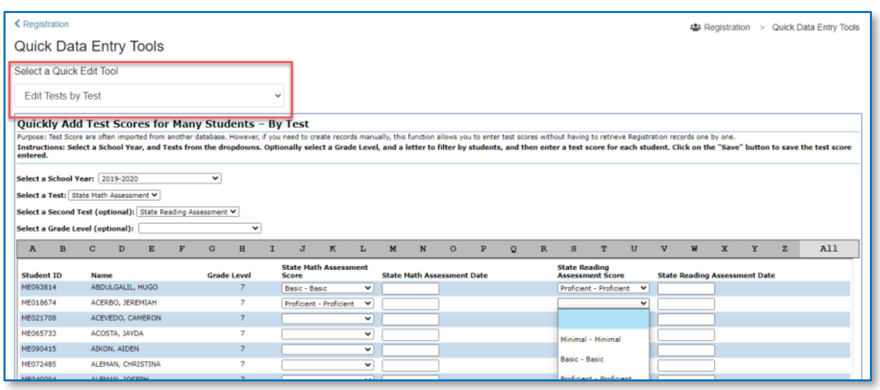
Access Quick Edit Tools

1. In your left-hand navigation menu, click 'Registration'
2. Click 'Access Tools'
3. The Quick Edit Tools screen will open, click a tab in the left, blue menu. (below are examples of quick edit tools options)

Fill in Missing Demographics

1. Select 'Edit Demographics' from the dropdown list
2. Select a demographic field from the drop-down (a list of participants missing these data will populate)
3. Enter the values for the participants
4. Click 'Save'





Add/Edit Test Scores

1. Select 'Edit Tests by Test' from the dropdown list
2. Select a School Year and Test(s) from the drop-down menus
3. Add or edit test scores
4. Click 'Save'

Tips

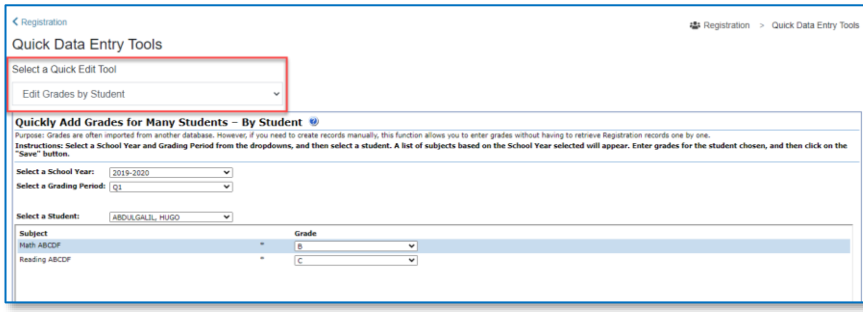
- If no participants appear in the list after selecting a demographic field in Edit Demographics, all participants have a value in that field.

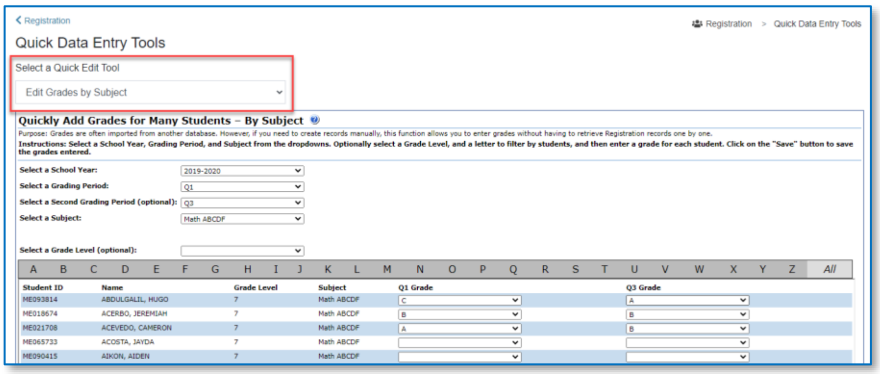
Notes

- Your program may need to record day school grades, state standardized test scores, and/or teacher surveys as outcomes for the APR.
- If entering test scores for the APR, enter the performance levels for those tests, not the numeric scores.

Add/Edit Grades by Student (useful when entering grades from report cards)

1. Select 'Edit Grades by Student' from the dropdown list
2. Select a School Year, Grading Period and Participant from the drop-down menus
3. Add or edit grade data
4. Click 'Save'



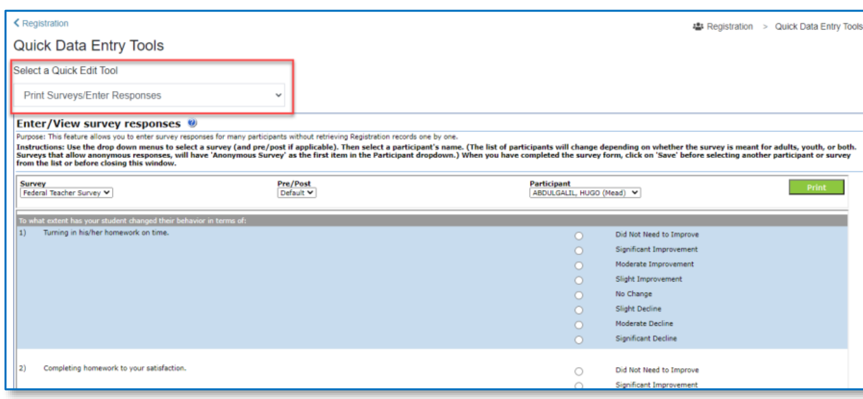


Add/Edit Unweighted GPA, In-School Suspensions, and School Attendance Rates

1. Select 'Edit APR Outcomes' from the dropdown list
2. Select the outcome for which you have data to enter
3. Select a School Year(s)
4. Add or edit outcome data
5. Click 'Save'

Print Surveys/Enter Responses

1. In the left blue menu, click 'Print Survey/Enter Responses'
2. Select the survey and participant
3. Complete the survey
4. Click 'Save'

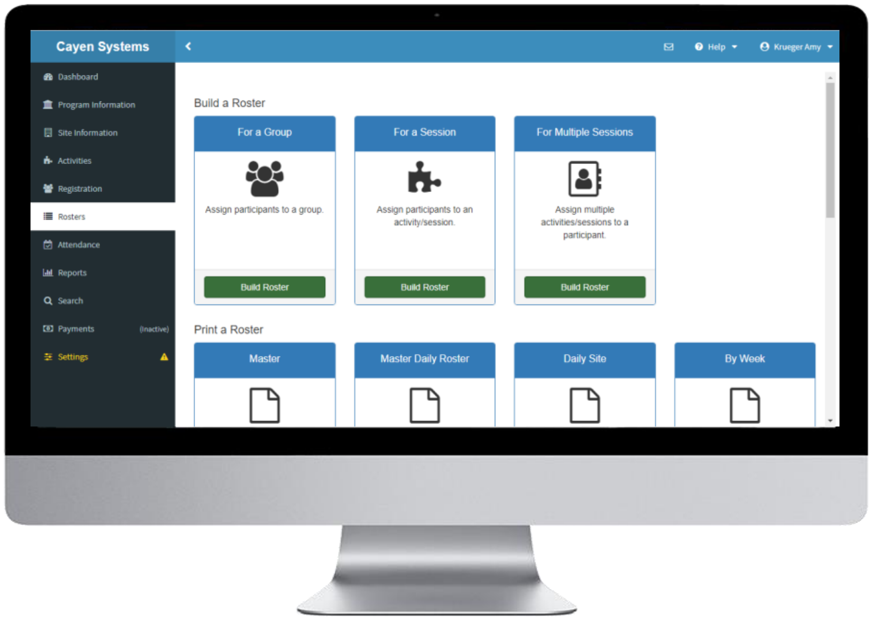


Tips

- Surveys can be taken by the respondent online through the Survey Portal without the paper! See your grant administrator or contact your Cayen Systems Account Manager with questions.

Notes

- When entering GPRA outcomes, the available school years are based on the Current and Prior School Year selections entered in Settings -> Site Settings -> Reporting Periods.



ROSTERS

Rosters are lists of participants and can be used to print paper attendance sheets for recording participation. Rosters can be associated with specific sessions being offered at a site or can be established for a custom group of participants.

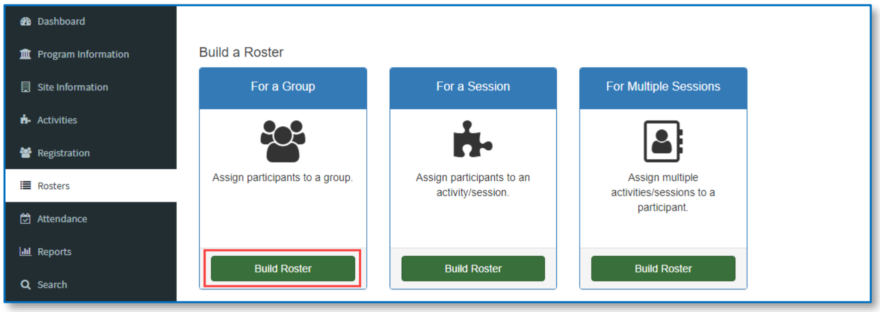
- ✔ Group Rosters (pg #43)
- ✔ Session Rosters (pg #45)
- ✔ Multiple Session Selection (pg #46)
- ✔ Print a roster (pg #47)

IMPORTANT NOTES ABOUT WORKING IN THIS SECTION

- Group Rosters can be used to create a list of participants with common attributes. Examples include groups for grade levels, teachers, bus routes, or students being picked up at the end of the day.
- Including bar-coded Student IDs on Rosters can expedite attendance entry.
- Changes to Roster Setup will affect all users at a Site.

GROUP ROSTERS

Group rosters can be used to minimize the amount of paper, ink, and time needed to track attendance for a set of participants that move collectively from one session to another.

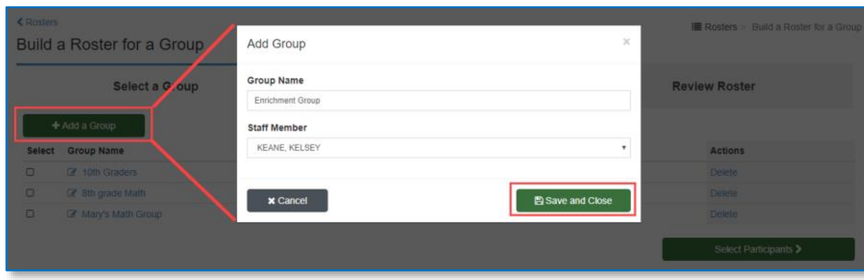


Create a Group

1. In your left-hand navigation menu, click 'Rosters'
2. Locate the 'For a Group' card
3. Click 'Build Roster'

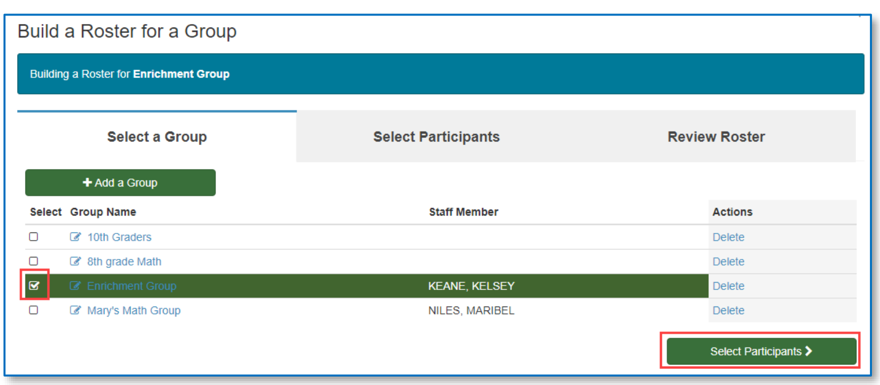
Add a New Group

1. Click the green 'Add a Group' button, at the top of the screen.
2. Enter the Group Name and Staff Member associated with the group
3. Click 'Save and Close'
4. Your new group will now appear in the Group list at the bottom of the screen



Notes

- Groups are site- and term-specific. So, new groups will need to be established at the start of each new term.
- Click a group name to edit the group

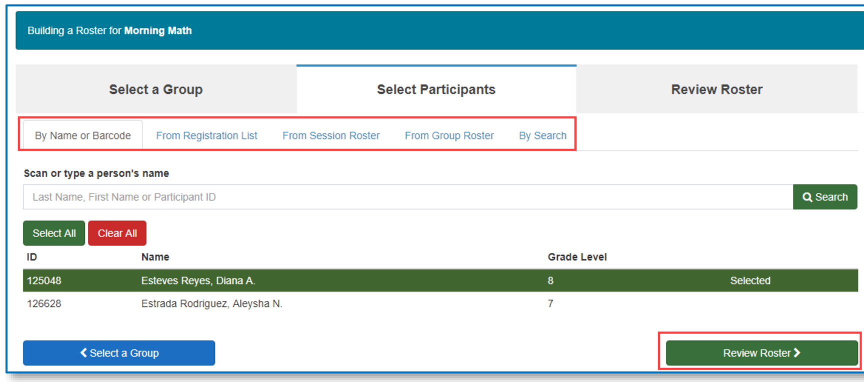


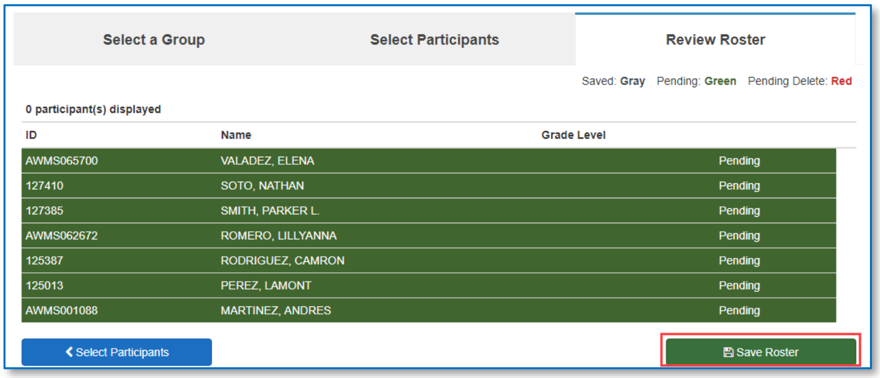
Add Participants to a Group

1. Check the box to select the Group for which you wish to build a roster.
2. Click 'Select Participants'
3. You will be taken to the next screen to select participants.

Select Participants

1. Select participants using the options at the top of the screen. (By Name or Barcode, From Registration List, From Session Roster, From Group Roster, or By Search)
2. Click 'Review Roster' to advance to the next screen



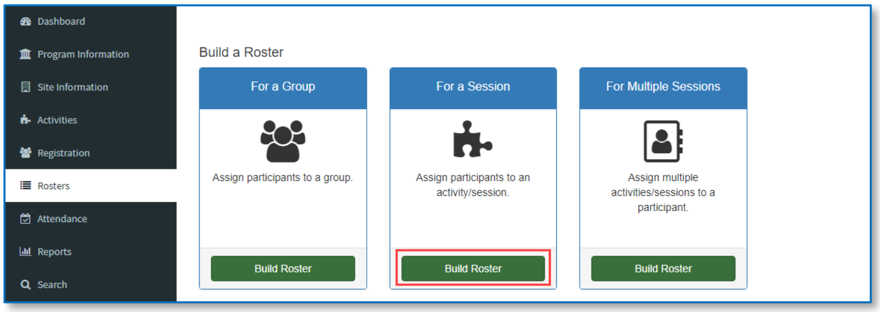


Review Roster

1. Review the list of participants
2. Click on a participant name to remove it from the list
3. Click 'Save Roster'

ADD PARTICIPANTS TO A SESSION ROSTER

Create rosters of participants that regularly attend or are enrolled in a specific session.

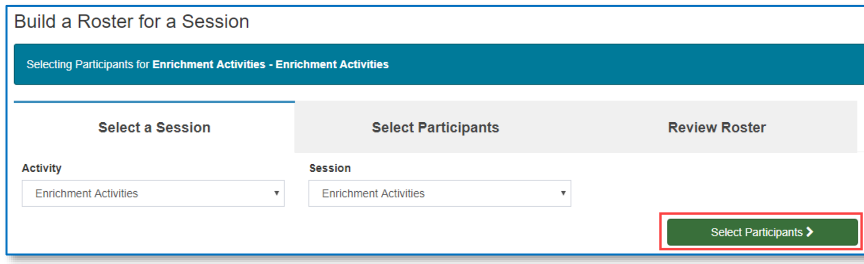


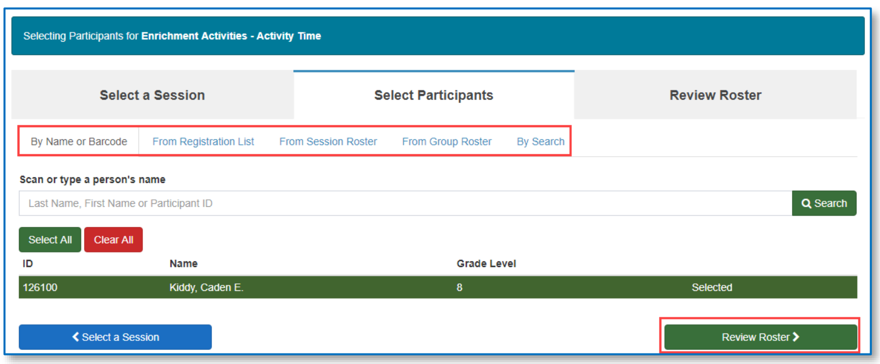
Build a Roster for a Session

1. In your left-hand navigation menu, click 'Rosters'
2. Locate the 'For a Session' card
3. Click 'Build Roster'

Select Activity and Session

1. Use the drop-down menus to select the Activity and Session for which you are building a roster
2. Click 'Select Participants' to advance to the next screen



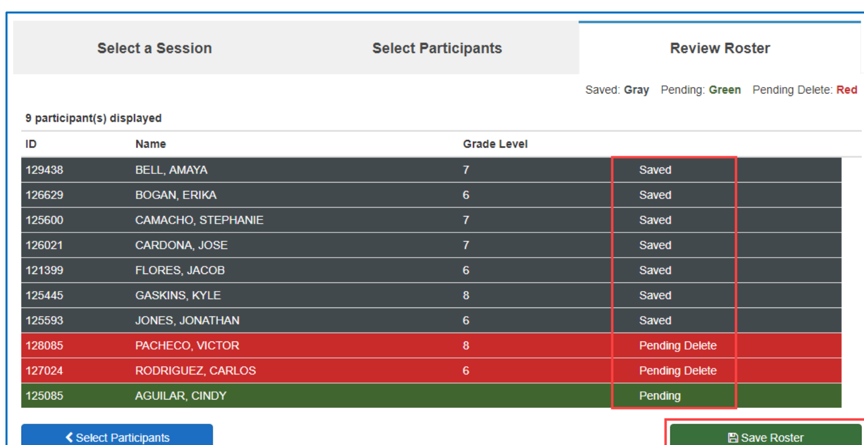


Select Participants

1. Select participants using the options at the top of the screen. (By Name or Barcode, From Registration List, From Session Roster, From Group Roster, or By Search)
2. Click 'Review Roster' to advance to the next screen

Review Roster

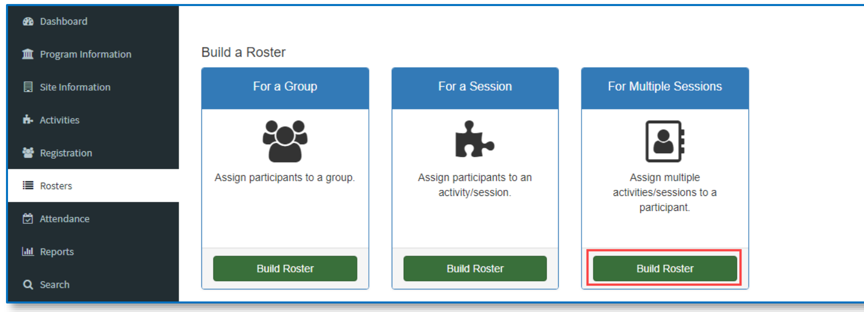
1. Review the list of participants
2. Click on a participant name to remove it from the list
3. Click 'Save Roster'

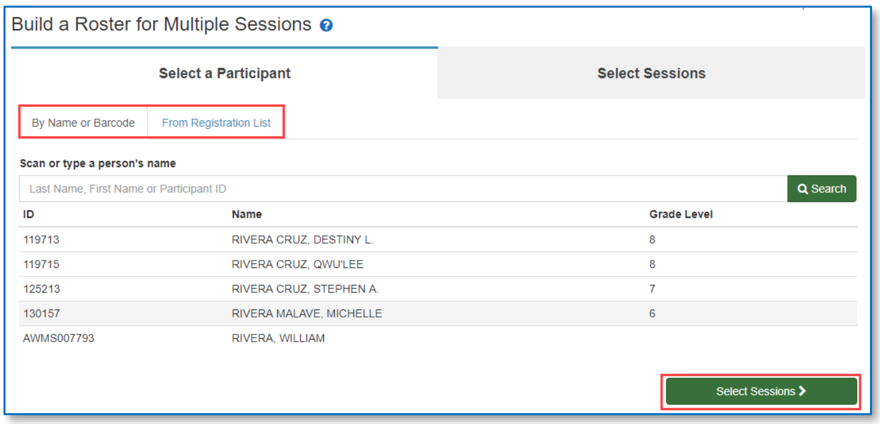


MULTIPLE SESSION SELECTION

Build a Roster for Multiple Sessions

1. In your left-hand navigation menu, click ‘Rosters’
2. Locate the ‘For Multiple Sessions’ card
3. Click ‘Build Roster’



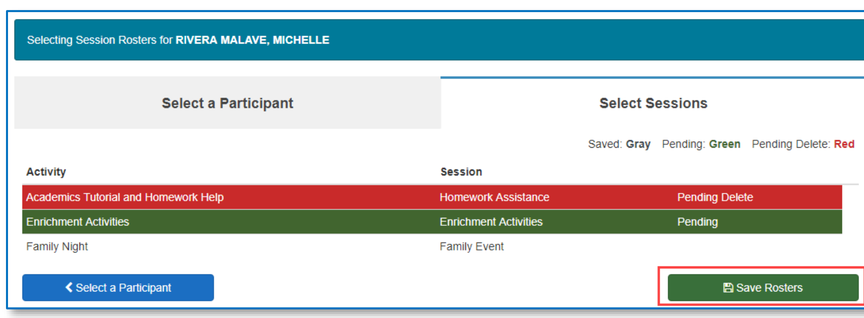


Select a Participant

1. Select a participant using either, ‘By Name or Barcode’ or ‘From Registration List’
2. Click ‘Select Sessions’ to advance to the next screen

Select Sessions

1. Click on the sessions that you wish to select for the participant
2. Click ‘Save Rosters’ to update the rosters for these sessions



Tips

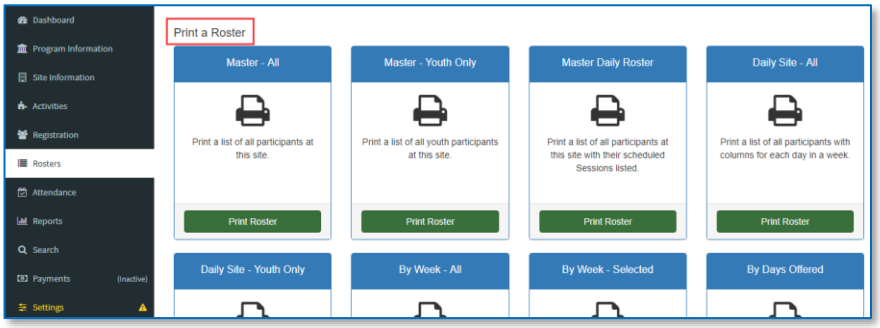
- In many programs, participants can be enrolled in multiple activities and sessions at the same time.
- Ensure that all names are grey prior to leaving the roster screen. Any names highlighted in green will not be saved and names in red will not be deleted if you don’t click Save.

Notes

- ‘Build a Roster – For a Session’ and ‘Build a Roster – For Multiple Sessions’ both update the session rosters. ‘For a Session’ starts with the session and shows the participants associated with that session roster. ‘For Multiple Sessions’ starts with the participant and shows the session rosters associated with that person.

PRINT A ROSTER

Printed rosters can be used to record participation in sessions or as sign-in/out sheets.

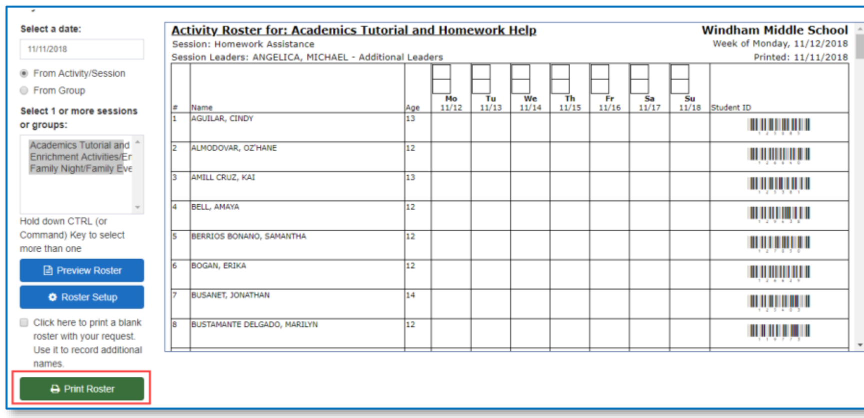


Print a Roster

1. In your left-hand navigation menu, click 'Rosters'
2. Scroll to the Print a Roster section
3. Locate the card for the roster you wish to print
4. Click 'Print Roster'

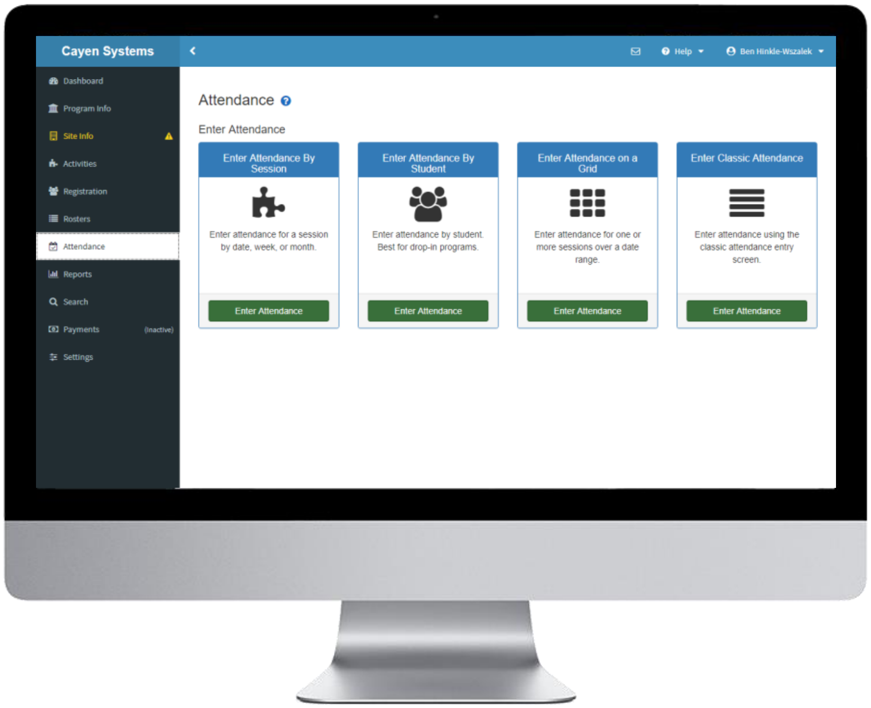
Select and Print a Roster

1. Select a date (if required)
2. Select an Activity/Session or Group
3. Click 'Preview Roster'
4. Click the green 'Print Roster' button



Tips

- Be sure to click the green 'Print' button when printing. Do not use File > Print or Ctrl+P to print
- Click 'Roster Setup' to change the fields/columns that print on the roster.
- Including bar coded ID numbers on the printed rosters can help when entering attendance with a scanner.



ATTENDANCE

Recording who came to each session is arguably the most critical data to collect at a site. Several methods of attendance collection are available in AfterSchool 21.

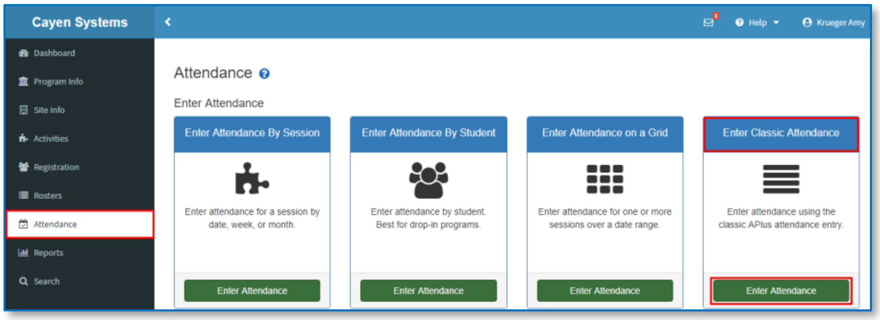
- ✔ Enter basic attendance (pg #49)
- ✔ Fill attendance from a roster (pg #50)
- ✔ Add family members from sign-in sheet (pg #51)
- ✔ Record real-time attendance (pg #52)
- ✔ Enter Attendance on Grid (pg #53)

IMPORTANT NOTES ABOUT WORKING IN THIS SECTION

- Attendance should be recorded daily to avoid getting too far behind on data entry.
- Rosters with bar-coded student IDs can be used to expedite the data entry process.
- Use Select Previous Attendance in the Classic Attendance feature to spot-check attendance entry efforts.
- Entering attendance on a grid should be a last resort. Please get in touch with TransACT support if needed.

ENTER BASIC ATTENDANCE

The most common way of entering attendance.

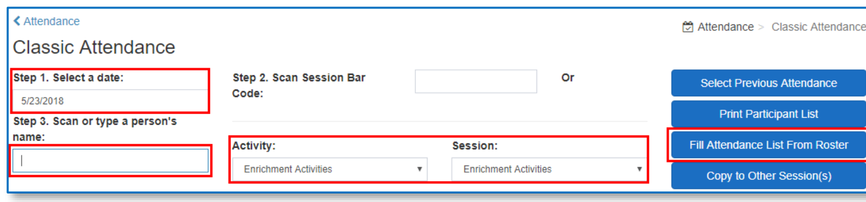


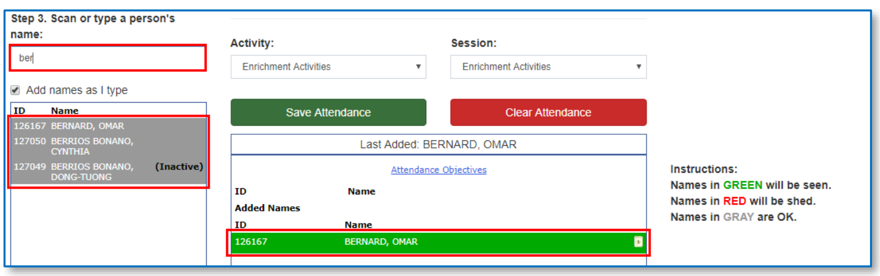
Enter Attendance

1. In your left-hand navigation menu, click ‘Attendance’
2. Locate the ‘Enter Classic Attendance’ Card
3. Click ‘Enter Attendance’

Select Criteria for Entering Attendance

1. Select the date of the attendance
2. Select the Activity and Session
3. Scan or type in the person’s name OR click ‘Fill Attendance List from Roster’





If you scan or type in the person’s name:

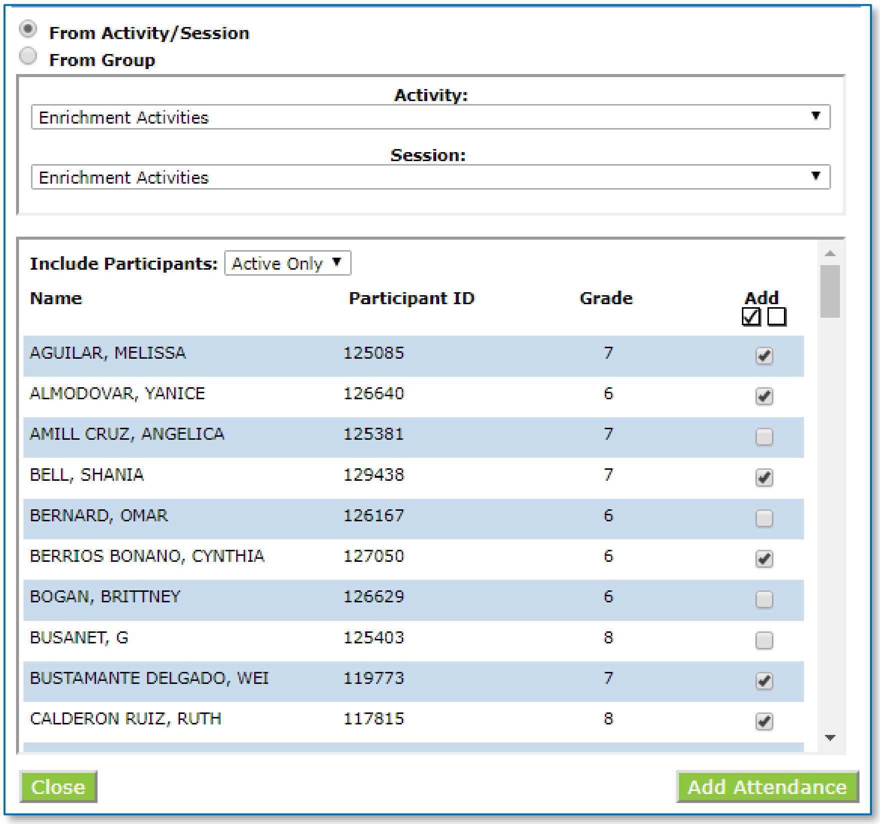
1. Type in the participant name and hit Enter or Tab on the keyboard. All matching records will show below
2. Click the participant name to add to the attendance list
3. Click ‘Save Attendance’

Tips

- Scanning bar coded IDs from a roster is a quick and efficient way to enter attendance.
- Ensure that all names are grey prior to leaving the attendance screen. Any names highlighted in green will not be saved and names in red will not be deleted if you don’t click Save Attendance.
- After attendance has been saved, use the Copy to Other Session(s) or Copy to All Scheduled Sessions to quickly populate other sessions that participants attended on a selected date.

FILL ATTENDANCE FROM A ROSTER

It may be easier to start with a list of expected participants and remove those absent rather than typing or scanning all the people present.



Fill Attendance List from Roster

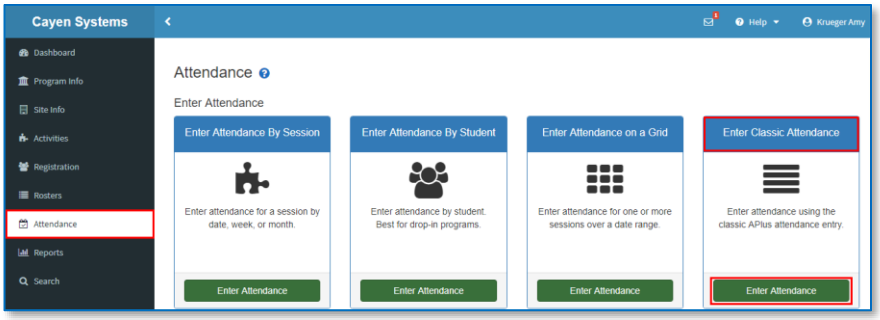
1. Click 'Fill Attendance From Roster'
2. Select the Activity and Session or Group for which you are entering attendance
3. Check the box next to each participant name for which you would like to add attendance
4. Click 'Add Attendance'
5. If necessary, repeat steps 1-3 with all rosters containing attendance for the selected Date and Activity/Session (or Group). Once done, click the 'Close' button
6. Click 'Save Attendance'

Tips

- Fill from group rosters to quickly enter attendance for sessions with participants from multiple groups (e.g. Snack).

ADD A FAMILY MEMBER FROM A SIGN-IN SHEET

When adding attendance for a family member or one-time participant from a sign-in sheet a participant can be added to registration ‘on the fly.’



Add an Attendee

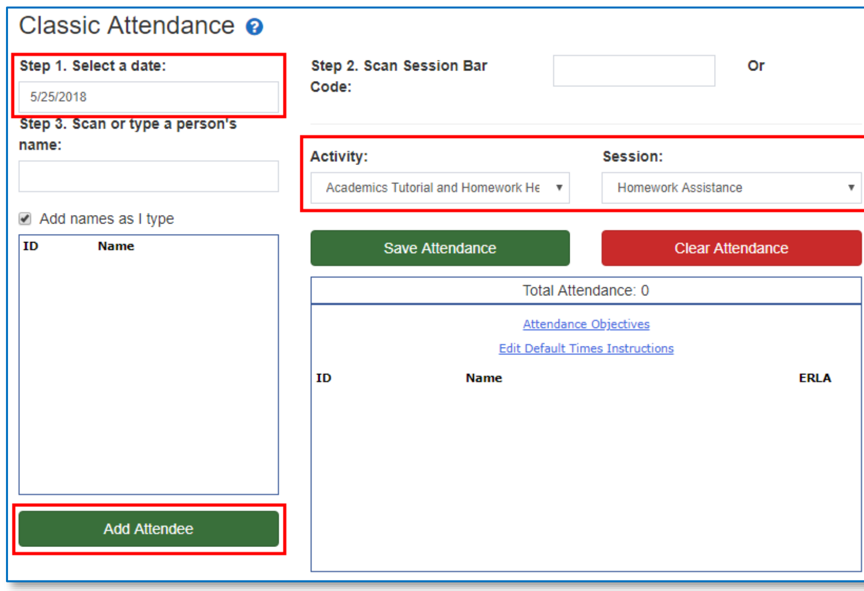
1. In your left-hand navigation menu, click ‘Attendance’
2. Locate the ‘Enter Classic Attendance’ Card
3. Click ‘Enter Attendance’

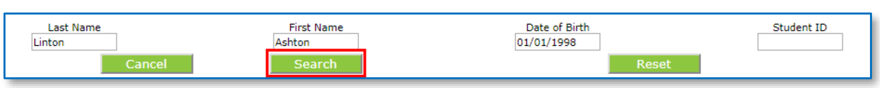
Select criteria for entering attendance

1. Choose the date of attendance from the calendar
2. Select an Activity and Session
3. Click ‘Add Attendee’

   OR

3. Type the person’s name and hit Enter or Tab on the keyboard. If no match is found in Registration, you will be prompted to add the new person
4. The Registration tab will open and the add new participant search screen will appear



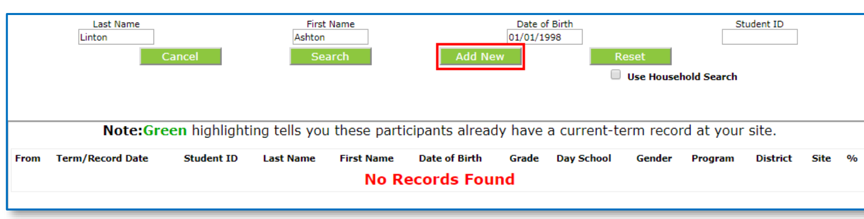


Enter Attendee information

1. Enter the information that you have on the attendee
2. Click ‘Search’.

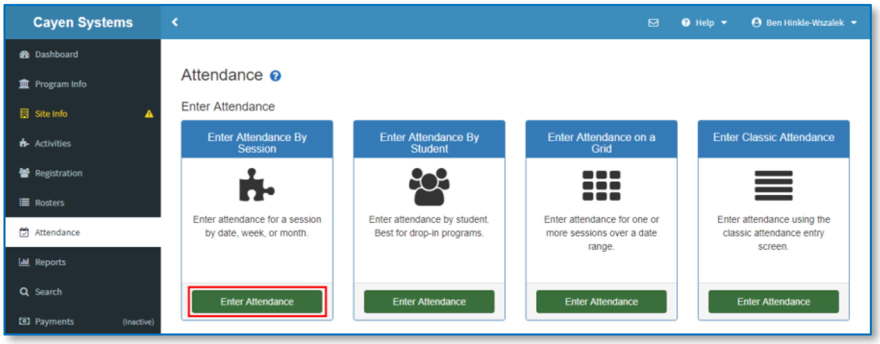
Enter Attendee information

3. If no matching records are found in the registration search, click ‘Add New’
4. Update the information as needed in the new participant’s Registration record
5. Click ‘Save.’ The Attendance tab will re-open and the new person will automatically be saved in attendance



RECORD REAL-TIME ATTENDANCE

Staff can record real-time attendance using a mobile device such as a tablet or smartphone. This can reduce the need for paper attendance sheets and increase the speed and accuracy of recording participation.

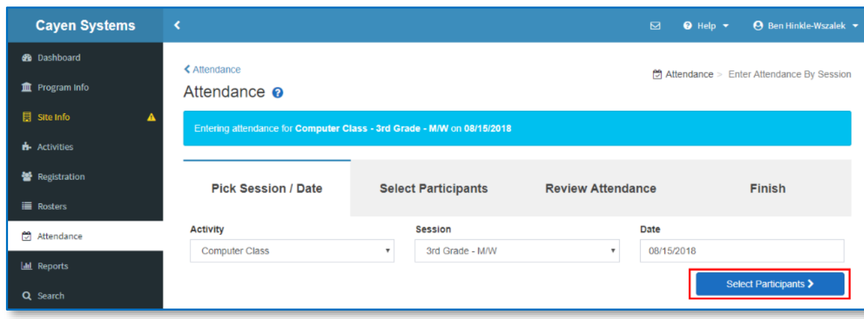


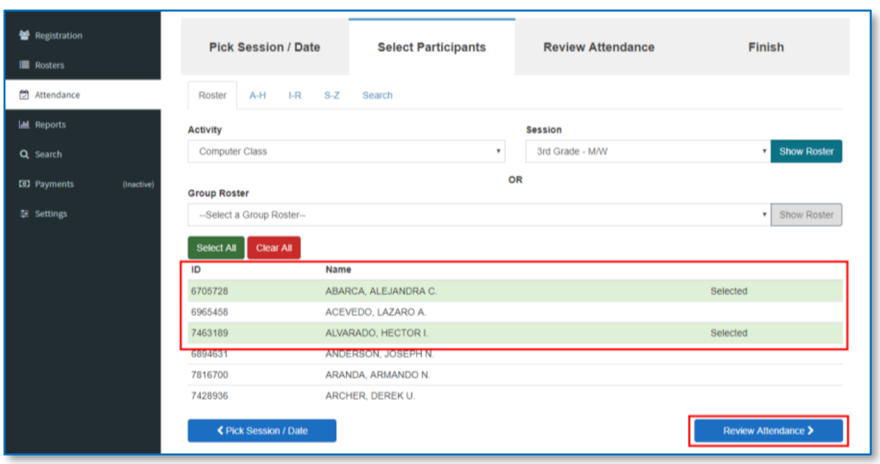
Record Real-Time Attendance

1. Use your smart device to access and login to you AS21 site
2. In you left navigation menu, tap ‘Attendance’
3. Locate the ‘Enter Attendance by Session’ card
4. Click or tap ‘Enter Attendance’

Select the Activity, Session, and Date

4. Pick the Activity, Session, and Date from the provided drop-down fields
5. Click or tap ‘Select Participants’



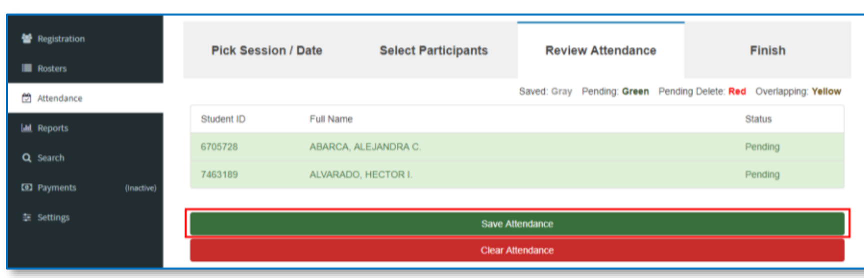


Choose how you will select participants

6. Click or tap ‘Roster,’ ‘Search,’ or a group of letters
7. Select participants and click or tap ‘Review Attendance’

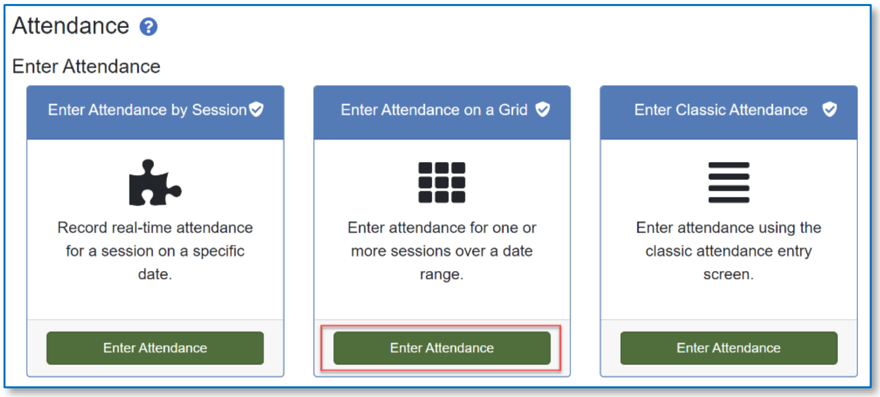
Review the attendance list

8. Click or tap a pending (green) name to mark it for deletion (the name will turn red)
9. Click or tap ‘Save Attendance’ upon completing review



ENTER ATTENDANCE ON GRID

Enter attendance for one or more sessions for multiple participants and dates on a single screen.

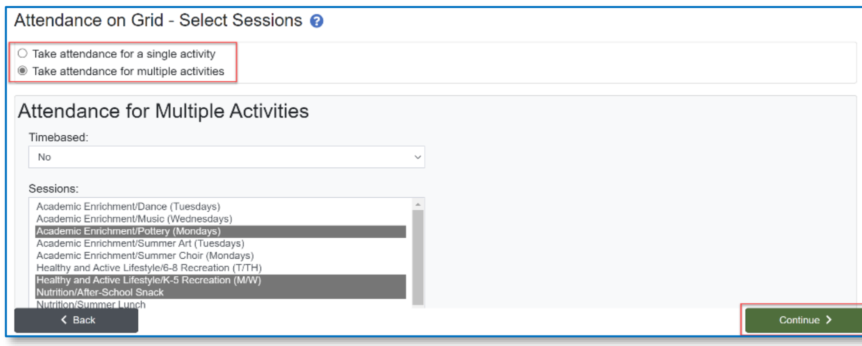


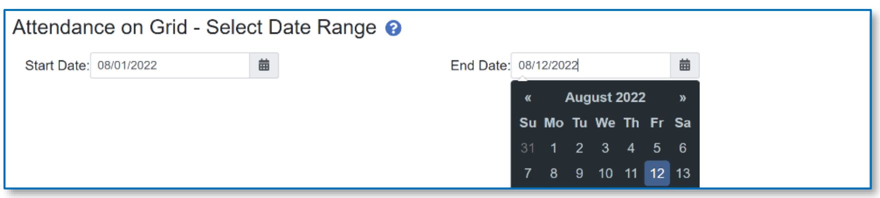
Enter Attendance on Grid

1. In your left-hand navigation menu, click 'Attendance'
2. Locate the 'Enter Attendance on a Grid' Card
3. Click 'Enter Attendance'

Select the Activities and Sessions

4. Select the session or sessions for which you wish to enter attendance
5. Click 'Continue'



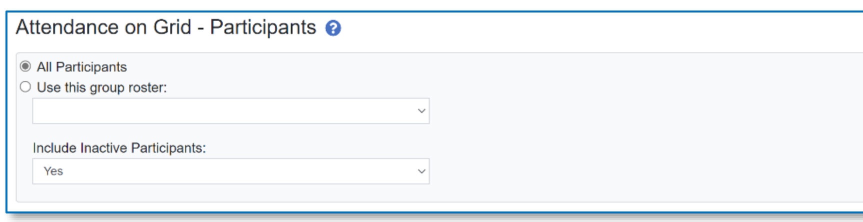


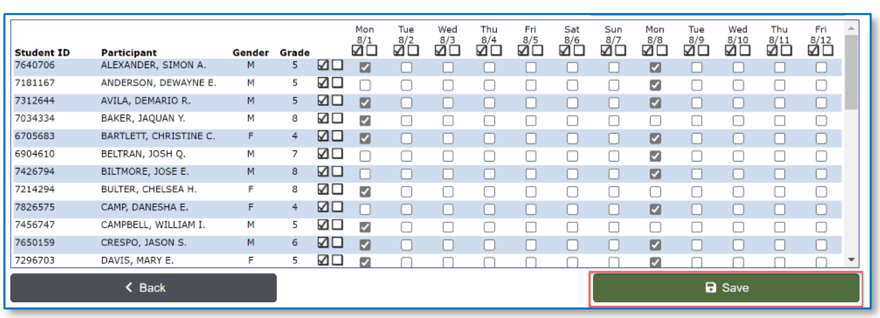
Select Date Range

12. Select the date range over which you wish to enter attendance
13. Click 'Continue'

Select a list of Participants

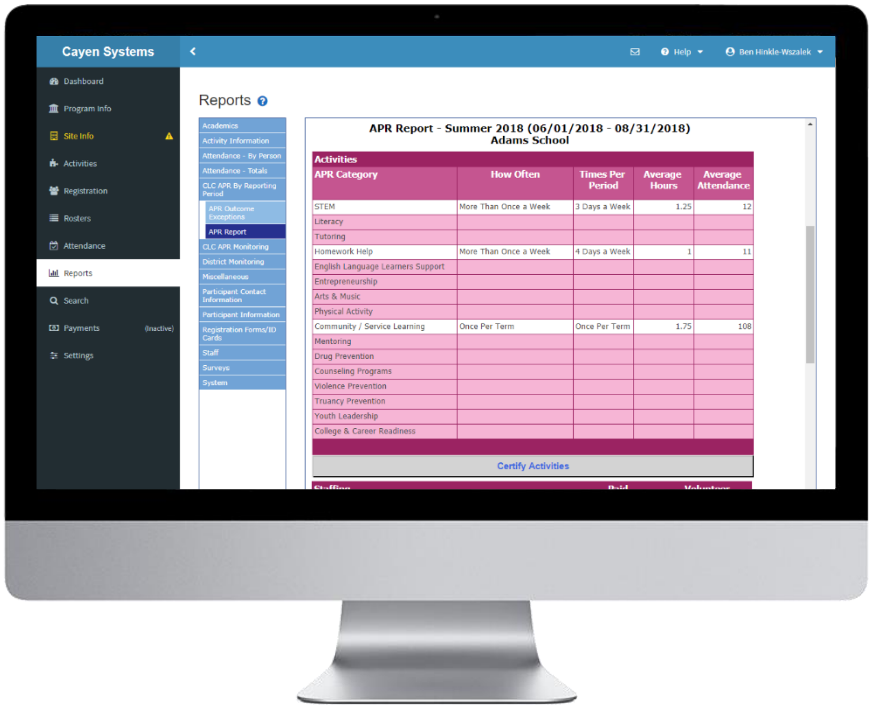
8. Select the list of participants for which you wish to enter attendance
9. Click 'Continue'





Record Attendance

10. Check the boxes to indicate the participants that attended the selected session(s) on specific dates.
11. Click 'Save



REPORTS

Reports are the easiest way to get data out of AfterSchool 21. Hundreds of reports provide program-specific information to funders, administrators, and evaluators.

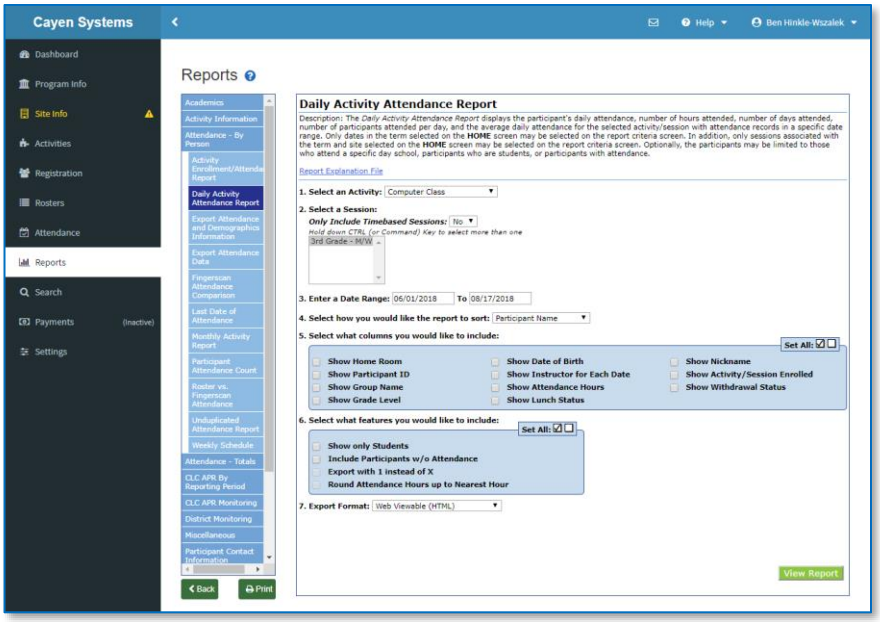
- ✔ Generate reports (pg #55)
- ✔ Sample reports (pg #56)
- ✔ 21st CCLC Annual Performance Report (pg #57)
- ✔ Certify Annual Performance Report data (pg #58)
- ✔ Override APR Report Values (pg #59)

IMPORTANT NOTES ABOUT WORKING IN THIS SECTION

- On the main reports screen, a list of report categories will appear. Click a category to view the corresponding selection of reports.
- Refer to the Description documentation for information on the report you want to generate. For details on how a report's data is generated, click the blue Report Explanation File link below each report's description.

GENERATE REPORTS

AS21 offers a wide variety of reports that can be generated to assist with day-to-day programming, data entry monitoring, and funding source and evaluation purposes.



Generate a Report

1. In your left-hand navigation menu, click ‘Reports’
2. Click a report category to view the corresponding selection of reports
3. Click on the report you wish to generate
4. Select any criteria to include/exclude on the report
5. Click ‘View Report’ in the lower-right corner
6. Click the green ‘Print’ button in the lower-left corner to print the report

Tips

- Refer to the description documentation for information on the report you want to generate.
- For a report breakdown, click the blue Report Explanation File located below the description caption of the report.
- If you would like to download a report to Excel, use the Export Format field to select the Comma Separated Value (CSV) option prior to clicking View Report.

SAMPLE REPORTS

Daily Activity Attendance Report
District: Windham Public Schools
Windham Middle School
Between 08/28/2017 and 06/26/2018
Activity: Snack
All Sessions
Date Run: Tuesday, June 26, 2018 at 11:56:51 PM (ET)

Name	Age	06/18	06/19	06/26	Days Attended	% Attendance
[illegible]	12			X	1	33.3%
[illegible]	11	X		X	2	66.7%
[illegible]	12		X	X	2	66.7%
[illegible]	13	X	X		2	66.7%
[illegible]	13	X	X		2	66.7%
Total Participants		**3**	**3**	**3**	9	
Average Daily Attendance: 3						

Attendance – By Person → Daily Activity Attendance Report

- Use this report to see daily attendance information for a site's participants, their attendance percentage for a specific date range, and average daily attendance information.

Attendance – Totals → Attendance Summary

- Use this report for an overview of participation in site's activities.

Number of Participants Registered: 55 **Number of Unduplicated Participants:** 4
Number Active: 55 **Total Days Open:** 3
Number Inactive: 0 **Participant Daily Average (All Days):** 3
Number of Attendees: 0
These totals reflect data as of 4/25/2012.

Activity Name	Session Description	Avg Hours/Session	#Attended	#Adults	#Youth	#Times/Days Offered	Total Hours Offered	Avg Daily Attendance	Count/Percent of Participants Attending > 50%
Support Services Activity	Staff Attendance	1	1	0	1	1	1	1	1/100.00%

Recreation

Activity Name	Session Description	Avg Hours/Session	#Attended	#Adults	#Youth	#Times/Days Offered	Total Hours Offered	Avg Daily Attendance	Count/Percent of Participants Attending > 50%
Enrichment and Recreational Activities	Remedial Reading	2	4	0	4	3	6	2	2/50.00%

Field Trip Emergency Information Report
Hillandale Public School
Activities/Sessions: 2011 Summer Program/Academic Enrichment
Date Run: Wednesday, April 25, 2012 at 10:46:21 AM (CT)

Participant Name	Address	City	State	Zip	Phone	Date of Birth	Medical Limitations	Contact Name	Con Rel
ANDERSON, SERENA	1167 N Henderson ST 401	Hillandale	WI	53202	555-9876	1/18/2004		Mark Anderson	Par
BANIDAR, LAZARO A	1108 CENTER ST	Milwaukee	WI	53218	566-4354	11/14/2000		Luis Banidar	Gra
BANNERS, SIENNA T	1167 N Henderson ST 401	Hillandale	WI	53202	555-9876	1/18/2003		Maria Banners	Par
BASTIAN, SONIA I	1019 MILTON WILSON BLVD	Milwaukee	WI	53217	567-6677	10/31/2002		Lola Bastian	Gra
BROWNE, DANESHA A	1118 HOPKINS HILL RD	Milwaukee	WI	53224	223-3224	7/19/2001		Kenneth Browne	Par
COSTRO, Tyrone	1167 N Henderson ST 401	Hillandale	WI	53202	555-9876	12/2/1998		N/A	

Participant Contact Information → Field Trip Report

- Use this report to quickly obtain medical limitations and emergency contact information of participants.

CLC APR By Reporting Period → APR Review Report

- Use this report to monitor sites to ensure accurate information is being entered.

District	Grantee	Site	School Year 2022 Date Range	Last Updated	Attendance						
					1-29	30-59	60-89	90+	American Indian	Asian	Bl
Adair County - Cycle 10	Grantee 279	Adair Co. Elementary	08/25/2021-05/20/2022	2/24/2022	108	41	4	0	0	0	
Adair County Cycle 15 Continuation	Grantee 17	Adair Co. Primary Center	09/20/2021-05/06/2022	2/18/2022	191	35	27	0	0	2	

21ST CCLC ANNUAL PERFORMANCE REPORT

The 21st CCLC APR is submitted to the US Department of Education three times a year to demonstrate what each site and grant has done with their funds in the summer, fall, and spring reporting periods. The information on this report aligns with the 21APR federal database to make submissions as painless as possible.

APR Report - Summer 2022 (06/06/2022 - 08/31/2022)
Hillandale K-12

Grantee Information	Type: School District	Award: $100000.0000
Hillandale Public Schools Cycle 5 123456 Apple St Hillandale, KY 53005		
Grantee Contact Information		
Sherry Maddox	Phone: (414) 555-5555	E-Mail:Smaddox@yopmail.com
Center Information	**Type: School**	**Center ID: [Not Set]**
Hillandale K-12 12456 N Apple St Hillandale, WI 53201		
Center Contact Information		
Jennifer Wilson	Phone: (920) 759-8695	E-Mail:jwilson@yopmail.com

Feeder Schools (1)

School	Summer	Full Year
HILLANDALE PUBLIC SCHOOL	X	X

*Center Location

Partners (1)

Partner	Subcontractor
American Red Cross	No

CLC APR By Reporting Period → APR Report

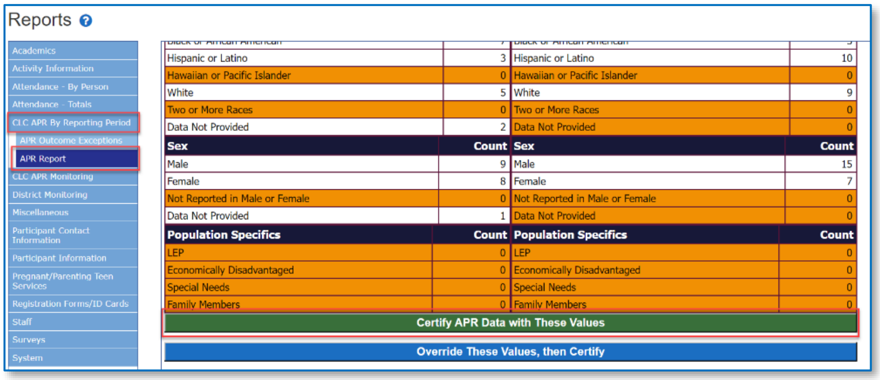
- Use this report to compile information needed to submit your Annual Performance Report (APR) data to the 21APR federal database.

Notes

- The report will show the reporting categories in sections (e.g. Activities, Staffing, Participation, etc.).
- Fields will show in white if data is present and in pink if no data is present.
- There is a certify button at the bottom of report. Instructions for certifying data can be found on the next page.

CERTIFY APR DATA

Some programs must certify their APR data before submission to the 21APR federal database.



Certify APR Data

1. Click ‘CLC APR By Reporting Period,’ then ‘APR Report’
2. Select the Site and Reporting Period to certify
3. Click ‘View Report’
4. Review the data in EACH section of the APR
5. Click the certify button at the bottom of the APR
6. Confirm that you wish to certify/lock the APR data

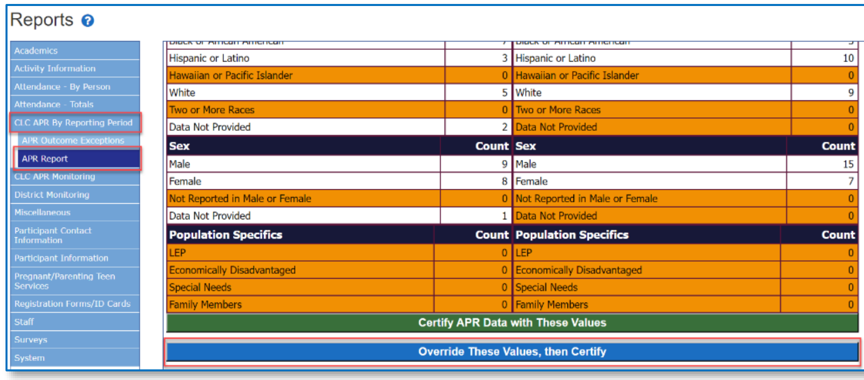
Notes

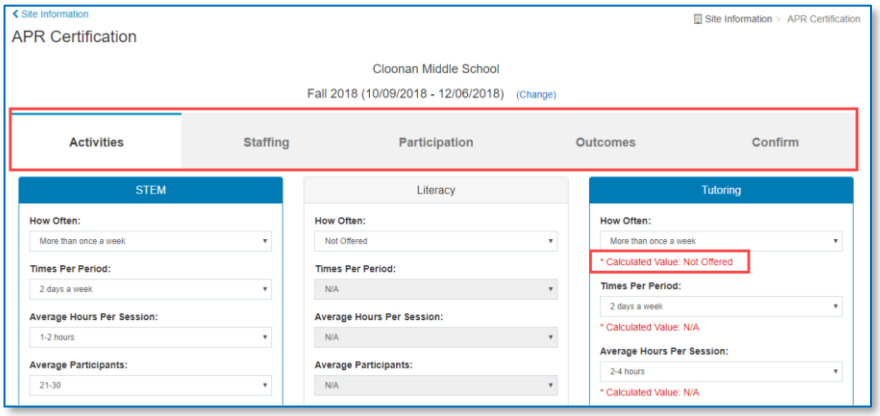
- After you certify/lock the APR data, the report will not reflect any changes made to the site’s data after the time of certification.
- The certify button will no longer be visible and a timestamp of when and by whom the data was certified will show at the top of the report.

OVERRIDE APR REPORT VALUES (only available if allowed by your state)

Override APR Report Values

1. If you have reviewed the report and feel that data is incorrect, click 'Override These Values, then Certify'
2. You will be redirected to Site Information to review and update values



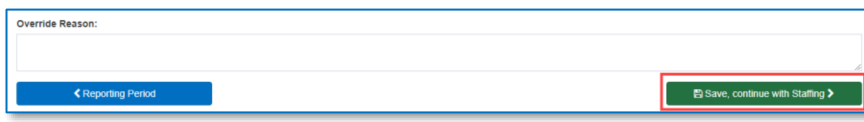


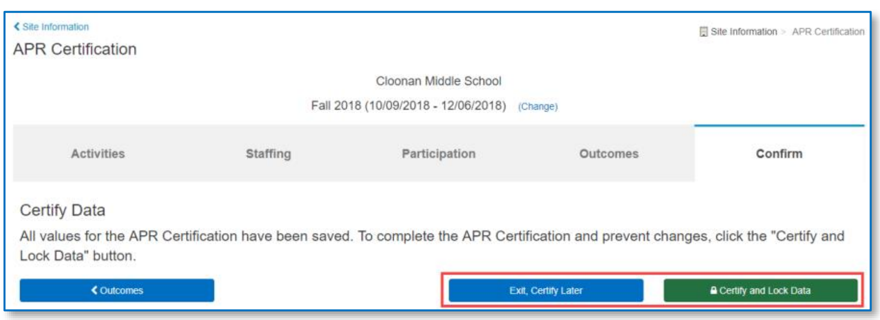
Override APR Report Values

3. Start by reviewing the 'Activities' tab
4. Change values as needed
5. When a value is changed, the value that was calculated for the report will show below the field, in red

Override APR Report Values

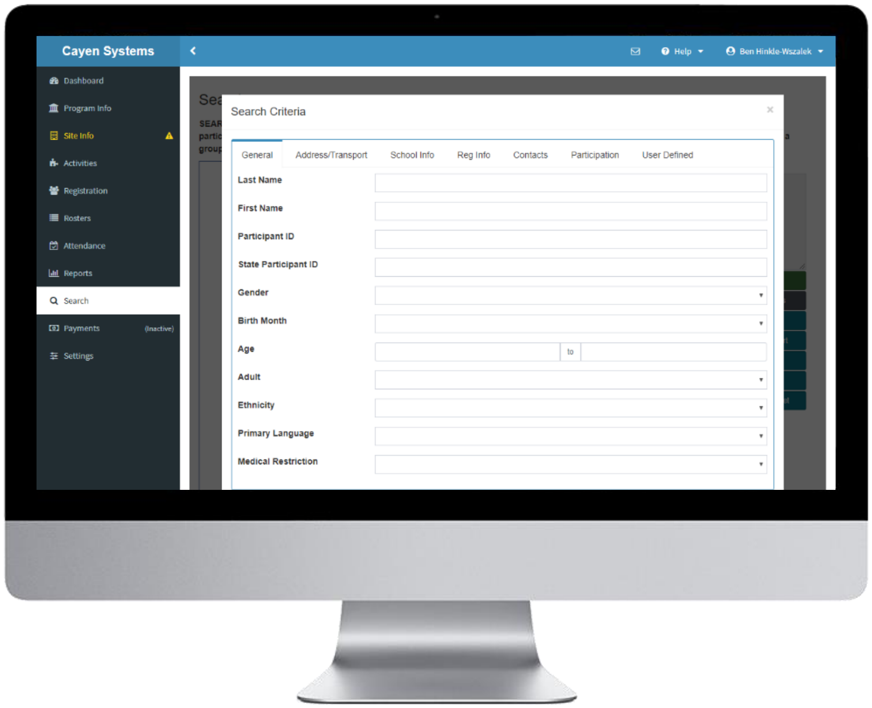
6. At the bottom of the tab, enter an 'Override Reason'
7. Click 'Save, Continue with Staffing', to move to the next tab





Override APR Report Values

8. Once you have reviewed all tabs, click either 'Exit, Certify Later' or 'Certify and Lock Data'
9. If you choose to certify later, you can do this in Reports → CLC APR by Reporting Period → APR Report



SEARCH

Search is a powerful tool for quickly generating a list of participants meeting select criteria. Use the Quick Edit/Export Spreadsheet feature to edit information for a group of participants or to generate ad hoc reports.

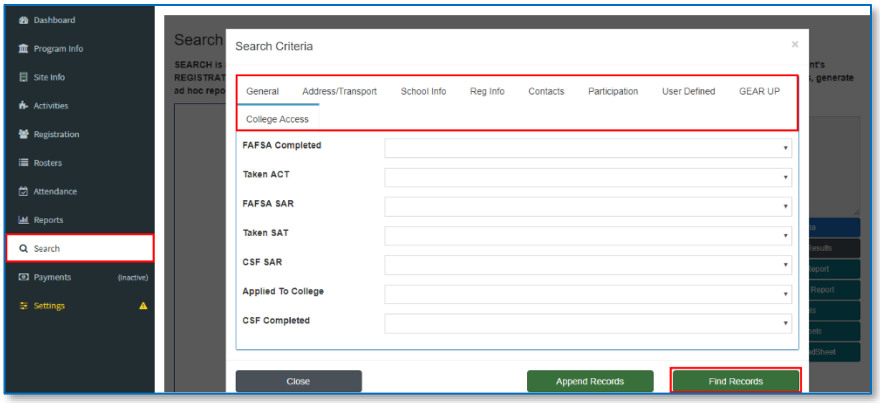
- ✔ Find records that match certain criteria (pg #61)
- ✔ Generate custom reports (pg #61)
- ✔ Quick edit registration records (pg #62)
- ✔ Print mailing / file folder labels (pg #63)

IMPORTANT NOTES ABOUT WORKING IN THIS SECTION

- Fields from multiple tabs in the Edit Search Criteria screen can be combined to find the necessary information.
- Only participants that match ALL criteria entered in a search will be returned.
- If a search results in more than 1,000 records, the print mailing and file folder labels buttons will be disabled. Additionally, the performance of other features may be affected.

FIND RECORDS THAT MATCH SPECIFIC CRITERIA

Programs often need to find participants that match specific criteria to either edit those participants' information or generate a report.

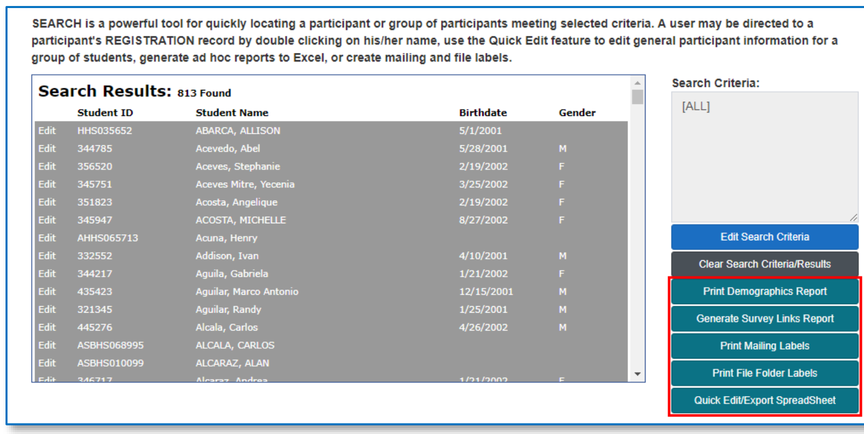


Find Records

1. In your left-hand navigation menu, click 'Search'
2. Click 'Edit Search Criteria'
3. Use the criteria tabs to locate specific fields and enter values that match the desired participants
4. Click 'Find Records.' The search results will be displayed

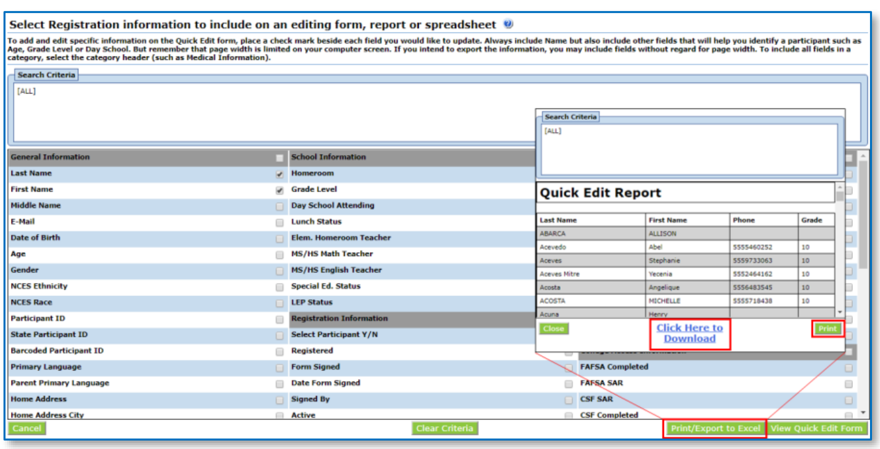
Next Steps:

- Generate a custom report
- Use quick edit to update registration information
- Create mailing / file folder labels
- Generate links for taking surveys via the survey portal



GENERATE CUSTOM REPORTS

Search results can be used to create ad hoc reports that may be requested from funders, administrators, or evaluators.

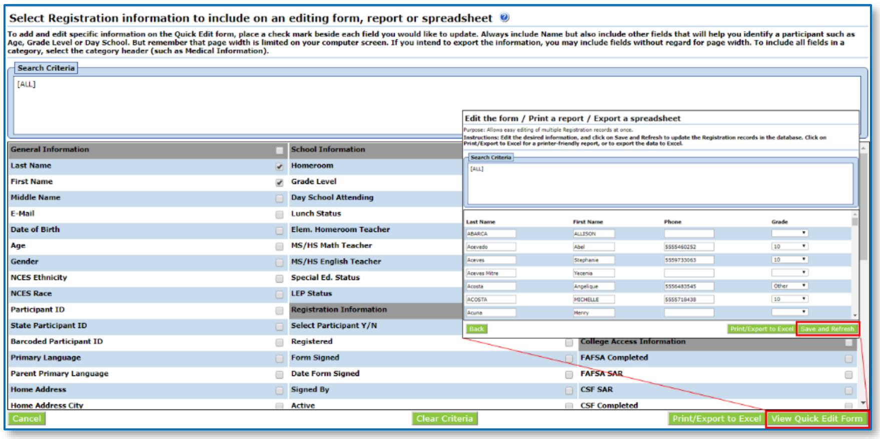


Create a custom report

1. Once search results have been returned, click 'Quick Edit/Export Spreadsheet.' A screen listing multiple participant-related fields will appear
2. Check the boxes for the fields you would like to include in the report
3. Click 'Print/Export to Excel.' A preview of the report will appear
4. Click 'Print' to print the report or click 'Click Here to Download' to export the information to Excel

QUICK EDIT REGISTRATION RECORDS

Search results can be used to create quick edit forms to efficiently update information for a group of people simultaneously.



Quick Edit Records

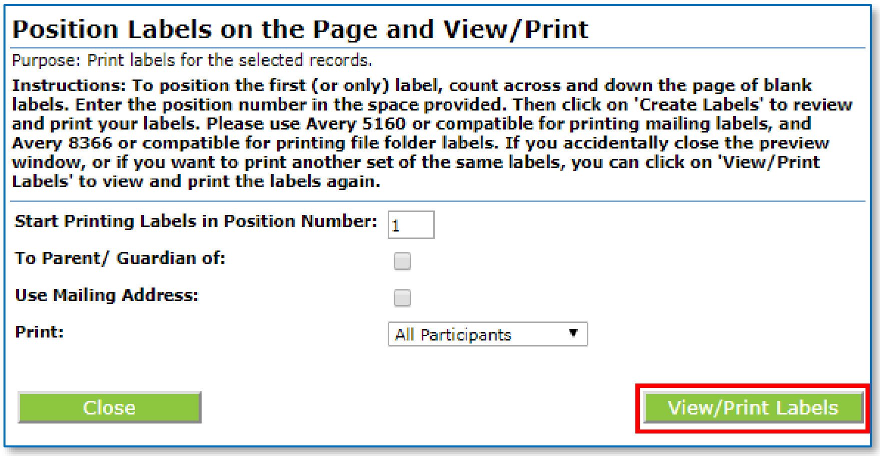
1. Once search results have been returned, click 'Quick Edit/Export Spreadsheet.' A screen listing multiple participant-related fields will appear
2. Check the boxes for the fields you would like to include in the report
3. Click 'View Quick Edit Form'
4. Edit data as needed and click 'Save and Refresh'

Tips

- Use quick edit in Search when you get updated demographic, contact, or teacher information for a group of participants. This feature can be very useful to update information after using Quick Register from Prior Term.
- Save frequently when using quick edit in Search. Often several hundred records are being saved at once. Internet connection issues could result in data not saving properly.

PRINT MAILING AND FILE FOLDER LABELS

Search results can be used to print mailing and file folder labels.

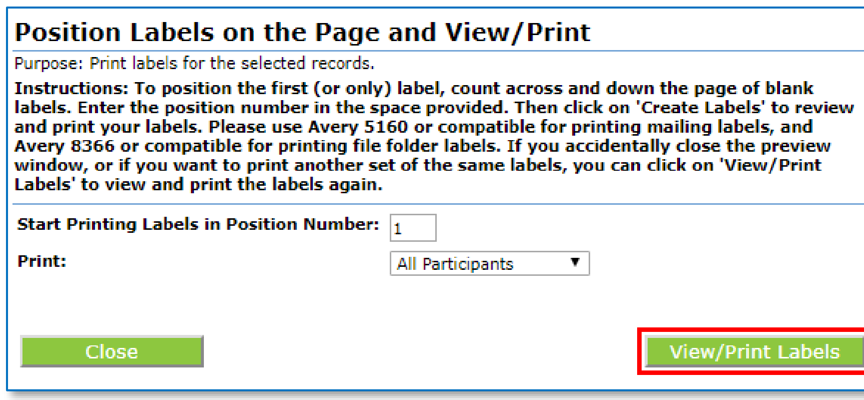


Print Mailing Labels

1. Once search results have been returned, click ‘Print Mailing Labels’
2. Select criteria and determine if printing labels for All Participants or Select Participants
3. Click ‘View/Print Labels’
4. Click ‘Print’ to print your labels

Print File Folder Labels

1. Once search results have been returned, click ‘Print File Folder Labels’
2. Select criteria and determine if printing labels for All Participants or Select Participants
3. Click ‘View/Print Labels’
4. Click ‘Print’ to print your labels



Tips

- When printing mailing and file folder labels, review the instructions noted on the Position Labels on the Page and View/Print window.
- Use Avery 5160 (or compatible) labels when printing mailing labels.
- Use Avery 8366 (or compatible) labels when printing file folder labels.

SUPPORT

support@cayen.net

WWW.21CCLC.COM