Grouptrail

Grouptrail P-3 Overview

Training Handbook for P-3 Programs 2025-26

Last Updated on October 2025

Grouptrail

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_hKMjA5vuBD0AlEGFa-NyRU8ztoqE85O1raSg/viewform
- **For Grouptrail questions, comments or concerns use [this form]**
  - https://forms.gle/sneS5RraGf7fpTau5
- **For assistance with WellSky Community Services and/or Grouptrail email: yfswellskysupport@multco.us**

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Staff Workflow: Creating a New P-3 participant
(Through the one-page creation forms)

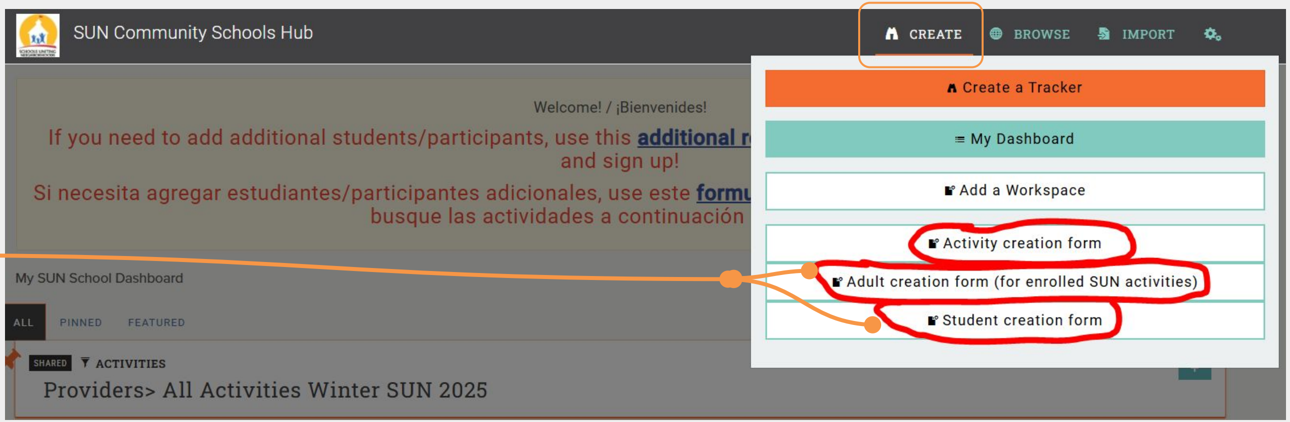
Please Note:

This process reviews how to create a new P-3 participant in Grouptrail and what important field to select to identify if a participant is attached to a P-3 program

Grouptrail

Step 1) Creating a New P-3 participant through the one-page creation forms

1. Hover over **Create,** then click **the following creation forms; depending on what you would like to create**



Note:

- ***To create a P-3 child or student participant, select the "Student Creation form"***
- ***To create a P-3 adult participant, select the "Adult Creation form"***

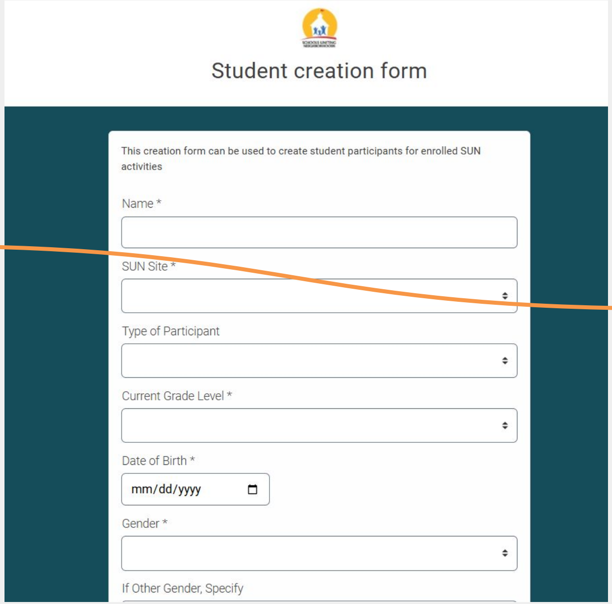
Grouptrail

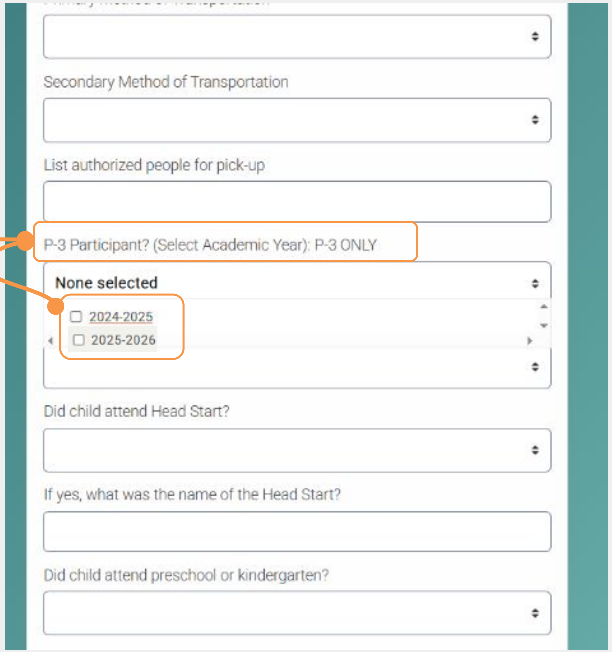
Step 2) Creating a New P-3 participant through the one-page creation forms

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. When **creating** a **P-3 Participant** (adult or child) it will be **important** to acknowledge the field labeled
    - **P-3 Participant? (Select Academic Year): P-3 ONLY**
    - Make sure to select the correct academic year for your P-3 Participant
    - Each year the P-3 Participant field will need to be selected with the new academic year (This will need to be done for new and returning P-3 participants)

3. Once you fill out the form you will click "Submit" at the bottom. You will be asked to **refresh** the screen or be given the option to c**reate another participant**





Staff Workflow: Creating a New P-3 activity
(Through the one-page creation forms)

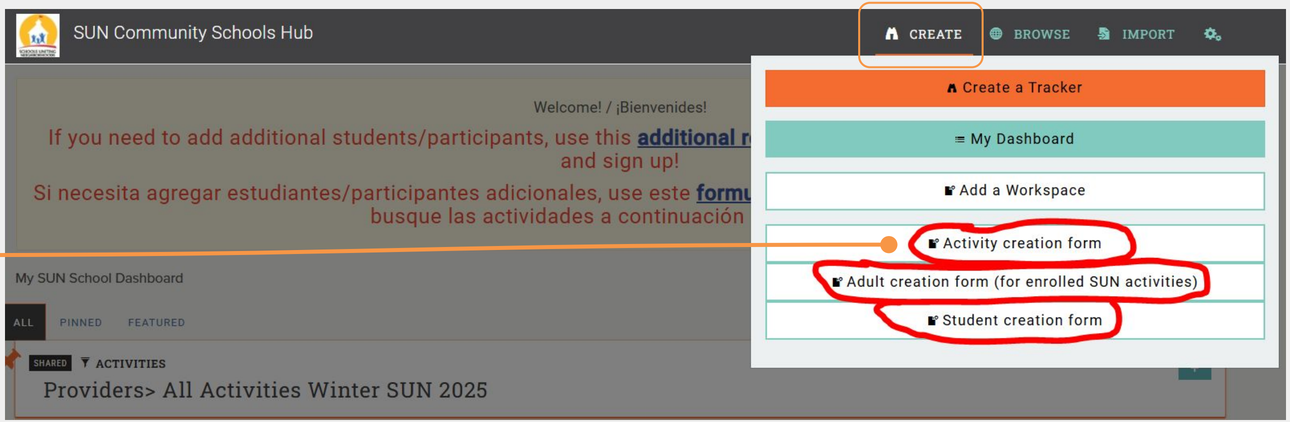
Please Note:

This process reviews how to create a new P-3 activity in Grouptrail and what important fields to select to identify if an activity is attached to a P-3 program

Grouptrail

Step 2) Creating a new P-3 activity through the one-page creation forms

1. Hover over **Create,** then click **the following creation forms; depending on what you would like to create**



Note:

- ***To create a P-3 activity, select the "Activity Creation form"***

Step 2) Creating a new P-3 activity through the one-page creation forms

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. When filling out the activity details, they're **two fields** that are extremely **important** for P-3 programs to select the **correct option** for when creating a **P-3 activity** in Grouptrail:

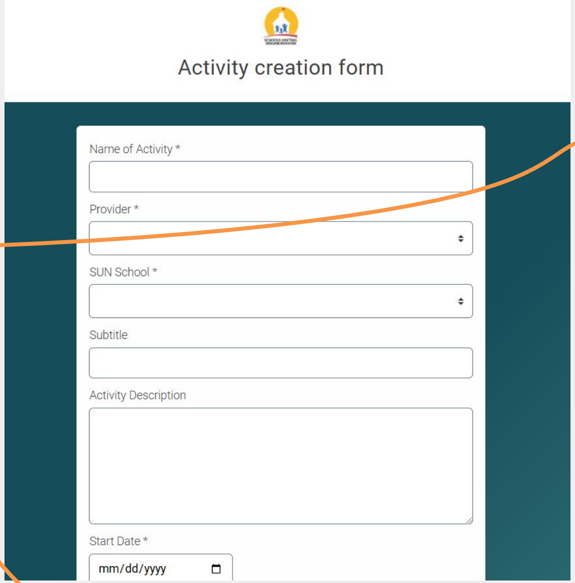
- **Activity Subject**
- **Is this a P-3 Activity (P-3 Only)**

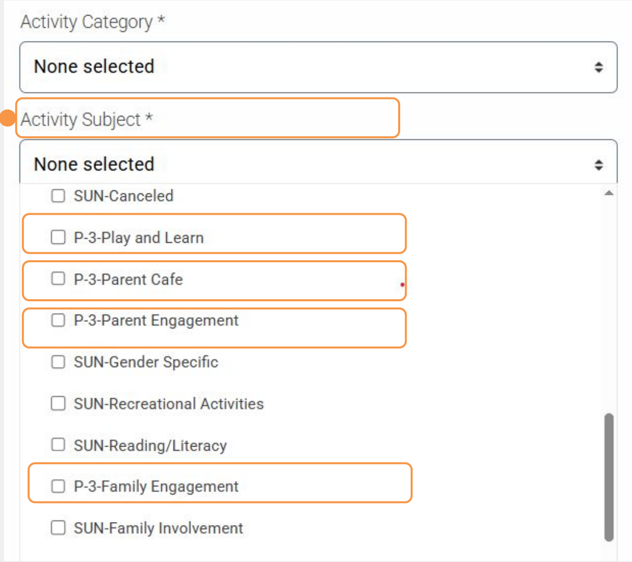
3. P-3 coordinators should make sure to select the correct activity subject for their P-3 activity

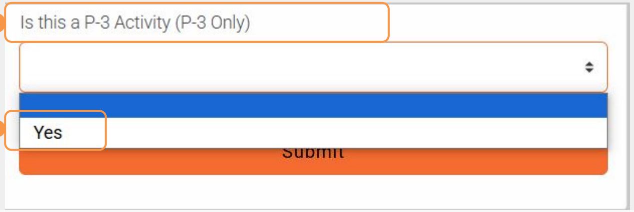
-) **Example 1**: The P-3-Play and Learn activity subject should be the only option selected if you're creating a P-3-Play and Learn activity

-) **Example 2:** The P-3-Parent Cafe activity subject should be the only option selected if you're creating a P-3-Parent Cafe activity

-) **Example 3:** The activity subjects for P-3-Parent Engagement and P-3-Family Engagement should be the correct fields selected for any activity that is not directly a Parent Cafe or Play and Learn activity







Staff Workflow: Updating Required Fields For An Existing or Returning P-3 Participant

Please Note:

This process reviews how to update required fields for an existing or returning P-3 Participant in Grouptrail. This process is required in order to accurately count the number of P-3 participants being served at a P-3 site

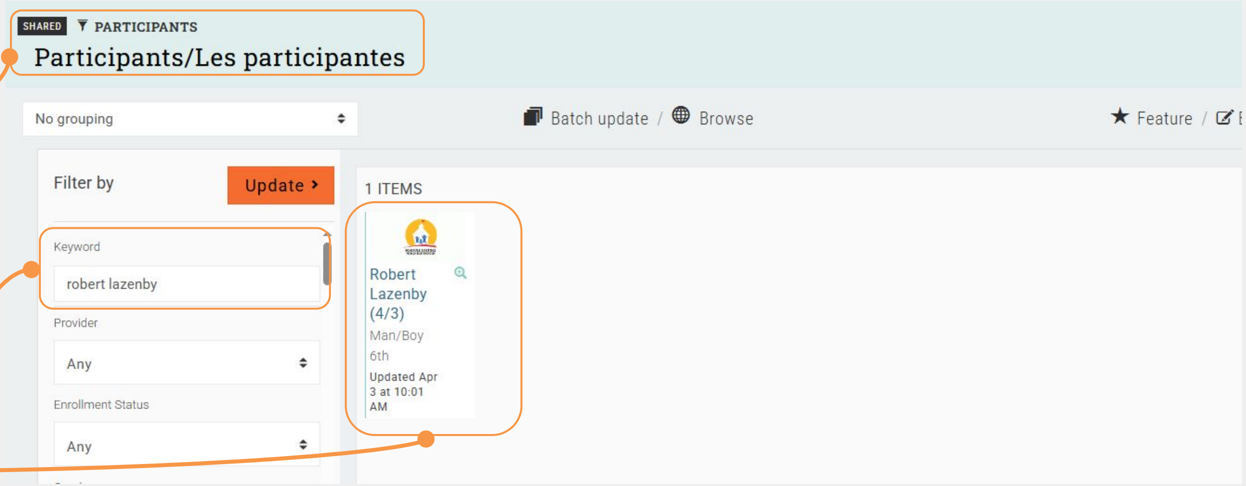
Step 1) Search up the participant and click their profile

To **update** the **required field** for an **existing** P–3 participant the first step is to locate the participant(s) that you would like to update this information for

To do this, **go to your participant tracker** and find the participant you need to update the field for

Once you have opened your participant tracker, you can then use the **keyword search field** to enter the name of the participant you need to update the field for

Once you have found the participant you need to update this information for, **select** the participant **profile**



Grouptrail

Step 2) Locate and update P3 fields

Locate the required P-3 participant question which is called:

- **P-3 Participant? (Select Academic Year): P-3 only**

This field can be found towards the bottom of the page for the participant

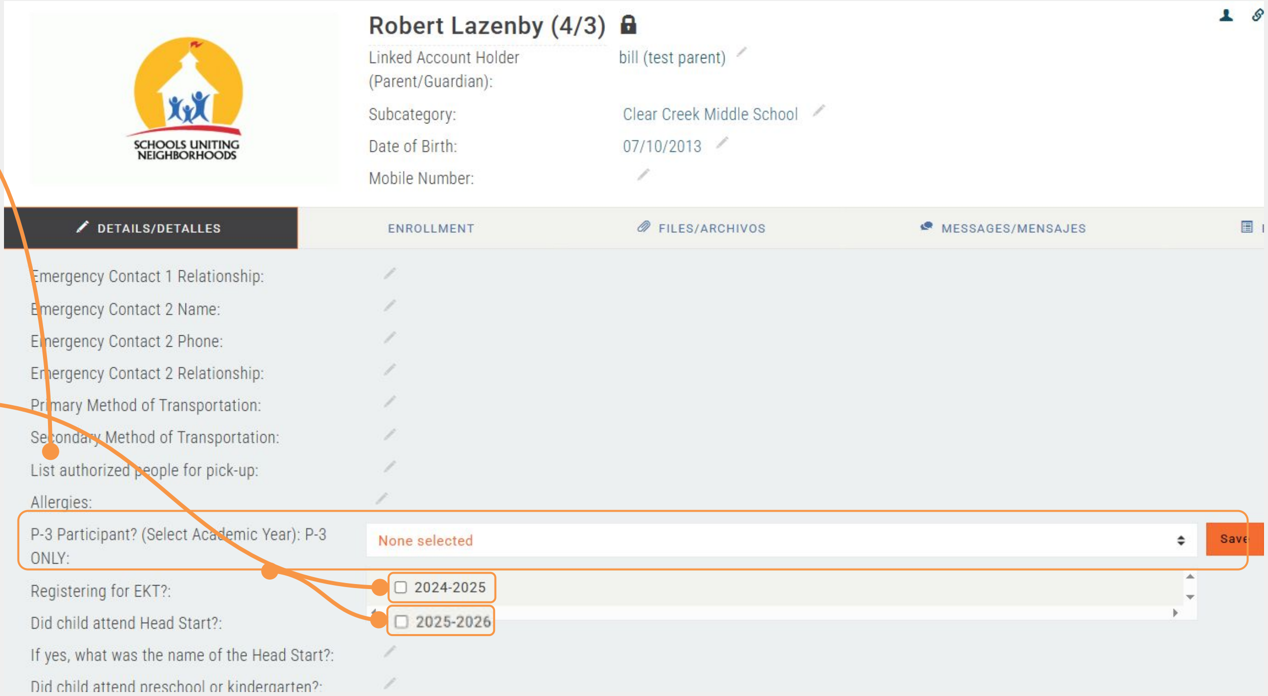
Once you have found the field, please update it to the new academic year listed

Please keep in mind that the P-3 academic year for returning P-3 participants will need to be updated annually

The new P-3 Participant Academic Field will be updated every July 1st once the new fiscal cycle begins

NOTE: It will be important to not deselect the previous year if a P-3 participant participated in your program in the year prior(s)

For any new P-3 participant, you should just select the new school year and leave previous year selections alone



Staff Workflow: Updating Required Fields For An Existing P-3 Activity in Grouptrail

Please Note:

This process reviews how to update required fields for an existing P-3 activity that a P-3 coordinator has created in Grouptrail. This process is required in order to accurately capture P-3 data in Grouptrail reports

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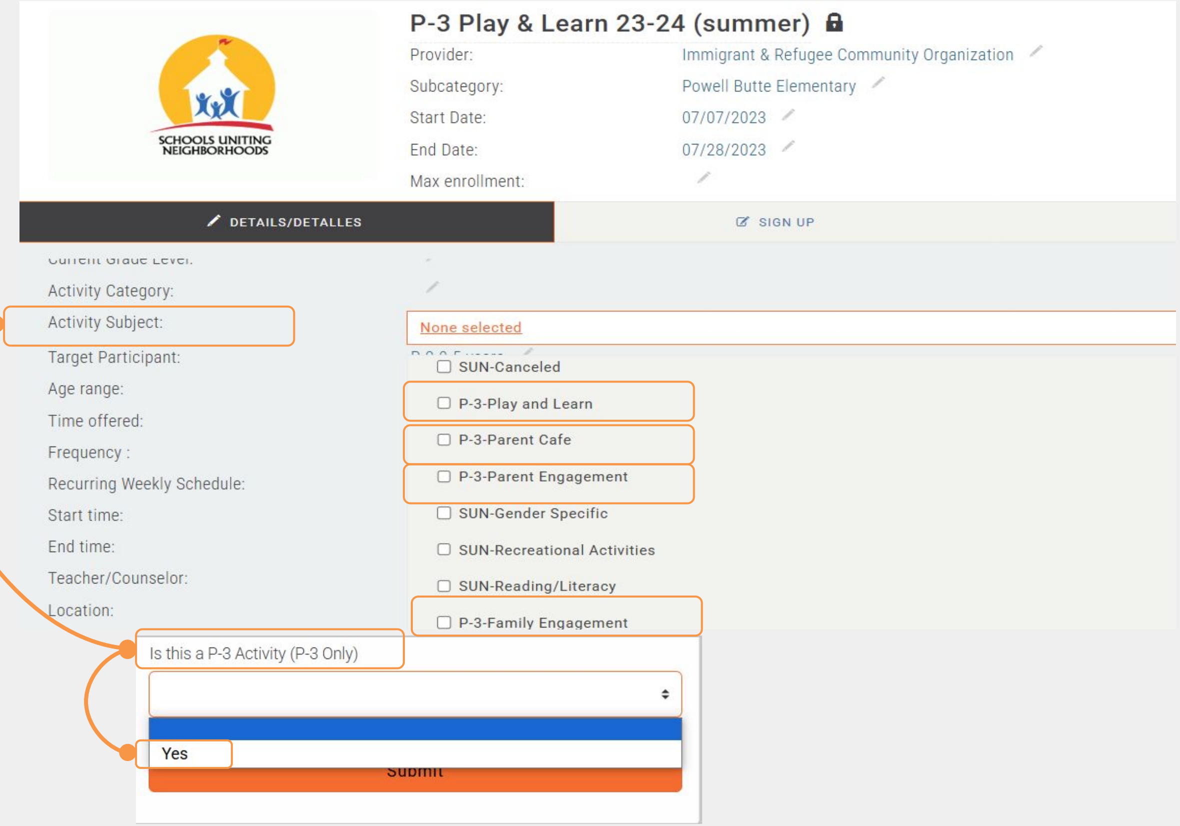
Updating required fields for existing P-3 activities

To **update** the **required fields** for **existing** P–3 activities the first step is to locate the activity that you would like to update this information for

Once you have found the P-3 activity you need to update this information for, **select** the **activity profile**

Once you have identified your P-3 activity you need to update the required fields for, the next step is to locate the required P-3 activity fields to update which will be:

- **Activity Subject**
- **Is this a P-3 Activity (P-3 Only)**



Important Note:
When updating activity subjects for your existing P-3 activity, please select the correct subject for your P-3 activity:

-) **Example 1**: The P-3-Play and Learn activity subject should be the only option selected if you're creating a P-3-Play and Learn activity

-) **Example 2**: The P-3-Parent Cafe activity subject should be the only option selected if you're creating a P-3-Parent Cafe activity

-) **Example 3**: The activity subjects for P-3-Parent Engagement and P-3-Family Engagement should be the correct fields selected for any activity that is not directly a Parent Cafe or Play and Learn activity

O&O P-3 Progress Summary Report - (Excel Version 2024)

Please Note:

This section reviews how to generate and run the “O&O P-3 Progress Summary Report (Excel Version 2024) in Grouptrail. This report is compatible with users that have an updated version of Excel 2024 and above

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O&O P-3 Progress Summary Report

Reporting Context:

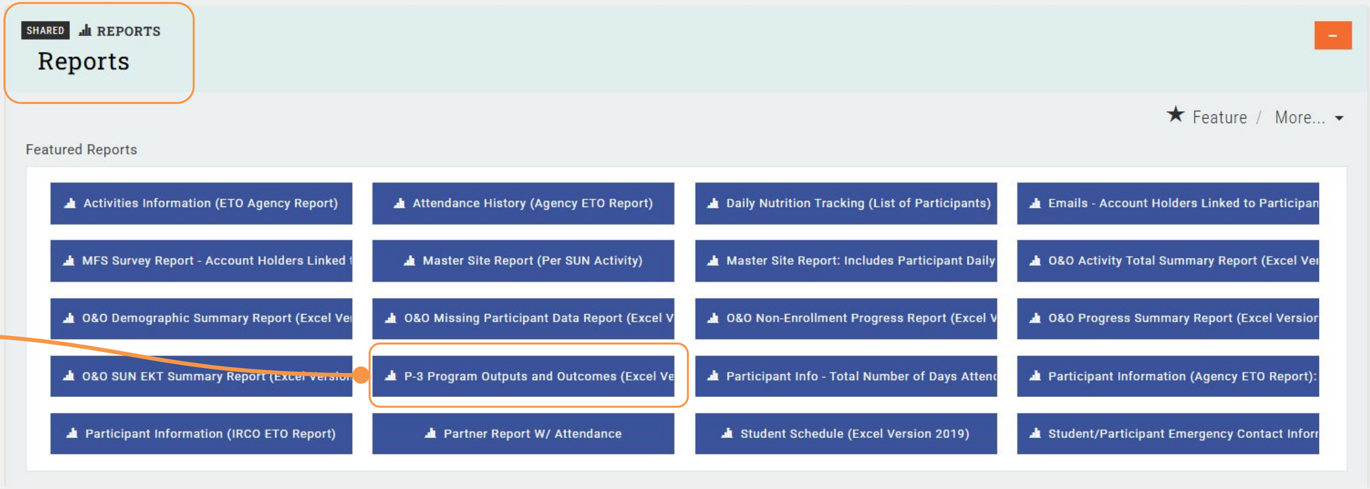
- This report in Grouptrail allows a user to check their current outputs in the system to understand the number of adults and children served for P-3 related activities
- This report includes three tabs that measure P-3 outputs
  - P-3 Overview Summary
  - P-3 Play & Learn Summary
  - P-3 Parent Cafe Summary
- The report will take a user anywhere between 30 seconds to one minute to download
- If a user has multiple school access and generates this report for a long date range then the report may download within 1 to 4 minutes
- This report contains Excel formulas meaning if a user clicks into a cell then it may break the data being viewed by the user
  - To avoid this issue, a user can copy and paste just the values in the report into a new Excel tab or Google Sheets
  - Here is quick YouTube video to demonstrate how to copy and paste values without formulas: https://www.youtube.com/watch?v=E2qBofQrAXY

Step 1) Click on O&O P-3 Progress Summary Report

To Generate the O&O P-3 Progress Summary Report, go to your **Report Tracker** and click the correct report:

O&O P-3 Progress Summary Report (Excel Version 2024)

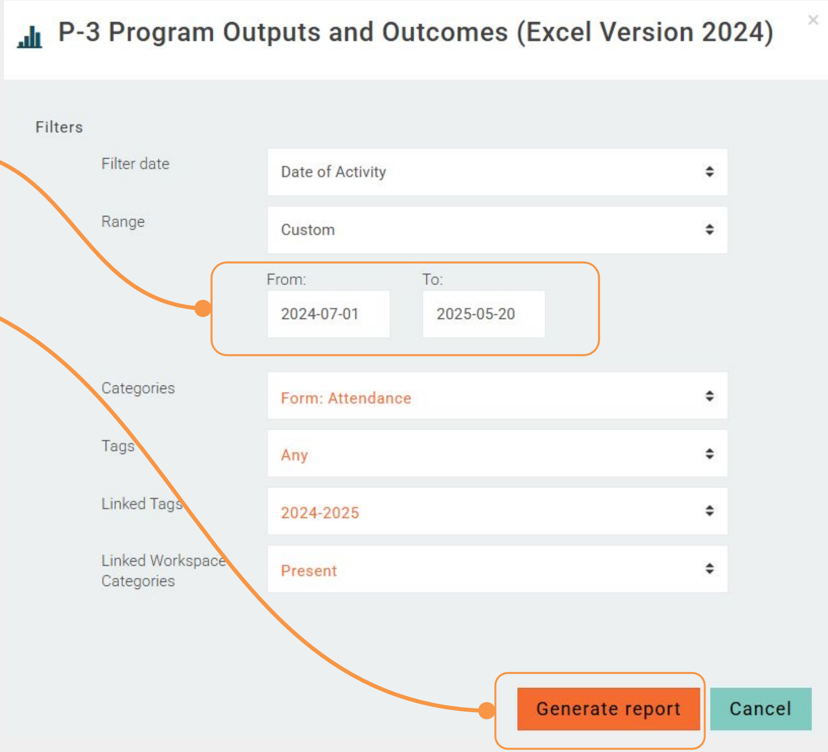
If you hover your mouse over the appropriate report, you will see the full description title name

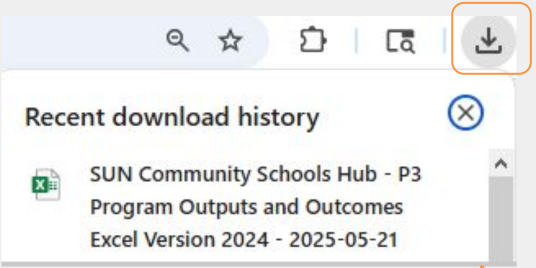


Step 2) Enter the date range you want to look at and click Generate report. Open the report in Excel.

Fill out the report prompt section by putting the **start** and **end** date you would like to generate data for **(Example: Just 1st, 2024 to May 20th, 2025)**

Once your dates are enter, click **"Generate Report"**





Please Note: You do not need to change any of the filter options on the report prompt. You will only need to enter a "Start and End Date in the **date range fields**"

Find the Excel report in your **"downloads"** on your desktop and open the excel spreadsheet

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Step 3) Review your data. Tab 1

Once you have open the report, you will see calculations happening on the report. Please allow time for the report to process the calculations **(bottom right hand corner)**

This report will contain three different progress tabs

The first tab is labeled
“P-3 Overview Summary”

In this tab contains the following information:

-) Site Names(s)
(located in column A)

-) **Total P-3 enrolled activities**
(located in column B)

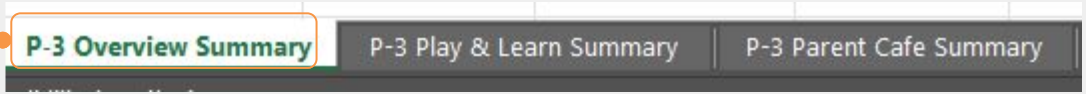
-) Total Participants Served
(located in column C)

-) Total Children (0-5) Served
(located in column D)

-) **Total P-3 Students (Kinder - 3rd) Served**
(located in column E)

-) **Total P-3 Adults (18+) Served**
(Located in column F)

	A	B	C	D	E	F
1	P-3 Sites	Total P-3 Activities	Total P-3 Participants	Total P-3 Children (0-5) Served	Total P-3 Students (Kinder - 3rd Grade) Served	Total P-3 Adults (18+) Served
2	[redacted]	9	130	67	0	63
3						
4						
5						
6						
7						
8						



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Step 4) Review your data. Tab 2

The second tab in this report is labeled **"P-3 Play & Learn Summary"**

In this tab contains the following information:

-) Site Names(s)
(located in column A)

-) **Total Participants served at least once for P-3-Play and Learn Activities**
(located in column B)

-) Number of participants that have been "present" at least 5 or more times for P-3-Play and Learn activities
(located in column C)

	A	B	C	D
1	P-3 Sites	40 participants present at least once for Play and Learn	20 participants present 5 or more times for Play and Learn	
2	[redacted]	114	112	
3				
4				
5				
6				

P-3 Overview Summary | P-3 Play & Learn Summary | P-3 Parent Cafe Summary

Grouptrail

Step 5) Review your data. Tab 3

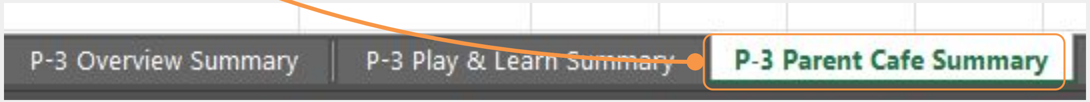
The third tab in this report is labeled **“P-3 Parent Cafe Summary”**

In this tab contains the following information:

-) Site Names(s)
(located in column A)

-) **Total Adults (18+) served at least once for P-3-Parent Cafe activities**
(located in column B)

	A	B	D
1	P-3 Sites	30 adults (18+) present at least once for Parent Café	
2	[redacted]	28	
3			
4			



O&O P-3 Demographic Summary Report (Excel Version 2024)

Please Note:
This section reviews how to generate and run the “O&O P-3 Demographic Summary Report (Excel Version) in Grouptrail. This report is compatible with users that have an updated version of Excel 2024 and above

Grouptrail

O&O P-3 Demographic Summary Report

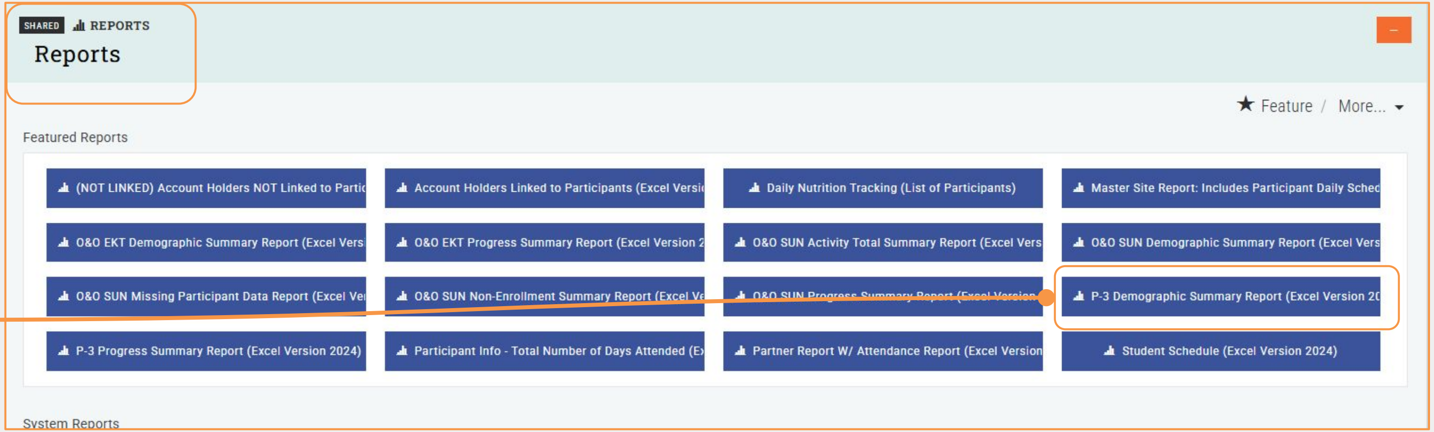
Reporting Context:

- This report in Grouptrail provides a breakdown of inclusive identities based on the P-3 participants a site is serving
- Users should keep in mind that inclusive identity totals will not equal 100%
- To view entire break down of inclusive identities, users should use the scroll bar to locate more data from left to right
- Included in the report will be the following information: Declined to Answer, Participants of Color and Primary Language Other Than English
- The report will take a user anywhere between 30 seconds to one minute to download
- If a user has multiple school access and generates this report for a long date range then the report may deliver via email to the user within 10 to 15 minutes
- This report contains Excel formulas meaning if a user clicks into a cell then it may break the data being viewed by the user
    - To avoid this issue, a user can copy and paste just the values in the report into a new Excel tab or Google Sheets
    - Here is quick YouTube video to demonstrate how to copy and paste values without formulas: https://www.youtube.com/watch?v=E2qBofQrAXY

Step 1) Click on O&O P-3 Demographic Summary Report

To Generate the O&O P-3 Demographic Summary Report, go to your **Report Tracker** and click the correct report:

O&O P-3 Demographic Summary Report (Excel Version 2024)



If you hover your mouse over the appropriate report, you will see the full description title name

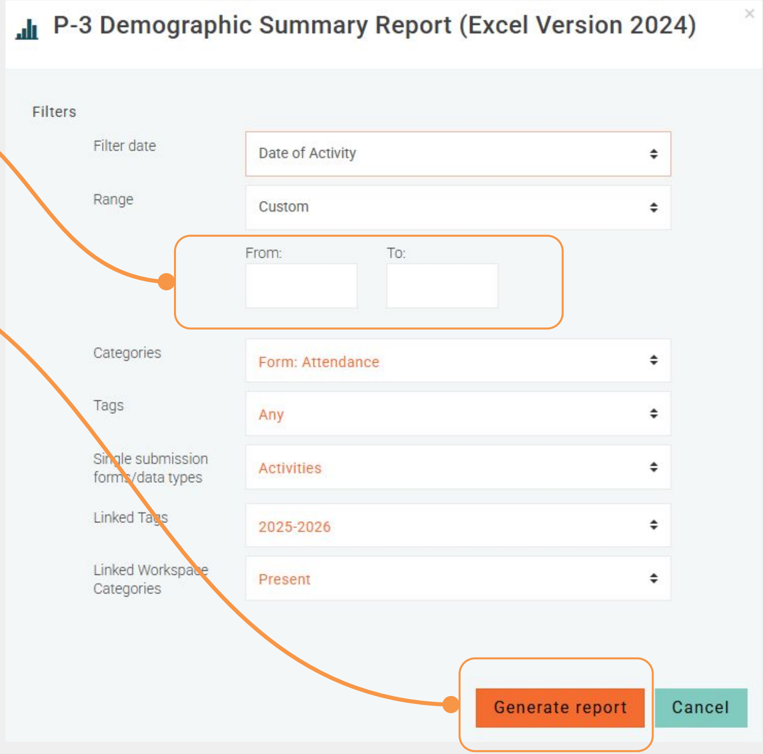
Step 2) Enter the Date Range you want to look at and click Generate Report.

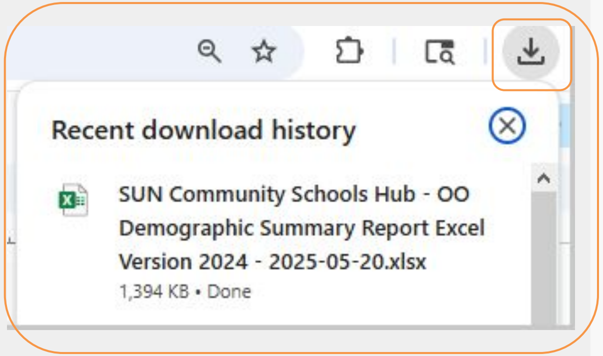
Fill out the report prompt section by putting the **start** and **end** date you would like to generate data for **(Example: Just 1st, 2024 to May 20th, 2025)**

Once your dates are enter, click **"Generate Report"**

Find the Excel report in your **"downloads"** on your desktop and open the excel spreadsheet

Please Note: You do not need to change any of the filter options on the report prompt. You will only need to enter a "Start and End Date in the **date range fields**"





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Step 3) Review your Demographic data.

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y
	Total Served			African						Asian						Black / African American						Hispanic / L		
Site	Children (0-5)	Students (Kinder - 3rd	Adults (18+)	Children (0-5)		Students (Kinder - 3rd Grade)		Adults (18+)		Children (0-5)		Students (Kinder - 3rd Grade)		Adults (18+)		Children (0-5)		Students (Kinder - 3rd Grade)		Adults (18+)		Children (0-5)		Students (Kir 3rd Grad
	N	N	N	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N
[redacted]	38	5	52	5	13.2%	0	0.0%	3	5.8%	18	47.4%	2	40.0%	27	51.9%	4	10.5%	1	20.0%	3	5.8%	11	28.9%	1 20.

Once you have open the report, you will see calculations happening on the report, please allow time for the report to process the calculations **(bottom right hand corner)**

This report will contain an **inclusive identity breakdown** by **children (0-5), student (K-3rd)** and **adult (18+)** participants

This report will contain the **number** of children, students and adults who selected the appropriate inclusive identity along with the **percentage**

To see more breakdown of site data, a user should scroll to the right in the report tab

O&O P-3 Participant Info - Total Number of P-3 Activities Attended Report (Excel Version 2021)

Please Note:
This section reviews how to generate and run the "O&O P-3 Participant Info - Total Number of P-3 Activities Attended Report (Excel Version 2021) in Grouptrail. This report is compatible with users that have an updated version of Excel 2021 and above

Step 1) Click on O&O P-3 Participant Info - Total Number of P-3 Activities Attended Report

To Generate the O&O P-3 Total Activities Report, go to your **Report Tracker** and click the correct report:

O&O P-3 Participant Info - Total Number of P-3 Activities Attended Report (Excel Version 2024)

If you hover your mouse over the appropriate report, you will see the full description title name

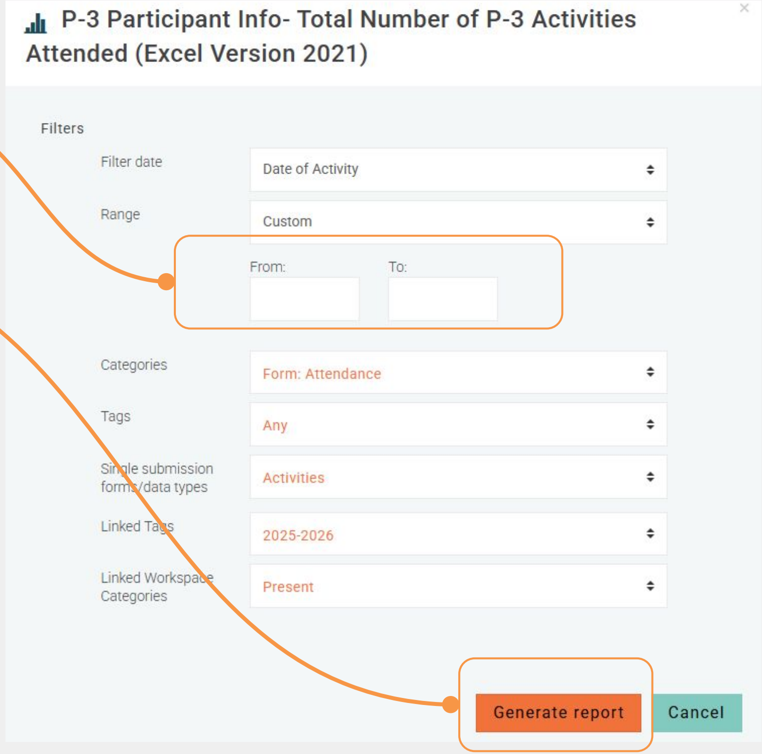
Step 2) Enter the Date Range you want to look at and click Generate Report.

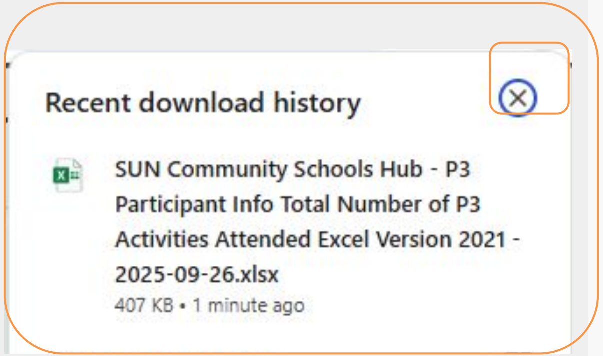
Fill out the report prompt section by putting the **start** and **end** date you would like to generate data for **(Example: Just 1st, 2024 to May 20th, 2025)**

Once your dates are enter, click **"Generate Report"**

Find the Excel report in your **"downloads"** on your desktop and open the excel spreadsheet

Please Note: You do not need to change any of the filter options on the report prompt. You will only need to enter a "Start and End Date in the **date range fields**"





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Step 3) Review Total Number of Days and Hours.

	Agency Name	School Name	Client Unique Id / Workspace Number	SSID Number	Name	Enrollment Status	P-3 School Year	Risk Factors (Y/N)	Number of Days Attended: TOTAL	Number of Hours ATTENDED: TOTAL	Inclusive Ider
1											
2	Metropolitan Family Service	Fairview Elementary	[illegible]		[illegible]		2024-2025, 2025-2026	No	36	118.7	Latino/Hispanic
3	Metropolitan Family Service	Fairview Elementary	[illegible]		[illegible]		2024-2025, 2025-2026	No	80	243.8	Declined to Answer
4	Metropolitan Family Service	Fairview Elementary	[illegible]		[illegible]		2024-2025, 2025-2026	No	47	164.3	Latino/Hispanic
5	Metropolitan Family Service	Fairview Elementary	[illegible]		[illegible]	Other	2024-2025, 2025-2026	No	36	107.5	Latino/Hispanic
6	Metropolitan Family Service	Fairview Elementary	[illegible]		[illegible]	Other	2024-2025, 2025-2026	No	48	146.5	Latino/Hispanic
7	Metropolitan Family Service	Fairview Elementary	[illegible]		[illegible]	Other	2024-2025, 2025-2026	No	27	84.0	Latino/Hispanic
8	Metropolitan Family Service	Fairview Elementary	[illegible]		[illegible]		2024-2025, 2025-2026	No	28	100.0	Latino/Hispanic
9	Metropolitan Family Service	Fairview Elementary	[illegible]		[illegible]		2024-2025, 2025-2026	No	28	99.3	Latino/Hispanic

Once you have open the report, you will see calculations happening on the report, please allow time for the report to process the calculations **(bottom right hand corner)**

This report will contain all the P-3 participants with recorded attendance for the generated dates pulled

Staff Workflow:
Creating a Personalized P-3 Participant Tracker

Please Note:

This process reviews how to create a personalized P-3 participant tracker in Grouptrail to display all of your P-3 participants into one place. This process will allow you to have specific trackers for your P-3 data

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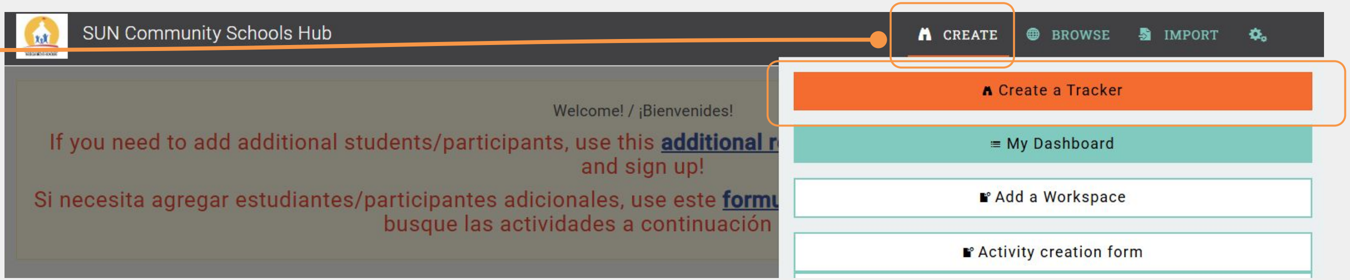
Step 1) Hover and click

1. Hover over **Create,** then click **“create a Tracker”**



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Step 2) Select and click:

1. Select the option of **"Search Filter"**, then click **"Choose Options"**

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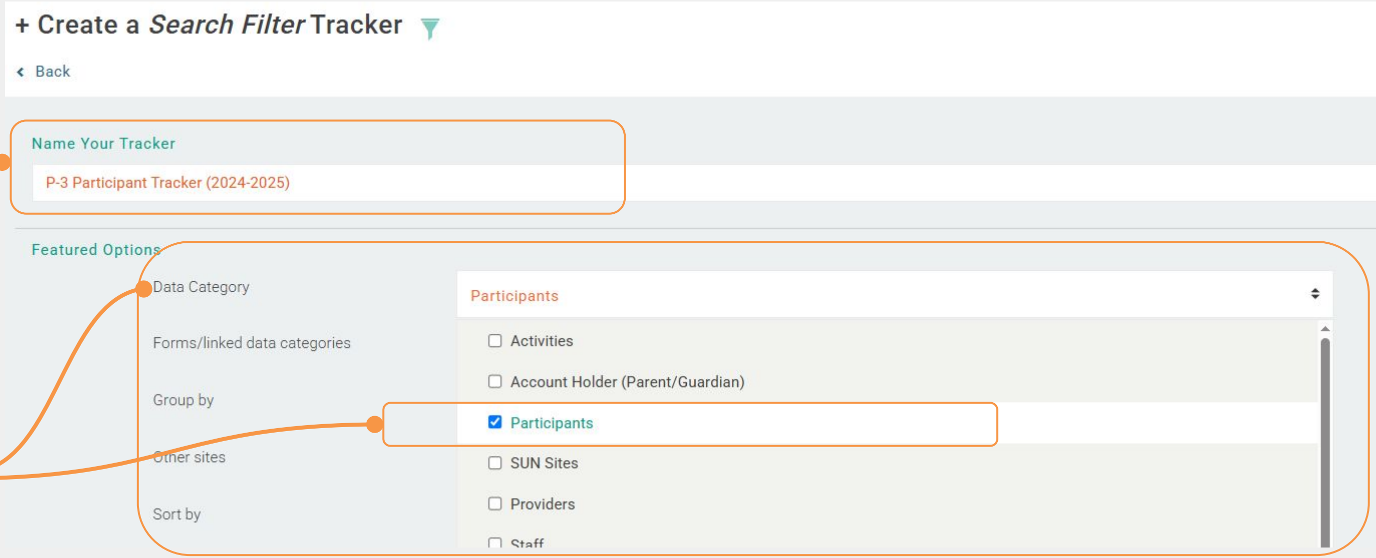
Step 3) Create a name and select data category

Step 1: Name your Tracker: **“P-3 Participant Tracker** (Add Current School in the parentheses)

- You can name your tracker anything you want for the year that you would like to view your participants for

Step 2: Change the **“data category”** the appropriate option you are creating a tracker for

In this case, you will select **“participants”**



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Step 4) Choose details to display the data you want in the Tracker

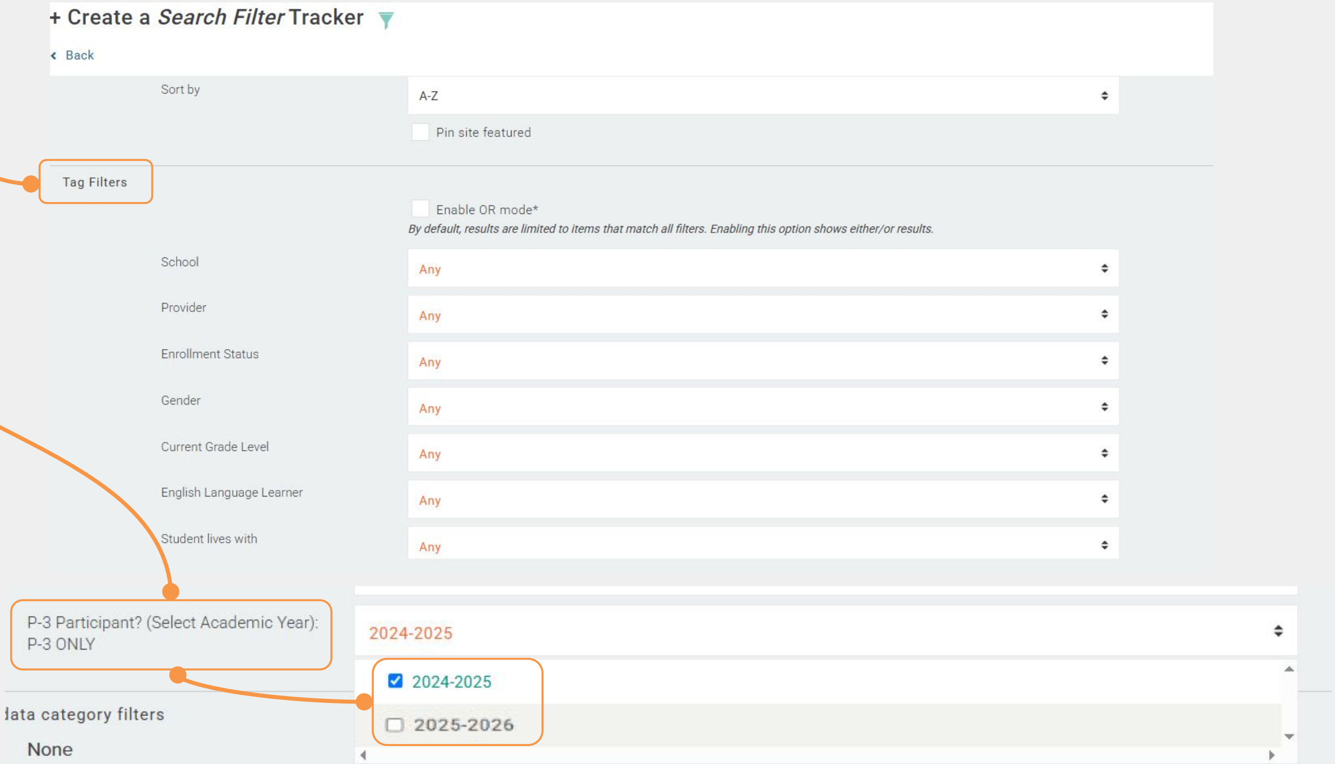
After you change the "data category" to participants scroll down and find a section called: **"Tag Filters"**

Once you have found that section, find the field called **"P-3 Participant? (Select Academic Year):**

And click the **current academic year** that you would like to create the tracker for

This field will be located on the bottom for this section

If you cannot find the field, please click the green + button which will add more fields to select



Step 5) Choose your Display options and Add to Dashboard

Once you have selected the P-3 participant field in the slide prior, scroll all the way to the bottom until you find the last two sections called:

- **Display Options**
- **Publish Options**

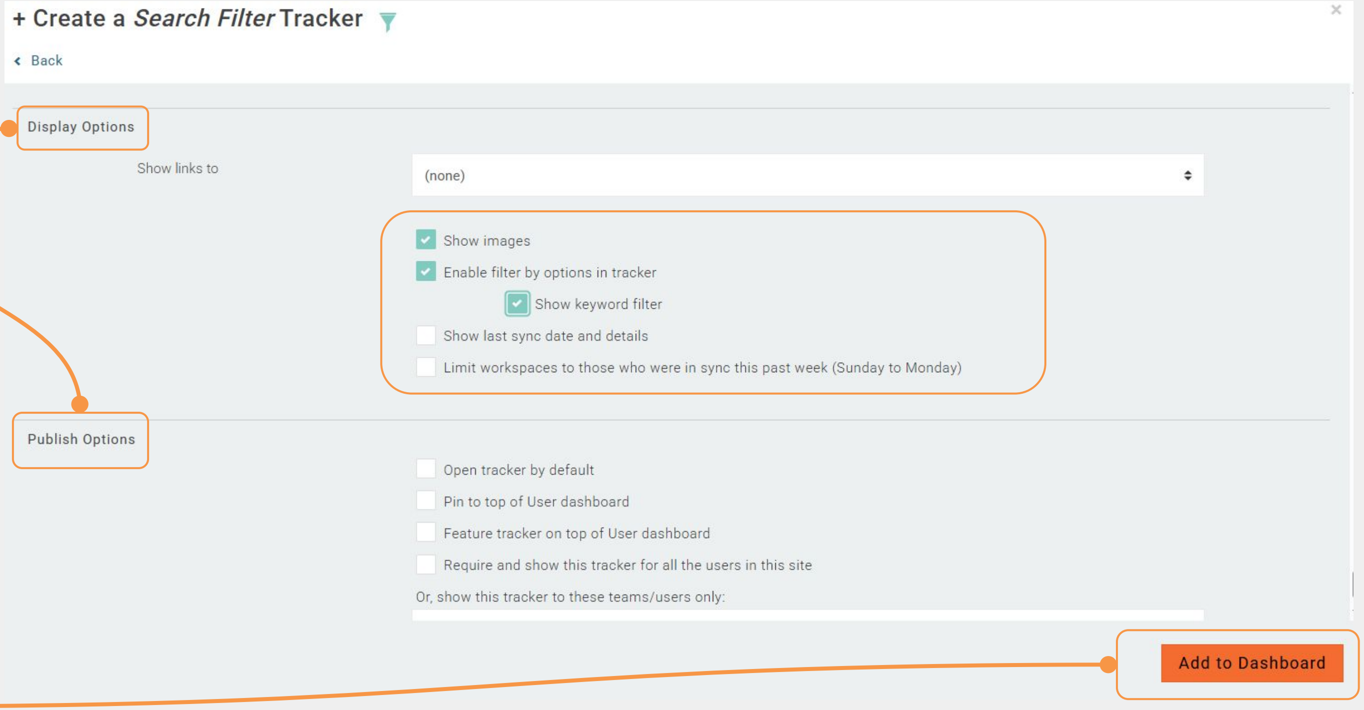
In **Display Options** section, select the following:

- Show Images
- Enable Filter
- Show Keyword Filter

In the **Publish Options** section, select any option that makes sense for your access (this is optional)

- Open tracker by default
- Pin to top of user dashboard

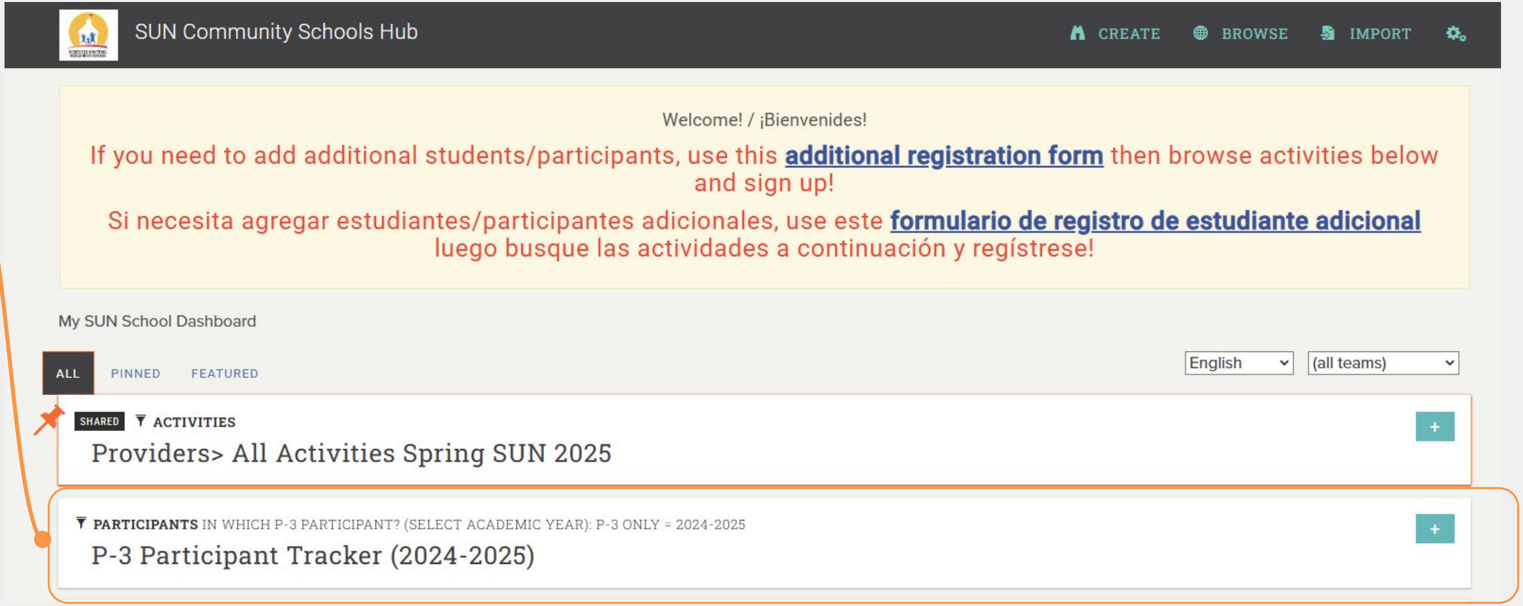
Once done, click **"Add to Dashboard"**



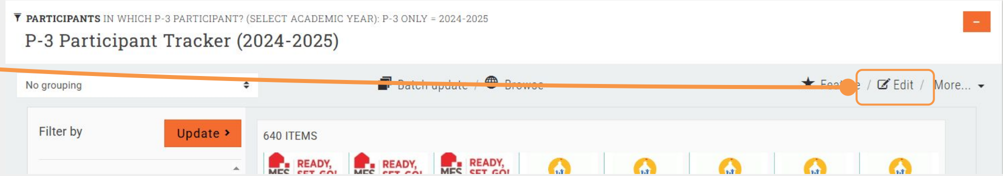
Grouptrail

Step 6) Confirm your tracker was created, and how to edit

Once you have added the tracker to your dashboard, you will see it appear on your home screen



If you need to update, delete or change your tracker, open your tracker and click **"Edit"** on the right side



Staff Workflow:
Creating a Personalized P-3 Activity Tracker

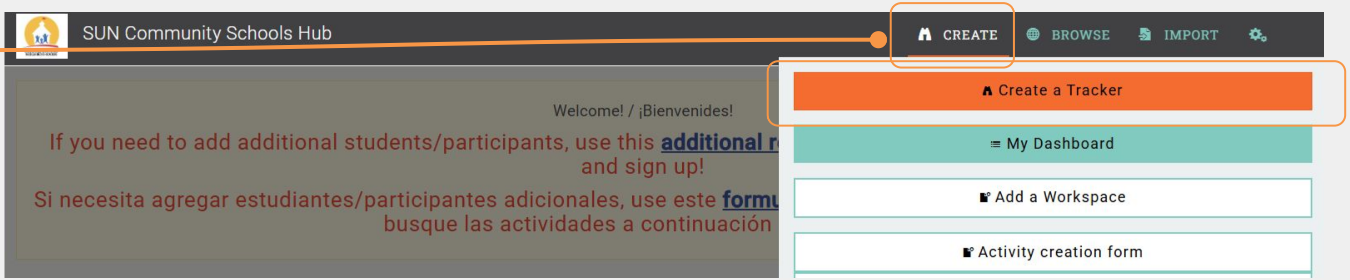
Please Note:

This process reviews how to create a personalized P-3 activity tracker in Grouptrail to display all of your P-3 activities into one place. This process will allow you to have specific trackers for your P-3 data

Grouptrail

Step 1) Select Create a Tracker

1. Hover over **Create,** then click **“create a Tracker”**



Grouptrail

Step 2) Select and click:

1. Select the option of **"Search Filter"**, then click **"Choose Options"**

Grouptrail

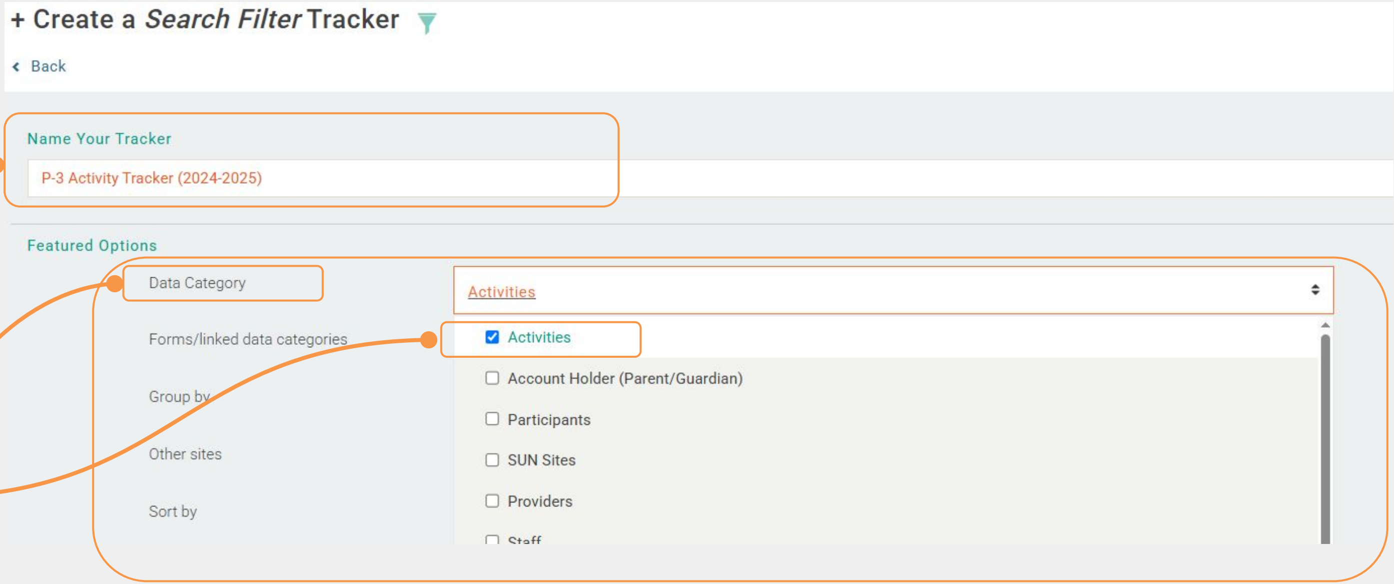
Step 3) Create a name and select data category

Step 1: Name your Tracker: **“P-3 Activity Tracker** (Add Current School in the parentheses)

- You can name your tracker anything you want for the year that you would like to view your activities for

Step 2: Change the **“data category”** the appropriate option you are creating a tracker for

In this case, you will select **“activities”**



Grouptrail

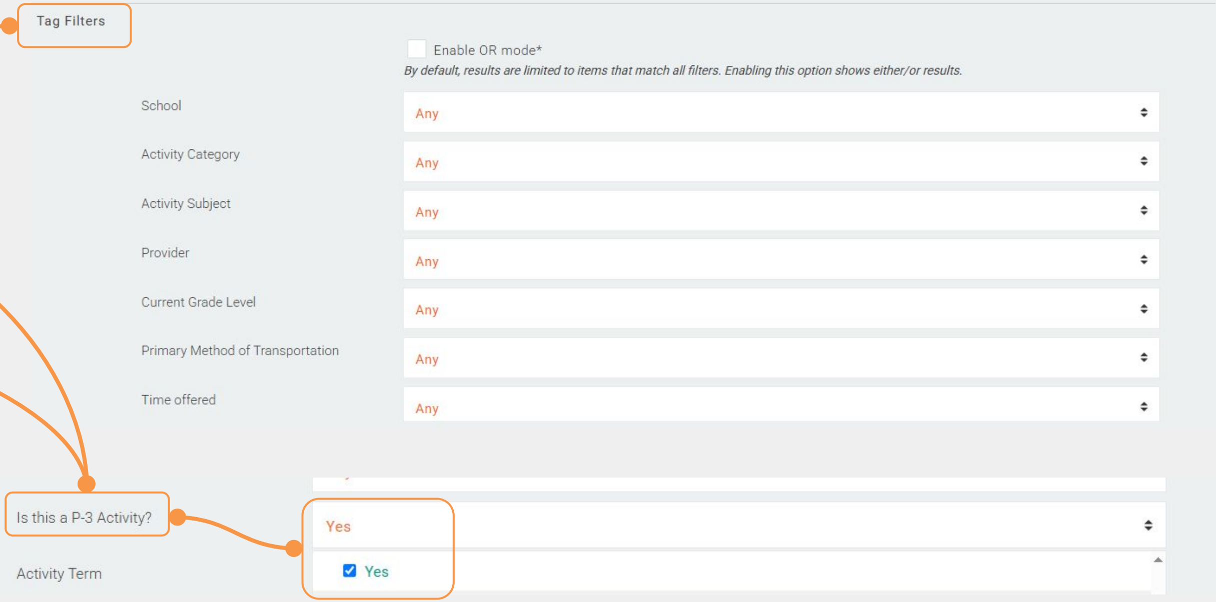
Step 4) Check the P-3 Activity box

After you change the “data category” to activities scroll down and find a section called: **“Tag Filters”**

Once you have found that section, find the field called **“Is this a P-3 Activity?**

And select the option of **“Yes”**

This field will be located on the bottom for this section



Grouptrail

Step 5) Make updates to the Date Filter section

After you have updated the "Tag Filter" section scroll down and find a section called: **"Date Filter"**

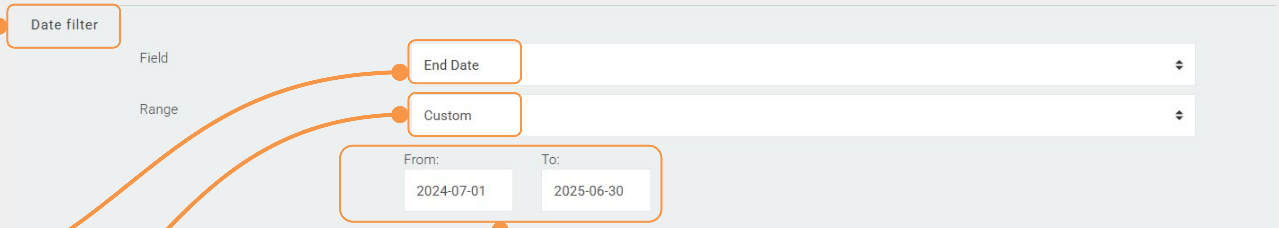
Once you have found that section, update the following:

- **Field**
- **Range**
- **Dates**

For the section of "**Field**" choose the date selection of "**End Date**"

For the section of "**Range**" choose the range selection to "**Custom**"

For the section of "**Dates**" choose the range to **July 1st - June 30th** (these dates should reflect the current school year we are in)



Grouptrail

Step 6) Choose your Display options and Add to Dashboard

Once you filled out the date field section in the previous slide, scroll all the way to the bottom until you find the last two sections called:

- **Display Options**
- **Publish Options**

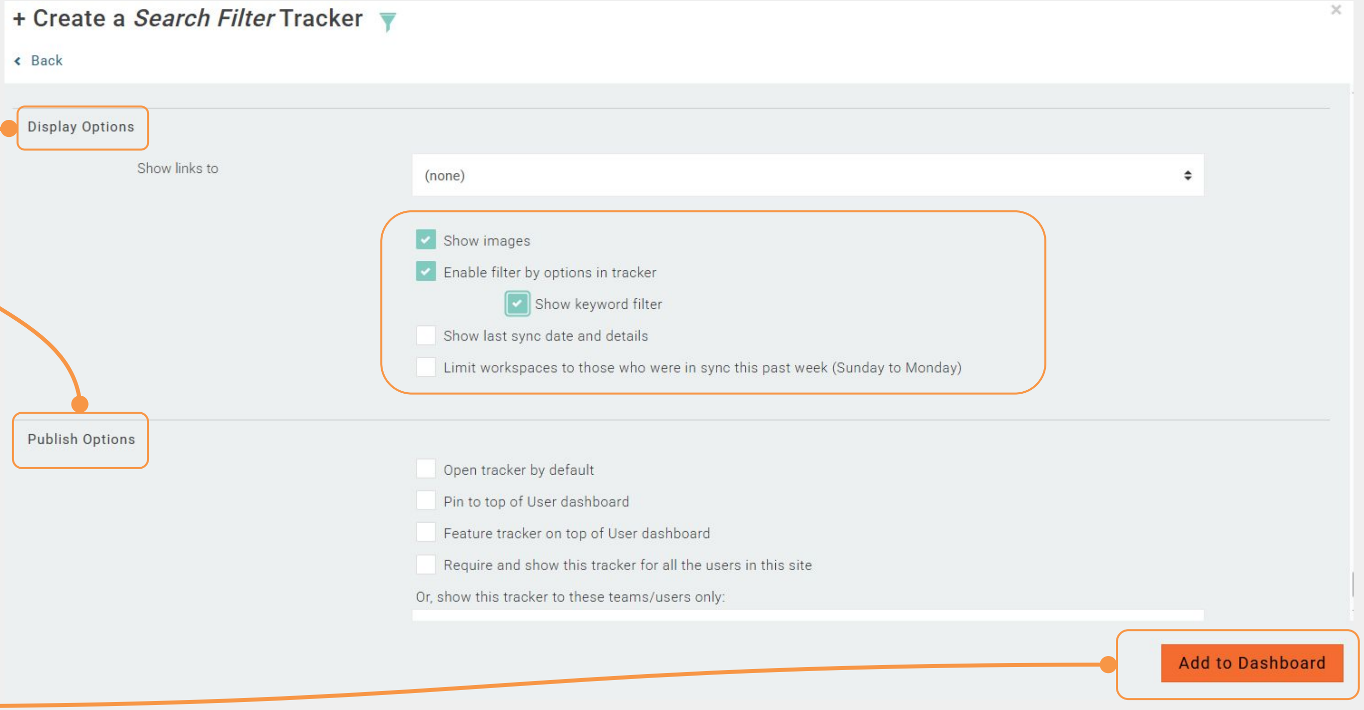
In **Display Options** section, select the following:

- Show Images
- Enable Filter
- Show Keyword Filter

In the **Publish Options** section, select any option that makes sense for your access (this is optional)

- Open tracker by default
- Pin to top of user dashboard

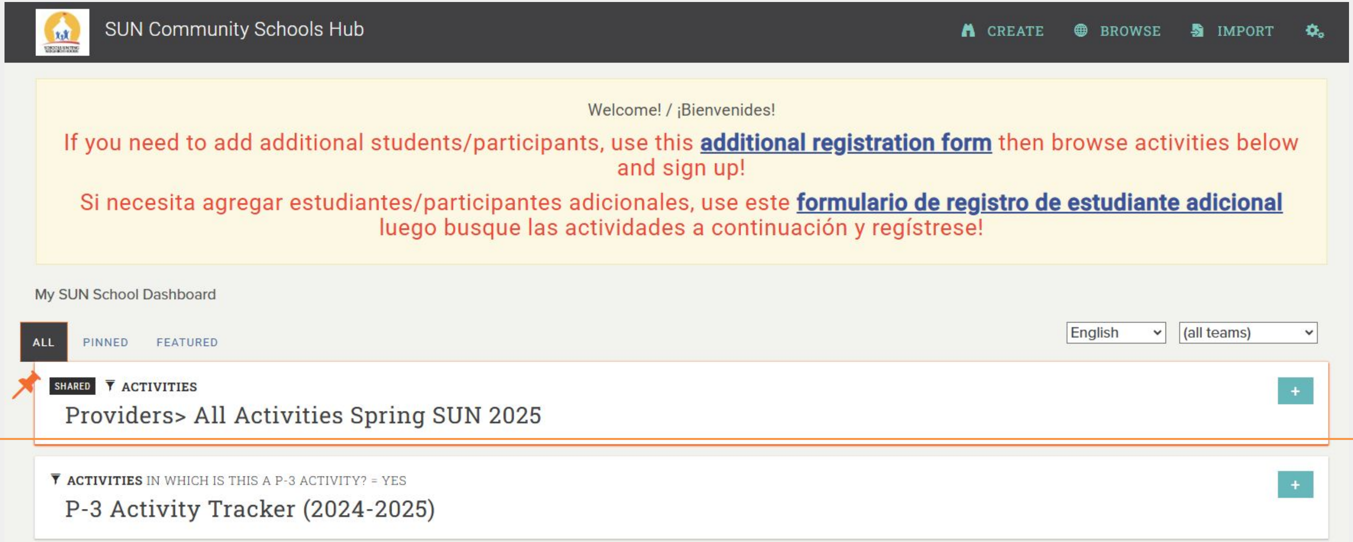
Once done, click **"Add to Dashboard"**



Grouptrail

Step 7) Confirm your Tracker was created, and how to edit

Once you have added the tracker to your dashboard, you will see it appear on your home screen



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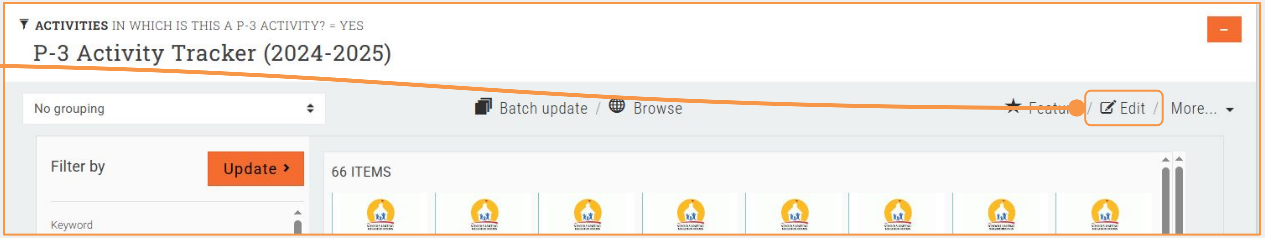

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Thank you!

Multnomah County

Youth & Family Services

SUN Service System Data Team

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