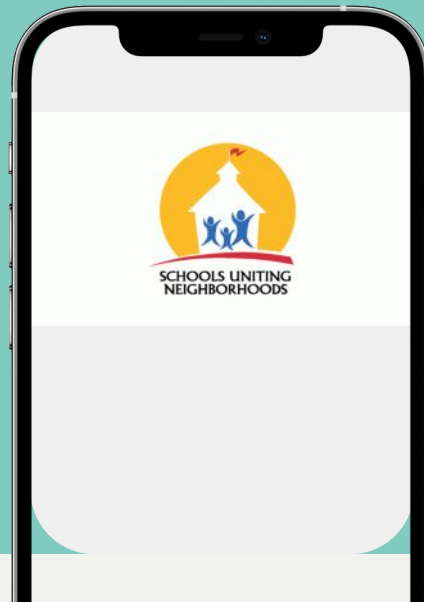




# Grouptrail SUN Community School Overview

---

## Training Handbook for SUN Community Schools 2026-27





## County SUN System Training and Support Resources

---

- **For New User Access and/or Training use [this form](#)**
  - [https://docs.google.com/forms/d/e/1FAIpQLScJ6IJucyAdu\\_hKMjA5vuBD0AIEGFa-NyRU8ztoqE85O1raSg/viewform](https://docs.google.com/forms/d/e/1FAIpQLScJ6IJucyAdu_hKMjA5vuBD0AIEGFa-NyRU8ztoqE85O1raSg/viewform)
- **For Multnomah County Grouptrail Handbooks**
  - <https://multco.us/info/sun-community-schools-handbooks>
- **For Grouptrail SUN Community School YouTube Page**
  - [https://www.youtube.com/playlist?list=PLT3mjva75FQgGFTTnhXgRH37VgIm\\_Dn9\\_](https://www.youtube.com/playlist?list=PLT3mjva75FQgGFTTnhXgRH37VgIm_Dn9_)
- **For Grouptrail Help Articles**
  - [https://scribehov.com/o/3j\\_CNcdJRH2L0NWUYiSi2w/page/SUN\\_Community\\_Schools\\_Grouptrail\\_help\\_articles\\_for\\_SUN\\_Site\\_staff\\_\\_OPY2X5IJQc6Nb04UUiFzXg?back\\_to=%2Fworkspace%23documents\\_\\_PA1L\\_HXMR-mTxPKA16ZIVQ](https://scribehov.com/o/3j_CNcdJRH2L0NWUYiSi2w/page/SUN_Community_Schools_Grouptrail_help_articles_for_SUN_Site_staff__OPY2X5IJQc6Nb04UUiFzXg?back_to=%2Fworkspace%23documents__PA1L_HXMR-mTxPKA16ZIVQ)
- **For assistance with WellSky Community Services and/or**  
**Grouptrail email: [yfsdatasupport@multco.us](mailto:yfsdatasupport@multco.us)**



*Grouptrail*

## **Table of Contents**

|           |                                                                                                                                                           |
|-----------|-----------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>4</b>  | <b>Staff Workflow: Creating a new Participant or activity (includes non-enrolled activities)</b>                                                          |
| <b>15</b> | <b>Staff Workflow: Enrolling Participants</b>                                                                                                             |
| <b>22</b> | <b>Staff Workflow: Taking Attendance</b>                                                                                                                  |
| <b>26</b> | <b>Staff Workflow: Integrated Attendance and Dismissal Sheets</b>                                                                                         |
| <b>29</b> | <b>Staff Workflow: Updating Participant Workspace Name</b>                                                                                                |
| <b>31</b> | <b>Staff Workflow: Reviewing or Updating Staff-only Embedded Fields</b>                                                                                   |
| <b>41</b> | <b>Staff Workflow: Scenarios of Duplicate Participants</b>                                                                                                |
|           | <ul style="list-style-type: none"><li>● <b>Scenario 1 (Page 42)</b></li><li>● <b>Scenario 2 (Page 48)</b></li><li>● <b>Scenario 3 (Page 59)</b></li></ul> |
| <b>72</b> | <b>Other Grouptrail Features (How to search workspaces effectively , Batch updating fields &amp; tags)</b>                                                |
| <b>84</b> | <b>Staff Workflow: Creating and linking Account Holders</b>                                                                                               |



# **Staff Workflow: Creating a new activity or a manual participant workspace in Grouptrail (Through the one-page creation forms)**

**Please Note:** This process reviews how to create new participants and activities in Grouptrail.



# Creating a new activity or participant through the one-page creation forms (Step 1)

To create a workspace, select  
**“Activities”**

OR

**“Participants”**  
in your  
navigation  
window

The screenshot displays the Grouptrail web application interface. On the left is a vertical navigation menu with a 'Welcome Rob!' header and a hamburger menu icon. The menu items are: Home, Browse (with a dropdown arrow), Activities (highlighted with an orange box), Account Holder (Parent/Gua...), Participants (highlighted with an orange box), Grouptrail Announcements, ..., Reports, Site management, My Sites, and My Account. At the bottom of the menu is a 'Sign Out' link. The main content area on the right has a 'Home' header and an 'Add New' button in the top right corner. Below the header is a light blue announcement banner with a megaphone icon, the text 'Welcome! / ¡Bienvenidos!', an 'Update' button, and a close button. The banner contains a message about the new version of Grouptrail v11 and lists several help articles. Below the banner is a dark grey bar with the text 'FY27 Grouptrail Announcements and Updates'.

Welcome Rob! ☰

Home

Browse ▾

Activities

Account Holder (Parent/Gua...

Participants

Grouptrail Announcements, ...

Reports

Site management

My Sites

My Account

Sign Out

Home

+ Add New

Welcome! / ¡Bienvenidos! Update

In the new version of Grouptrail v11, you no longer need the additional student registration form linked at the top. Parents/Guardians can more easily add students at any time!

- Account holder/parent/restricted user help articles: [Create an account and register](#), [Adding an additional participant](#), [Find activities and request enrollment](#)
- Use [this link](#) to test the full account holder/parent/restricted user workflow experience from registration to enrollment.
- And here are staff help articles: [How to create a new participant or activity](#), [Connect a new parent to an existing student record](#), [Marking duplicates for deletion](#), [Viewing staff reports](#), [Taking activity attendance](#), [Enrolling participants](#), [Frequently asked questions](#)

> FY27 Grouptrail Announcements and Updates



## Creating a new activity or participant through the one-page creation forms (Step 2)

Once you're in the **"Activities"** OR **"Participants"** Menu view, click the icon called: **"Add New"** in the right hand corner to locate the one-page creation form

The screenshot displays the Grouptrail user interface. On the left is a sidebar with a 'Welcome Rob!' greeting and a menu containing 'Home', 'Browse', 'Activities', 'Account Holder (Parent/G...', 'Participants', 'Grouptrail Announcement...', 'Reports', and 'My Account'. The main content area is divided into two sections: 'Activities' and 'Participants'. The 'Activities' section shows a list of activities with two items: 'Providers > All Activities Fall SUN 2026 (Example Tracker)' and 'Providers > All Activities Summer SUN 2026 (Example Tracker)'. The 'Participants' section shows a list of participants with two items: 'Participants (Active)' and 'Participants (Inactive)'. In both sections, an 'Add New' button is located in the top right corner, highlighted by an orange box. An orange line connects the 'Add New' button in the 'Activities' section to the 'Add New' button in the 'Participants' section.



## Creating a new activity or participant through the one-page creation forms (Step 3)

Once you have selected the “Add New” icon, you will now click either the word “Activities” or “Participants” depending on what data category you’re in

Once clicked, you will be redirected to the appropriate one-page creation form

### Important Note:

Be sure not to “Add a New Tracker” instead of clicking on either activities or Participants.

#### Activities

+ Add New

> Providers > All Activities Fall SUN 2026 (Example Tracker)

Tracker  
Activities

> Providers > All Activities Summer SUN 2026 (Example Tracker)

#### Participants

+ Add New

> Participants (Active)

Tracker  
Participants

> Participants (Inactive)



## Creating a new activity or participant through the one-page creation forms (Step 4)

1. Once you have selected the one-page creation form, you will fill it out in its entirety. They're some fields that are **required** in order to submit the form

2. Once you fill out the form you will click **“Submit”** at the bottom. Once submitted, you will be asked if you would like to **create another participant or activity**, view the **workspace** that you just completed or **close out of the one-page creation form**

### Important Note:

When naming a participant, the following are optional “Middle Name” and/ “Preferred Name”

When naming an activity, please include these identifiers in the name:

- **Session and the year**
  - Example: Fall 2025
- **Name of the activity**
- **Optional (Grade and class frequency)**

Add new: Activities

Name \*

Provider \* SUN Site \*

Select... Select...

Subtitle

Activity Description

Activity Term \* Start Date \*

Select... mm/dd/yyyy

End Date \* Start time? \*

mm/dd/yyyy

End time? \* Max enrollment \*

Select...

Current Grade Level \*

Select...

Activity Category \* Activity Subject \*

Select... Select...

Target Participant \* Age range \*

Select...

Time offered \* Frequency \*

Select... Select...

Recurring Weekly Schedule \* Activity Leader/Instructor

Select...

Location

Cancel Add workspace

Add new: Participants

Student's First Name: Student's MI:

Student's Last Name: SUN Site \*

Select... Select...

Type of Participant \* Current Grade Level \*

Select... Select...

Date of Birth \* Gender \*

mm/dd/yyyy Gender \*

If Other Gender, Specify Email (Custom)

Primary language spoken at home \* Inclusive Identity \*

Select... Select...

Student State ID # (SSID) Has your child experienced any resilience factors?

Select... Select...

Risk factor (Yes/No) Release to Participate Granted for 2026-2027 \*

Select... Select...

Release of Information Granted for 2026-2027 \* Photo Release Granted for 2026-2027 \*

Select... Select...

Accept Non-Discrimination & Behavioral Expectations Parent 1

Select... Select...

Parent 2 Agency Client ID

Teacher/Counselor [School] Enrollment Status \*

Select... Select...

Primary Contact Name Primary Contact Number

Cancel Add workspace



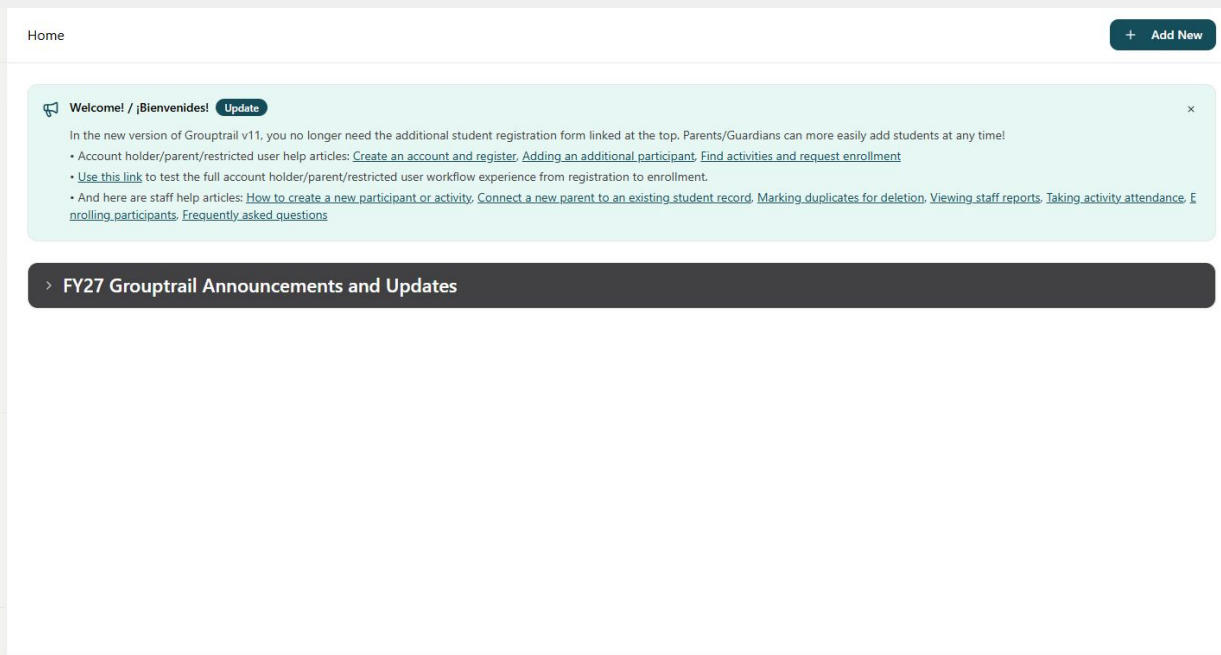
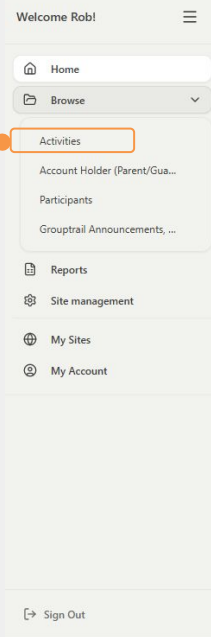
# **Staff Workflow: Creating a Non-Enrolled Activity in Grouptrail (Through the one-page creation forms)**

**Please Note:** This process reviews how to create a non-enrolled activity in Grouptrail.



# Creating an non-enrolled activity through the one-page creation forms (Step 1)

To create an Non-Enrolled Activity, select “Activities” in your navigation window





## Creating an non-enrolled activity through the one-page creation forms (Step 2)

Once you're in the “**Activities**” Menu view, click the icon called: “**Add New**” in the right hand corner to locate the one-page creation form





## Creating an non-enrolled activity through the one-page creation forms (Step 3)

Once you have selected the “Add New” icon, you will now click the word “Activities”

Once clicked, you will be redirected to the appropriate one-page creation form

### Important Note:

Be sure not to “Add a New Tracker” instead of clicking on activities.

Activities

+ Add New

> Providers > All Activities Fall SUN 2026 (Example Tracker)

> Providers > All Activities Summer SUN 2026 (Example Tracker)

Tracker

Activities



## Creating a new activity or participant through the one-page creation forms (Step 4)

1. Once you select the one-page creation form, you will fill it out in its entirety. They're some fields that are **required** in order to submit the form

2. For non-enrolled activities, please be sure to select **"Non-Enrollment"** for the **Enrollment Type** field

This field will be at the bottom of the one-page creation form

3. Once you fill out the form you will click **"Submit"** at the bottom. Once submitted, you will be asked if you would like to **create another activity**, **view the workspace** that you just completed or **close out of the one-page creation form**

The screenshot shows the 'Add new: Activities' form. At the bottom, the 'Enrollment Type \*' dropdown menu is open, showing two options: 'Open' and 'Non-Enrollment'. An orange arrow points from the text in step 2 to the 'Non-Enrollment' option. Other fields on the form include 'Time offered \*', 'Frequency \*', 'Recurring Weekly Schedule \*', 'Activity Leader/Instructor', 'Location', 'Partners', 'Enrollment Type \*', 'Is this a P-3 Activity (P-3 Only)', 'Cancel', and 'Add workspace'.

The screenshot shows the 'Add new: Activities' form. Fields include: Name \*, Provider \*, SUN Site \*, Subtitle, Activity Description, Activity Term \*, Start Date \*, End Date \*, Start time? \*, End time? \*, Max enrollment \*, Max waitlist \*, Current Grade Level \*, Activity Category \*, Activity Subject \*, Target Participant \*, Age range \*, Time offered \*, Frequency \*, Recurring Weekly Schedule \*, Activity Leader/Instructor, Location, Cancel, and Add workspace.

# Creating a new activity or participant through the one-page creation forms (Step 5)

1. To view your non-enrolled activity you just created, go find the event in your **activity tracker**

2. Once you find it, click the activity. You can always edit event details or change the enrollment type if you make a mistake

3. For non-enrolled activities, you can **record the number of headcounts or attendees** in the last two fields at the bottom of activity profile called:

- # of Students Attended
- # of Adults Attended

## Important Note:

Please remember that for non-enrolled activities you do not need to enroll participants into the event. Just select the correct **"Enrollment Type"** and specify the **number of headcounts**



### Fall 2026 Back To School Night

Provider: Self Enhancement Inc ✓

Subcategory: Fake School ✓

Start Date: 9/1/2026 ✓

End Date: 9/1/2026 ✓

Recurring Weekly Schedule: Monday ✓

Max enrollment: 15 ✓

DETAILS/DETALLES

SIGN UP

ATTENDANCE

Workspace number: 12728068

Name: Fall 2026 Back To School Night ✓

Subtitle: ✓

Activity Description: ✓

Current Grade Level: 1st, 2nd, 3rd, 4th, 5th, Parent/Adult ✓

Start Date: 07/15/2026 ✓

End Date: 12/19/2026 ✓

Start time: 7:00 PM ✓

End time: 9:00 PM ✓

Time offered: After School ✓

Recurring Weekly Schedule: Monday ✓

Frequency: One time event ✓

Max enrollment: 150 ✓

Max waitlist: ✓

Age range: ✓

Teacher/Counselor: ✓

Location: Cafeteria ✓

Partners: ✓

Target Participant: SUN- Students/Youth, SUN- Families/ ✓

Activity Category: SUN-Academic Enrichment ✓

Activity Subject: SUN- Art/Music/Dance/Theater ✓

Is this a P-3 Activity?: ✓

Enrollment Type: Non-Enrollment ✓

# of Students Attended: ✓

# of Adults Attended: ✓

< Showing page 4 of 5 >

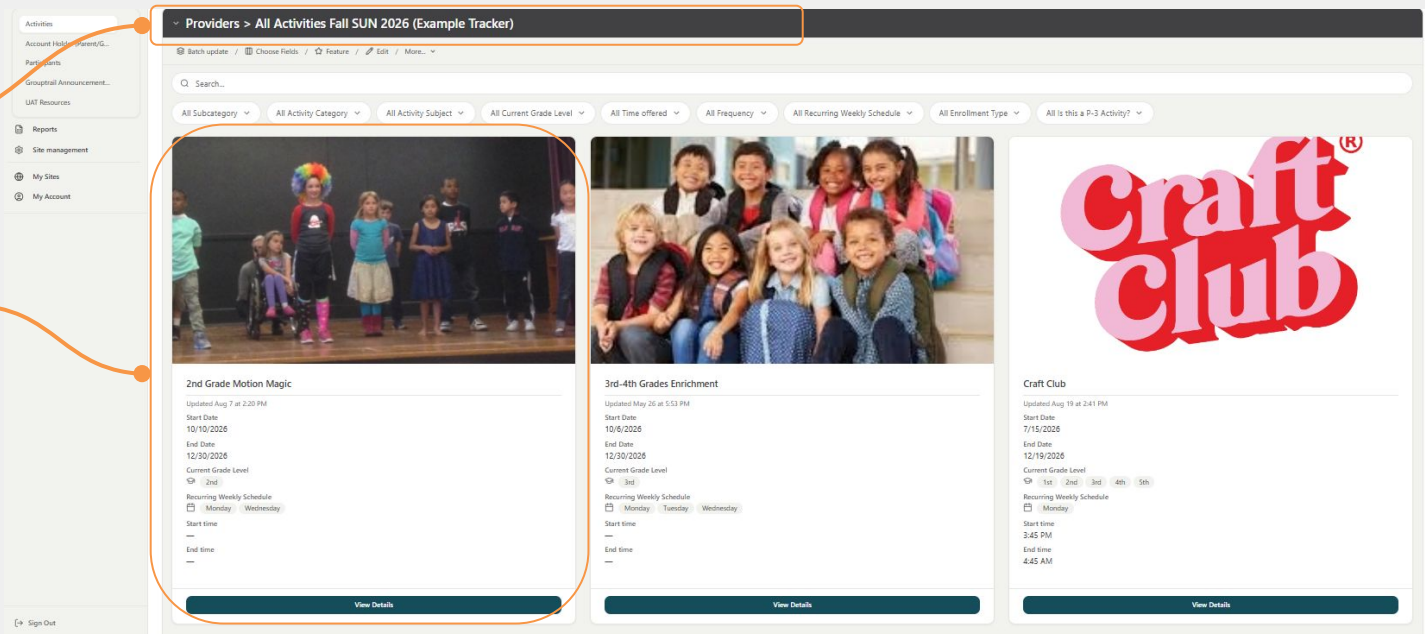


## Staff workflow: Enrolling Participants

**Please Note:** This process will review how users can manually enroll a participant into an activity. This process will also include how sites who are using the online Grouptrail registration process can accept “*requested enrollment*” from families signing up online.

# Manually enrolling participants into an activity (step 1)

1. Click on your **Activity Tracker** to see your activities, then **click the Activity** you want to enroll participants in.



The screenshot shows the Grouptrail interface for managing activities. The top navigation bar includes links for Activities, Account History/Reports/SL, Participants, Grouptrail Announcement..., and UAT Resources. The main header displays the current view: Providers > All Activities Fall SUN 2026 (Example Tracker). Below the header is a search bar and a set of filters: All Subcategory, All Activity Category, All Activity Subject, All Current Grade Level, All Time offered, All Frequency, All Recurring Weekly Schedule, All Enrollment Type, and All is this a P-3 Activity?. The main content area shows three activity cards. The first card, '2nd Grade Motion Magic', is highlighted with an orange circle around its 'View Details' button. The second card is '3rd-4th Grades Enrichment' and the third is 'Craft Club'. Each card displays a photo of children, the activity name, update date, start/end dates, current grade level, and recurring weekly schedule.

**Providers > All Activities Fall SUN 2026 (Example Tracker)**

Batch update / Choose Fields / Feature / Edit / More...

Search...

All Subcategory All Activity Category All Activity Subject All Current Grade Level All Time offered All Frequency All Recurring Weekly Schedule All Enrollment Type All is this a P-3 Activity?

**2nd Grade Motion Magic**  
Updated Aug 7 at 2:20 PM  
Start Date: 10/10/2026  
End Date: 12/30/2026  
Current Grade Level: 2nd  
Recurring Weekly Schedule: Monday, Wednesday  
Start time: —  
End time: —  
[View Details](#)

**3rd-4th Grades Enrichment**  
Updated May 26 at 5:53 PM  
Start Date: 10/6/2026  
End Date: 12/30/2026  
Current Grade Level: 3rd  
Recurring Weekly Schedule: Monday, Tuesday, Wednesday  
Start time: —  
End time: —  
[View Details](#)

**Craft Club**  
Updated Aug 19 at 2:41 PM  
Start Date: 7/15/2026  
End Date: 12/19/2026  
Current Grade Level: 1st, 2nd, 3rd, 4th, 5th  
Recurring Weekly Schedule: Monday  
Start time: 3:45 PM  
End time: 4:45 AM  
[View Details](#)

Sign Out



## Manually adding participants to an activity (step 2)

To **manually enroll** a **participant** who is in the system, but who has not “requested enrollment” through the online registration process, search for them on the Activity Workspace in the bar at the bottom of the sign-up tab called: **Add student**

When you manually enroll a participant you will see the participants name appear; followed by their unique Grouptrail number at the bottom

When their name appears, select them and Click **Enroll**

**2nd Grade Motion Magic**

Provider: Portland Parks & Recreation  
Subcategory: Arleta Elementary  
Start Date: 10/10/2026  
End Date: 12/30/2026  
Recurring Weekly Schedule: Monday, Wednesday  
Max enrollment: 12

**ADD STUDENT**

Select: All / Requested / Enrolled / Waitlisted / Dropped / None

| Student                                             | Status   | Primary Contact Name | Primary Contact Number | Emergency Contact 1 Name | Emergency Contact 1 Relationship | Emergency Contact 1 Phone | Photo |
|-----------------------------------------------------|----------|----------------------|------------------------|--------------------------|----------------------------------|---------------------------|-------|
| <input type="checkbox"/> Sample student             | Enrolled |                      |                        |                          |                                  |                           |       |
| <input type="checkbox"/> Lukas Yuen                 | Enrolled |                      |                        |                          |                                  |                           |       |
| <input type="checkbox"/> Nickel Yuen                | Enrolled | Justin Yuen          | 971.222.3016           | Katrina                  |                                  |                           |       |
| <input type="checkbox"/> Aja Wilson                 | Enrolled |                      | (347)-841-6077         |                          |                                  |                           |       |
| <input type="checkbox"/> George A Caceres           | Enrolled | George Caceres       | 5038059483             | George Caceres           | Parent                           | 5038059483                |       |
| <input type="checkbox"/> Robert Lazenby (test 10/4) | Enrolled | Dad                  | 444-444-4444           | test grandpa             | grandpa                          | 444-222-2222              | Yes   |

**Enroll** **Waitlist** **Drop**

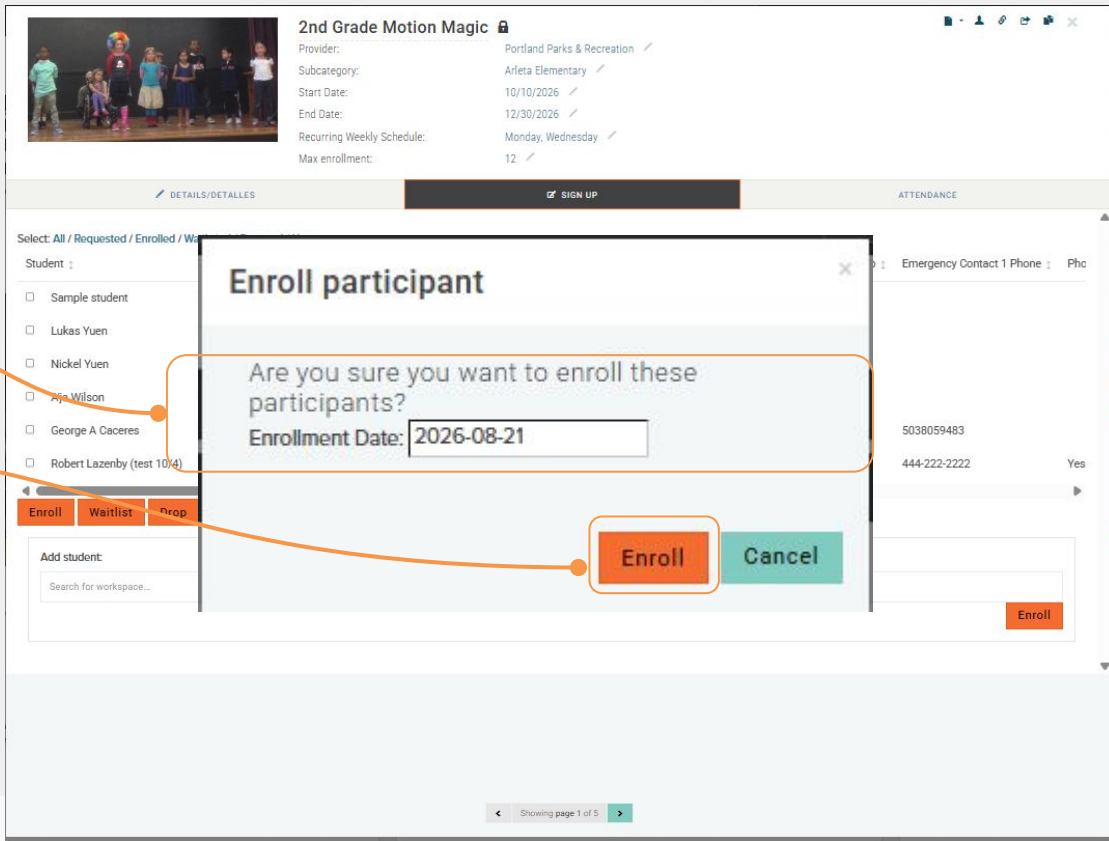
**Add student:**  
Search for workspace...

**Enroll**

Showing page 1 of 5

## Manually Enrolling participants: Enroll (step 3)

Before you are done Enrolling participants you will be prompted to add an **enrollment date**, before hitting **Enroll** again.



**2nd Grade Motion Magic** 

Provider: Portland Parks & Recreation ✓  
 Subcategory: Arleta Elementary ✓  
 Start Date: 10/10/2026 ✓  
 End Date: 12/30/2026 ✓  
 Recurring Weekly Schedule: Monday, Wednesday ✓  
 Max enrollment: 12 ✓

DETAILS/DETAILS SIGN UP ATTENDANCE

Select: All / Requested / Enrolled / Waitlist

Student :

- ☐ Sample student
- ☐ Lukas Yuen
- ☐ Nickel Yuen
- ☐ Aja Wilson
- ☐ George A Caceres
- ☐ Robert Lazenby (test 10/4)

Enroll Waitlist Drop

Add student:  
 Search for workspace...

**Enroll participant** 

Are you sure you want to enroll these participants?  
 Enrollment Date: 2026-08-21

Enroll Cancel

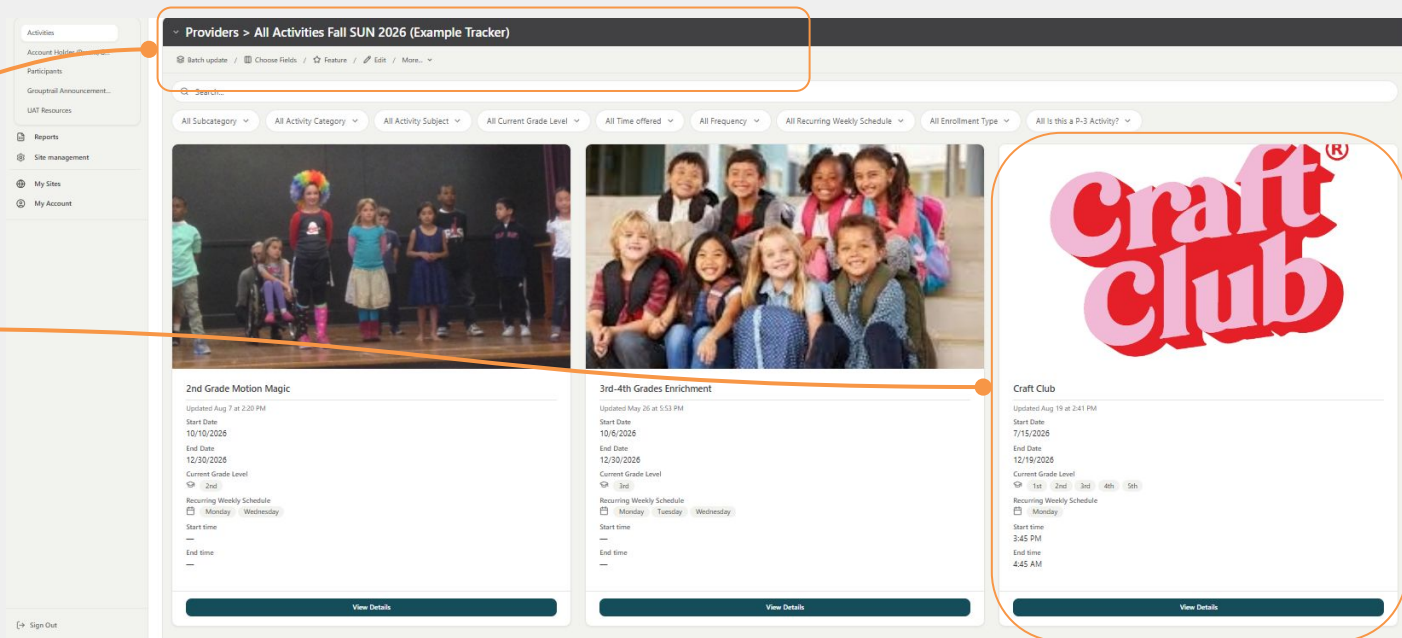
Emergency Contact 1 Phone : Phc  
 5038059483  
 444-222-2222 Yes

Enroll

Showing page 1 of 5

# Enrolling participants through the Grouptrail online registration process: Find the activity (step 1)

1. Click on your **Activity Tracker** to see your activities, then **click the Activity** you want to enroll participants in.



The screenshot shows the Grouptrail online registration interface. On the left is a sidebar with navigation links: Activities, Account Information, Participants, Grouptrail Announcement..., UAT Resources, Reports, Site management, My Sites, and My Account. The main content area is titled 'Providers > All Activities Fall SUN 2026 (Example Tracker)'. Below the title is a search bar and a row of filters: All Subcategory, All Activity Category, All Activity Subject, All Current Grade Level, All Time offered, All Frequency, All Recurring Weekly Schedule, All Enrollment Type, and All Is this a P-3 Activity?. The main area displays three activity cards. The first card is '2nd Grade Motion Magic', the second is '3rd-4th Grades Enrichment', and the third is 'Craft Club'. The 'Craft Club' card is highlighted with an orange border. Each card includes a photo of children, the activity name, update date, start/end dates, current grade level, and recurring weekly schedule. At the bottom of each card is a 'View Details' button.

**Providers > All Activities Fall SUN 2026 (Example Tracker)**

Search...

All Subcategory All Activity Category All Activity Subject All Current Grade Level All Time offered All Frequency All Recurring Weekly Schedule All Enrollment Type All Is this a P-3 Activity?

**2nd Grade Motion Magic**  
Updated Aug 7 at 2:20 PM  
Start Date: 10/10/2026  
End Date: 12/30/2026  
Current Grade Level: 2nd  
Recurring Weekly Schedule: Monday, Wednesday  
Start time: ---  
End time: ---  
[View Details](#)

**3rd-4th Grades Enrichment**  
Updated May 26 at 5:53 PM  
Start Date: 10/6/2026  
End Date: 12/30/2026  
Current Grade Level: 3rd  
Recurring Weekly Schedule: Monday, Tuesday, Wednesday  
Start time: ---  
End time: ---  
[View Details](#)

**Craft Club**  
Updated Aug 19 at 2:41 PM  
Start Date: 7/15/2026  
End Date: 12/19/2026  
Current Grade Level: 1st, 2nd, 3rd, 4th, 5th  
Recurring Weekly Schedule: Monday  
Start time: 3:45 PM  
End time: 4:45 AM  
[View Details](#)

## Enrolling participants through the Grouptail online registration process: Select the participants (step 2)

2. On the **Sign Up** tab, click the box for the participants you want to enroll, and then click **Enroll\***.



Craft Club

Provider:

Subcategory:

Start Date:

End Date:

Recurring Weekly Schedule:

Max enrollment:

Impact NW

Sabin Elementary

07/15/2026

12/19/2026

Monday

15

DETAILS/DETALLES

SIGN UP

ATTENDANCE

Select: All / Requested / Enrolled / Waitlisted / Dropped / None

| Student                                          | Status               | Primary Contact Name | Primary Contact Number | Emergency Contact 1 Name | Emergency Contact 1 Relationship | Emergency Contact 1 Phone | Ph |
|--------------------------------------------------|----------------------|----------------------|------------------------|--------------------------|----------------------------------|---------------------------|----|
| <input checked="" type="checkbox"/> Jamaal Brown | Requested Enrollment | Michael Brown        | 555-333-1350           | Manny Tests              | uncle                            | 555-888-1350              | Nc |
| <input type="checkbox"/> Rae Roberts             | Enrolled             | Olie                 |                        |                          |                                  |                           |    |
| <input type="checkbox"/> Dani Brown              | Enrolled             | Michael Brown        | 444-333-1350           | Manny Tests              | uncle                            | 555-888-1350              | Ye |

Enroll

Waitlist

Drop

Add student:

Search for workspace...

Enroll

### Important Note:

If your site is using the online Grouptail process to request enrollment for SUN activities - participants will show up top to bottom from: top being first requested to bottom being recent requested.

For sites using the online process, participants who are signing up online will display “**requested enrollment**” in the **status** column



## Enrolling participants through the Grouptrail online registration process: Enroll (step 3)

3. Before you are done Enrolling participants you will be prompted to add an **enrollment date**, before hitting **Enroll** again.

### Important Note:

Account Holders of student(s) profiles that are signing up online will receive notifications when their student has been **enrolled**, **waitlisted** or **dropped** from an activity.

**Craft Club**

Provider: Impact NW ✓  
Subcategory: Sabin Elementary ✓  
Start Date: 07/15/2026 ✓  
End Date: 12/19/2026 ✓  
Recurring Weekly Schedule: Monday ✓  
Max enrollment: 15 ✓

### Enroll participant

Are you sure you want to enroll these participants?  
Enrollment Date:

**Enroll** **Cancel**

**DETAILS/DETALLES**

Select: All / Requested / Enrolled / Waitlisted / Dropped

| Student                                          | Status               | Prim |
|--------------------------------------------------|----------------------|------|
| <input checked="" type="checkbox"/> Jamaal Brown | Requested Enrollment | Mich |
| <input type="checkbox"/> Rae Roberts             | Enrolled             | Olie |
| <input type="checkbox"/> Danl Brown              | Enrolled             | Mich |

**Enroll** **Waitlist** **Drop**

**ATTENDANCE**

| Relationship | Emergency Contact 1 Phone | Ph |
|--------------|---------------------------|----|
|              | 555-888-1350              | Nc |
|              | 555-888-1350              | Ye |

**Add student:**

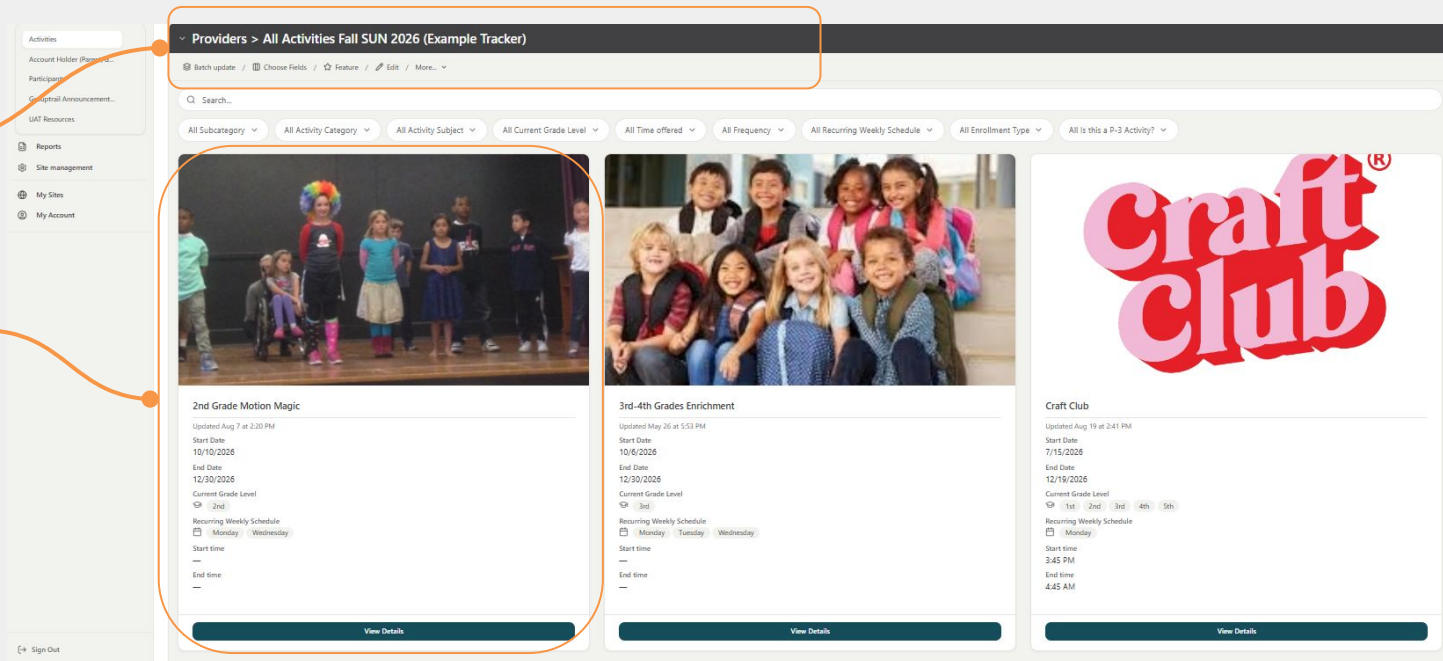
**Enroll**



# **Staff Workflow: Taking Attendance in Grouptrail**

## Taking activity attendance (step 1)

1. Click on your **Activity Tracker** to see your activities, then **find the Activity** you want to take attendance for.



**Providers > All Activities Fall SUN 2026 (Example Tracker)**

Batch update / Choose Fields / Feature / Edit / More...

Search...

All Subcategory / All Activity Category / All Activity Subject / All Current Grade Level / All Time offered / All Frequency / All Recurring Weekly Schedule / All Enrollment Type / All is this a P-3 Activity?

**2nd Grade Motion Magic**

Updated Aug 7 at 2:20 PM

Start Date: 10/10/2026

End Date: 12/30/2026

Current Grade Level: 2nd

Recurring Weekly Schedule: Monday, Wednesday

Start time: —

End time: —

**3rd-4th Grades Enrichment**

Updated May 26 at 5:53 PM

Start Date: 10/6/2026

End Date: 12/30/2026

Current Grade Level: 3rd

Recurring Weekly Schedule: Monday, Tuesday, Wednesday

Start time: —

End time: —

**Craft Club**

Updated Aug 19 at 2:41 PM

Start Date: 7/15/2026

End Date: 12/19/2026

Current Grade Level: 1st, 2nd, 3rd, 4th, 5th

Recurring Weekly Schedule: Monday

Start time: 3:45 PM

End time: 4:45 AM

Sign Out

## Taking activity attendance (step 2)

Click on the **Attendance** tab, then select the **Week** for which you are taking attendance for



### Fall 2025 - Arts & Crafts (Monday & Wednesday) 1st - 3rd Grade

Provider: El Programa Hispano   
 Subcategory: Grouptrail School   
 Start Date: 09/08/2025   
 End Date: 11/30/2025   
 Max enrollment: 15 

[DETAILS/DETALLES](#)
[SIGN UP](#)

ATTENDANCE

[FORMS](#)

Date Week of Sep 8, 2025 (Mon) 
[Print Attendance Sheet](#)

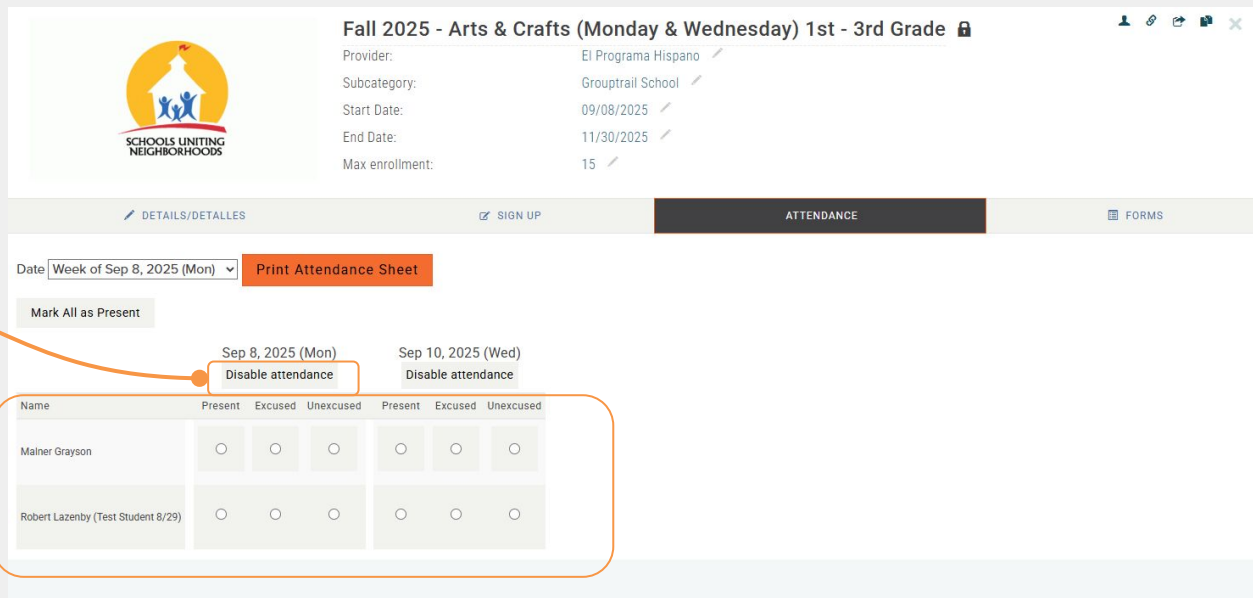
[Mark All as Present](#)

|                                    | Sep 8, 2025 (Mon)                  |                       |                       | Sep 10, 2025 (Wed)                 |                       |                       |
|------------------------------------|------------------------------------|-----------------------|-----------------------|------------------------------------|-----------------------|-----------------------|
|                                    | <a href="#">Disable attendance</a> |                       |                       | <a href="#">Disable attendance</a> |                       |                       |
| Name                               | Present                            | Excused               | Unexcused             | Present                            | Excused               | Unexcused             |
| Mainer Grayson                     | <input type="radio"/>              | <input type="radio"/> | <input type="radio"/> | <input type="radio"/>              | <input type="radio"/> | <input type="radio"/> |
| Robert Lazenby (Test Student 8/29) | <input type="radio"/>              | <input type="radio"/> | <input type="radio"/> | <input type="radio"/>              | <input type="radio"/> | <input type="radio"/> |

## Taking activity attendance (step 3)

If there was no activity on that Date (for example it may be a holiday, school closure or activity cancelled), click on **Disable attendance**.

Otherwise, click on the **radio button** that represents each participants attendance.\*



The screenshot shows the Grouptrail attendance interface. At the top, there's a header with the Grouptrail logo and the activity title: "Fall 2025 - Arts & Crafts (Monday & Wednesday) 1st - 3rd Grade". Below the title, there are details: Provider: El Programa Hispano, Subcategory: Grouptrail School, Start Date: 09/08/2025, End Date: 11/30/2025, and Max enrollment: 15. There are three tabs: "DETAILS/DETALLES", "SIGN UP", and "ATTENDANCE" (which is selected). Below the tabs, there's a "Date" dropdown set to "Week of Sep 8, 2025 (Mon)" and a "Print Attendance Sheet" button. A "Mark All as Present" button is also visible. The main section shows a table for attendance. The table has columns for "Name", "Present", "Excused", and "Unexcused" for two dates: "Sep 8, 2025 (Mon)" and "Sep 10, 2025 (Wed)". Each date has a "Disable attendance" button. The table lists two participants: Malher Grayson and Robert Lazenby (Test Student 8/29). Each participant has three radio buttons (dots) under each date for "Present", "Excused", and "Unexcused".

| Name                               | Sep 8, 2025 (Mon)     |                       |                       | Sep 10, 2025 (Wed)    |                       |                       |
|------------------------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
|                                    | Present               | Excused               | Unexcused             | Present               | Excused               | Unexcused             |
| Malher Grayson                     | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Robert Lazenby (Test Student 8/29) | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

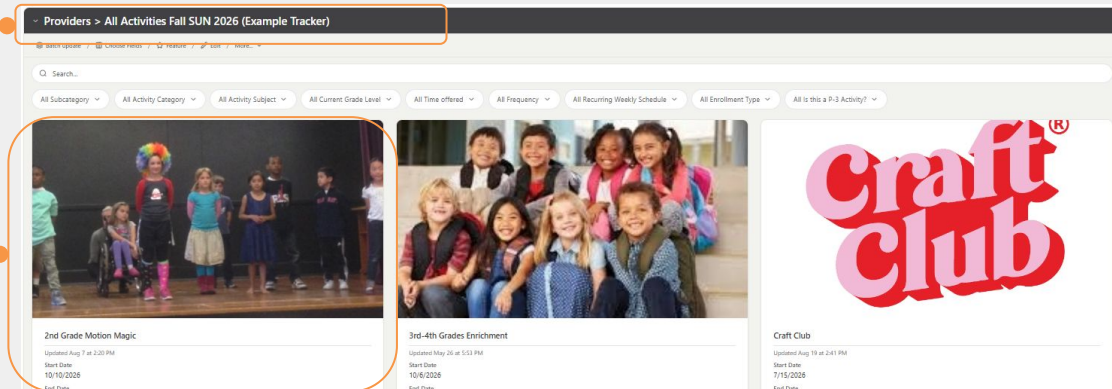
**\*\*Radio buttons (dots above under "Present/Excused/Unexcused") automatically save - there is no save button to push as a second step\*\***



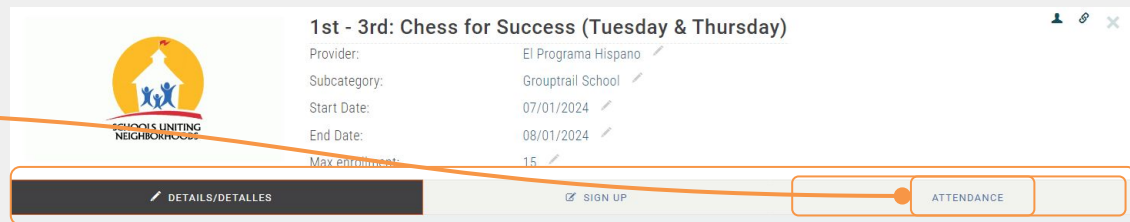
**Optional:  
Integrated Printing Attendance  
and  
Dismissal Sheets**

# Printing an attendance sheet

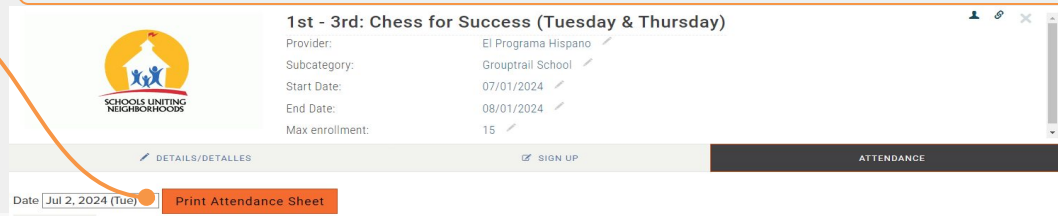
**Step 1)** To print an attendance sheet, go to your activity tracker and select the activity you would like to print-off an attendance sheet for



**Step 2)** On the Activity page, click on the **Attendance** tab.



**Step 3)** Select **“Print Attendance Sheet”** and then print it



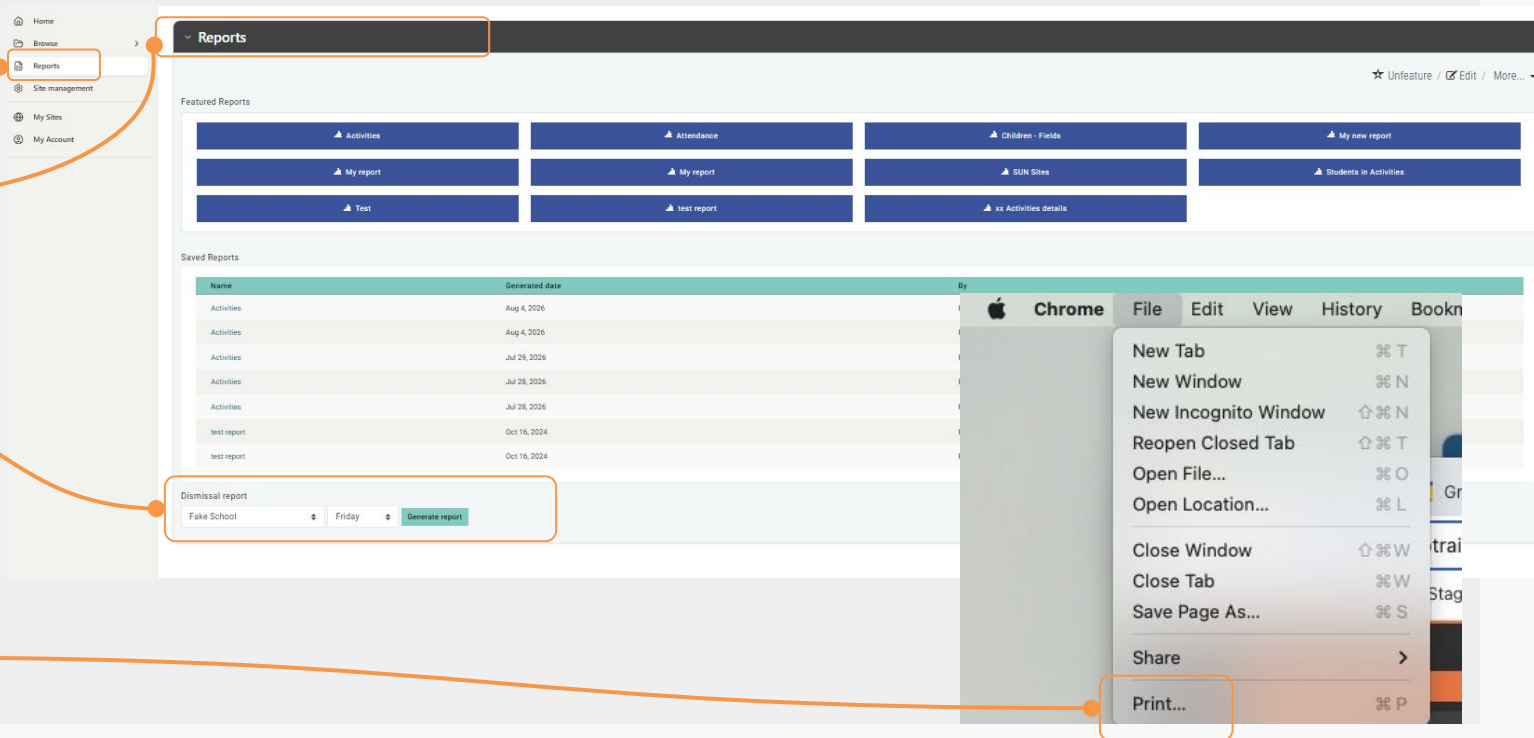
**Note:**

Attendance sheets can be print-off for each week (session dates will only display in printed attendance for each week depending on the frequency of the activity)

## Printing the dismissal list report

To print the dismissal report, go to your “**Reports**” Menu view and open the **Reports** Tracker, then choose the school and day, and click **Generate Report**.

The list will open in another Tab. To print click on **File->Print**.



The screenshot shows the Grouptrail Reports interface. On the left, a sidebar menu has the 'Reports' option highlighted. The main content area is titled 'Reports' and contains two sections: 'Featured Reports' and 'Saved Reports'.

The 'Featured Reports' section displays a grid of report cards with titles like 'Activities', 'Attendance', 'Children - Fields', 'My new report', 'My report', 'SUN Sites', 'Students in Activities', 'Test', 'test report', and 'xx Activities details'.

The 'Saved Reports' section contains a table with the following data:

| Name        | Generated date | By |
|-------------|----------------|----|
| Activities  | Aug 4, 2026    |    |
| Activities  | Aug 4, 2026    |    |
| Activities  | Jul 29, 2026   |    |
| Activities  | Jul 28, 2026   |    |
| Activities  | Jul 28, 2026   |    |
| test report | Oct 16, 2024   |    |
| test report | Oct 16, 2024   |    |

Below the table, there is a 'Dismissal report' section with a dropdown menu set to 'Fake School', a date selector set to 'Friday', and a 'Generate report' button.

Overlaid on the right side of the screenshot is a Chrome browser window. The 'File' menu is open, showing options like 'New Tab', 'New Window', 'New Incognito Window', 'Reopen Closed Tab', 'Open File...', 'Open Location...', 'Close Window', 'Close Tab', 'Save Page As...', 'Share', and 'Print...'. The 'Print...' option is highlighted with an orange box.



# Staff Workflow:

## Updating Participant Name Fields (First Name, Middle Name, Last Name)

**Please Note:** This section will review the how to align separate name fields with participant workspace name



**Step 2)** To **update** a participants workspace name properly, you will need to **change the separate name fields** located **here** 

**Step 3)** Update the participant workspace name that is located at the top of the profile for the participant by clicking on the pencil icon for **“Participant’s First Name”**, **“Participant’s Middle Name”** and **“Participant’s Last Name”**

**Step 4)** Once you have updated the name fields, make sure to click **the “Save” button** (on the **right side**)

Editing the participant's workspace name at the top of their profile will not update or change the separate fields of first, middle and last name found in the form section

First Name, Middle Name (If Applicable) and Last Name are concatenated together to make a participants “Workspace Name”

30



# Staff Workflow: Reviewing or Updating Staff-Only Embedded Fields

**Please Note:** This section will review the following:

- How to mark a risk factor for a participant workspace
- How to mark a participant workspace to be deleted
- How to manually **“Inactivate”** a participant workspace
- How to manually **“Re-Activate”** a participant workspace
- How to view and update old or past releases and permissions for participants
- How to mark an activity workspace to be deleted

## Adding staff-only fields

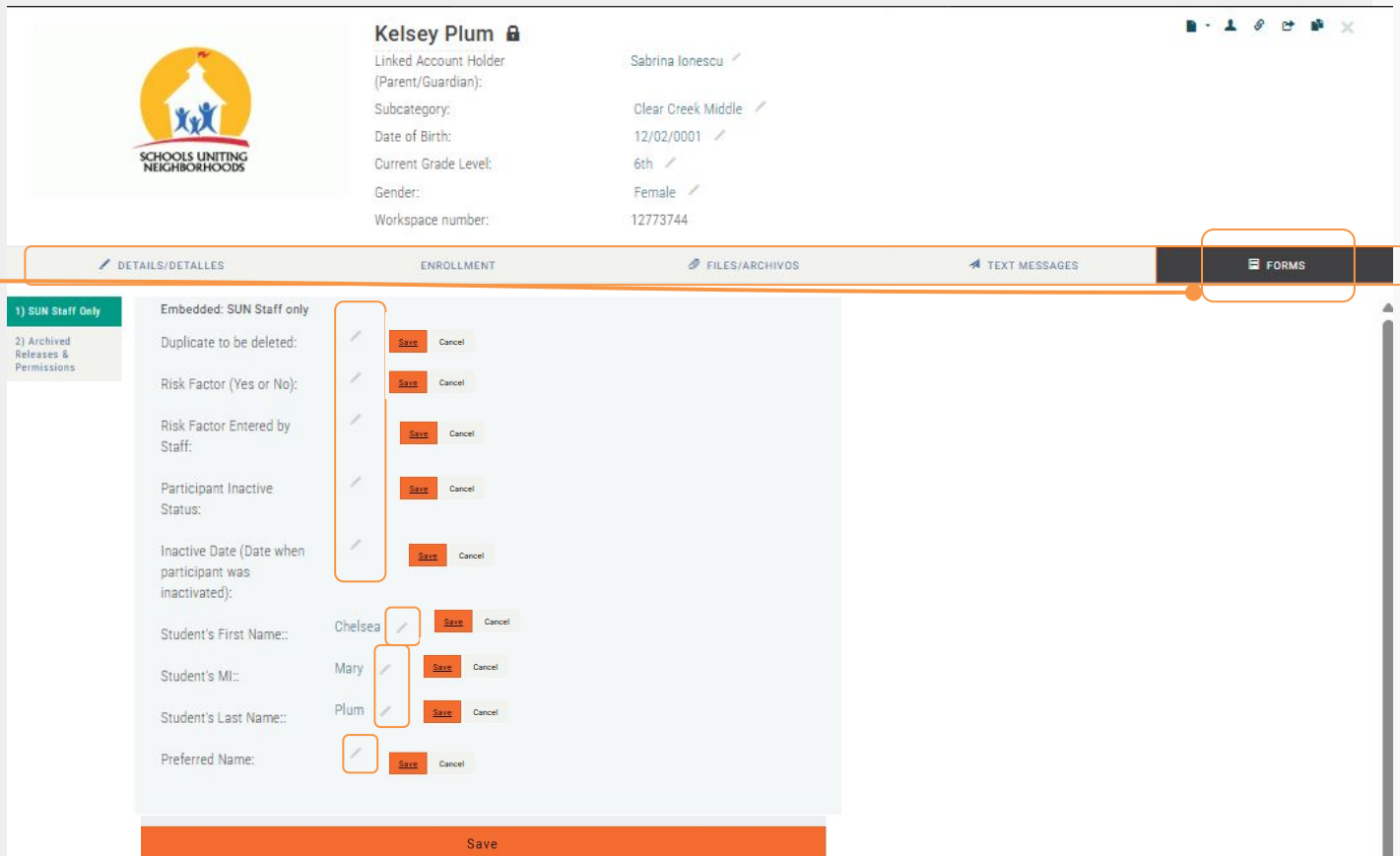
On a Participant's Workspace/Profile, click on **Forms**.

To edit the fields click on the **pencil icon**.

### Note:

For any field being edit, make sure to save any changes, by clicking **Save** everywhere you see it.

This page has a double "save" function. A user will need to click **save** once they have finished editing the field and then hit the **"orange save"** button



**Kelsey Plum** 

Linked Account Holder (Parent/Guardian): Sabrina Ionescu 

Subcategory: Clear Creek Middle 

Date of Birth: 12/02/0001 

Current Grade Level: 6th 

Gender: Female 

Workspace number: 12773744

**Forms**

1) SUN Staff Only

2) Archived Releases & Permissions

Embedded: SUN Staff only

Duplicate to be deleted:  **Save** Cancel

Risk Factor (Yes or No):  **Save** Cancel

Risk Factor Entered by Staff:  **Save** Cancel

Participant Inactive Status:  **Save** Cancel

Inactive Date (Date when participant was inactivated):  **Save** Cancel

Student's First Name: Chelsea  **Save** Cancel

Student's MI: Mary  **Save** Cancel

Student's Last Name: Plum  **Save** Cancel

Preferred Name:  **Save** Cancel

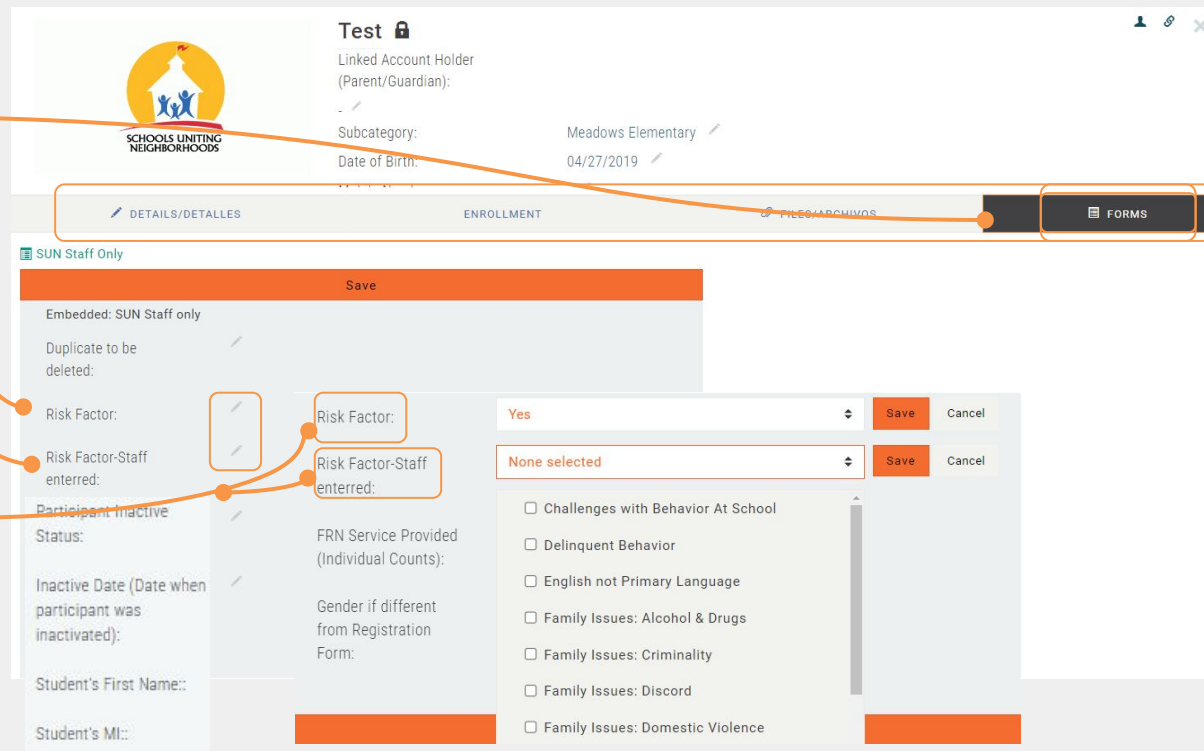
**Save**

## Marking “Risk Factor” for Participants

**Step 1)** On a Participant page, click on **Forms**.

**Step 2)** To edit “Risk Factor” and “Risk Factor Type” click on the pencil icon.

**Step 3)** Mark the correct option pertaining to the participant record as and then hit save.



**Test** 

Linked Account Holder  
(Parent/Guardian):

Subcategory: Meadows Elementary

Date of Birth: 04/27/2019

[DETAILS/DETALLES](#) [ENROLLMENT](#) [FILES/ARCHIVOS](#) **FORMS**

**SUN Staff Only**

**Save**

Embedded: SUN Staff only

Duplicate to be deleted:

Risk Factor: 

Risk Factor-Staff entered: 

Participant Inactive Status:

Inactive Date (Date when participant was inactivated):

Student's First Name:

Student's MI:

FRN Service Provided (Individual Counts):

Gender if different from Registration Form:

**Yes**  **Save** **Cancel**

**None selected**  **Save** **Cancel**

☐ Challenges with Behavior At School

☐ Delinquent Behavior

☐ English not Primary Language

☐ Family Issues: Alcohol & Drugs

☐ Family Issues: Criminality

☐ Family Issues: Discord

☐ Family Issues: Domestic Violence

**Important Note:**

Marking the risk factor of (Yes or No) for children/students is a requirement.

## Marking participant profiles for deletion

**Step 1)** Find and click the participant you would like to delete. Once found, click the **Forms** tab.

**Step 2)** To mark a participant's record to be deleted click on the **pencil icon**.

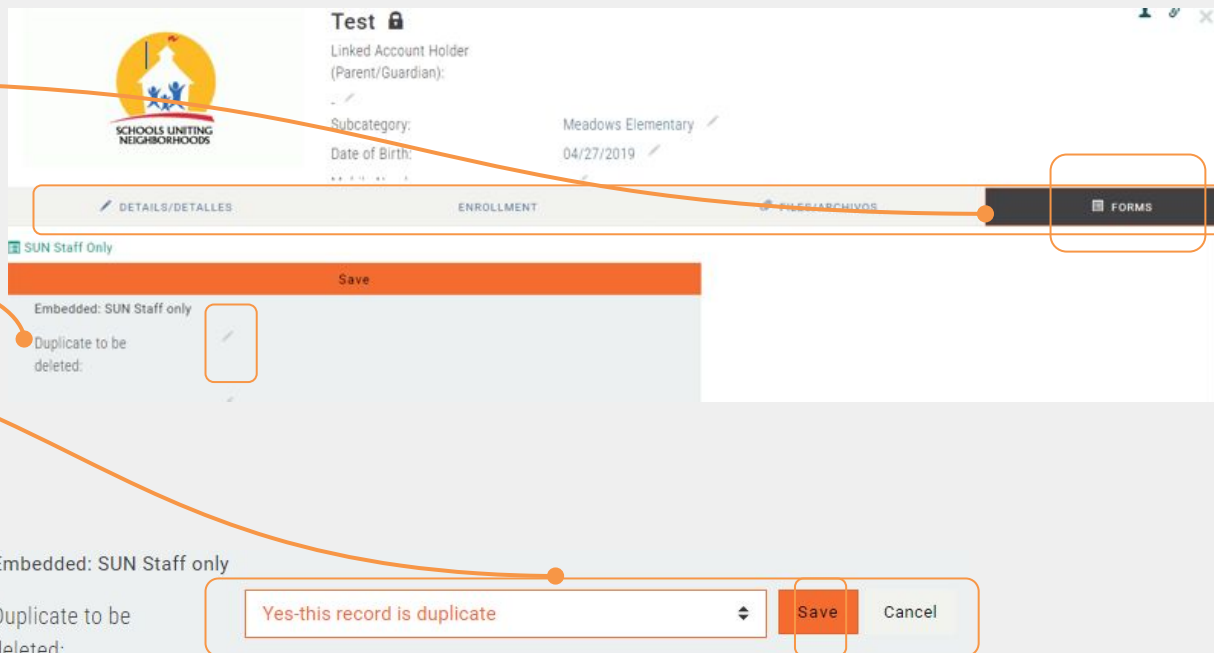
**Step 3)** Mark the participant record as **"Yes - this record is duplicate"** and hit Save.

**Step 4)** Click the **Save orange bar** again at the top.

**Step 5)** To help identity the duplicate record you just marked to be deleted. Please make sure to add the words: **"delete"** or **duplicate** to the name of the participant

**Important Note:**

Please make sure you're keeping profiles that have previous and current enrollment and attendance attached.



Test 

Linked Account Holder (Parent/Guardian):

Subcategory: Meadows Elementary

Date of Birth: 04/27/2019

DETAILS/DETALLES ENROLLMENT FILES/ARCHIVOS **FORMS**

SUN Staff Only

Save

Embedded: SUN Staff only

Duplicate to be deleted: 

Yes-this record is duplicate 

Save Cancel

# How To Manually “Inactivate” A Participant Workspace (Step 1)

**Step 1)** Find and click the participant you would like to **Inactivate**. Once found, click the **Forms** tab.

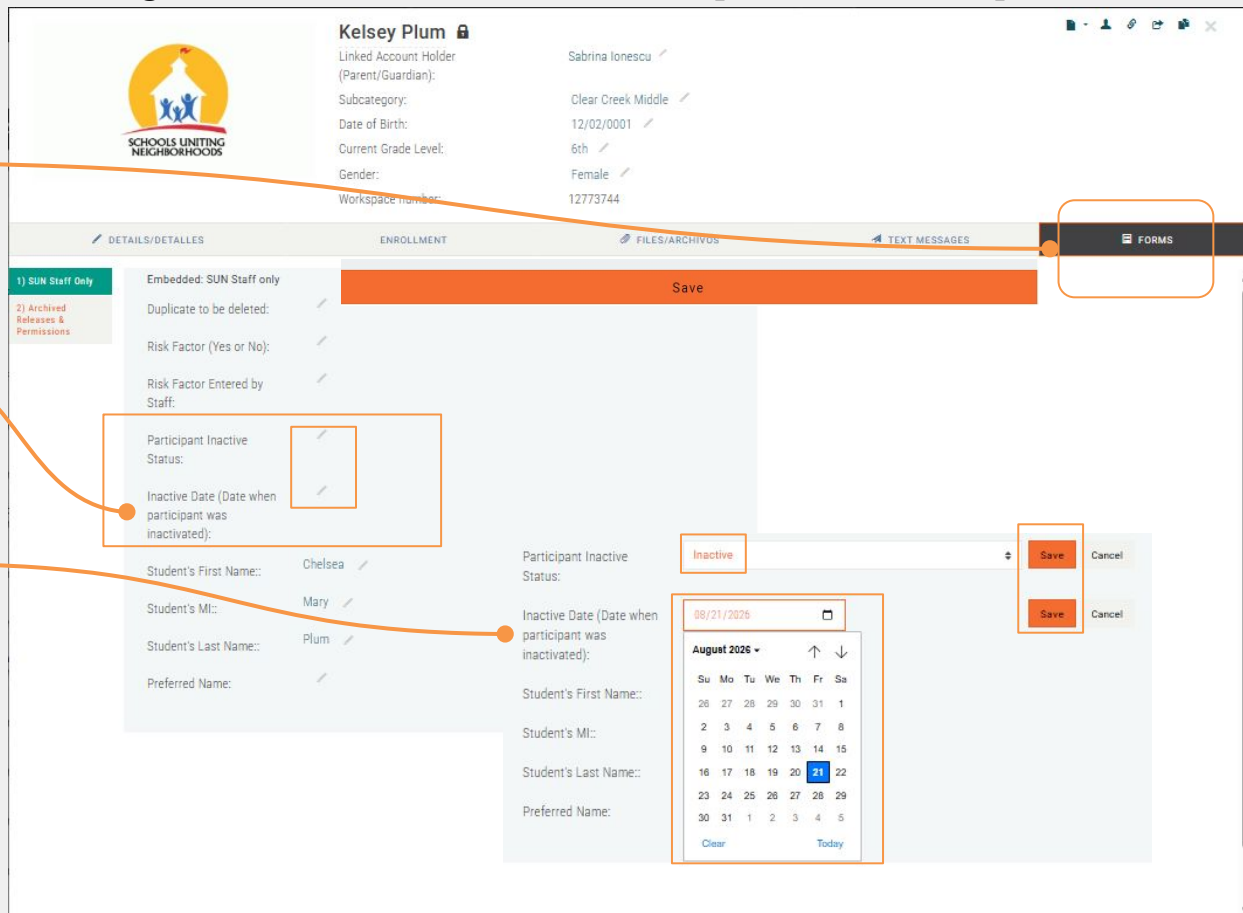
**Step 2)** To mark a participant’s record to be “Inactive” update the following two fields: “**Participant Inactive Status**” and the “**Inactive Date**” by clicking the pencil icon

**Step 3)** For the first field of “**Participant Inactive Status**” select the field option of “**Inactive**”

For the second field of “**Inactive Date**”, select the day you’re inactivating the participant (**Today’s Date**)

Then click “**Save**” on the right hand side of the field

**Step 4)** Click the **Save orange bar** again at the top.



The screenshot displays the Grouptrail interface for a participant named Kelsey Plum. The top navigation bar includes tabs for DETAILS/DETALLES, ENROLLMENT, FILES/ARCHIVOS, TEXT MESSAGES, and FORMS. The FORMS tab is selected and highlighted with an orange box. Below the navigation bar, there is a large orange "Save" button. The main content area shows the participant's details, including their name, linked account holder, subcategory, date of birth, current grade level, gender, and workspace number. The "Participant Inactive Status" field is set to "Inactive", and the "Inactive Date" field is set to "08/21/2025". A calendar widget is visible for the "Inactive Date" field, showing the date "21" selected. The "Save" button is highlighted with an orange box. The bottom of the screen shows a footer with the text "Showing page 1 of 5472".

# How To Manually “Inactivate” A Participant Workspace (Step 2)

Participants + Add New

> Participants (Active)

> Participants

▼ Participants (Inactive)

Batch update / Choose Fields / Send text / Feature / Edit / More...

Q Kelsey Plum

All Subcategory All Gender All Current Grade Level All [School] Enrollment Status All Type of Participant All P-3 Participant? (Select Academic Year): P-3 ONLY

Showing 1–1 of 1 record matching search

| Name                                    | Student's First Name: | Student's MI: | Student's Last Name: | Date of Birth | Gender | Current Grade Level | Subcategory        |
|-----------------------------------------|-----------------------|---------------|----------------------|---------------|--------|---------------------|--------------------|
| Kelsey Plum<br>Updated Today at 3:29 PM | Chelsea               | Mary          | Plum                 | 12/2/0001     | Female | 6th                 | Clear Creek Middle |

**Step 5)** To double check to see if the participant workspace has been successfully inactivated

Go to your “**Participants (Inactive) Tracker**” and search for the participant

Your participant should have been moved from your “**Participants (Active) Tracker**” to the “**Participants (Inactive) Tracker**”

# How To Manually “Re-Activate” A Participant Workspace (Step 1)

**Step 1)** Find and click the participant you would like to **Re-activate**. Once found, click the **Forms** tab.

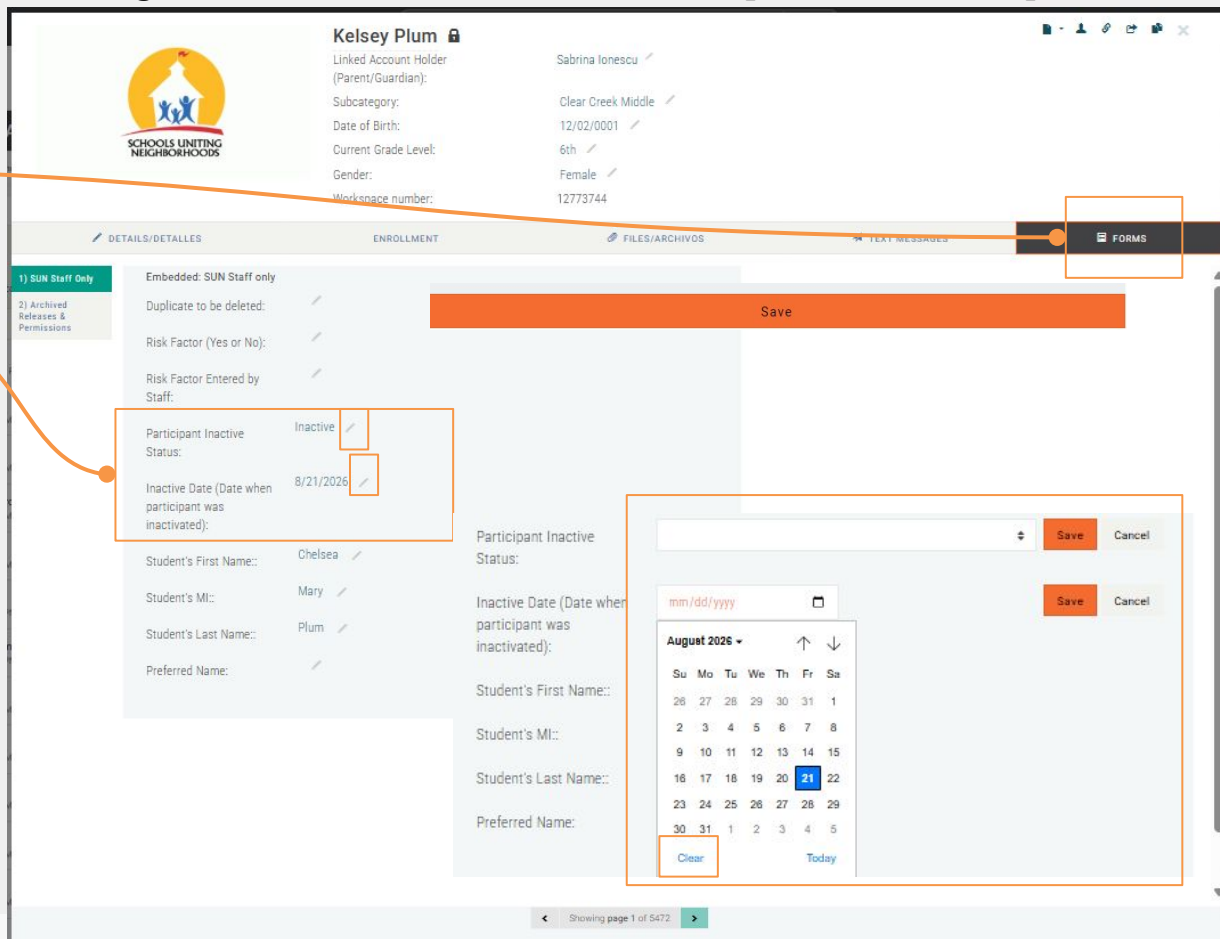
**Step 2)** To re-activate a participant’s workspace you will need to update the the following two fields: **“Participant Inactive Status”** and the **“Inactive Date”** by clicking the pencil icon

**Step 3)** For the first field of **“Participant Inactive Status”** **de-select** the field option of **“Inactive”**. This means click the blank option

For the second field of **“Inactive Date”**, open the small calendar icon in the date field and click **“Clear”**

This will clear out the last recorded inactive date entry for the participant

**Step 4)** Once you have cleared out both fields, make sure to click **both “Save” buttons** (the one on the **right side** and the **top** save orange bar)



**Kelsey Plum** 

Linked Account Holder (Parent/Guardian): Sabrina Ionescu ✓

Subcategory: Clear Creek Middle ✓

Date of Birth: 12/02/0001 ✓

Current Grade Level: 6th ✓

Gender: Female ✓

Workspace number: 12773744

DETAILS/DETALLES ENROLLMENT FILES/ARCHIVOS TEXT MESSAGES **FORMS**

1) SUN Staff Only Embedded: SUN Staff only

2) Archived Releases & Permissions Duplicate to be deleted: ✓

Risk Factor (Yes or No): ✓

Risk Factor Entered by Staff: ✓

Participant Inactive Status: Inactive 

Inactive Date (Date when participant was inactivated): 8/21/2026 

Student's First Name: Chelsea ✓

Student's MI: Mary ✓

Student's Last Name: Plum ✓

Preferred Name: ✓

Participant Inactive Status:   Save Cancel

Inactive Date (Date when participant was inactivated):   Save Cancel

Student's First Name:

Student's MI:

Student's Last Name:

Preferred Name:

August 2026

| Su | Mo | Tu | We | Th | Fr | Sa |
|----|----|----|----|----|----|----|
| 28 | 27 | 26 | 25 | 24 | 23 | 1  |
| 2  | 3  | 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  | 3  | 4  | 5  |

Clear Today

Showing page 1 of 5472

# How To Manually “Re-Activate” A Participant Workspace (Step 2)

Participants + Add New

▼ Participants (Active)

Batch update / Choose Fields / Send text / Unfeature / Edit / More...

Q Kelsey Plum

All Subcategory ▼ All Gender ▼ All Current Grade Level ▼ All Risk Factor ▼ All [School] Enrollment Status ▼ All Type of Participant ▼ All Text Opt-in ▼ All P-3 Participant? (Select Academic Year: P-3 ONLY ▼

Showing 1–1 of 1 record matching search

| Name                                    | Student's First Name | Student's MI | Student's Last Name | Date of Birth | Gender | Current Grade Level | Subcategory        |
|-----------------------------------------|----------------------|--------------|---------------------|---------------|--------|---------------------|--------------------|
| Kelsey Plum<br>Updated Today at 3:21 PM | Chelsea              | Mary         | Plum                | 12/2/0001     | Female | 6th                 | Clear Creek Middle |

> Participants

> Participants (Inactive)

**Step 5)** To double check to see if the participant workspace has been successfully reactivated

Go to your “**Participants (Active) Tracker**” and search for the participant

Your participant should have been moved from your “**Participants (Inactive) Tracker**” to the “**Participants (Active) Tracker**”



# How to view or edit past releases and permissions for participants

**Step 1)** Find and click the participant you would like to delete. Once found, click the **Forms** tab.

**Step 2)** To **view old or past releases and permissions** for a participant, click on the second forms page **HERE**

**Step 3)** You can edit past releases or permissions by clicking on the pencil icon

**Step 4)** If you're editing past permissions and releases, be sure to click **both "Save" buttons** (the one on the **right side** and the **top** save orange bar)

The screenshot displays the Grouptrail interface for a participant named Jim Love. The top section shows the participant's profile with a logo for 'SCHOOLS UNITING NEIGHBORHOODS' and personal details: Linked Account Holder (Parent/Guardian), Subcategory: Kellogg Middle School, Date of Birth: 01/04/2016, Current Grade Level: 6th, Gender: Male, and Workspace number: 12740417. Below this is a navigation bar with tabs: DETAILS/DETALLES, ENROLLMENT, FILES/ARCHIVOS, TEXT MESSAGES, and FORMS. The FORMS tab is active, showing a list of forms. The second form, '2) Archived Releases & Permissions', is selected and highlighted with a red box. This form is titled 'Past SUN Releases & Permissions' and contains a table with release and permission information for the years 2023-2024 and 2026-2027. The table has columns for 'Release to Participate', 'Release of Information', and 'Photo Release Granted'. The 'Release to Participate' column has a 'Yes' status for both years. The 'Release of Information' and 'Photo Release Granted' columns have 'Yes' status for both years. At the bottom of the form, there is a 'Save' button. On the right side of the form, there is a 'Photo Release Granted for 2023-2024:' section with a dropdown menu and a 'Save' button. Below this, there is a 'Release to Participate Granted for 2026-2027:' section with a 'Yes' status. Below that, there is a 'Release of Information Granted for 2026-2027:' section with a 'Yes' status. At the bottom right, there is a 'Photo Release Granted for 2026-2027:' section with a 'Yes' status.



## Marking activities to be deleted

**Step 1)** Find and click the activity you would like to delete. Once found, click the **Forms** tab.

**Step 2)** To mark an activity to be deleted select the **empty box** right next to “duplicate to be deleted”.

**Step 3)** Mark the activity record as “**Yes - this record is duplicate**” and hit Save.

**Step 4)** Click the **Save orange bar** again at the top.

**Step 5)** To help identify the duplicate activity you just marked to be deleted. Please make sure to add the words: “**delete**” or **duplicate** to the name of the activity.

Fall 2025 - Woodworking (Monday - Thursday) 4th & 5th Grade

Provider: El Programa Hispano

Subcategory: Grouptrail School

Start Date: 10/01/2025

End Date: 11/30/2025

Max enrollment: 15

DETAILS/DETALLES SIGN UP ATTENDANCE FORMS

Activities: Delete and/or Duplicated

Save

Duplicate to be deleted

Save

Embedded: SUN Staff only

Duplicate to be deleted:

Yes-this record is duplicate

Save

Cancel



# Staff Workflow:

## Scenarios of Duplicate Participants

**Please Note:** This section will review three different types of duplication scenarios that staff may encounter.

Staff should review each duplicate scenario and determine which best describes their situation.



# Staff Workflow: Scenario 1

## How to delete a duplicated profile with no enrollment and attendance attached

**Please Note:** This process will review how to effectively delete a duplicated profile where there is no data attached. This means that there is one profile with enrollment and attendance data and another profile with no enrollment attached.

## Deleting Duplicate Participants

**(Scenario 1: where they're duplicated profiles with only one having enrollment attached)**

### **Context:**

- This process will review how to effectively delete a duplicated profile where there is no data attached. This means that there is one profile with enrollment and attendance data and another profile with no enrollment attached
  - **Example:**
    - Profile 1 has enrollment and attendance attached (**same participant**)
    - Profile 2 has **NO** enrollment and attendance attached (**same participant**)
- This type of duplication scenario is tailored towards sites that may have accidentally created a duplicate of a participant that was already existing in the system but caught it just in time before enrolling the duplicate participant into an activity.
- This process will review the following:
  - How to identify which profile to keep
  - How to mark the duplicated profile to be deleted
- The data team reviews participants that have been “**marked to be deleted**” on a daily basis

# Step 1) Identify the duplicate profiles (Start by reviewing the Details Tab of the duplicated profiles)

- Find the two profiles that are duplicate, once found open each profile in two separate internet tabs (this will allow you to cross-examine each profile side by side)
  - Reminder, each participant created in the system will have a unique client identification created in Grouptrail called "Workspace number" this can be found on the **Details** tab
- First start by reviewing each profile by looking at the "Details" tab
- After reviewing the "Details" tab; move to the "Enrollment" tab to see if there is enrollment attached to each profile



**Robert Lazenby**   
Linked Account Holder  
(Parent/Guardian):  
Subcategory: Grouptrail School  
Date of Birth: 01/01/2018  
Mobile Number:  
Email (Custom):

DETAILS/DETALLES

ENROLLMENT

FILES/ARCHIVOS

MESSAGES/MENSAJES

FORMS

Subcategory: Grouptrail School  
Current Grade Level: 1st  
Type of Participant: Student enrolled at this school  
Workspace number: 11975718  
Date of Birth: 01/01/2018  
Gender: Man/Boy  
If Other Gender, Specify :  
Primary language spoken at home: English  
Inclusive Identity : Black/African American  
Student State ID # (SSID) : 12345678  
Release to Participate Granted for 2025-2026: Yes  
Release of Information Granted for 2025-2026: Yes  
Photo Release Granted for 2025-2026: Yes  
Accept Non-Discrimination & Behavioral Expectations: Yes  
Permission to Participate: Date 2025-2026: 09/01/2025



**Robert Lazenby**   
Linked Account Holder  
(Parent/Guardian):  
Subcategory: Grouptrail School  
Date of Birth: 1/1/2018  
Mobile Number:  
Email (Custom):

DETAILS/DETALLES

ENROLLMENT

FILES/ARCHIVOS

MESSAGES/MENSAJES

FORMS

Subcategory: Grouptrail School  
Current Grade Level: 1st  
Type of Participant: Student enrolled at this school  
Workspace number: 11719234  
Date of Birth: 01/01/2018  
Gender: Man/Boy  
If Other Gender, Specify :  
Primary language spoken at home: English  
Inclusive Identity : Black/African American  
Student State ID # (SSID) : 12345678  
Release to Participate Granted for 2025-2026: Yes  
Release of Information Granted for 2025-2026: Yes  
Photo Release Granted for 2025-2026: Yes  
Accept Non-Discrimination & Behavioral Expectations: Yes

Profile 1

Workspace #: 11975718

Profile 2

Workspace #: 11719234

44

# Step 1) Identify the duplicate profiles (Now review the Enrollment Tab)



**Robert Lazenby**   
Linked Account Holder  
(Parent/Guardian):  
Subcategory: Grouptrail School  
Date of Birth: 01/01/2018  
Mobile Number:  
Email (Custom):

DETAILS/DETALLES

**ENROLLMENT**

FILES/ARCHIVOS

MESSAGES/MENSAJES

FORMS

Current Activities

| Activity                                                                               | Status   | Start date |
|----------------------------------------------------------------------------------------|----------|------------|
| <a href="#">Fall 2025 - Arts &amp; Crafts (Monday &amp; Wednesday) 1st - 3rd Grade</a> | Enrolled | 09/08/2025 |

Past Activities

| Activity                                                                   | Status   | Start date |
|----------------------------------------------------------------------------|----------|------------|
| <a href="#">Spring 2025 (Kinder Group) Monday - Thursday: Kindergarten</a> | Enrolled | 04/01/2025 |
| <a href="#">Fall 2024 - Kinder Group (Monday - Thursday) Kindergartens</a> | Enrolled | 10/01/2024 |

Hide past activities

- Review the “**Enrollment**” tab for each participant
- Determine the profile that has enrollment and attendance attached
  - Users should keep the profile with enrollment
  - Once the profile that will be kept is identified, add “**Duplicate or Delete**” in the participant’s name of the profile that will be deleted (see example down below)
  - There is no need to add any identifiers to the name of Profile 1 (like “correct”, “keep”, “\*”, “merge”, etc.)
  - Profile 2 now has the unique identifier of “delete or duplicate” added to their name

**Profile 1 (Keep)**  
**Workspace #: 11975718**

Has enrollment attached

**Profile 2 (Delete)**  
**Workspace #: 11719234**

Does not have enrollment attached



**Robert Lazenby - Delete**   
Linked Account Holder  
(Parent/Guardian):  
Subcategory: Grouptrail School  
Date of Birth: 1/1/2018  
Mobile Number:  
Email (Custom):

DETAILS/DETALLES

**ENROLLMENT**

FILES/ARCHIVOS

MESSAGES/MENSAJES

FORMS

Current Activities

| Activity | Status | Start date |
|----------|--------|------------|
|----------|--------|------------|

# Step 2) Determine If Detail Fields Need To Be Updated

- After you have determine which profile that you will be keeping and the profile that you will be deleting, the next step is to review and update any fields between each profile on the **Details** Tab (if applicable)
- It should be noted that if you have a newly duplicated profile created, the information listed in that profile may contain the most update-to-date information
- After reviewing and updating all the fields on the **Details** tab, make sure that SSID and Risk Factor have also been reviewed. A user can see the risk factor field on the **"Forms"** tab of the participant profile



Robert Lazenby 

Linked Account Holder  
(Parent/Guardian):

Subcategory: Grouptrail School

Date of Birth: 01/01/2018

Mobile Number:

Email (Custom):

DETAILS/DETALLES

ENROLLMENT

FILES/ARCHIVOS

MESSAGES/MENSAJES

FORMS

Subcategory: Grouptrail School

Current Grade Level: 1st

Type of Participant: Student enrolled at this school

Workspace number: 11975718

Date of Birth: 01/01/2018

Gender: Man/Boy

If Other Gender, Specify :

Primary language spoken at home: English

Inclusive Identity : Black/African American

Student State ID # (SSID) : 12345678

Release to Participate Granted for 2025-2026: Yes

Release of Information Granted for 2025-2026: Yes

Photo Release Granted for 2025-2026: Yes

Accept Non-Discrimination & Behavioral Expectations: Yes

Permission to Participate: Date 2025-2026: 09/01/2025



Robert Lazenby - Delete 

Linked Account Holder  
(Parent/Guardian):

Subcategory: Grouptrail School

Date of Birth: 1/1/2018

Mobile Number:

Email (Custom):

DETAILS/DETALLES

ENROLLMENT

FILES/ARCHIVOS

MESSAGES/MENSAJES

FORMS

Subcategory: Grouptrail School

Current Grade Level: 1st

Type of Participant: Student enrolled at this school

Workspace number: 11719234

Date of Birth: 01/01/2018

Gender: Man/Boy

If Other Gender, Specify :

Primary language spoken at home: English

Inclusive Identity : Black/African American

Student State ID # (SSID) : 12345678

Release to Participate Granted for 2025-2026: Yes

Release of Information Granted for 2025-2026: Yes

Photo Release Granted for 2025-2026: Yes

Accept Non-Discrimination & Behavioral Expectations: Yes

Profile 1 (Keep)

Workspace #: 11975718

Profile 2 (Delete)

Workspace #: 11719234

# Step 3) Mark the Duplicated Profile To Be Deleted

- The last step is to mark the duplicated profile to be deleted (Profile 2)
- To mark the profile to be deleted, go to the "Forms" tab of the duplicated profile (Profile 2)
- Click the pencil icon next to the field called: Duplicate to be deleted
- Select the option **"Yes-this record is duplicate"**
- Once selected, make sure to hit both save buttons
  - Click the save button next to "Yes-this record is duplicate"
  - Then click the save button at the top or bottom of the page

**Profile 2 (Delete)**  
**Workspace #: 11719234**

Old Profile

**Robert Lazenby - Delete** 🔒

Linked Account Holder  
(Parent/Guardian):

Subcategory: Grouptrail School

Date of Birth: 1/1/2018

Mobile Number:

Email (Custom):

DETAILS/DETALLES ENROLLMENT FILES/ARCHIVOS MESSAGES/MENSAJES **FORMS**

**SUN Staff Only**

**Save**

Embedded: SUN Staff only

Duplicate to be deleted: Yes-this record is duplicate **Save** Cancel

Risk Factor (Yes or No):

Risk Factor Type:

FRN Service Provided  
(Individual Counts):

Gender if different from  
Registration Form:

**Save**

**Second "Save" button**

**First "Save" button**



# Staff Workflow: Scenario 2

## How to delete and combine two or more duplicate participant profiles together with data attached

**Please Note:** This process will review how to effectively combine and delete a duplicated profile of a participant that has enrollment attached to 2 or more profiles. This means that the duplicated profiles have enrollment and attendance reflected on 2 or more profiles

# Deleting Duplicate Participants & Combining Profiles

**(Scenario 2: where they're duplicated profiles with enrollment and attendance data attached)**

## Context:

- This process will review how to effectively combine and delete a duplicated profile of a participant that has enrollment attached to 2 or more profiles
  - **Example:**
    - Profile 1 has enrollment and attendance attached (**same participant**)
    - Profile 2 has enrollment and attendance attached (**same participant**)
- This type of duplication scenario is tailored towards sites that may have accidentally created a duplicate of a participant that was already existing in the system and unintentionally enrolled them into activities along with attendance being recorded
- This process will review the following:
  - How to identify which profile to keep
  - How to manually copy enrollment and attendance to one profile
  - How to mark the duplicated profile to be deleted
- Please note there is no “merging” function in Group trail. Any merging that needs to be done will need to be done manually by copying enrollment and attendance from one profile to the other
- We would like for sites to keep all enrollment and attendance records on one unique record for the participant at their school
  - Sites should always be mindful before marking a participant profile to be deleted
  - Sites should keep the profile that has enrollment and attendance records for previous school years
- The data team reviews participants that have been “marked to be deleted” on a daily basis

# Step 1) Identify the duplicate profiles (Start by reviewing the Details Tab of the duplicated profiles)

- Find the two profiles that are duplicate, once found open each profile in two separate internet tabs (this will allow you to cross-examine each profile side by side)
  - Reminder, each participant created in the system will have a unique client identification created in Grouptrail called “Workspace number” this can be found on the **Details** tab
- First start by reviewing each profile by looking at the “**Details**” tab
- After reviewing the “**Details**” tab; move to the “**Enrollment**” tab to see if there is enrollment attached to each profile



**Robert Lazenby**   
Linked Account Holder  
(Parent/Guardian):  
Subcategory: Grouptrail School  
Date of Birth: 01/01/2018  
Mobile Number:  
Email (Custom):

DETAILS/DETALLES

ENROLLMENT

FILES/ARCHIVOS

MESSAGES/MENSAJES

FORMS

Subcategory: Grouptrail School

Current Grade Level: 1st

Type of Participant: Student enrolled at this school

Workspace number: 11975718

Date of Birth: 01/01/2018

Gender: Man/Boy

If Other Gender, Specify :

Primary language spoken at home: English

Inclusive Identity : Black/African American

Student State ID # (SSID) : 12345678

Release to Participate Granted for 2025-2026: Yes

Release of Information Granted for 2025-2026: Yes

Photo Release Granted for 2025-2026: Yes

Accept Non-Discrimination & Behavioral Expectations: Yes

Permission to Participate: Date 2025-2026: 09/01/2025



**Robert Lazenby**   
Linked Account Holder  
(Parent/Guardian):  
Subcategory: Grouptrail School  
Date of Birth: 1/1/2018  
Mobile Number:  
Email (Custom):

DETAILS/DETALLES

ENROLLMENT

FILES/ARCHIVOS

MESSAGES/MENSAJES

FORMS

Subcategory: Grouptrail School

Current Grade Level: 1st

Type of Participant: Student enrolled at this school

Workspace number: 11719234

Date of Birth: 01/01/2018

Gender: Man/Boy

If Other Gender, Specify :

Primary language spoken at home: English

Inclusive Identity : Black/African American

Student State ID # (SSID) : 12345678

Release to Participate Granted for 2025-2026: Yes

Release of Information Granted for 2025-2026: Yes

Photo Release Granted for 2025-2026: Yes

Accept Non-Discrimination & Behavioral Expectations: Yes

← **Profile 1**  
**Workspace #: 11975718**

**Profile 2** →  
**Workspace #: 11719234**

# Step 1) Identify the duplicate profiles (Now review the Enrollment Tab)



**Robert Lazenby**   
Linked Account Holder  
(Parent/Guardian):  
Subcategory: Grouptrail School  
Date of Birth: 01/01/2018  
Mobile Number:  
Email (Custom):

DETAILS/DETALLES

ENROLLMENT

FILES/ARCHIVOS

MESSAGES/MENSAJES

FORMS

Current Activities

| Activity                                                                               | Status   | Start date |
|----------------------------------------------------------------------------------------|----------|------------|
| <a href="#">Fall 2025 - Arts &amp; Crafts (Monday &amp; Wednesday) 1st - 3rd Grade</a> | Enrolled | 09/08/2025 |

Past Activities

| Activity                                                                   | Status   | Start date |
|----------------------------------------------------------------------------|----------|------------|
| <a href="#">Spring 2025 (Kinder Group) Monday - Thursday: Kindergarten</a> | Enrolled | 04/01/2025 |
| <a href="#">Fall 2024 - Kinder Group (Monday - Thursday) Kindergartens</a> | Enrolled | 10/01/2024 |

Hide past activities

- Review the “**Enrollment**” tab for each participant
- Determine the profile with the most attendance
  - Users should keep the profile with the previous years attendance
  - Once the profile that will be kept is identified, add “**Duplicate or Delete**” in the participant’s name of the profile that will be deleted (see example down below)
  - Do not mark Profile 2 to be deleted until attendance and enrollment is combined to Profile 1
  - There is no need to add any identifiers to the name of Profile 1 (like “correct”, “keep”, “\*”, “merge”, etc.) Profile 2 now has the unique identifier of “delete or duplicate” added to their name

 **Profile 1 (Keep)**  
**Workspace #: 11975718**

**Profile 2 (Delete)**  
**Workspace #: 11719234** 



**Robert Lazenby - Delete**   
Linked Account Holder  
(Parent/Guardian):  
Subcategory: Grouptrail School  
Date of Birth: 1/1/2018  
Mobile Number:  
Email (Custom):

DETAILS/DETALLES

ENROLLMENT

FILES/ARCHIVOS

MESSAGES/MENSAJES

FORMS

Current Activities

| Activity                                                                                     | Status   | Start date |
|----------------------------------------------------------------------------------------------|----------|------------|
| <a href="#">Fall 2025 - Math through Basketball (Monday &amp; Wednesday) 1st - 3rd Grade</a> | Enrolled | 10/02/2025 |
| <a href="#">Fall 2025 - Arts &amp; Crafts (Monday &amp; Wednesday) 1st - 3rd Grade</a>       | Enrolled | 09/08/2025 |

# Step 2) Update Detail Fields Before Manually Combining Enrollment

- After you have determine which profile that you will be keeping and the profile that you will be deleting, the next step is to review and update any fields between each profile on the **Details** Tab (if applicable)
- It should be noted that if you have a newly duplicated profile created, the information listed in that profile may contain the most update-to-date information
- After reviewing and updating all the fields on the **Details** tab, make sure that SSID and Risk Factor have also been reviewed. A user can see the risk factor field on the **"Forms"** tab of the participant profile



Robert Lazenby 

Linked Account Holder  
(Parent/Guardian):

Subcategory: Grouptrail School

Date of Birth: 01/01/2018

Mobile Number:

Email (Custom):

DETAILS/DETALLES

ENROLLMENT

FILES/ARCHIVOS

MESSAGES/MENSAJES

FORMS

Subcategory: Grouptrail School

Current Grade Level: 1st

Type of Participant: Student enrolled at this school

Workspace number: 11975718

Date of Birth: 01/01/2018

Gender: Man/Boy

If Other Gender, Specify :

Primary language spoken at home: English

Inclusive Identity : Black/African American

Student State ID # (SSID) : 12345678

Release to Participate Granted for 2025-2026: Yes

Release of Information Granted for 2025-2026: Yes

Photo Release Granted for 2025-2026: Yes

Accept Non-Discrimination & Behavioral Expectations: Yes

Permission to Participate: Date 2025-2026: 09/01/2025



Robert Lazenby - Delete 

Linked Account Holder  
(Parent/Guardian):

Subcategory: Grouptrail School

Date of Birth: 1/1/2018

Mobile Number:

Email (Custom):

DETAILS/DETALLES

ENROLLMENT

FILES/ARCHIVOS

MESSAGES/MENSAJES

FORMS

Subcategory: Grouptrail School

Current Grade Level: 1st

Type of Participant: Student enrolled at this school

Workspace number: 11719234

Date of Birth: 01/01/2018

Gender: Man/Boy

If Other Gender, Specify :

Primary language spoken at home: English

Inclusive Identity : Black/African American

Student State ID # (SSID) : 12345678

Release to Participate Granted for 2025-2026: Yes

Release of Information Granted for 2025-2026: Yes

Photo Release Granted for 2025-2026: Yes

Accept Non-Discrimination & Behavioral Expectations: Yes

Profile 1 (Keep)

Workspace #: 11975718

Profile 2 (Delete)

Workspace #: 11719234

# Step 3) Manually Combine Enrollment and Attendance

- The third step is to now add any enrollment and attendance from Profile 2 to Profile 1. In the example down below, we need to add the current enrolled activities of Profile 2 to Profile 1.
  - Profile 1 will need to be enrolled into the following activities: “Fall 2025 - Math through Basketball (Monday & Wednesday) 1st - 3rd Grade” and “Fall 2025 - Arts & Crafts (Monday & Wednesday) 1st - 3rd Grade”
  - Start with one activity first and then move on to the next
  - Once Profile 1 is enrolled into the correct activities, be sure to take attendance based on what has been recorded for Profile 2



**Robert Lazenby** 

Linked Account Holder  
(Parent/Guardian):  
Subcategory: Grouptrail School  
Date of Birth: 01/01/2018  
Mobile Number:  
Email (Custom):

DETAILS/DETALLES

ENROLLMENT

FILES/ARCHIVOS

MESSAGES/MENSAJES

FORMS

Subcategory: Grouptrail School

Current Grade Level: 1st

Type of Participant: Student enrolled at this school

Workspace number: 11975718

Date of Birth: 01/01/2018

Gender: Man/Boy

If Other Gender, Specify :

Primary language spoken at home: English

Inclusive Identity : Black/African American

Student State ID # (SSID) : 12345678

Release to Participate Granted for 2025-2026: Yes

Release of Information Granted for 2025-2026: Yes

Photo Release Granted for 2025-2026: Yes

Accept Non-Discrimination & Behavioral Expectations: Yes



**Robert Lazenby - Delete** 

Linked Account Holder  
(Parent/Guardian):  
Subcategory: Grouptrail School  
Date of Birth: 1/1/2018  
Mobile Number:  
Email (Custom):

DETAILS/DETALLES

ENROLLMENT

FILES/ARCHIVOS

MESSAGES/MENSAJES

FORMS

Current Activities

| Activity                                                                                     | Status   | Start date |
|----------------------------------------------------------------------------------------------|----------|------------|
| <a href="#">Fall 2025 - Math through Basketball (Monday &amp; Wednesday) 1st - 3rd Grade</a> | Enrolled | 10/02/2025 |
| <a href="#">Fall 2025 - Arts &amp; Crafts (Monday &amp; Wednesday) 1st - 3rd Grade</a>       | Enrolled | 09/08/2025 |

**Profile 1 (Keep)**  
**Workspace #: 11975718**  
Add the classes below to this profile

**Profile 2 (Delete)**  
**Workspace #: 11719234**

# Step 3) Manually Combine Enrollment and Attendance

- Add any enrollment and attendance from Profile 2 to Profile 1. In the example down below, we need to add the current enrolled activities of Profile 2 to Profile 1.
  - So Profile 1 will need to be enrolled into the following activities: “Fall 2025 - Math through Basketball (Monday & Wednesday) 1st - 3rd Grade” and “Fall 2025 - Arts & Crafts (Monday & Wednesday) 1st - 3rd Grade”
  - Once Profile 1 is enrolled into the correct activities, be sure to take attendance based on what has been recorded for Profile 2



### Fall 2025 - Math through Basketball (Monday & Wednesday) 1st - 3rd Grade

Provider: El Programa Hispano  
Subcategory: Grouptrail School  
Start Date: 10/02/2025  
End Date: 11/30/2025  
Max enrollment: 15

DETAILS/DETALLES

SIGN UP

ATTENDANCE

FORMS

Select: All / Requested / Enrolled / Waitlisted / Dropped / None

| Student                                          | Status   | Primary Contact Name | Primary Contact Number | Emergency Contact 1 Name | Emergency Contact 1 Relationship | Emergency Contact 1 Phone | Photo Release Granted for 2025-2026 | Enrollment date | Drop date |
|--------------------------------------------------|----------|----------------------|------------------------|--------------------------|----------------------------------|---------------------------|-------------------------------------|-----------------|-----------|
| <input type="checkbox"/> Robert Lazenby - Delete | Enrolled | Mary J. Blige        | 222-222-2222           | Damson Idris             | Brother                          | 333-333-3333              |                                     | 10/06           |           |

Enroll

Waitlist

Drop

Add student:

Search for workspace...

Robert Lazenby

Robert Lazenby - Delete

11719234

Robert Lazenby

11975718

Profile 2 (Delete)

Workspace #: 11719234

Old Profile

Profile 1 (Keep)

Workspace #: 11975718

Correct profile that we want to add enrollment and attendance for

# Step 3) Manually Combine Enrollment and Attendance

- Make sure when you're copying enrollment over to the profile you're keeping to the old profile, that the **Enrollment Date** matches
  - In the example below, Profile 1 should have Profile 2 enrollment reflected
- Remember, the profile that we will be deleting at the end of this process should have the identifier "**Delete or Duplicate**"
  - This will help with combining records together

**Profile 2 (Delete)**  
Workspace #: 11719234

Old Profile

**Profile 1 (Keep)**  
Workspace #: 11975718



**Fall 2025 - Math through Basketball (Monday & Wednesday) 1st - 3rd Grade**

Provider: El Programa Hispano

Subcategory: Grouptrail School

Start Date: 10/02/2025

End Date: 11/30/2025

Max enrollment: 15

DETAILS/DETALLES

SIGN UP

ATTENDANCE

FORMS

Select: All / Requested / Enrolled / Waitlisted / Dropped / None

| Student                                          | Status   | Primary Contact Name | Primary Contact Number | Emergency Contact 1 Name | Emergency Contact 1 Relationship | Emergency Contact 1 Phone | Photo Release Granted for 2025-2026 | Enrollment date | Drop date |
|--------------------------------------------------|----------|----------------------|------------------------|--------------------------|----------------------------------|---------------------------|-------------------------------------|-----------------|-----------|
| <input type="checkbox"/> Robert Lazenby - Delete | Enrolled | Mary J. Blige        | 222-222-2222           | Damson Idris             | Brother                          | 333-333-3333              | Yes                                 | 10/06           |           |
| <input type="checkbox"/> Robert Lazenby          | Enrolled | Mary J. Blige        | 222-222-2222           | Damson Idris             | Brother                          | 333-333-3333              | Yes                                 | 10/06           |           |

Enroll

Waitlist

Drop

Add student:

Search for workspace...

Enroll

# Step 4) Take Attendance For The Profile Being Kept

- The fourth step is to make sure that attendance for Profile 1 matches the attendance for Profile 2
  - Remember Profile 2 will be the participant that we “**Mark to be deleted**” at the end of this process
- Make sure that attendance is captured and matches for Profile 1 until there is no more attendance recorded
- Once you have finished the first activity move on and do the same process until all enrollment and attendance is copied over to the main profile being kept (Profile 1)



### Fall 2025 - Math through Basketball (Monday & Wednesday) 1st - 3rd Grade

Provider: El Programa Hispano  
Subcategory: Grouptrail School  
Start Date: 10/02/2025  
End Date: 11/30/2025  
Max enrollment: 15

DETAILS/DETALLES

SIGN UP

ATTENDANCE

FORMS

Date: Week of Oct 6, 2025 (Mon)

Print Attendance Sheet

Mark All as Present

Oct 6, 2025 (Mon)

Oct 8, 2025 (Wed)

Disable attendance

Disable attendance

| Name                    | Present                          | Excused               | Unexcused             | Present               | Excused               | Unexcused                        |
|-------------------------|----------------------------------|-----------------------|-----------------------|-----------------------|-----------------------|----------------------------------|
| Robert Lazenby          | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> |
| Robert Lazenby - Delete | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> |

**Profile 1 (Keep)**  
Workspace #: 11975718

**Profile 2 (Delete)**  
Workspace #: 11719234

Old Profile

# Step 5) Review Both Profiles One Last Time

- The fifth step is to review both profiles to make sure that all enrollment is now reflected and copied over on the profile that you will be keeping (Profile 1)



**Robert Lazenby**   
Linked Account Holder  
(Parent/Guardian):  
Subcategory: Grouptrail School  
Date of Birth: 01/01/2018  
Mobile Number:  
Email (Custom):

DETAILS/DETALLES

ENROLLMENT

FILES/ARCHIVOS

MESSAGES/MENSAJES

FORMS

Current Activities

| Activity                                                                                     | Status   | Start date |
|----------------------------------------------------------------------------------------------|----------|------------|
| <a href="#">Fall 2025 - Math through Basketball (Monday &amp; Wednesday) 1st - 3rd Grade</a> | Enrolled | 10/02/2025 |
| <a href="#">Fall 2025 - Arts &amp; Crafts (Monday &amp; Wednesday) 1st - 3rd Grade</a>       | Enrolled | 09/08/2025 |

Past Activities

| Activity                                                                   | Status   | Start date |
|----------------------------------------------------------------------------|----------|------------|
| <a href="#">Spring 2025 (Kinder Group) Monday - Thursday: Kindergarten</a> | Enrolled | 04/01/2025 |
| <a href="#">Fall 2024 - Kinder Group (Monday - Thursday) Kindergartens</a> | Enrolled | 10/01/2024 |

Hide past activities

**Profile 1 (Keep)**  
**Workspace #: 11975718**



**Robert Lazenby - Delete**   
Linked Account Holder  
(Parent/Guardian):  
Subcategory: Grouptrail School  
Date of Birth: 1/1/2018  
Mobile Number:  
Email (Custom):

DETAILS/DETALLES

ENROLLMENT

FILES/ARCHIVOS

MESSAGES/MENSAJES

FORMS

Current Activities

| Activity                                                                                     | Status   | Start date |
|----------------------------------------------------------------------------------------------|----------|------------|
| <a href="#">Fall 2025 - Math through Basketball (Monday &amp; Wednesday) 1st - 3rd Grade</a> | Enrolled | 10/02/2025 |
| <a href="#">Fall 2025 - Arts &amp; Crafts (Monday &amp; Wednesday) 1st - 3rd Grade</a>       | Enrolled | 09/08/2025 |

**Profile 2 (Delete)**  
**Workspace #: 11719234**  
  
Old Profile

# Step 6) Mark the Duplicated Profile To Be Deleted

- The last step is to mark the duplicated profile to be deleted (Profile 2)
- To mark the profile to be deleted, go to the “Forms” tab of the duplicated profile (Profile 2)
- Click the pencil icon next to the field called: Duplicate to be deleted
- Select the option “**Yes-this record is duplicate**”
- Once selected, make sure to hit both save buttons
  - Click the save button next to “Yes-this record is duplicate”
  - Then click the save button at the top or bottom of the page

**Profile 2 (Delete)**  
**Workspace #: 11719234**

Old Profile

**Robert Lazenby - Delete**

Linked Account Holder  
(Parent/Guardian):

Subcategory: Grouptrail School

Date of Birth: 1/1/2018

Mobile Number:

Email (Custom):

**DETAILS/DETALLES** **ENROLLMENT** **FILES/ARCHIVOS** **MESSAGES/MENSAJES** **FORMS**

**SUN Staff Only**

**Save**

Embedded: SUN Staff only

Duplicate to be deleted: **Yes-this record is duplicate** **Save** Cancel

Risk Factor (Yes or No):

Risk Factor Type:

FRN Service Provided  
(Individual Counts):

Gender if different from  
Registration Form:

**Save**

**Second “Save” button**

**First “Save” button**



## Staff Workflow: Scenario 3

**How to delete and combine  
duplicate participants that have  
account holders linked to two or  
more profiles**

**Please Note:** This process will review how to effectively combine and delete a duplicated profile of a participant that has account holders linked to multiple profiles. This means that the duplicated profiles have account holders linked and enrollment reflected on multiple profiles

## Deleting Duplicate Participants & Combining Profiles

**(Scenario 3: where they're duplicated profiles with account holders linked and enrollment attached)**

### **Context:**

- This process will review how to effectively combine and delete a duplicated profile of a participant that has account holders linked to multiple profiles
  - **Example:**
    - Profile 1 has account holder(s) linked with enrollment and attendance attached
    - Profile 2 has account holder(s) linked with enrollment and attendance attached
- This type of duplication scenario is tailored towards sites that may be administering and implementing the online Grouptrail registration process
- This process will review the following:
  - How to identify which profile to keep
  - How to temporarily remove account holders and relink them to the kept profile once enrollment has been copied over
  - How to manually copy enrollment and attendance to one profile
  - How to mark the duplicated profile to be deleted
- Please note there is no “merging” function in Grouptrail. Any merging that needs to be done will need to be done manually by copying enrollment and attendance from one profile to the other
- We would like for sites to keep all enrollment and attendance records on one unique record for the participant at their school
  - Sites should always be mindful before marking a participant to be deleted
  - Sites should keep the profile with enrollment and attendance records for previous school years
- The data team reviews participants that have been “marked to be deleted” on a daily basis

# Step 1) Identify the duplicate profiles (Start by reviewing the Details Tab and Account Holders Linked to the participants)

- Find the two profiles that are duplicate, once found open each profile in two separate internet tabs (this will allow you to cross-examine each profile side by side)
  - Reminder, each participant created in the system will have a unique client identification created in Grouptrail called “Workspace number” this can be found on the **Details** tab
- First start by reviewing each profile by looking at the “**Details**” tab and if they’re any **Account Holder Linked** to each profile
- After reviewing the “**Details**” tab and seeing if they’re any **account holders linked** to participants move to the “**Enrollment**” tab to see if there is enrollment attached to each profile



Robert Lazenby

Linked Account Holder  
(Parent/Guardian):

Subcategory:

Date of Birth:

Mobile Number:

Email (Custom):

Test Parent (9/12/25) , test parent (8/29) , test parent (8/12)

Grouptrail School

01/01/2018

DETAILS/DETALLES

ENROLLMENT

FILES/ARCHIVOS

MESSAGES/MENSAJES

FORMS

Profile 1  
Workspace #: 11975718

Subcategory:

Current Grade Level:

Type of Participant:

Workspace number:

Date of Birth:

Gender:

If Other Gender, Specify :

Primary language spoken at home:

Inclusive Identity :

Student State ID # (SSID) :

Release to Participate Granted for 2025-2026:

Release of Information Granted for 2025-2026:

Photo Release Granted for 2025-2026:

Accept Non-Discrimination & Behavioral Expectations:

Permission to Participate: Date 2025-2026:

Grouptrail School

1st

Student enrolled at this school

11975718

01/01/2018

Man/Boy

English

Black/African American

12345678

Yes

Yes

Yes

Yes

09/01/2025



Robert Lazenby

Linked Account Holder  
(Parent/Guardian):

Subcategory:

Date of Birth:

Mobile Number:

Email (Custom):

test parent (robert)

Grouptrail School

1/1/2018

DETAILS/DETALLES

ENROLLMENT

FILES/ARCHIVOS

MESSAGES/MENSAJES

FORMS

Subcategory:

Current Grade Level:

Type of Participant:

Workspace number:

Date of Birth:

Gender:

If Other Gender, Specify :

Primary language spoken at home:

Inclusive Identity :

Student State ID # (SSID) :

Release to Participate Granted for 2025-2026:

Release of Information Granted for 2025-2026:

Photo Release Granted for 2025-2026:

Accept Non-Discrimination & Behavioral Expectations:

Grouptrail School

1st

Student enrolled at this school

11719234

01/01/2018

Man/Boy

English

Black/African American

12345678

Yes

Profile 2  
Workspace #: 11719234

# Step 1) Identify the duplicate profiles (Now review the Enrollment Tab)



**Robert Lazenby** 

Linked Account Holder  
(Parent/Guardian):  
Subcategory:  
Date of Birth:  
Mobile Number:  
Email (Custom):

Test Parent (9/12/25) , test parent (8/29) , test parent (8/12) ✓  
  
Grouptrail School ✓  
01/01/2018 ✓  
/  
/  
/

DETAILS/DETALLES

ENROLLMENT

FILES/ARCHIVOS

MESSAGES/MENSAJES

FORMS

Current Activities

| Activity                                                                               | Status   | Start date |
|----------------------------------------------------------------------------------------|----------|------------|
| <a href="#">Fall 2025 - Arts &amp; Crafts (Monday &amp; Wednesday) 1st - 3rd Grade</a> | Enrolled | 09/08/2025 |

Past Activities

| Activity                                                                   | Status   | Start date |
|----------------------------------------------------------------------------|----------|------------|
| <a href="#">Spring 2025 (Kinder Group) Monday - Thursday: Kindergarten</a> | Enrolled | 04/01/2025 |
| <a href="#">Fall 2024 - Kinder Group (Monday - Thursday) Kindergartens</a> | Enrolled | 10/01/2024 |

Hide past activities

- Review the “**Enrollment**” tab for each participant
- Determine the profile with the most attendance
  - Users should keep the profile with the previous years attendance
  - Once the profile that will be kept is identified, add “**Duplicate or Delete**” in the participant’s name of the profile that will be deleted (see example down below)
  - Do not mark Profile 2 to be deleted until attendance and enrollment is combined to Profile 1
  - There is no need to add any identifiers to the name of Profile 1 (like “correct”, “keep”, “\*”, “merge”, etc.) Profile 2 now has the unique identifier of “delete or duplicate” added to their name

 **Profile 1 (Keep)**  
**Workspace #: 11975718**

**Profile 2 (Delete)**  
**Workspace #: 11719234** 



**Robert Lazenby - Delete** 

Linked Account Holder  
(Parent/Guardian):  
Subcategory:  
Date of Birth:  
Mobile Number:  
Email (Custom):

test parent (robert) ✓  
  
Grouptrail School   
1/1/2018 ✓  
/  
/  
/

DETAILS/DETALLES

ENROLLMENT

FILES/ARCHIVOS

MESSAGES/MENSAJES

FORMS

Current Activities

| Activity                                                                                     | Status   | Start date |
|----------------------------------------------------------------------------------------------|----------|------------|
| <a href="#">Fall 2025 - Math through Basketball (Monday &amp; Wednesday) 1st - 3rd Grade</a> | Enrolled | 10/02/2025 |
| <a href="#">Fall 2025 - Arts &amp; Crafts (Monday &amp; Wednesday) 1st - 3rd Grade</a>       | Enrolled | 09/08/2025 |

# Step 2) Update Detail Fields Before Manually Combining Enrollment

- After you have determine which profile that you will be keeping and the profile that you will be deleting, the next step is to review and update any fields from Profile 2 to Profile 1 on the **Details Tab**
- It should be noted that the new duplicated profile created from the account holder will most likely contain the most update-to-date information
- After reviewing and updating all the fields on the **Details** tab, make sure that SSID and Risk Factor have also been reviewed. A user can see the risk factor field on the **"Forms"** tab of the participant profile



Robert Lazenby 

Linked Account Holder (Parent/Guardian):  
Subcategory: Grouptrail School  
Date of Birth: 01/01/2018  
Mobile Number:  
Email (Custom):

Test Parent (9/12/25) , test parent (8/29) , test parent (8/12)

DETAILS/DETALLES

ENROLLMENT

FILES/ARCHIVOS

MESSAGES/MENSAJES

FORMS

Subcategory: Grouptrail School  
Current Grade Level: 1st  
Type of Participant: Student enrolled at this school  
Workspace number: 11975718  
Date of Birth: 01/01/2018  
Gender: Man/Boy  
If Other Gender, Specify :  
Primary language spoken at home: English  
Inclusive Identity : Black/African American  
Student State ID # (SSID) : 12345678  
Release to Participate Granted for 2025-2026: Yes  
Release of Information Granted for 2025-2026: Yes  
Photo Release Granted for 2025-2026: Yes  
Accept Non-Discrimination & Behavioral Expectations: Yes  
Permission to Participate: Date 2025-2026: 09/01/2025



Robert Lazenby - Delete 

Linked Account Holder (Parent/Guardian):  
Subcategory: Grouptrail School  
Date of Birth: 1/1/2018  
Mobile Number:  
Email (Custom):

test parent (robert)

DETAILS/DETALLES

ENROLLMENT

FILES/ARCHIVOS

MESSAGES/MENSAJES

FORMS

Subcategory: Grouptrail School  
Current Grade Level: 1st  
Type of Participant: Student enrolled at this school  
Workspace number: 11719234  
Date of Birth: 01/01/2018  
Gender: Man/Boy  
If Other Gender, Specify :  
Primary language spoken at home: English  
Inclusive Identity : Black/African American  
Student State ID # (SSID) : 12345678  
Release to Participate Granted for 2025-2026:  
Release of Information Granted for 2025-2026:  
Photo Release Granted for 2025-2026:  
Accept Non-Discrimination & Behavioral Expectations: Yes

Profile 2 (Delete)

Workspace #: 11719234

Profile 1 (Keep)

Workspace #: 11975718

# Step 3) Optional: Temporarily Removing Linked Account Holders

- Account Holders receive notifications whenever their linked participant is **Enrolled**, **Waitlisted** or **Dropped** from an activity
- Before manually combining the enrollment and attendance from Profile 2 to Profile 1, it will be up to the site to determine if they would like to temporarily remove the account holder and re-linked them to Profile 1 after they have manually combined enrollment and attendance records to the main profile (Profile 1)
- If you would like to remove the linked account holders from profile 1 so parents/adults do not receive notifications of updates; be sure to copy the names or emails of the account holders so you can re-attach them once enrollment and attendance has been manually merged over.



**Robert Lazenby** 

Linked Account Holder (Parent/Guardian):

Subcategory: Grouptrail School

Date of Birth: 01/01/2018

Mobile Number:

Email (Custom):

**Robert Lazenby** 

Linked Account Holder (Parent/Guardian): Test Parent (9/12/25) , test parent (8/29) , test parent (8/12)

**Remove account holders first from profile 1**

**Profile 1 (Keep)**  
**Workspace #: 11975718**



**Robert Lazenby - Delete** 

Linked Account Holder (Parent/Guardian): test parent (robert)

Subcategory: Grouptrail School

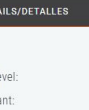
Date of Birth: 1/1/2018

Mobile Number:

Email (Custom):

**Profile 2 (Delete)**  
**Workspace #: 11719234**

**→**



**Robert Lazenby - Delete** 

Linked Account Holder (Parent/Guardian): test parent (robert)

Subcategory: Grouptrail School

Date of Birth: 1/1/2018

Mobile Number:

Email (Custom):

DETAILS/DETALLES

ENROLLMENT

FILES/ARCHIVOS

MESSAGES/MENSAJES

FORMS

Subcategory: Grouptrail School

Current Grade Level: 1st

Type of Participant: Student enrolled at this school

Workspace number: 11975718

Date of Birth: 01/01/2018

Gender: Man/Boy

If Other Gender, Specify :

Primary language spoken at home: English

Inclusive Identity : Black/African American

Student State ID # (SSID) : 12345678

Release to Participate Granted for 2025-2026: Yes

Release of Information Granted for 2025-2026: Yes

Photo Release Granted for 2025-2026: Yes

Accept Non-Discrimination & Behavioral Expectations: Yes

DETAILS/DETALLES

ENROLLMENT

FILES/ARCHIVOS

MESSAGES/MENSAJES

FORMS

Subcategory: Grouptrail School

Current Grade Level: 1st

Type of Participant: Student enrolled at this school

Workspace number: 11719234

Date of Birth: 01/01/2018

Gender: Man/Boy

If Other Gender, Specify :

Primary language spoken at home: English

Inclusive Identity : Black/African American

Student State ID # (SSID) : 12345678

Release to Participate Granted for 2025-2026:

Release of Information Granted for 2025-2026:

Photo Release Granted for 2025-2026:

Accept Non-Discrimination & Behavioral Expectations: Yes

Add account holders back to profile 1 once you have moved enrollment from profile 1

64

# Step 4) Manually Combine Enrollment and Attendance

- The fourth step is to now add any enrollment and attendance from Profile 2 to Profile 1. In the example down below, we need to add the current enrolled activities of Profile 2 to Profile 1.
  - Profile 1 will need to be enrolled into the following activities: “Fall 2025 - Math through Basketball (Monday & Wednesday) 1st - 3rd Grade” and “Fall 2025 - Arts & Crafts (Monday & Wednesday) 1st - 3rd Grade”
  - Start with one activity first and then move on to the next
  - Once Profile 1 is enrolled into the correct activities, be sure to take attendance based on what has been recorded for Profile 2



**Robert Lazenby** 

Linked Account Holder  
(Parent/Guardian):  
Subcategory: Grouptrail School  
Date of Birth: 01/01/2018  
Mobile Number:  
Email (Custom):

DETAILS/DETALLES

ENROLLMENT

FILES/ARCHIVOS

MESSAGES/MENSAJES

FORMS

Subcategory: Grouptrail School

Current Grade Level: 1st

Type of Participant: Student enrolled at this school

Workspace number: 11975718

Date of Birth: 01/01/2018

Gender: Man/Boy

If Other Gender, Specify :

Primary language spoken at home: English

Inclusive Identity : Black/African American

Student State ID # (SSID) : 12345678

Release to Participate Granted for 2025-2026: Yes

Release of Information Granted for 2025-2026: Yes

Photo Release Granted for 2025-2026: Yes

Accept Non-Discrimination & Behavioral Expectations: Yes



**Robert Lazenby - Delete** 

Linked Account Holder  
(Parent/Guardian): test parent (robert)  
Subcategory: Grouptrail School  
Date of Birth: 1/1/2018  
Mobile Number:  
Email (Custom):

DETAILS/DETALLES

ENROLLMENT

FILES/ARCHIVOS

MESSAGES/MENSAJES

FORMS

Current Activities

| Activity                                                                                     | Status   | Start date |
|----------------------------------------------------------------------------------------------|----------|------------|
| <a href="#">Fall 2025 - Math through Basketball (Monday &amp; Wednesday) 1st - 3rd Grade</a> | Enrolled | 10/02/2025 |
| <a href="#">Fall 2025 - Arts &amp; Crafts (Monday &amp; Wednesday) 1st - 3rd Grade</a>       | Enrolled | 09/08/2025 |

**Profile 1 (Keep)**  
**Workspace #: 11975718**  
Add the classes below to this profile

**Profile 2 (Delete)**  
**Workspace #: 11719234**

# Step 4) Manually Combine Enrollment and Attendance

- The fourth step is to now add any enrollment and attendance from Profile 2 to Profile 1. In the example down below, we need to add the current enrolled activities of Profile 2 to Profile 1.
  - So Profile 1 will need to be enrolled into the following activities: “Fall 2025 - Math through Basketball (Monday & Wednesday) 1st - 3rd Grade” and “Fall 2025 - Arts & Crafts (Monday & Wednesday) 1st - 3rd Grade”
  - Once Profile 1 is enrolled into the correct activities, be sure to take attendance based on what has been recorded for Profile 2



### Fall 2025 - Math through Basketball (Monday & Wednesday) 1st - 3rd Grade

Provider: El Programa Hispano  
Subcategory: Grouptrail School  
Start Date: 10/02/2025  
End Date: 11/30/2025  
Max enrollment: 15

DETAILS/DETALLES

SIGN UP

ATTENDANCE

FORMS

Select: All / Requested / Enrolled / Waitlisted / Dropped / None

| Student                                          | Status   | Primary Contact Name | Primary Contact Number | Emergency Contact 1 Name | Emergency Contact 1 Relationship | Emergency Contact 1 Phone | Photo Release Granted for 2025-2026 | Enrollment date | Drop date |
|--------------------------------------------------|----------|----------------------|------------------------|--------------------------|----------------------------------|---------------------------|-------------------------------------|-----------------|-----------|
| <input type="checkbox"/> Robert Lazenby - Delete | Enrolled | Mary J. Blige        | 222-222-2222           | Damson Idris             | Brother                          | 333-333-3333              |                                     | 10/06           |           |

Enroll

Waitlist

Drop

Add student:

Search for workspace...

Robert Lazenby

Robert Lazenby - Delete

11719234

Robert Lazenby

11975718

Profile 2 (Delete)

Workspace #: 11719234

Old Profile

Profile 1 (Keep)

Workspace #: 11975718

Correct profile that we want to add enrollment and attendance for

# Step 4) Manually Combine Enrollment and Attendance

- Make sure when you're copying enrollment over to the profile you're keeping to the old profile, that the **Enrollment Date** matches
  - In the example below, Profile 1 should have Profile 2 enrollment reflected
- Remember, the profile that we will be deleting at the end of this process should have the identifier "**Delete or Duplicate**"
  - This will help with combining records together

**Profile 2 (Delete)**  
Workspace #: 11719234

Old Profile

**Profile 1 (Keep)**  
Workspace #: 11975718



**Fall 2025 - Math through Basketball (Monday & Wednesday) 1st - 3rd Grade**

Provider: El Programa Hispano

Subcategory: Grouptrail School

Start Date: 10/02/2025

End Date: 11/30/2025

Max enrollment: 15

DETAILS/DETALLES

SIGN UP

ATTENDANCE

FORMS

Select: All / Requested / Enrolled / Waitlisted / Dropped / None

| Student                                          | Status   | Primary Contact Name | Primary Contact Number | Emergency Contact 1 Name | Emergency Contact 1 Relationship | Emergency Contact 1 Phone | Photo Release Granted for 2025-2026 | Enrollment date | Drop date |
|--------------------------------------------------|----------|----------------------|------------------------|--------------------------|----------------------------------|---------------------------|-------------------------------------|-----------------|-----------|
| <input type="checkbox"/> Robert Lazenby - Delete | Enrolled | Mary J. Blige        | 222-222-2222           | Damson Idris             | Brother                          | 333-333-3333              | Yes                                 | 10/06           |           |
| <input type="checkbox"/> Robert Lazenby          | Enrolled | Mary J. Blige        | 222-222-2222           | Damson Idris             | Brother                          | 333-333-3333              | Yes                                 | 10/06           |           |

Enroll

Waitlist

Drop

Add student:

Search for workspace...

Enroll

# Step 5) Take Attendance For The Profile Being Kept

- The fifth step is to make sure that attendance for Profile 1 matches the attendance for Profile 2
  - Remember Profile 2 will be the participant that we “**Mark to be deleted**” at the end of this process
- Make sure that attendance is captured and matches for Profile 1 until there is no more attendance recorded
- Once you have finished the first activity move on and do the same process until all enrollment and attendance is copied over to the main profile being kept (Profile 1)



### Fall 2025 - Math through Basketball (Monday & Wednesday) 1st - 3rd Grade

Provider: El Programa Hispano  
Subcategory: Grouptrail School  
Start Date: 10/02/2025  
End Date: 11/30/2025  
Max enrollment: 15

DETAILS/DETALLES

SIGN UP

ATTENDANCE

FORMS

Date: Week of Oct 6, 2025 (Mon)

Print Attendance Sheet

Mark All as Present

Oct 6, 2025 (Mon)

Oct 8, 2025 (Wed)

Disable attendance

Disable attendance

| Name                    | Present                          | Excused               | Unexcused             | Present               | Excused               | Unexcused                        |
|-------------------------|----------------------------------|-----------------------|-----------------------|-----------------------|-----------------------|----------------------------------|
| Robert Lazenby          | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> |
| Robert Lazenby - Delete | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> |

**Profile 1 (Keep)**  
Workspace #: 11975718

**Profile 2 (Delete)**  
Workspace #: 11719234  
  
Old Profile

# Step 6) Review Both Profiles One Last Time

- The sixth step is to review both profiles to make sure that all enrollment is now reflected and copied over on the profile that you will be keeping (Profile 1)



**Robert Lazenby**   
Linked Account Holder  
(Parent/Guardian):  
Subcategory: Grouptrail School  
Date of Birth: 01/01/2018  
Mobile Number:  
Email (Custom):

DETAILS/DETALLES

ENROLLMENT

FILES/ARCHIVOS

MESSAGES/MENSAJES

FORMS

Current Activities

| Activity                                                                                     | Status   | Start date |
|----------------------------------------------------------------------------------------------|----------|------------|
| <a href="#">Fall 2025 - Math through Basketball (Monday &amp; Wednesday) 1st - 3rd Grade</a> | Enrolled | 10/02/2025 |
| <a href="#">Fall 2025 - Arts &amp; Crafts (Monday &amp; Wednesday) 1st - 3rd Grade</a>       | Enrolled | 09/08/2025 |

Past Activities

| Activity                                                                   | Status   | Start date |
|----------------------------------------------------------------------------|----------|------------|
| <a href="#">Spring 2025 (Kinder Group) Monday - Thursday: Kindergarten</a> | Enrolled | 04/01/2025 |
| <a href="#">Fall 2024 - Kinder Group (Monday - Thursday) Kindergartens</a> | Enrolled | 10/01/2024 |

Hide past activities

**Profile 1 (Keep)**  
**Workspace #: 11975718**



**Robert Lazenby - Delete**   
Linked Account Holder  
(Parent/Guardian): test parent (robert)  
Subcategory: Grouptrail School  
Date of Birth: 1/1/2018  
Mobile Number:  
Email (Custom):

DETAILS/DETALLES

ENROLLMENT

FILES/ARCHIVOS

MESSAGES/MENSAJES

FORMS

Current Activities

| Activity                                                                                     | Status   | Start date |
|----------------------------------------------------------------------------------------------|----------|------------|
| <a href="#">Fall 2025 - Math through Basketball (Monday &amp; Wednesday) 1st - 3rd Grade</a> | Enrolled | 10/02/2025 |
| <a href="#">Fall 2025 - Arts &amp; Crafts (Monday &amp; Wednesday) 1st - 3rd Grade</a>       | Enrolled | 09/08/2025 |

**Profile 2 (Delete)**  
**Workspace #: 11719234**  
  
Old Profile

# Step 7) Re-Attach Account Holders and Add New Account Holder



DETAILS/DETALLES

ENROLLMENT

FILES/ARCHIVOS

MESSAGES/MENSAJES

FORMS

Subcategory:

Current Grade Level:

Type of Participant:

Workspace number:

Date of Birth:

Gender:

If Other Gender, Specify :

Primary language spoken at home:

Inclusive Identity :

Student State ID # (SSID) :

Grouptrail School

1st

Student enrolled at this school

11975718

01/01/2018

Man/Boy

English

Black/African American

12345678

Robert Lazenby

Linked Account Holder (Parent/Guardian):

Subcategory:

Date of Birth:

Mobile Number:

Email (Custom):

Test Parent (9/12/25), test parent (8/29), test parent (8/12), test parent (robert)

Grouptrail School

01/01/2018

The seventh step is to reattach the account holders back to the profile you will be keeping (Profile 1)

It is **VERY IMPORTANT** to also add and attach any account holders that are listed in the profile that you will be deleting (Profile 2) to the main profile you will be keeping (Profile 1)

**Profile 1 (Keep)**  
**Workspace #: 11975718**



**Profile 2 (Delete)**  
**Workspace #: 11719234**



Old Profile



DETAILS/DETALLES

ENROLLMENT

FILES/ARCHIVOS

MESSAGES/MENSAJES

FORMS

Subcategory:

Current Grade Level:

Type of Participant:

Workspace number:

Date of Birth:

Gender:

If Other Gender, Specify :

Primary language spoken at home:

Inclusive Identity :

Student State ID # (SSID) :

Grouptrail School

1st

Student enrolled at this school

11719234

01/01/2018

Man/Boy

English

Black/African American

12345678

Robert Lazenby - Delete

Linked Account Holder (Parent/Guardian):

Subcategory:

Date of Birth:

Mobile Number:

Email (Custom):

test parent (robert)

Grouptrail School

1/1/2018

# Step 8) Mark the Duplicated Profile To Be Deleted

- The last step is to mark the duplicated profile to be deleted (Profile 2)
- To mark the profile to be deleted, go to the “Forms” tab of the duplicated profile (Profile 2)
- Click the pencil icon next to the field called: Duplicate to be deleted
- Select the option “**Yes-this record is duplicate**”
- Once selected, make sure to hit both save buttons
  - Click the save button next to “Yes-this record is duplicate”
  - Then click the save button at the top or bottom of the page

**Profile 2 (Delete)**  
**Workspace #: 11719234**

Old Profile

**Robert Lazenby - Delete** 🔒

Linked Account Holder (Parent/Guardian): test parent (robert) ✎

Subcategory: Grouptrail School ✎

Date of Birth: 1/1/2018 ✎

Mobile Number: ✎

Email (Custom): ✎

DETAILS/DETALLES ENROLLMENT FILES/ARCHIVOS MESSAGES/MENSAJES **FORMS**

**SUN Staff Only**

**Save**

Embedded: SUN Staff only

Duplicate to be deleted: Yes-this record is duplicate **Save** Cancel

Risk Factor (Yes or No): ✎

Risk Factor Type: ✎

FRN Service Provided (Individual Counts): ✎

Gender if different from Registration Form: ✎

**Save**

**Second “Save” button**

**First “Save” button**



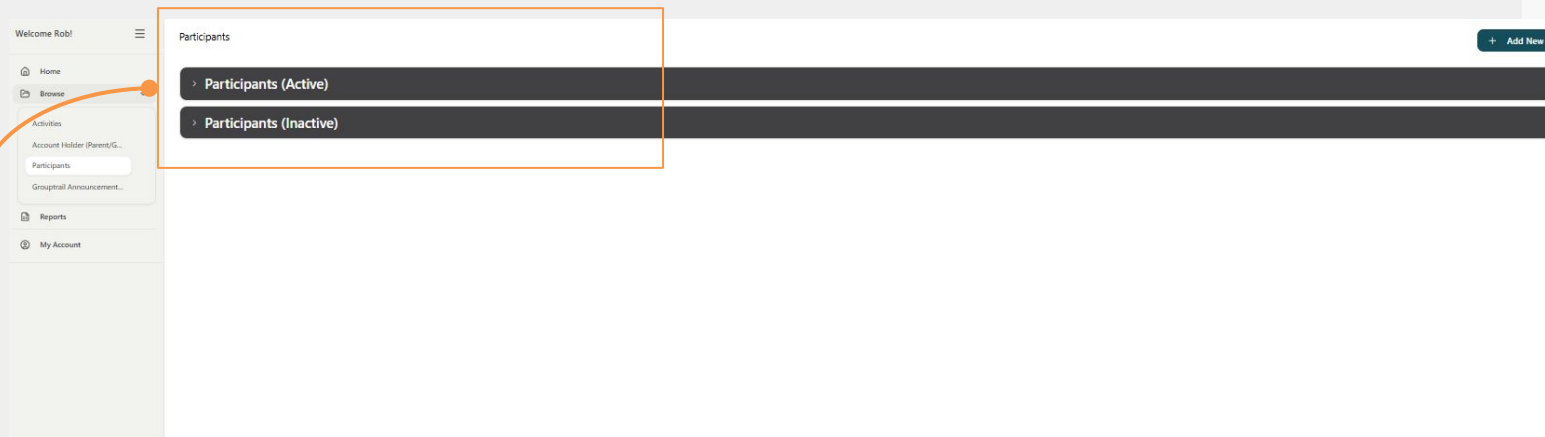
# Other Grouptrail Features For Users:

## How to effectively search workspaces in Grouptrail using Trackers

**Please Note:** This process reviews how a user can effectively and accurately search a participant or activity in Grouptrail using dashboard trackers. This process will also review the advanced search bar.

## Searching Participants by trackers (Step 1)

To effectively search a participant up in your Grouptrail account, go to your **Participant trackers** and open the tracker you would like to locate a participant



## Searching Participants by trackers (Step 2)

Once you have open your participant tracker search the participant you're trying to find in the **"Keyword"** search bar

You can search a participant by the following criterias in the **"Keyword"** search bar:

### Different Name Combinations

You can search by a combination of name variables like: First name, Middle name, Preferred Name, last name, first and last name, first three characters, etc.

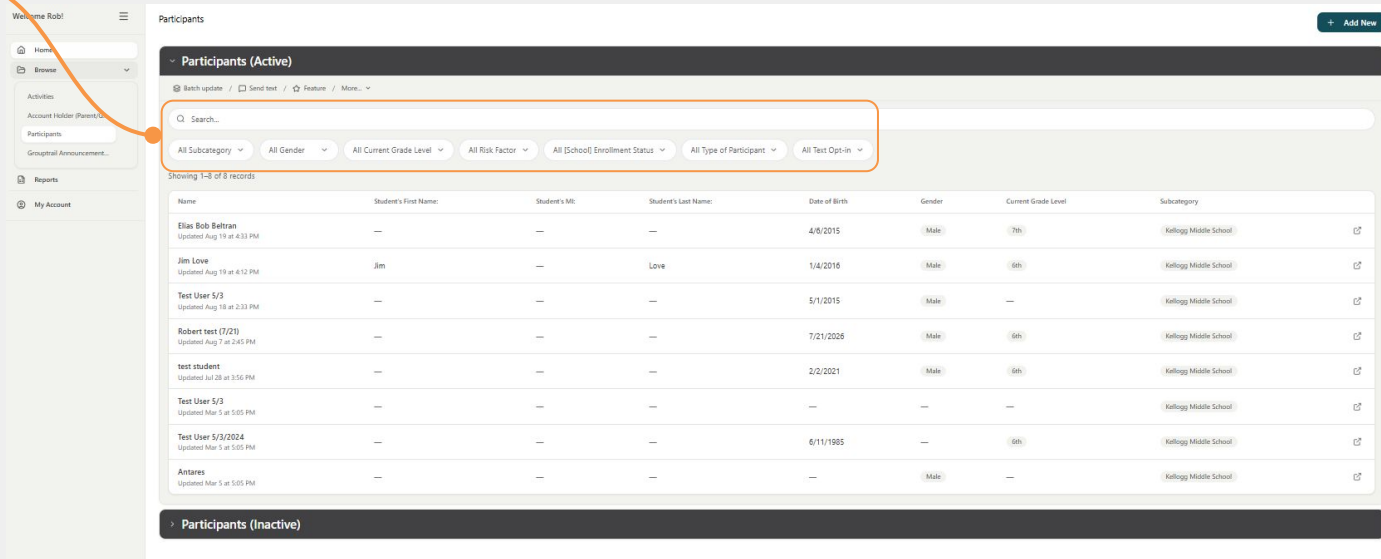
### SSID Number

You can search by a student's SSID Number. Make sure the number is an exact match

### Grouptrail Workspace Number

You can search a participant by their unique workspace number. This number can be found directly in a profile of the student or in Grouptrail reports like: the Missing Data Report

Make sure the number is an exact match



The screenshot shows the 'Participants' page in the Grouptrail interface. On the left is a sidebar with navigation links: Home, Browse, Activities, Account Holder (Parents/Guardians), Participants, Grouptrail Announcements, Reports, and My Account. The main content area is titled 'Participants' and includes a '+ Add New' button. Below the title is a section for 'Participants (Active)' with a search bar and several filter dropdowns: All Subcategory, All Gender, All Current Grade Level, All Risk Factor, All [School] Enrollment Status, All Type of Participant, and All Text Opt-in. Below the filters, it says 'Showing 1-8 of 8 records'. A table lists the participants with columns: Name, Student's First Name, Student's MI, Student's Last Name, Date of Birth, Gender, Current Grade Level, and Subcategory. The table contains 8 rows of participant data.

| Name                                           | Student's First Name | Student's MI | Student's Last Name | Date of Birth | Gender | Current Grade Level | Subcategory           |
|------------------------------------------------|----------------------|--------------|---------------------|---------------|--------|---------------------|-----------------------|
| Elias Bob Selman<br>Updated Aug 19 at 4:33 PM  | —                    | —            | —                   | 4/6/2015      | Male   | 7th                 | Kellogg Middle School |
| Jim Love<br>Updated Aug 19 at 4:12 PM          | Jim                  | —            | Love                | 1/4/2016      | Male   | 6th                 | Kellogg Middle School |
| Test User 5/3<br>Updated Aug 18 at 2:33 PM     | —                    | —            | —                   | 5/1/2015      | Male   | —                   | Kellogg Middle School |
| Robert test (7/21)<br>Updated Aug 7 at 2:45 PM | —                    | —            | —                   | 7/21/2026     | Male   | 6th                 | Kellogg Middle School |
| test student<br>Updated Jul 28 at 3:56 PM      | —                    | —            | —                   | 2/2/2021      | Male   | 6th                 | Kellogg Middle School |
| Test User 5/3<br>Updated Mar 5 at 5:05 PM      | —                    | —            | —                   | —             | —      | —                   | Kellogg Middle School |
| Test User 5/3/2024<br>Updated Mar 5 at 5:05 PM | —                    | —            | —                   | 6/11/1985     | —      | 6th                 | Kellogg Middle School |
| Antares<br>Updated Mar 5 at 5:05 PM            | —                    | —            | —                   | —             | Male   | —                   | Kellogg Middle School |

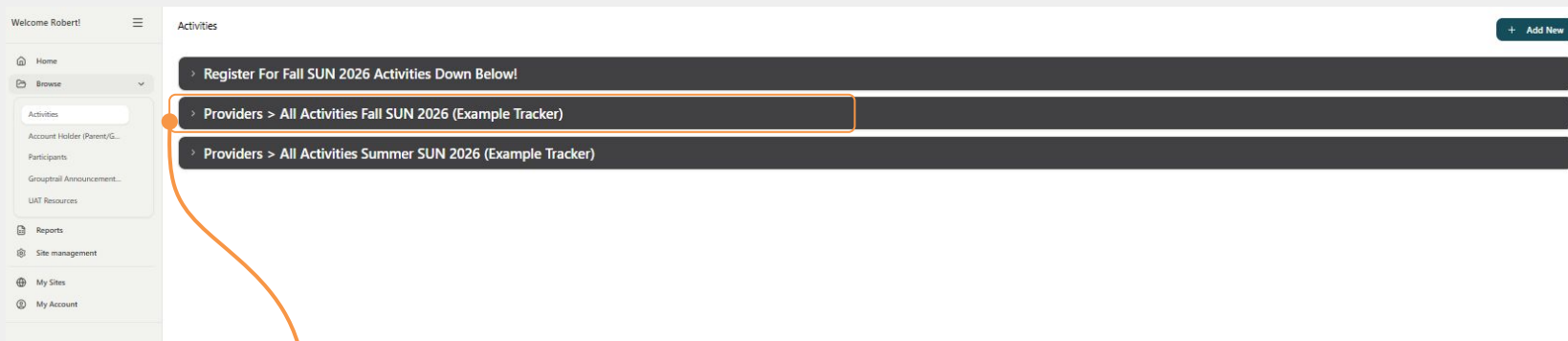
Below the table is a section for 'Participants (Inactive)'.

### Important Note:

Searching participants in your **Participant Trackers** allows you **more** searching **options** and **flexibility** when it comes to finding participants or searching by names. You can also find participants by information that is associated with other fields on their profile (like phone number, street address, etc.)

Users can also use a combination of the pinned tracker filters below the search bar to add additional conditions to help find participants

## Searching Activities by trackers (Step 1)



To effectively search an activity up in your Grouptrail account, identify which **activity tracker** your activity lives in. For this example, we will find an activity from the “Fall SUN 2026” tracker

Once found, open the corresponding activity tracker

# Searching Activities by trackers (Step 2)

Once you have open your activity tracker search the activity you're trying to find in the **"Keyword"** search bar

You can search an activity by the following criterias in the "Keyword" search bar:

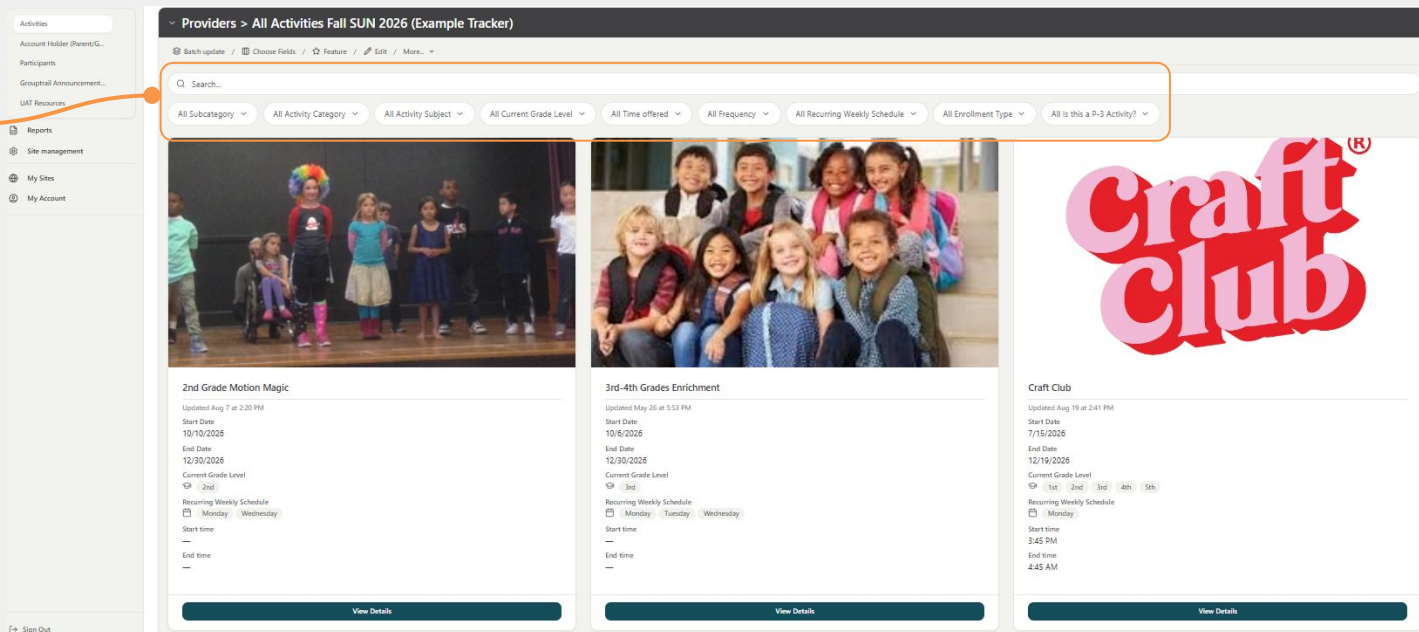
## Name of the activity

You can search by a combination of name variables like: EKT, P-3, Basketball, first three characters, etc.

## Grouptrail Workspace Number

You can search a activity by their unique workspace number. This number can be found directly in a profile of the activity.

Make sure the number is an exact match



The screenshot shows the Grouptrail activity tracker interface. On the left is a sidebar with navigation links: Activities, Account Holder (Parent/G...), Participants, Grouptrail Announcement..., UAT Resources, Reports, Site management, My Sites, and My Account. The main area is titled "Providers > All Activities Fall SUN 2026 (Example Tracker)". Below the title is a search bar with a magnifying glass icon and a "Search..." placeholder. Below the search bar are several filter buttons: All Subcategory, All Activity Category, All Activity Subject, All Current Grade Level, All Time offered, All Frequency, All Recurring Weekly Schedule, All Enrollment Type, and All is this a P-3 Activity?. Below the filters are three activity cards. The first card is titled "2nd Grade Motion Magic" and shows a group of children on a stage. The second card is titled "3rd-4th Grades Enrichment" and shows a group of children sitting together. The third card is titled "Craft Club" and shows the "Craft Club" logo. Each card displays details such as "Updated Aug 7 at 2:30 PM", "Start Date", "End Date", "Current Grade Level", and "Recurring Weekly Schedule". At the bottom of each card is a "View Details" button.

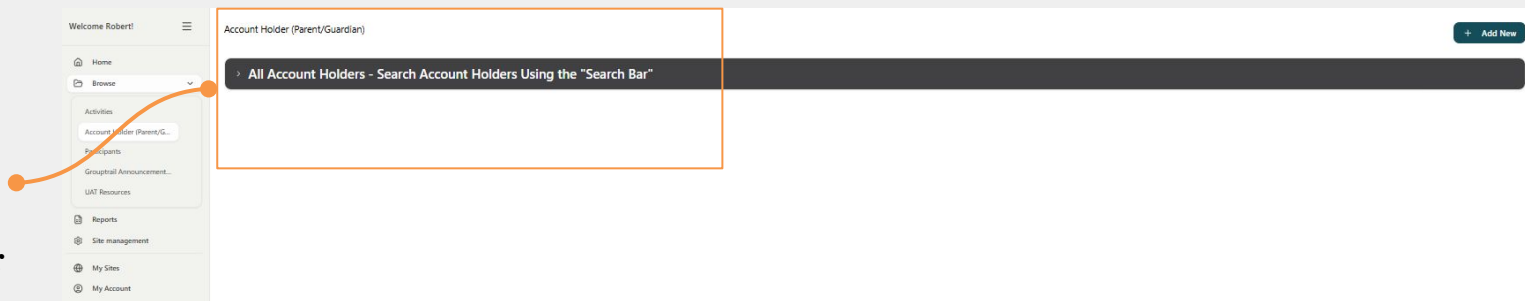
## Important Note:

Searching activities in your **Activity Trackers** allows you **more** searching **options** and **flexibility** when it comes to finding activities or searching by activity names

Users can also use a combination of the pinned tracker filters below the search bar to add additional conditions to help find participants

## Searching Account Holders by tracker (Step 1)

To effectively search an account holder in Grouptail, go to your **All Account Holders Tracker** and open the tracker



### Important Note:

All general users in the system have access to all Grouptail Parent/Guardian Accounts created in the system (also known as Account Holders).

This means that any user can locate and find if a parent/guardian may have an account registered in the system

## Searching Participants by trackers (Step 2)

Once you have open your All Account Holders tracker search the parent/guardian account you're trying to find in the “**Keyword**” search bar

You can search an account holder by the following criterias in the “**Keyword**” search bar:

### Different Name Combinations

You can search by a combination of name variables like: First name and/or last name

### Email Address

You can search for an account holder by typing in a parent/guardian's email address

### Important Note:

Searching for account holders in your **All Account Holder Tracker** allows you **more** searching **options** and **flexibility** when it comes to finding accounts.

Users should keep in mind that account holders may share the same name. Users should always confirm if they have the correct account for the parent/guardian by their email address

Account Holder (Parent/Guardian) + Add New

All Account Holders - Search Account Holders Using the "Search Bar"

Batch update / Choose Fields / Feature / Edit / More...

Q Search...

Showing 1-30 of 193 records

| Name                                                      | Account first name | Account last name | Account Email                                    |
|-----------------------------------------------------------|--------------------|-------------------|--------------------------------------------------|
| Chanelle Brown<br>Updated Aug 18 at 6:27 PM               | Chanelle           | Brown             | susan+chanelle_brown-0710@grouptail.com          |
| Test test<br>Updated Aug 18 at 5:57 PM                    | Test               | test              | test@test.com                                    |
| Chanelle temp<br>Updated Aug 18 at 5:49 PM                | Chanelle           | temp              | susan+chanelle_temp-0710@grouptail.com           |
| mike_brown1355@grouptail.com<br>Updated Aug 18 at 5:41 PM | ---                | ---               | mike_brown1355@domain.com                        |
| James Brown<br>Updated Aug 18 at 1:45 PM                  | James              | Brown             | robert.lazenby+71@multico.us                     |
| Test Account<br>Updated Aug 18 at 1:38 PM                 | Test               | Account           | robert.lazenby+71@multico.us                     |
| Year Validation<br>Updated Aug 16 at 9:23 PM              | Year               | Validation        | justin+yearvalidation@grouptail.com              |
| Los Mets2<br>Updated Aug 14 at 9:20 PM                    | Los                | Mets2             | justin+losmets2@grouptail.com                    |
| Los Mets<br>Updated Aug 14 at 6:48 PM                     | Los                | Mets              | justin+losmets@grouptail.com                     |
| Sabrina Ionescu<br>Updated Aug 13 at 9:20 AM              | Sabrina            | Ionescu           | robert.lazenby+208@multico.us                    |
| Justin Yuen<br>Updated Aug 12 at 9:47 PM                  | Justin             | Yuen              | justin+testtheneewregistrationform@grouptail.com |
| robert.lazenby+63@multico.us<br>Updated Aug 12 at 3:34 PM | ---                | ---               | robert.lazenby+63@multico.us                     |
| Account Holder<br>Updated Aug 12 at 10:29 AM              | Account            | Holder            | justin+accountholderinstructions@grouptail.com   |
| Testing Middenname<br>Updated Aug 10 at 2:48 PM           | Testing            | Middenname        | justin+testingmiddenname@grouptail.com           |

# Grouptrail Searching Workspaces with All-System Search Bar

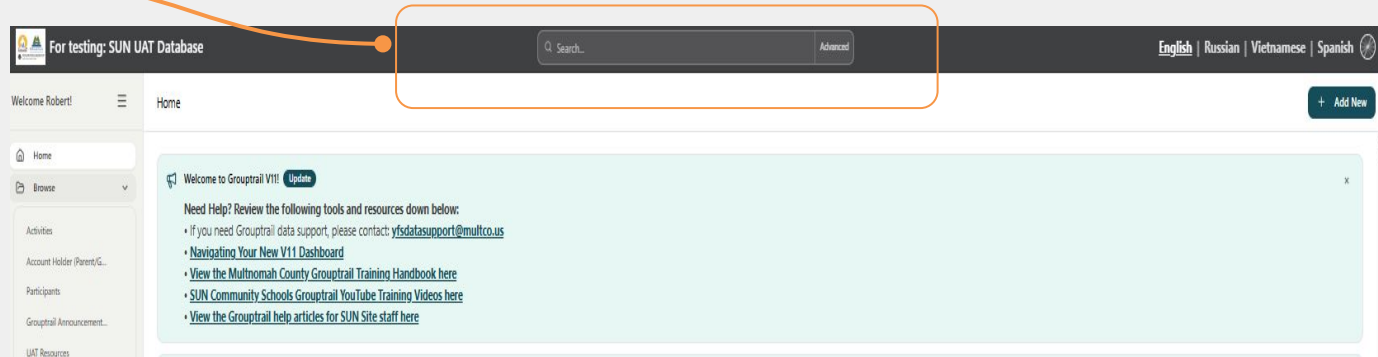
You may also search workspaces with the **all-system search bar** at the top of a user's dashboard

Please keep in mind that you can only search workspaces (like participants and activities) by their name

The all-system search bar does not provide a user with flexibility when attempting to find workspaces in the system like their dashboard trackers

The majority of the time the all-system search will only generate results with EXACT matches

A user may also generate system-wide results for specific data categories like: account holders



## Important Note:

It's highly recommended that users first use their Trackers to search either participants and/or activities

If a user cannot find an activity that may have been created but does not fall into a seasonal tracker, it's then recommended that the user use the advanced search bar to find results



# Other Grouptrail Features For Users:

## Batching Updating Fields and Tags in Grouptrail

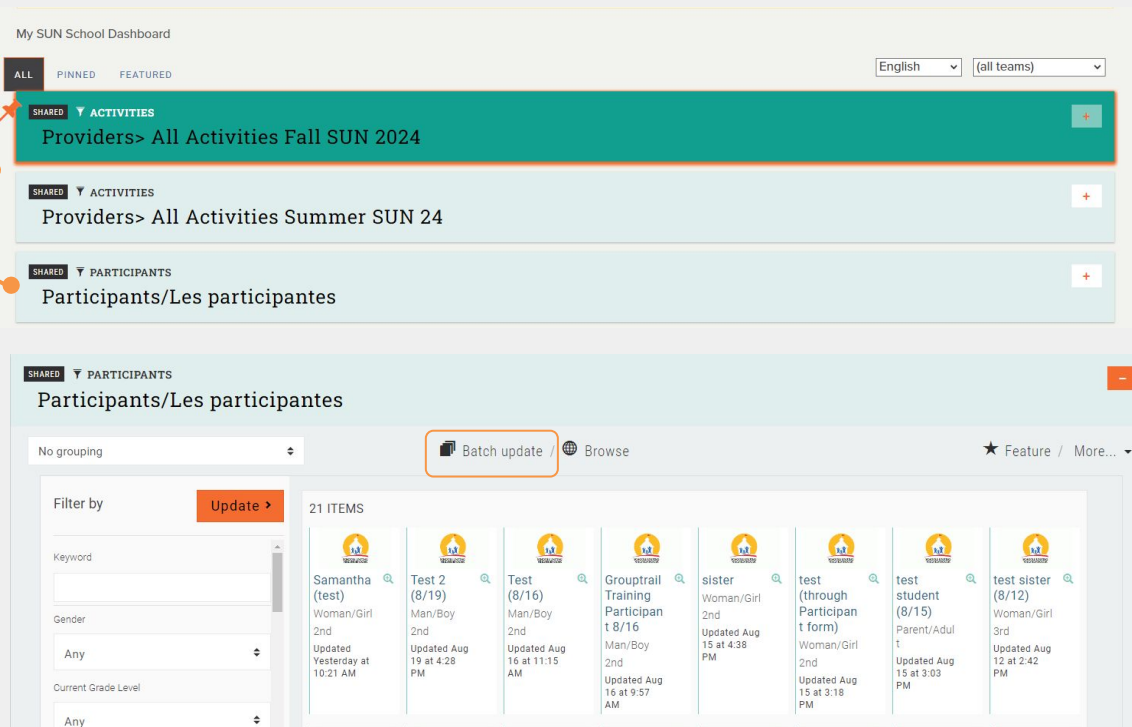
**Please Note:** This process reviews how a user can quickly update a universal field or tag in Grouptrail to multiple workspaces (activities and/or participants)

## Step 1) Batch Updating

Batch updating in Grouptail allows you to quickly add information across multiple workspaces for activities and/or participants

**Step 1)** Select the tracker for **activities** or **participants** that you would like to batch update

Once you have chosen the tracker you would like to batch update, find the batch update icon located at the top of your tracker



The screenshot shows the 'My SUN School Dashboard' with a sidebar on the left containing 'ALL', 'PINNED', and 'FEATURED' tabs. The main content area displays a list of trackers under the 'ACTIVITIES' and 'PARTICIPANTS' sections. An orange arrow points from the text 'Step 1) Select the tracker for activities or participants that you would like to batch update' to the 'Participants/Les participantes' tracker.

The 'Participants/Les participantes' tracker is selected, showing a 'Batch update' icon (a document with a plus sign) and a 'Browse' button. Below this, there is a 'Filter by' section with a 'Keyword' field, a 'Gender' dropdown set to 'Any', and a 'Current Grade Level' dropdown set to 'Any'. An 'Update' button is next to the filters.

The main content area displays a list of 21 items, each with a Grouptail logo, a name, a gender, and an update timestamp. The items are:

| Name                                | Gender       | Update Time                   |
|-------------------------------------|--------------|-------------------------------|
| Samantha (test)                     | Woman/Girl   | Updated Yesterday at 10:21 AM |
| Test 2 (8/19)                       | Man/Boy      | Updated Aug 19 at 4:28 PM     |
| Test (8/16)                         | Man/Boy      | Updated Aug 16 at 11:15 AM    |
| Grouptail Training Participant 8/16 | Man/Boy      | Updated Aug 16 at 9:57 AM     |
| sister                              | Woman/Girl   | Updated Aug 15 at 4:38 PM     |
| test (through Participant form)     | Woman/Girl   | Updated Aug 15 at 3:18 PM     |
| test student (8/15)                 | Parent/Adult | Updated Aug 15 at 3:03 PM     |
| test sister (8/12)                  | Woman/Girl   | Updated Aug 12 at 2:42 PM     |

## Step 2) Batch Updating

**Step 2)** Follow the two batch updating steps. **First**, select the drop down menu to select what you would like to batch update

**Second**, select the field/information you would like to update across your workspaces (participants or activities)

**Note:** Linked Categories allow you to link an activity or participant to another workspace or even an account holder

The fields displayed in the dropdown menu are also reflected on an activity or participant details tab

Batch update

Step 1: Select what you would like to do

I would like to...

I would like to...

Link categories

Add linked categories

Update tags

Provider

Enrollment Status

Gender

Current Grade Level

English Language Learner

Student lives with

Primary Method of Transportation

When/if possible you would like bus transportation

Artwork permission

Permission for student to use internet

Primary language spoken at home

Inclusive Identity

Accept behavioral expectations

Risk Factor

[School] Enrollment Status

Step 2: Select which pages to update

Filter list...

Check all

Uncheck all

|                                                               |                                                     |                                                |
|---------------------------------------------------------------|-----------------------------------------------------|------------------------------------------------|
| <input type="checkbox"/> Raela Test 09/05                     | <input type="checkbox"/> test student (8/12)        | <input type="checkbox"/> test student (robert) |
| <input type="checkbox"/> Jonny Test 08/30                     | <input type="checkbox"/> test student (8/6)         |                                                |
| <input type="checkbox"/> Jr Lazenby (8/30)                    | <input type="checkbox"/> Ariela's Child 9.13 (test) |                                                |
| <input type="checkbox"/> John Doe                             | <input type="checkbox"/> Ariela junior 9/22         |                                                |
| <input type="checkbox"/> P.J Test                             | <input type="checkbox"/> Ariela Child 2 (test)      |                                                |
| <input type="checkbox"/> Test 2 (8/19)                        | <input type="checkbox"/> Ariela Child 2 on 9/23     |                                                |
| <input type="checkbox"/> Test (8/16)                          | <input type="checkbox"/> John Smith (test)          |                                                |
| <input type="checkbox"/> Grouptrail Training Participant 8/16 | <input type="checkbox"/> Jane James (test)          |                                                |
| <input type="checkbox"/> sister                               | <input type="checkbox"/> Jane James (7/16)          |                                                |
| <input type="checkbox"/> test (through Participant form)      | <input type="checkbox"/> test student (7/29)        |                                                |
| <input type="checkbox"/> test student (8/15)                  | <input type="checkbox"/> bill (test student 7/28)   |                                                |
| <input type="checkbox"/> test sister (8/12)                   | <input type="checkbox"/> John (test parent)         |                                                |

## Step 3) Batch Updating

**Step 3)** Once you have selected a field, please select the correct **tag option** you want to update across your workspaces

**Next**, select the workspaces (participants or activities) that you would like to update the information across

**Lastly**, select “Run Batch Update” to apply the updated information across your workspaces

**Note:**

You can double check to see if your “batch update” was successful by going to a workspace to see if the information was added/updated

Batch update

Step 1: Select what you would like to do

Risk Factor

What tag would you like to add to the checked pages?

\*Note this will clear any current tags assigned to these pages.

\*Unassigned

Yes

No

\*Unassigned

Step 2: Select which pages to update

Filter list...

Check all

Uncheck all

☐ Raela Test 09/05
 ☐ test student (8/12)
 ☐ test student (robert)

☐ Jonny Test 08/30
 ☐ test student (8/6)

☐ Jr Lazenby (8/30)
 ☐ Ariela's Child 9,13 (test)

☐ John Doe
 ☐ Ariela junior 9/22

☐ P.J Test
 ☐ Ariela Child 2 (test)

☐ Test 2 (8/19)
 ☐ Ariela Child 2 on 9/23

☐ Test (8/16)
 ☐ John Smith (test)

☐ Grouptrail Training Participant 8/16
 ☐ Jane James (test)

☐ sister
 ☐ Jane James (7/16)

☐ test (through Participant form)
 ☐ test student (7/29)

☐ test student (8/15)
 ☐ bill (test student 7/28)

☐ test sister (8/12)
 ☐ John (test parent)

Run batch update

83



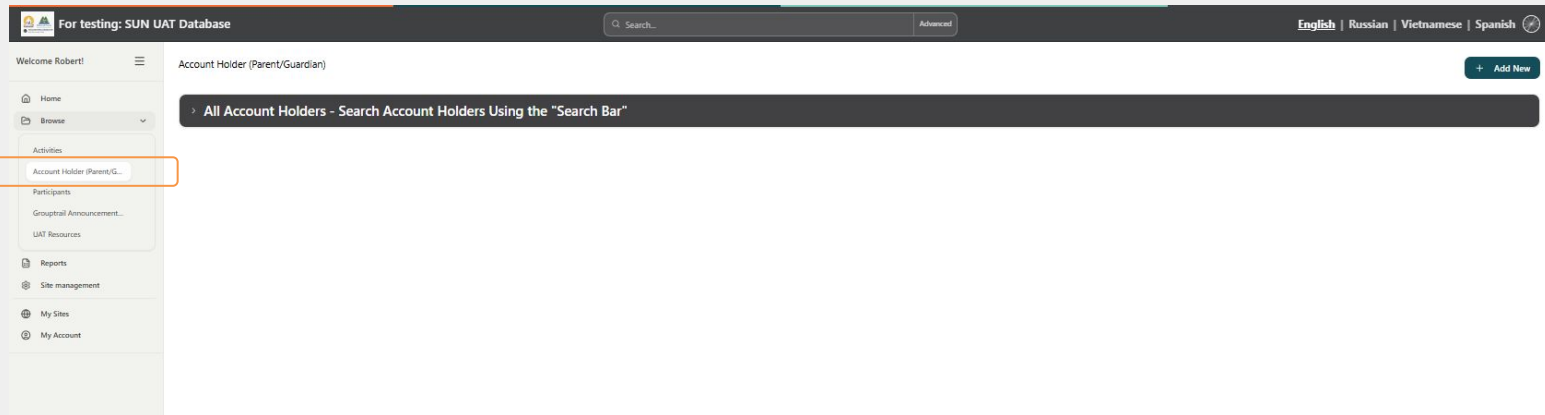
# Other Grouptrail Features For Users:

## Manually Creating and linking Account Holders to Participants

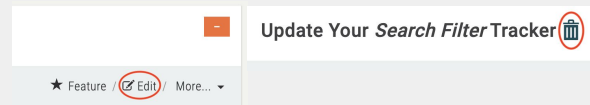
**Please Note:** This process reviews how to create and link participants that are manually created in the system and/or adding additional account holders to an existing student or adult record(s)

## Step 1) Manually creating a NEW account holder for an Existing participant

To create an account holder, select **“Account Holder”**

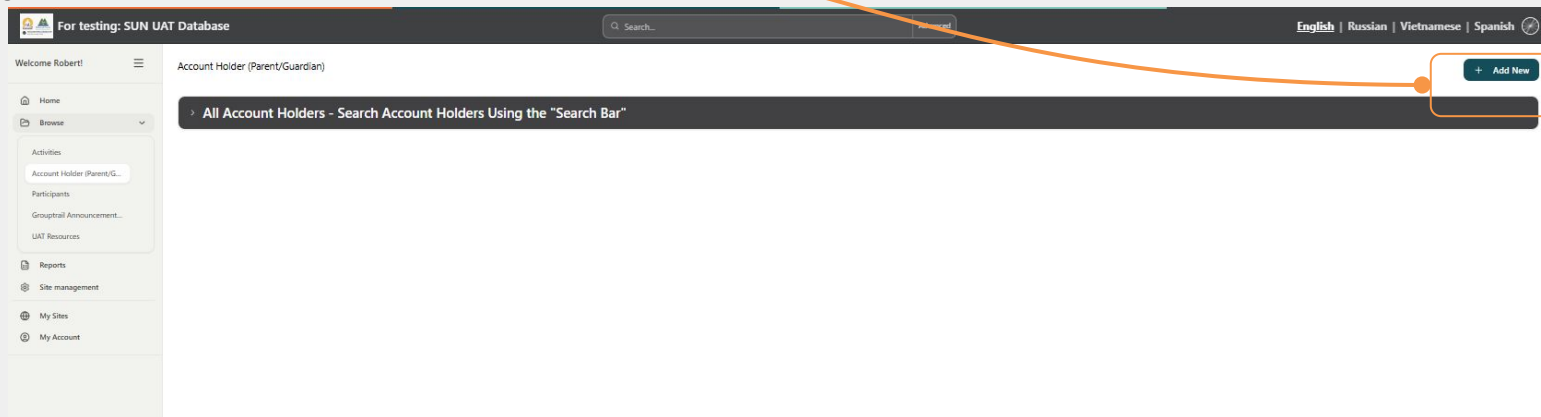


**NOTE:** Be sure not to “Create a Tracker” instead of clicking on “Add a Workspace.” If you do, you can open up and edit the tracker you created and delete it:



## Step 2) Manually creating a NEW account holder for an Existing participant

Once you're in the "Account Holders" Menu view, click the icon called: "Add New" in the right hand corner to locate the one-page creation form



**NOTE:** Be sure not to "Create a Tracker" instead of clicking on "Account Holder"

## Step 2) Manually creating a NEW account holder for an Existing participant

1. Once you have selected the one-page creation form, they're **only three fields** that need to be filled out in order to create a Grouptrail for a Parent/Guardian

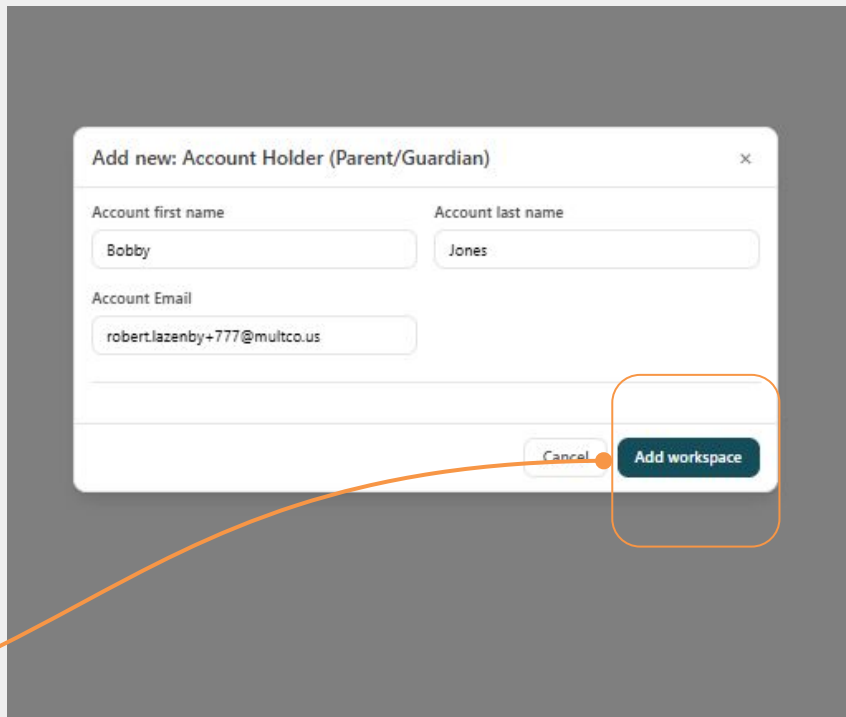
- 1) Account Holder First Name
- 2) Account Holder Last Name
- 3) Account Holder Email

When creating a Grouptrail account, be sure to **use the best email for the parent/guardian**

The account holder will need access to this email in order to sign-in into their account and register their student(s) for SUN activities

This parent/guardian should be one of the primary people responsible for signing up their student's for SUN activities

2) Once you have entered in the parent/guardian accounts information, select **"Add Workspace"**



## Step 3) Manually creating a **NEW** account holder for an **Existing** participant

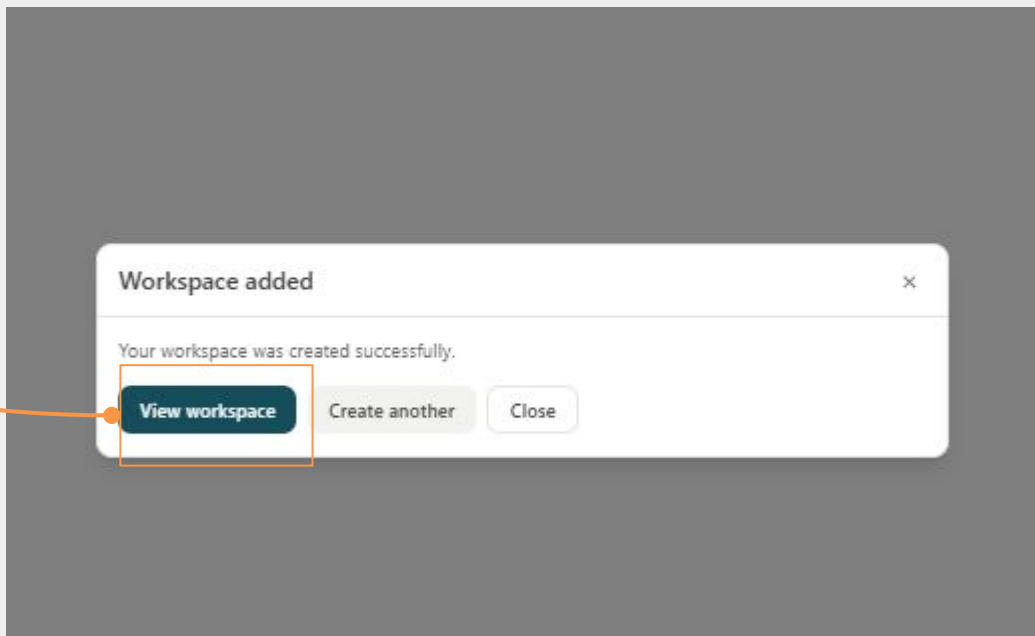
1. Once you have selected, “Add Workspace” you will receive a notification referencing that the workspace has been successfully created

**DO NOT CLOSE OUT THIS WINDOW**

2) You will **NOW** need to **LINK** the parent/guardian account to their **student(s) profile**

3) To do so, click the button “**View Workspace**”

This process will allow the family to sign into their Grouptail account and have access to their student(s) profiles as well as request enrollment for SUN activities



## Step 4) Manually creating a NEW account holder for an Existing participant

1. Once you have selected, “View Workspace”, you’re now looking at the profile side of the account holder you just created

2) To link student(s) to the parent/guardian account, click the pencil icon on the right hand side of the field called: **Linked Participants**



Bobby Jones 

DETAILS/DETALLES

|                      |                                                                                                                  |
|----------------------|------------------------------------------------------------------------------------------------------------------|
| Account first name:  | Bobby                         |
| Account last name:   | Jones                         |
| Account Email:       | robert.lazenby+777@multco.us  |
| Linked Participants: | -                             |

## Step 5) Manually creating a NEW account holder for an Existing participant

1. Once you have selected the pencil icon, use the **search bar** to **type in the name** of the **student(s)** you would like to link to the parent/guardian account

2) Once you have found and added the student(s) to the parent/guardian account, click **"Save"**



The screenshot displays the 'DETAILS/DETALLES' page for a user named Bobby Jones. The page features the 'SCHOOLS UNITING NEIGHBORHOODS' logo and a search bar. The search results show a list of participants, with 'Jim Love' selected. The 'Save' button is highlighted, indicating the final step in adding the new participant.

**Account details:**

- Account first name: Bobby
- Account last name: Jones
- Account Email: robert.lazenby+777@multco.us
- Linked Participants:

**Search results:**

- Jim Love

**Buttons:**

- Save
- Cancel

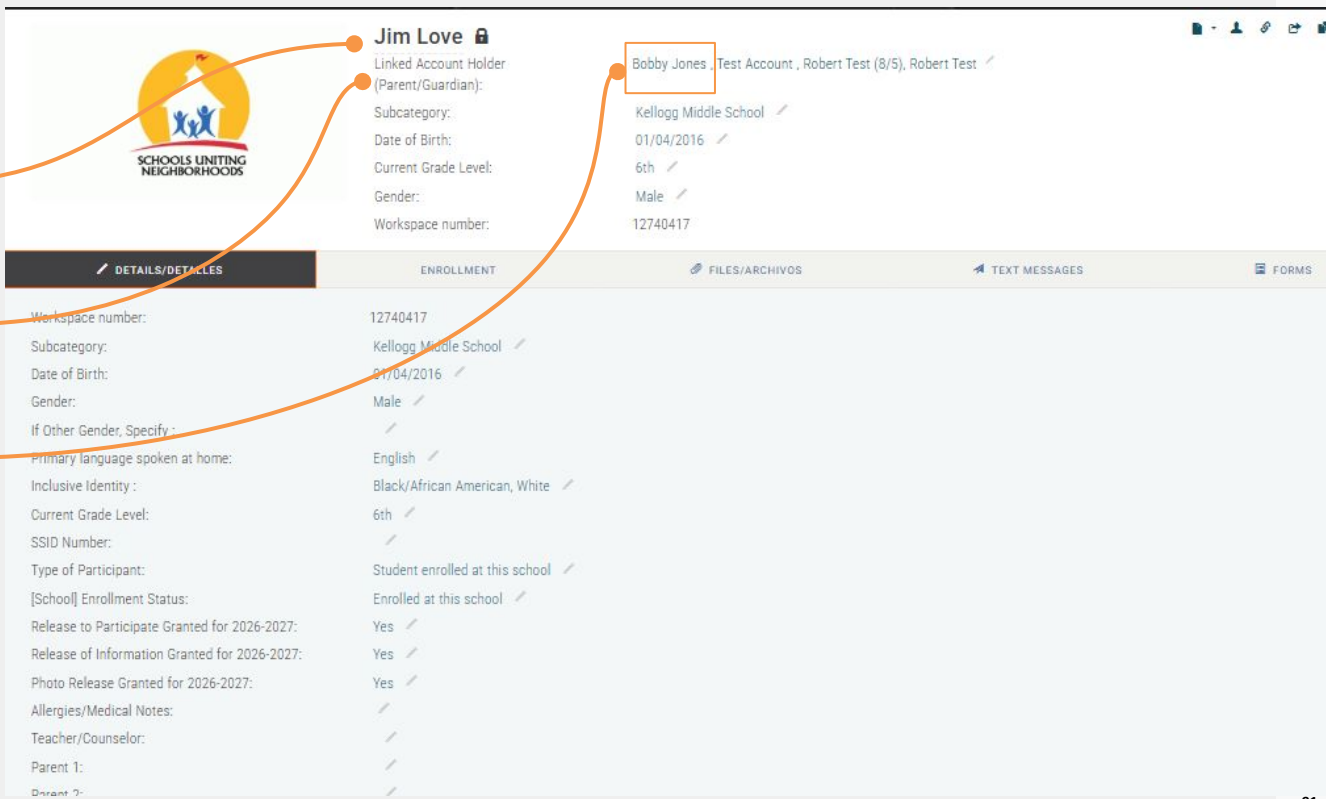
## Step 6) Manually creating a NEW account holder for an Existing participant

1. To confirm if you successfully added the student(s) to the parent/guardian account, go to the workspace of student(s) you linked

2. Right below the workspace name of the student, you will see a field called: **Linked Account Holder (Parent/Guardian)**

3. To the **right of that field** should be the **name of the parent/guardian** that you have **linked** to the **student(s)** profile

4. You can view the account holders linked to a student(s) account by clicking the name(s) of the account holders attached



**Schools Uniting Neighborhoods**

**Jim Love** 

Linked Account Holder (Parent/Guardian):

Subcategory: Kellogg Middle School

Date of Birth: 01/04/2016

Current Grade Level: 6th

Gender: Male

Workspace number: 12740417

**Bobby Jones** Test Account , Robert Test (8/5), Robert Test

**DETAILS/DETALLES** ENROLLMENT FILES/ARCHIVOS TEXT MESSAGES FORMS

Workspace number: 12740417

Subcategory: Kellogg Middle School

Date of Birth: 01/04/2016

Gender: Male

If Other Gender, Specify:

Primary language spoken at home: English

Inclusive Identity: Black/African American, White

Current Grade Level: 6th

SSID Number:

Type of Participant: Student enrolled at this school

[School] Enrollment Status: Enrolled at this school

Release to Participate Granted for 2026-2027: Yes

Release of Information Granted for 2026-2027: Yes

Photo Release Granted for 2026-2027: Yes

Allergies/Medical Notes:

Teacher/Counselor:

Parent 1:

Parent 2:

# Linking multiple account holder(s) to a participant record

You may also link **multiple** account holders to a student or adult record by going to your participant tracker and selecting the participant

You can link existing or new account holders in the system to a student(s) profile

At the top of the participant record, click the **pencil icon** underneath the field of **Linked account holder**

Next, begin to **search** the **account holder** by **first & last** name that you would like to **link** to the participant record. Once done, make sure to click **Save**

Participants

Participants (Active)

Batch update / Choose Fields / Send text / Unlink / Edit / More...

Search...

All Subcategory / All Gender / All Current Grade Level / All Risk Factor / All [School] Enrollment Status / All Type of Participant / All Test Opt-in / All P-3 Participant? (Select Academic Year): P-3 ONLY

Showing 1-30 of 5471 records

| Name                                           | Student's First Name | Student's MI | Student's Last Name | Date of Birth | Gender | Current Grade Level | Subcategory           |
|------------------------------------------------|----------------------|--------------|---------------------|---------------|--------|---------------------|-----------------------|
| Samantha (test)<br>Updated Today at 4:19 PM    | Samantha             | —            | (test)              | 2/2/2012      | Male   | 8th                 | Cesar Chavez K-8      |
| Elias Bob Beltran<br>Updated Aug 19 at 4:33 PM | —                    | —            | —                   | 4/6/2015      | Male   | 7th                 | Kellogg Middle School |

**Samantha (test)** 

Linked Account Holder (Parent/Guardian):

Samantha parent 

Subcategory: Grouptrail School

Date of Birth: 07/10/2018

DETAILS/DETALLES ENROLLMENT FILES/ARCHIVOS FORMS

Subcategory: Grouptrail School

**Samantha (test)** 

Linked Account Holder (Parent/Guardian):

Samantha parent x

Save Cancel



# Thank you!

---

**Multnomah County**

**Department of County Human Services**

SUN Service System Data Team

[yfsdataskysupport@multco.us](mailto:yfsdataskysupport@multco.us)