SUN COMMUNITY SCHOOLS WellSky Community Services Handbook

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Questions? Contact the Community Services Helpline at 503.970.4408 or servicepoint@multco.us

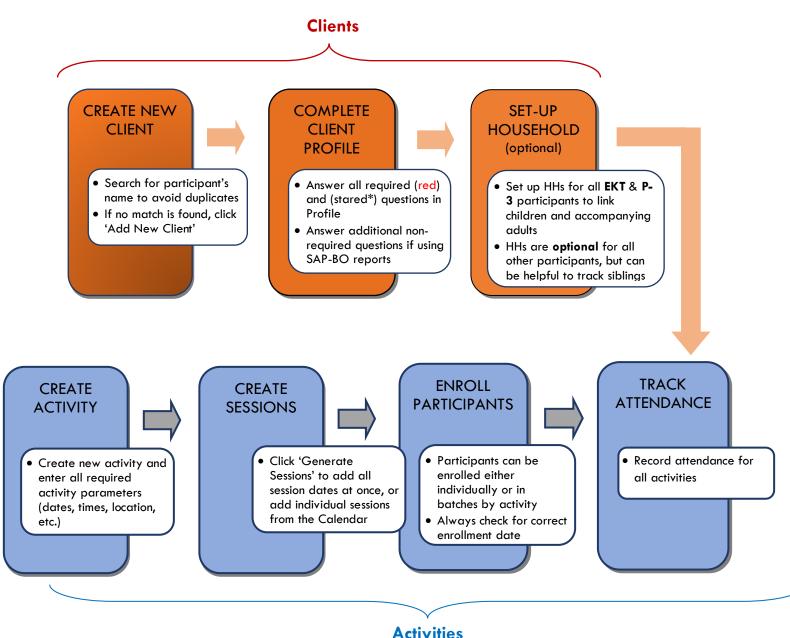
http://multco.us/servicepoint

Revised 8. 24. 23

SUN Community Schools Community Services Handbook - Revision History

- Revised August 2015 Updated ART Report section with changes made for 2015-16 school year, added section on ReportWriter
- Revised March 2016 Program Entries are no longer required. All Required Data Elements are located in the Client Profile. Households are optional, except for EKT participants.
- Revised September 2016 Added requirement of building households for P3 activities (in addition to EKT)
- Revised August 2023 Updated text ART Report to SAP-BO Report. Updated text and images from ServicePoint to WellSky Community Services.

SUN COMMUNITY SCHOOLS DATA MILESTONES



CREATING A NEW CLIENT IN CLIENTS

Every student and adult participating in enrolled activities in a SUN Community School should be entered in Community Services.

SEARCHING FOR A CLIENT

- Always search for a participant's name before adding them as a new client. Participants may already be in Community Services if they (or their family) have been served in other programs.
- Search by first name, last name, or a portion of either name.
- If a name match is found, check that the DOB also matches. If no match is found, click 'Add New Client with This Information.'

		Please S	Search t	he System before adding a	New Client.			
Name	First SUN 3	Middle		Last Test	Suffix			
Name Data Quality	-Select-		٠					
Alias								
ocial Security Number	· ·							
Social Security Number Data Quality	-Select-		٠					
U.S. Military Veteran?	-Select-	•						
Exact Match	0							
r or scan a Client ID number to nt ID #	go directly to that Client's Submit	profile.						
ent Results								
				Social Security Number	Date of Birth	Alias	Gender Banned	Househo Count
ID Name 🔺								-
					08/09/2008		Đ	οQ
ID Name - 1022 Test, SUN 1					08/09/2008		-	0 Q 0 Q

In this example, you've found mom and big sister, but little brother isn't in Community Services yet. You'll need to add him as a new client.

COMPLETING THE CLIENT PROFILE

Answer All Required	Answer the questions below for ALL PARTICIPANTS		
Questions (in red):	Date of Birth	/ / i li l	
For ALL Participants:		Female Aller	
- DOB		A gender other than singularly female or male (e.g., non-binary, genderfluid, agender, culturally specific gender)	
- Gender	Gender		G
- Primary Language: If		Client doesn't know Client refused	
'Other,' specify below		Data not collected	
- Inclusive Identity: Click	If Other Gender, specify	G	
'Add' and choose all that	Primary Language	-Select- VG	
apply	If Primary Language is Other, then Specify:	G	
For All STUDENTS:			
- SSID Number	Q Inclusive Identity (Race/Ethnicity/Origin)		
- Risk Factors (Y/N) *See	Start Date*	Please add all that apply (Race/Ethnicity/Origin):	
List Below	Add		
 Release Granted by 	Add		
Parent?	Answer the questions below for ALL STUDENTS		
- Release Year	SSID Number	G	
For All Early Kindergarten	Risk Factor(s)? (Y/N)	-Select- ✓ G	
Transition (EKT) Students:	Release granted by parent?	-Select- V G	
 Did child attend Head 	Release Year	-Select- 🗸 G	
Start?: If yes, provide	Answer the questions below for ALL EKT STUDENTS		
name	In the past year, was child involved in any of these program	ns?	
 Did child attend 	Did child attend Head Start?	-Select- G	
preschool or	If yes, what was the name of the Head Start?	G	
kindergarten?: If yes,	Did child attend preschool or kindergarten?	-Select- VG	
provide name			
 Child is receiving SPED 	If yes, what was the name of the school?	G	
services?	Child is receiving special education services	-Select- V G	

*Student Risk Factors Include:

Behavioral Issues Delinquent Behavior English not Primary Language Family Issues: Alcohol & Drugs Family Issues: Criminality Family Issues: Discord Family Issues: Domestic Violence Family Issues: Mental Health Foster Care Gang Involvement (or Risk of) Homelessness Individualized Education Plan (IEP) Mental Health Poor Academic Performance Poor Class Attendance Poverty Substance Abuse Suspension/Expulsion Teen Pregnancy

All other questions are OPTIONAL, but they're very helpful if using SAP-BO reports. Be sure to update questions for returning students.

The questions below are OPTIONAL, but can greatly Additional Client Identification	enhance SUN School reports			
Parent 1	G			
Parent 2	0			
Photo Release?	-Select- 🗸 G			
Agency Client ID	G			
Synergy Number (For optional use only)		G		
School Information				
Enrollment Status	-Select- V G			
Current Grade Level	-Select- 🗸 G			
Teacher/Counselor	G			
Other	G			
Contact Information				
Primary Contact Name		G		
Primary Contact Phone		G		
Primary Contact Phone Desc		G		
Email Address		G		
Street Address		G		
Street Address (Additional)		G		
City		G		
State	-Select- v G			
Zip Code	G			
Add				
Q Contacts (Emergency and Other)				
Emergency Contact's Name Contact	Contact ROI Expiration Contact's City	Phone Number	Second Phone Number	Relationship to Client
Add				
Transportation Information				
Primary Method of Transportation	-Select- V G			
Secondary Method of Transportation	-Select- V G			
Bus Number	G			
Bus Stop	G			
Authorized Pick-Up		G		
Special Considerations				
Medical Notes			G	
Other Issues			G	
OPTIONAL Risk Factor Details				
Q, Risk Factor Type				
Q Risk Factor Type Entry Date*		Risk Factor		
		Risk Factor		
Entry Date *		Risk Factor		
Entry Date 4			Verify and	Save Data Save Cancel

SETTING UP A HOUSEHOLD

Households are required for all child and adult participants in Early Kindergarten Transition (EKT) and P3 School Project activities. Beyond that, setting up households in Community Services is OPTIONAL. Setting up households can be helpful, particularly at elementary and K-8 sites, to track siblings and coordinate their enrollment.

ADDING TO AN EXISTING HOUSEHOLD

- Once inside of the client's record, click on the Households tab
- Click 'Search Existing Households' and search for the other household members
- Click the magnifying glass under client count to see the names of household members
- If you find a matching family, click the green plus sign to add the new family member

STARTING A NEW HOUSEHOLD

If you didn't find a matching household, click 'Start New Household'

- Choose the Household Type
- Search for/add any additional household members.
- Choose 1 Head of Household and add specify the Relationship of all members
- Household Members Age Head of Relationship t Household of Household Relationship to Head Previous Household Joined Household* Name Associations Count Self iii ii 0 Q 2 Q (1022) Test, SUN 1 15 Yes 🗸 09 / 06 / 2023 2 Q (1023) Test, SUN 2 9 09 / 06 / 2023 **茴 同** ○ へ No 🗸 Daughter 😑 (1084) Test, SUN 3 4 No 💙 Son 09 / 06 / 2023 ■● 0 へ 1 Q Add/Delete Household Members Household History Report

Click 'Save & Exit'

ſ	Client - (1128) Test	t, SUN 4								
	(1128) Test, SUI Release of Infor									
	Client Information					Service T	ransactions			
	Summary	Client Profile	Households	ROI	Entry / Ex	cit	Case Managers	Case Plans	Activities	Assessme
				1 This Client is no	ot currently	a member	of any Households.			
	Previous Hou	useholds								
	2 Search Existing	Households Start I	New Household							
4										

	sehold Type*	Female S	ingle Parent	~					
Client	Search				<u> </u>				
			 Please Sea 	arch the System b	efore ad	ding a New Client.	Hide A	Advanced	Search
		First	•	Middle		Last	Sut	tix	
Nam	ne	SUN				Test			
Nam	ne Data Quality	-Select-			~				
Alias	s								
Soci Num	ial Security nber		-						
	ial Security nber Data lity	-Select-			•				
U.S. Vete	Military eran?	-Select-		*					
Exac	ct Match								
				and all and a set of					
	Number			With This Informa	ition				
Client	Number Scan a Client ID			ousehold.	tion				
Client Enter or Client I	Number Scan a Client ID) to add that C	lient to this Ho Submi	ousehold.	ition				
Client Enter or Client II Client	Number Scan a Client ID D #) to add that C	lient to this Ho	ousehold.	ition	Alias	Gender	Banned	Househol
Client Enter or Client II Client ID	Number Scan a Client ID D # Results) to add that C	lient to this Ho Submi	ousehold.	ition	Alias	Gender	Banned	
Client II Client II Client II ID	Number Scan a Client ID D # Results Name) to add that C	lient to this Ho Submi	Date of Birth	tion	Alias		Banned	Count
Client II Client II Client II ID	Number Scan a Client ID D # Results Name 2 Test, SUN 1) to add that C	lient to this Ho Submi	Date of Birth 08/09/2008 02/27/2014	tion		Ð	Banned	Count 1 Q
Client Client II Client ID 102: 102:	Number Scan a Client ID D # Results Name 2 Test, SUN 1) to add that C	lient to this Ho Submi	Date of Birth 08/09/2008 02/27/2014			Ð	Banned	Count 1 Q
Client II Client II Client II D 102: D 102:	Number Scan a Client IC D # Results Name 2 Test, SUN 1 3 Test, SUN 2	o to add that C Soc Nut	lient to this Ho Submi	Date of Birth 08/09/2008 02/27/2014			8	Banned	Count 1 Q 1 Q
Client Client II Client ID 1022 Select ID	Number Scan a Client ID D # Results Name 2 Test, SUN 1 3 Test, SUN 2 ed Clients	o to add that C Soc Nut	lient to this He Submi cial Security mber	Date of Birth 08/09/2008 02/27/2014 Date of Birth 01/27/2019	Showing	1-2 of 2 Alias	8	Banned	Count 1 Q 1 Q Househol
Client Client II Client ID 102: Select ID	Number Scan a Client ID D # Results Name 2 Test, SUN 1 3 Test, SUN 2 ed Clients Name	o to add that C Soc Nut	lient to this He Submi cial Security mber	Date of Birth 08/09/2008 02/27/2014 Date of Birth 01/27/2019		1-2 of 2 Alias	Gender	Banned	1 Q 1 Q Househol Count

4

nts

CREATING ACTIVITIES IN ACTIVITYPOINT

- Enrolled Activities are groups that meet regularly with consistent attendees (ex: 15-16 Soccer League, Fall 1st 2nd Grade Arts & Crafts, etc.)
- Non-enrolled Activities are open events where you only want to track the total number of attendees (ex: SUN Showcase, Back-to-School Fair, etc.)
- Before creating a new activity, always search for the activity name. Click 'My Provider' to

Search for Activit	Vee huusing languarde fee the Merry
	ties by using keywords for the Name.
Fall 2023 Science 6th - 8th	
Multnomah County - SP (2206)	Search My Provider Clear
= (= (
= 0 =	
Add New Activity	
	Multnomah County - SP (2206)

search only within your own program. Always click 'Include Past if the activity has ended.

ACTIVITY INFO

- Choose an activity name that clearly describes the class, ex: '2015-16 Book Club' or 'Summer 2016 Adult ESL'
- Activity Type is always 'Local'
- Set all activity parameters.
- For enrolled activities, leave Enrollment Type as 'Open'
- Set Max enrollment
- G Choose the most appropriate category. Only select from the options that begin with 'SUN.'
- Always leave Assign Service as 'No'
- Select the appropriate Subject and Target Participant Group and click 'Add.' Add all that apply from the options that begin with 'SUN.'
- If applicable, write in any activity partners and click 'Add.' Add as many as apply.
- Click 'Save' then continue on to the 'Sessions' tab (see following page)

Activity Info	
Provider	Multnomah County - SP (2206)
1 Name*	
2 Activity Type*	Local O Public
Ages*	· ·
Time Offered *	-Select-
Frequency*	-Select-
Recurring Weekly Schedule	Sunday OMonday OTuesday OMednesday OThursday OFriday OSaturday
Start Date*	
End Date*	
Start Time*	3 V : 00 V PM V
End Time*	4 • : 30 • PM •
Teacher	
Location	
Enrollment Type •	<u>Open</u> O Conditional O Non-Enrollment
5 Max Enrollment *	
6 Category*	-Select-
7 Assign Service*	O <u>Yes</u> ●No
Subject	
	-Select-
Subject Name	
	No matches.
Target Participant Groups	(8) {
	-Select- Add Target Participant Group
Target Participant Group	
	No matches.
Partners (Activity Sponsors)	
	9 Add Partner
Partner/Activity Sponsor	
	No matches.
	10 Save Save & Exit Exit

IMPORTANT: Always add a Target Participant Group. Many SAP-BO reports rely on this field to pull the correct participants. See pages 10-15 for details.

<u>CREATING SESSIONS FOR ENROLLED ACTIVITIES</u> Activities must have session dates in order to appear in SAP-BO reports.

- Click on the Sessions tab
- Click 'Generate Sessions' to create a full list of session dates based on the date range and days you selected in the Activity Info tab
 - or...

to add individual session dates, click 'Add Sessions from Calendar' and click only the days you want.

This feature can be useful for activities with irregular session dates or, for instance, to add a Saturday field trip to an activity that normally meets Mon/Wed.

It delete unwanted sessions (holidays, snow days, etc.) click the garbage can next to that session date

Activity Info	Sessions	Enroliment Attendance		Volunteers
Activity	Dance (98707)			
Activity Dates	06/02/2023 - 08/04/2023			
Session Date Range	_/_/ 📩 🖯 🖬 to _/_/_	🗂 C 🛗		
Update Date Range				
Session List				
Date Description			Attendance	Volunteers
Add Session Add Sessions from Calendar		No matches.		
Generate Sessions				Save Save & Exit Exit

<<	<	Ma	r 20	016	>	>>	
s	м	т	w	т	F	s	
21	22	23	24	25	26	27	
28	29	1	2	З	4	5	
6	7	8	9	10	11	12	
13	14	15	16	17	18	19	
20	21	22	23	24	25	26	
27	28	29	30	31	1	2	
з	4	5	6	7	8	9	

Acti	ivity Info		Sessions	Enrollment	Attendance	Volunteers
1	Activity		Fall 2023 Scince 6th -8th (98702)			
4	Activity Dates		09/08/2023 - 09/29/2023			
1	Session Date Range		/ 🗂 🖯 🖬 to//	0 D		
l	Jpdate Date Range					
Se	ession List					
	Date	Description			Attendance	Voluntee
	B atto	Desemption			Attendance	Volunteer
Û	09/11/2023	becarput			0/0	0
-	-					
Î	09/11/2023				0/0	0
Ū	09/11/2023 09/13/2023				0/0	0
Î Î Î	09/11/2023 09/13/2023 09/18/2023				0/0 0/0 0/0	0 0 0

COPYING AN ACTIVITY

After adding activity info and clicking 'Save,' you have the option to create another activity with the same activity parameters by clicking 'Copy Activity' **Be sure to give the newly-generated activity a different name and re-enter the date range.**

Subject Name Subject Name Subject Value Subj	Activity Into	5655.075 . B	roliment		Attendance	Volunteers	
New A 202 Googs A April 120 Googs A<	Activity ID	99705					
A kan'y Tan'	Provider	Multromah County - SP (2206)					
April 1 1 Free Offers' Are for any Free Offers' Free on v Free on v Statute Statute Statute	Name*	Fall 2023 Science 6th -9th					
The offer and And Second V Prequency Trice street V Sections V V V Sections V V V V Sections V	Activity Type*	Local O Public					
Fragency* Tricks web Recurry Newly Greace Naid 2002 San the* Naid 2002 Gato Newly Naid 2002 San the* Naid 2002 San the* Naid 2002 San the* Naid 2002 San the* San San the San the* San the San the	Ages*	12 • 15					
Parting Weeks Undate Status	Time Offered*	After School 🗸					
serier ''' ''''''''''''''''''''''''''''''	Frequency*	Twice a week 🗸 🗸					
so the solution of the soluti	Recurring Weekly Schedule	□ <u>Sunday</u> ⊠ <u>Monday</u> □ <u>Tutsday</u> ☑ <u>We</u>	dhesday [] Thurs	day OFriday Saturday			
lan Time" 2 v : SV PI V lan Time" 2 v : SV PI V Solider SV SV Plane Robers for Mathema Comp. PI (set) solider SV SV Plane Robers for Mathema Comp. PI (set) Solider SV SV Plane Robers for Mathema Comp. PI (set) Solider SV SV Plane Robers for Mathema Comp. PI (set) Solider SV SV Plane Robers for Mathema Comp. PI (set) Solider SV SV Plane Robers for Mathema Comp. PI (set) Solider SV SV Plane Robers for Mathema Comp. PI (set) Solider SV SV Plane Robers for Mathema Comp. PI (set) Solider SV SV SV Plane Robers for Mathema Comp. PI (set) Solider SV	Start Date*	09 / 08 / 2023 🗒 🏷 🗒					
sartment Size Parkieset Source Sourc	End Date *	10 / 18 / 2023					
i of time" 4 v 20 v 20 v i sater 4 v 20 v 20 v 20 v i sater 0 ce i sotimet Type 0 ce Max Groelment* 15 i sotimet Sata 15 Sotimet Sata i sotiet Sata Sotiet	Start Time*						
scation spectrum in the spect	End Time*						
scation spectrum in the spect	Teacher						
kat forefunes* 1 kat forefunes* 15 Bios Remains Coppoy* 2004-Restancinal Activities Subtract on MAInternant Courry - SP (Lent) J astronome Balget							
inoriner: Saus is provided in Sin Saus Samaing Cargoy ' Save Rates for Multional Courp - SP (Lent 2) ast Updated in Sin S2022 by RateR Rates for Multional Courp - SP (Lent 2) Safet: Safet	Enrolment Type	Open					
Chargery* BURGereational Activities ✓ States on 60 /r 12022 by Rachel Roberts for Multimenta Couny-OP (Lent 2) ast Updated on 60 /r 12022 by Rachel Roberts for Multimenta Couny-OP (Lent 2) States on 60 /r 12022 by Rachel Roberts for Multimenta Couny-OP (Lent 2) Biglest	Max Enrollment*						
leter o 19/1 2022 by Partie Rotens for Multionank Couny - SP (Leter 8) Subject Subject Subject Subject Subject Subject Subject Sub-Rocessional Activities Subvieges Subvieges Subvieges Subvieges Subvieges Subvieges Subvieges Subvieges Subv	Enrolment Status	15 Slots Remaining					
ast (pland on 69/12/222 by Sachel Roberts for Multimone Courpy - 59 (Level 2) Subject Subject Name Subject Name Sub-Recessional Activities Sub-Recessional Activities Subvinger 1-2 el 2 Terget Participant Group Terget Participant Group Terget Participant Group Partners (Activity Sponson) Partners (Activity Sponson) Partners (Activity Sponson No matches.	Category*	SUN-Recreational Activities		*			
<u>idea:</u>	Added on 09/18/2023 by Rachel Roberts for Multhomah Last Updated on 09/18/2023 by Rachel Roberts for Multi	County - SP (Level 3) nomah County - SP (Level 3)					
Solijent Name Solijent Name Solijent Name Solijent Name Solijent Solijen	Subject						
Sh-Recession Activities Shudgons Shudgons Shudgons Shudgons Terget Participant Group Terget Par					-Select		V Add Subject
Sh-Recession Activities Shudgons Shudgons Shudgons Shudgons Terget Participant Group Terget Par	Subject Name						
Stowing 1:2d 2 Target Participant Groups Target Participant Group Targe	SUN-Recreational Activities						
Target Participent Group Target Participent Group Target Participent Group Target Participent Group No matches. Partners (Activity Sporsons) Partners/Activity Sporsons No matches. No matches. No matches. No matches. No matches.	SUN-Sports						
Select- Add Target Participant Deup Target Participant Coup No matches. Partners (Activity Sporsors) Add Partner Partners/Activity Sporsors Add Partner					Showing 1-2 of 2		
Target Pericipan Group No matches. Partners (Activity Sponsors) Partners /Activity Sponsor No matches. No matches.	Target Participant Groups						
No matches. Partners (Activity Sporsons) Add Partner Partners/Activity Sporsons No matches. No matches.					-Select-		Add Target Participant Group
No matches. Partners (Activity Sporsons) Add Partner Partners/Activity Sporsons No matches. No matches.	Target Participant Group						
Partners (Achinity Sponson) Add Partner Partner:/Achinity Sponson No matches.					No matches.		
Partner/Activity Sponsor No matches.	Partners (Activity Sponsors)						
Partner/Activity Sporsor No matches.							Add Partner
No matches,	Partner/Activity Sponsor						
	and a second second				No matches.		
	Coore Activity					5	e Save&Enit Frit
			_				

NOTE: Remember to generate sessions and enroll participants on the copied activity. Sessions and enrollment in the original activity DO NOT carry over.

ENROLLING PARTICIPANTS IN AN ACTIVITY Participants can be enrolled in activities in two different ways:

Option 1: by Participant (in Clients)

	Client Information			Service T	ransactions				
Click on the Activities tab in the participant's record	Assessments	Households	Entry / Exit		Clie	nt Profile		Activities 1	
puncipun s record	Current Activities OPast Activ	ities O All Activities							
	▼ Enrolled Activities								
Click 'Enroll in Activities'	Activity Name 🔺	E	Enrollment Date	Start Date	Start Time	End Date	Frequency		Attendance
	2 Enroll in Activity				No mate	ches.			
 Search for the activity you'd like to participant in. Click 'My Provider' activities at your school. Remembe 'Include Past Activities' if the activativation already. Click the green plus sign to enroll to the provider of the pro	o enroll that to look only at r to click vity has ended he participant	Activity Search Activity Search Search Provider Include Past Activitie Start Date End Date Search Cele Search Result Activity Search Result Activity Name 4 Q Activity 8 Q Activity 9 Q Activity 9 Q Dance	Multnomah ((2206) es 2 // ear	Provide Multhor (2206) Multhor (2206) Multhor (2206)		Start Da P 04/09/2 P 07/14/2 P 06/02/2	Provider Pro	Clear te Enrollment 2012 Open (10) 2012 Open (17) 2011 Open (25) 2023 Open (17) ious Next I	
 Set the Enrollment Date on or befor that the participant attended/will Click 'Continue' 	re the first day attend	Enroll Client in Note: You a Please set a	are about to an Enrollme		r this acti	on: _ 🛗 පි 🖻		ity. Cance	×
Option 2: by Activity (in Activities) In Activities, open up the activity a	Max	vity	s Remaining)	Multno 09/08 15	123 Science omah Coun /2023 - 10/	ty - SP (220	98705)	inrollment	1
the Enrollment tab		Client ID	Name 🔺						
Click 'Add New Participant'	2 Add N	lew Participant	Print Enrol	lment					

- Search for participants by name. Participants will only appear if they have a profile in Clients.
- Continue searching for and checking off all of the names of the participants you'd like to enroll. Just click 'Submit' once when you're finished.
- Enroll Clients in Activity Search for Clients By Name or Client ID Search for Clients In My Provider By Entry First Middle Last Suffix Name test Alias Client ID Exact Match Search Clea **Client Search Results** Enroll Client ID Client Name 1022 Test, SUN 1 1023 Test SUN 2 Showing 1-13 of 13 Submit
- Set the 'Enrollment Date' to on or before the first day that the participant attended the activity and click 'Continue.'

Note: If you checked off a whole batch of names at once, they'll all get the same enrollment date. To change one participant's enrollment date, click the pencil next to their date and overwrite it.

				Client ID	Name 🔺		Enrollment Date	Date of Birth	Gender
8	Eb	6	Û	1022	Test, SUN 1	-	09/08/2023	08/09/2008	A gender other than singularly female or male (e.g., non-binary genderfluid, agender, culturally specific gender)
8	Fb	Th.	î	1023	Test, SUN 2	1	09/08/2023	02/27/2014	Data not collected

09 / 08 / 2023 🛗 🖯 🖬

5

Note: You are about to enroll 1 clients into this Activity. Please set an Enrollment Date for this action;

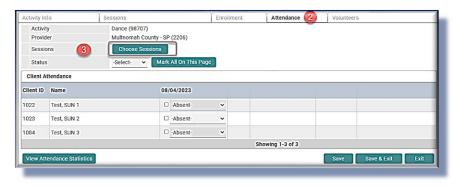
ENTERING ATTENDANCE

- In Activities, search for the class you want to enter attendance for - either by class title or by date range. Click 'My Provider' to search only within your own school. Remember to click 'Include Past Activities' if the activity has ended already.
- Activities Volunteers Activity Search Search for Activities by using keywords for the Name Search Dance Multnomah County - SP Provider My Provider Clear (2206) Include Past Activitie 07 /01 / 0 đ Start Date 0 C End Date 11

Enroll Client in Activity

Enrollment Date

- Click on the Attendance tab
- Click 'Choose Sessions.' You can enter attendance for up to 5 sessions at once.
- TIP: Change Status to 'Attended' and click 'Mark All on this Page,' then uncheck any absent participants



CREATING NON-ENROLLED ACTIVITIES

- I Follow the same steps as creating an enrolled activity, except for Enrollment Type, click **'Non-enrollment'** (see pg. 5)
- Create session(s) following the same steps as for an enrolled activity (see pg. 6)

Provider Multnomah County - SP (2206) Name* Spring 2023 SUN Open House Activity Type* ●Local ○Public Ages* 1100 Time Offered* Before School ▼ Frequency* One-time event ▼ Recurring Weekly Schedule Sunday. □Monday. □Tuesday. □Mednesday. □Thursday. ♥Friday. ©Saturday. Start Date* 05 / 05 / 2023. ■ ♡ ♥
Activity Type* Local O Public Ages* 1 100 Time Offered* Before School × Frequency* One-time event × Recurring Weekly Schedule Sunday Omoday, Tuesday, Wednesday, Thursday, Saturday, Saturday,
Ages* 1 100 Time Offered* Before School ▼ Frequency* One-time event ▼ Recurring Weekly Schedule Sunday. Monday. Tuesday. Wednesday. Thursday. ♥ Friday. Saturday.
Time Offered* Before School ~ Frequency* One-time event ~ Recurring Weekly Schedule Sunday Monday Tuesday Thursday Eriday
Frequency* One-time event Recurring Weekly Schedule Sunday Sunday Monday Tuesday Thursday
Recurring Weekly Schedule
Start Date* 05 / 05 / 2023 👼 🖏 🛱
End Date* 05 / 05 / 2023 🛗 🖸 🛱
Start Time* 5 • : 00 • PM •
End Time* 7 • : 00 • PM •
Teacher
Location
Enrollment Type* Open Conditional Non-Enrollment
Category* SUN-Community Involvement

RECORDING ATTENDANCE FOR NON-ENROLLED ACTIVITIES

Go to the Attendance tab and click the pencil next to the session date

Activity Info		Session	ns	Attendance	3	Volunt	eers
Activity	S	oring 2023 SU	N Open House (98708)				
Provider	M	ultnomah Cou	unty - SP (2206)				
Activity Dates	0	5/05/2023 - 0	5/05/2023				
Session Date Range			b to i to	1			
Update Date Range							
Session List							
Session Date	Description					Total Attendance	Total Ethnicity Counts
05/05/2023						0	0
_					Showing 1-1 of 1		

	Edit Session Attendan	ce		>
-	Activity	Spring 2023 SUN	Open House (98708)	
Inter the total youth and adult participants	Date	05/05/2023		
(race/ethnicity is optional)	Session Attendance To	otals		
	Youth Attendance	150	Asian/Indian Attendance	0
	4 Adult Attendance	75	Bi-Racial/Multi-Racial Attendance	0
	Total Attendance	225	Black/African American Attendance	0
			Caucasian Attendance	0
			Hawaiian/Pacific Islander Attendance	0
			Hispanic/Latino Attendance	0
			Native American/Alaskan Attendance	0
Glick 'Save' to exit			Unreported Attendance	0
			Total Ethnicity Counts	0

×

SUN COMMUNITY SCHOOL SAP-BO REPORTS

Report Name	Content and Purpose	Report Prompts	Trouble-Shooting
ATTENDANCE HISTORY	 TABS: Overview: All attendees and their attendance rate and # of sessions attended/enrolled/excused/unexcused/absent or not recorded By Activity: All activities that were offered in the report range, including the daily attendance status of each participant By Participant: All attendees and their # of sessions attended/enrolled/excused/unexcused/absent or not recorded broken down by activity Average Daily Attendance: All activities offered in the session with the average # of participants who attended per day PURPOSE: Track absenteeism, reward high attendance rates, track who has met 30 days of attendance (and who's close to meeting) Use by Activity tab to find gaps in attendance data entry 	 Run as either Excel or PDF Set Start and End dates as the whole date range (+1 day) that you want to see in your report 	 Only pulls activities where sessions have been created This report has trouble accurately counting sessions enrolled when a participant has enrolled, dropped, then re-enrolled in an activity. If a participant's attendance rate on the Overview tab is incorrect (<0% or >100%) check the By Participant tab to see which activity is generating the error.
ATTENDANCE SHEETS	 TABS: Attendance Sheets by Activity: Activity name, start time, days offered, location, all enrolled participants and their Community Services ID, grade, photo release (Y/N), primary transportation, and authorized pick-up Attendance Sheets by Day: one list of all students enrolled that day - useful for centralized 'check-in' or daily meal tracking. Includes: all enrolled participants and their Community Services ID, grade, photo release (Y/N), primary transportation, and authorized pick-up, and first and last activities of the day PURPOSE: Tracking daily attendance in extended-day activities 	 If run as PDF - max of 5 session dates per page If run as Excel - unlimited session dates 	 Only pulls activities where sessions have been created and participants have been enrolled Only pulls participants whose Activity Enrollment Date is on or before the report start date

Report Name	Content and Purpose	Report Prompts	Trouble-Shooting
CONFIRMATION LETTERS	 TABS: For Families: Prints 1 pg/student with: name, teacher, grade, primary contact name & phone, primary transportation, authorized pick-up, bus stop, and weekly class schedule with: activity name, time, date range, and location. Also flags any students who do not have a current release year. (Does NOT flag current release year w/ 'No' response.) Prints grouped by classroom teacher name for easy distribution. Is bilingual Spanish/English. For Teachers: Prints a list for each teacher of which of their students are enrolled in SUN each day, including: activity name, time, and date range For Admin: Master list of all enrolled students, including: student name, grade, primary contact name & phone, primary transportation, and weekly schedule with: activity names, days, location, and date range Mini Student Schedule: A simpler version of the "For Families" tab. Includes just student's name and weekly class schedule with: activity name, time, date range, and location. PURPOSE: Distribute prior to session start date to inform all parties of enrollment 	 Run as PDF only Set Start and End dates to include only 1 full week (+1 day) 	 Only pulls activities where Target Participant Group = Students/Youth Only pulls activities where sessions have been created Only pulls participants whose Activity Enrollment Date is on or before the report start date Teacher names come from the 'Teacher' field in the Client Profile. Spelling and capitalization must match. For instance, SAP- BO will recognize "Brown", "brown" and "Mr. Brown" as 3 different teachers and they'll each get their own confirmation letter.
CONTACT INFO	 TABS: Contact Information: For each enrolled student: (1) primary contact name, primary phone #, phone description, and email (2) contact name, phone and phone type, and (3) emergency contact, relationship to student, 1st phone, 2nd phone Addresses: For all enrolled students: street address, address (additional), city, state, zip Email List: a list of email addresses of all enrolled students - easy to copy and paste PURPOSE: Quick access to contact info for clipboards, field trips, staff without Synergy access, etc. 	 Run as either Excel or PDF Set Start and End dates to include at least 1 full week (+1 day) 	 Only pulls students enrolled in activities where Target Participant Group = Students/Youth Only pulls participants whose Activity Enrollment Date is on or before the report start date

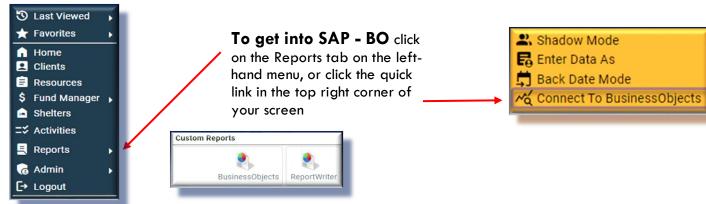
Report Name	Content and Purpose	Report Prompts	Trouble-Shooting
DAILY COUNT for NUTRITION DEPT.	 TABS: Daily Student Count: a day-by-day list of all students who attended PURPOSE: Send to District Nutrition Dept. for attendance verification 	 Run as either Excel or PDF Set Start and End dates as the whole date range (+1 day) that you want to see in your report 	 Only counts attendance for afternoon activities where Target Participant Group = Students/Youth Only pulls activities where sessions have been created and attendance has been entered
DAILY DISMISSAL	 TABS: Daily Sign-Out (pick-ups): Lists all enrolled students whose primary (or secondary) transportation = Parent or Authorized Person, including their: name, grade, first and last activities of the day, primary contact, primary phone, primary and secondary transportation, authorized pick-up, and a space to sign and date. Prints one section for each day in report range. Bus Roster: Lists all enrolled students whose primary (or secondary) transportation = Activity Bus, including their: name, grade, primary contact, primary phone, last activity of the day, bus #, and bus stop. Prints one section for each day in report range. Other (Walking, Trimet, etc.): Lists all enrolled students whose primary (or secondary) transportation = Student's Discretion, Walking, or Tri-Met including their: name, grade, primary and secondary transportation, primary contact, primary phone, last activity of the day, and authorized pick-up. PURPOSE: Facilitates end-of-day dismissal routines 	 Run as either Excel or PDF Set Start and End dates to include at least 1 full week (+1 day) 	 Only pulls activities where Target Participant Group = Students/Youth Only pulls activities where sessions have been created and students have been enrolled Only pulls participants whose Activity Enrollment Date is on or before the report start date

Report Name	Content and Purpose	Report Prompts	Trouble-Shooting
GENERIC PARTNER REPORT	 TABS: Youth Activities: A spreadsheet of all activities where 'Target Participant Group' = Students/Youth, including: all participants and their SvcPt ID, SSID#, school, grade, DOB, age, primary language, photo release (Y/N), street address, primary contact, primary phone, Inclusive Identity, total # of session attended and daily breakdown of attendance. This tab is filtered to only display data for youth with a current 'Yes' Parental Release All Activities - UNFILTERED: The same data points listed above, but with ALL data displayed, regardless of Target Participant Group and Parental Release. Unfiltered tab will also display activities that have not had attendance entered yet. Prompts & PCL Instructions: If using this report for a PCL-funded partner, please read and follow these instructions. PURPOSE: Share basic participant demographics and attendance with partners for all participants with current Releases of Information 	 Run as Excel Set Start and End dates as the whole date range (+1 day) that you want to see in your report 	 Only pulls activities where sessions have been created 'Youth Activities' tab only displays info for students who have a 'Yes' Parental Release for the current school year. Will not show activities that have had no attendance entered. Activities with <i>n</i>o Target Participant Group will only appear on the unfiltered tab. To make them appear on the Youth Activities tab with ROI filters, add the Students/Youth Target Participant Group, wait for the system refresh, then re-run the report.
MASTER SITE ROSTER AKA the Master Blaster	 TABS: Youth Activities: A spreadsheet of all enrolled students including: SvcPt ID, SSID#, Synergy #, name, alias, age, gender, primary language, language (other), risk factor (Y/N), grade, teacher, weekly schedule of AM and PM activities (M-F), primary contact name & phone, email, photo release, parental release, release year, medical notes, primary and secondary transportation, authorized pick-up, and inclusive identity All Activities (Unfiltered): The same data points listed above, but with ALL activities included, regardless of Target Participant Group PURPOSE: A raw data set for folks who prefer to use excel spreadsheets to track data and build program tools. Apply filters to activity columns to find any errors in enrollment, such as students enrolled in 2nd period activities but not in 1st or students enrolled in 2 activities with the same start time 	 Run as Excel only Set Start and End dates to include only 1 full week (+1 day) 	 'Youth Activities' tab only pulls activities where Target Participant Group = Students/Youth Only pulls activities where sessions have been created and students have been enrolled Only pulls one morning activity and the first and last afternoon activities. If a participant is enrolled in 3 or more activities in the same afternoon, this report will not display all of them.

Report Name	Content and Purpose	Report Prompts	Trouble-Shooting
MISSING DATA REPORT	 TABS: MISSING Data: a list of all required data elements (RDEs) for attendees with flags where fields are missing. If fields are unanswered because they're not required (e.g. an adult with no SSID #) this report will display 'N/A' instead of 'MISSING.' RDEs include: SSID#, DOB, gender, primary language, language - other (only required if primary language = 'other'), risk factors (Y/N), parental release, release year, and inclusive identity. SSIDs are also flagged as "Fishy" if they are 6 digits or less. EKT Data: Flags any missing data, missing households, or errors in enrollment for participants who have attended Early Kindergarten Transition. This tab only applies to sites who offer EKT. Multi-Site Summary: gives a list of % missing data for multiple schools in a format that is convenient for sorting/filtering PURPOSE: Facilitates quick data clean-up by flagging all missing data 	 Run as Excel only Set Start and End dates as the whole date range (+1 day) that you want to see in your report 	 Only pulls activities where sessions have been created and attendance has been entered Only pulls participants who have a attended an activity within the report date range. For fields that are only required for students, this report is wired to look for ages 5-20 yrs old. To do data clean-up on participants who are enrolled, but do not have attendance entered, use the Master Site Roster and filter RDE columns for blanks. (RDE column headers are in red.) The EKT Data tab only finds participants who have attended and activity with "EKT" in the activity title.
NAME TAGS	 TABS: Avery 5395 (Adhesive): Name tags for all enrolled students with: name, Mon-Thurs afternoon activities, teacher, primary transportation Avery 5390 (Lanyard Inserts): Same as above, just formatted for a different template style 5 Days (Avery 5390): Same as above, but Mon-Fri PURPOSE: Distribute on 1st week of activities so that staff can help students find their activities and follow dismissal routines 	 Run as either Excel or PDF Set Start and End dates to include only 1 full week (+1 day) 	 Only pulls afternoon activities where Target Participant Group = Students/Youth Only pulls activities where sessions have been created and students have been enrolled Only pulls participants whose Activity Enrollment Date is on or before the report start date

Report Name	Content and Purpose	Report Prompts	Trouble-Shooting
SUN COMMUNITY SCHOOL PROGRESS REPORT	 TABS: Site-by-Site Report: An overview of program outputs, including: # activities offered, youth served, repeat attendees, adults served, and demographic breakdown of participants. If more than 1 site is included in the report, this tab breaks down 1 pg/site Multi-Site Report: Same as above, but cumulative totals for all sites included in the report Participant Detail: Individual level detail that backs up the 1st 2 tabs Activity Detail: lists all activities in the reporting period and their dates, times, category, target participant group(s), and total # of adult and student attendees PURPOSE: Use to monitor progress towards contractual targets 	 Run as either Excel or PDF Set Start and End dates as the whole date range (+1 day) that you want to see in your report 	 Only pulls activities where sessions have been created and attendance has been entered For measures that differentiate between students and adults, students = ages 0-20 yrs old, adults = 21+ Only Community Services users with multi-site access should run this report for multiple schools at once. Note: it's not advised to pull more than 5-7 schools into this report at once. Results can become less accurate if the report is processing too much data. Call the Community Services Helpline for assistance with large-scale reports.
WAIT-LISTED STUDENTS	 TABS: Wait-Listed Students: A list of all waitlisted students including: SvcPt ID, date waitlisted, name, grade, teacher, activity name, activity dates, primary contact, and primary phone PURPOSE: Use to track how long students have been waiting to be enrolled in certain classes and contact families when a spot becomes available 	 Run as Excel Set Start and End dates as the whole date range (+1 day) that you want to see in your report 	 Only pulls activities where sessions have been created and students have been wait-listed

GENERATING SAP - BO REPORTS



Finding the Reports, You Need

To open a folder, click on the triangle next to the folder name. All SUN School reports can be found by opening the following folders:

Public Folders > Portland_live_Folder > Multnomah County > SUN Community Schools

Scheduling SAP - BO Reports

- Click the magnifying glass to the left of the report name Click 'Schedule Report'
- Enter Report Prompts: Prompts can vary, but typically include:
- EDA Provider: If you have multi-site access, enter the school you're looking for. Otherwise, leave blank.
- School: Click 'School' then click 'Select.' Choose your program (same program as above).
- Begin Date: Set as the beginning of the time period you want to look at.
- End Date: Set as the day after the end of your reporting period. Otherwise, your last day of data will not be included.
- Effective Date: Change to tomorrow's date this tells SAP -BO how current you want your data to be.
- Olick 'Next'

- Select Report Format (either excel or PDF)
- **6** Select Interval (either once or repeated)
- Click 'Send' and report will appear in your SAP-BO inbox in several minutes

Folders			Selected Folder
V 🖻 Public Folders	Public Folders / portland_live_folder / Multr	nomah County / SUN Community School	sl
> 🖻 Available Reports and Templates	Title A	Favorites 🔺	Туре
> 🖅 Available WellSky Resources	Archive - OLD SUN School Reports		Folder
✓	Specialty/Funder Reports		Folder
> 🖻 ART Gallery Reports and Resources	Attendance Sheets Student Survey W/SS	*	Web Intelligence
) C2 ADT Churched Provets	Attendance History	*	Web Intelligence
> 🔄 ART Standard Reports	Attendance Sheets	*	Web Intelligence
> 🖻 City of Portland	Confirmation Letters 2021-22 (best as P		Web Intelligence
> 🔄 Clackamas County	Contact Information		Web Intelligence
Community Solutions Custom Reports	Daily Count for Nutrition Dept.		Web Intelligence
7 Community solutions custom reports	Daily Dismissal	*	Web Intelligence
> 🖻 Data Quality	Generic Partner Report 2022-23	*	Web Intelligence
Y 🖻 Multnomah County	🗌 🔓 Master Site Roster	*	Web Intelligence
> Fill Annual Evaluation	🗌 🔓 Missing Data Report 2022-23	*	Web Intelligence
	🗌 🔓 Name Tags - Avery 5390 and 5395		Web Intelligence
> 🖻 Data Quality (DQs, etc.)	SUN Community Schools Progress Report	*	Web Intelligence
> 🖻 DMT Misc	SUN Community Schools Progress Repo	*	Web Intelligence
> T Program Outputs & Outcomes (O&Os)	G Waitlisted Students		Web Intelligence
> 🖅 Reports by Program			
> 🖻 ShelterPoint Reports			
V 🖻 SUN Community Schools			

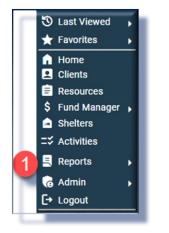
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you want your report	Users * Katie
to keep showing up in	Interval* -Se
your inbox	Start * 04 Date
	End * 04 Date

USING REPORTWRITER FOR NON-ENROLLED EVENTS

Follow the steps below to pulls a report of non-enrolled activities:

- Click the drop-down triangle to open the Reports menu, then click 'ReportWriter'
- Navigate to the 'S' section
- Click the magnifying glass next to the current year's SUN CS Non-**Enrollment Counts report**

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3 III SUN CS Non-Enrollment Counts 2012-13 11/19/2012 12:15:59 PM					Multnon	Multnomah County - SP						For SUN Community Schools to count Non-Enrollment events and attendance in Fiscal Year 13 (7/1/12-6/30/13). Remember to change the provider (in the Filters tab) to your SUN school instead of Multnomah County!															





The report is set to default to a generic 'Multnomah County' provider. You need to CHANGE that provider to your school's provider.

- Olick the Filters tab
- **G** Click the pencil next to 'Activities.Provider Equals Multnomah County - SP'
- **6** Click the search button to find your school
- In the window that pops up, choose your school by clicking the green plus sign
- 8 Click 'Save' in the prompt screen

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*	0	Activity Attendance (N	on-Enrollment).Active Equals Yes				AND	~	
	0	Activities.Start Date Is	Between and Including 07/01/2012	06/30/2013			AND	~	
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	Report Preview										
	Enrollment Type	Provider		Name		Sesssion D	ate				
	Non-Enrollment	Camp Fire USA: SU	N-Gilbert Heights Elementary -	SP GH 14.15	Back to School Night	09/18/2014					
	Non-Enrollment	Camp Fire USA: SU	N-Gilbert Heights Elementary -	SP 14.15 GH	SUN Healthy Family Night Carnival	05/15/2015					
Olick 'Download Full Report'	10 Download Ful	l Report		Showing 1-2	2 of 2		•				

Revised 9.20.16