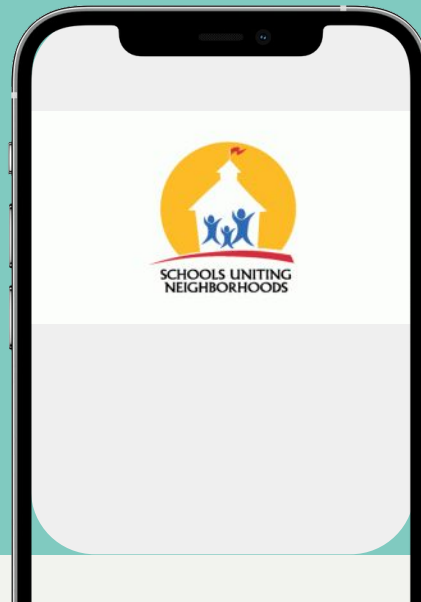




Grouptrail P-3 Overview

Training Handbook for P-3 Programs 2025-26





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 Grouptrail questions, comments or concerns use [this form](https://forms.gle/sneS5RraGf7fpTau5)**
 - <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

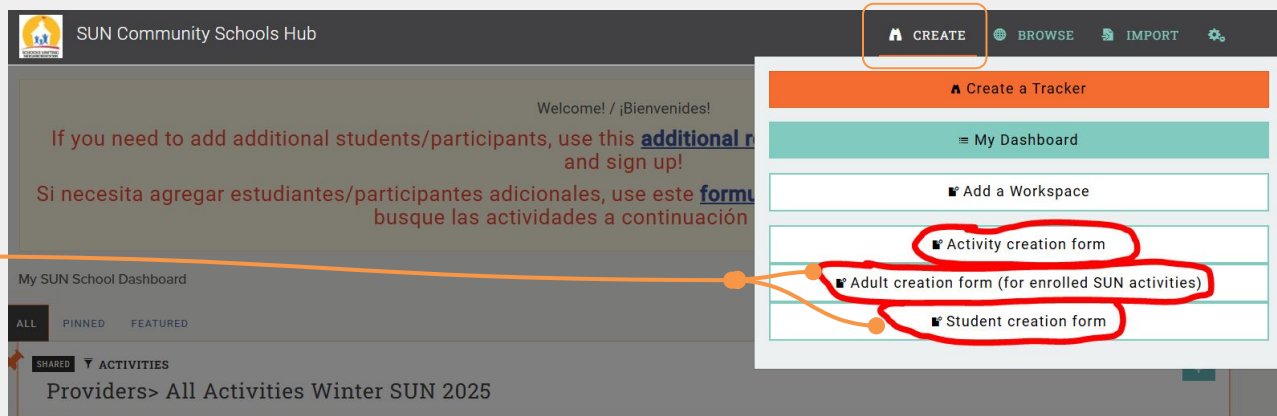
(Through the one-page creation forms)

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

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”



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 **create another participant**

Student creation form

This creation form can be used to create student participants for enrolled SUN activities

Name *

SUN Site *

Type of Participant

Current Grade Level *

Date of Birth *

mm/dd/yyyy

Gender *

If Other Gender, Specify

P-3 Participant? (Select Academic Year): P-3 ONLY

None selected

☒ 2024-2025

☐ 2025-2026

Secondary Method of Transportation

List authorized people for pick-up

Did child attend Head Start?

If yes, what was the name of the Head Start?

Did child attend preschool or kindergarten?



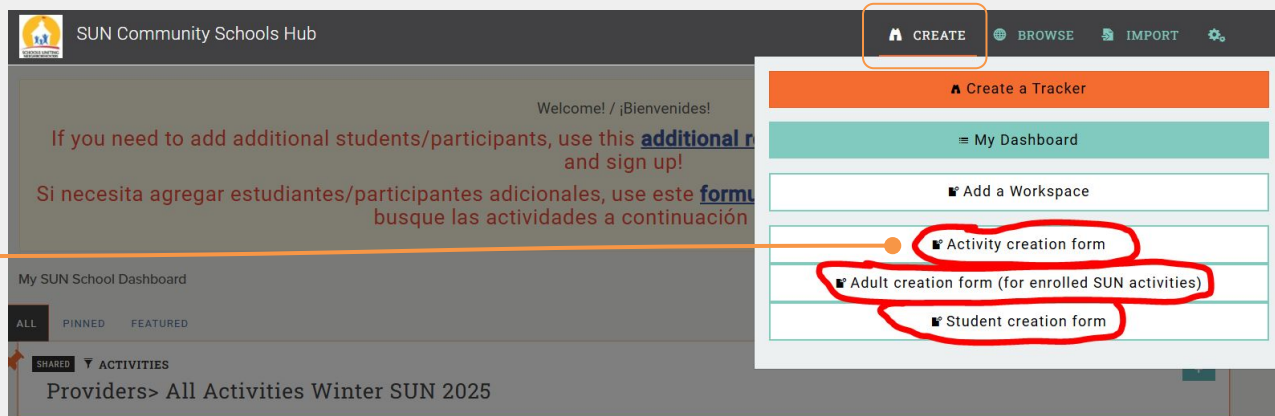
Staff Workflow: Creating a New P-3 activity (Through the one-page creation forms)

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

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:

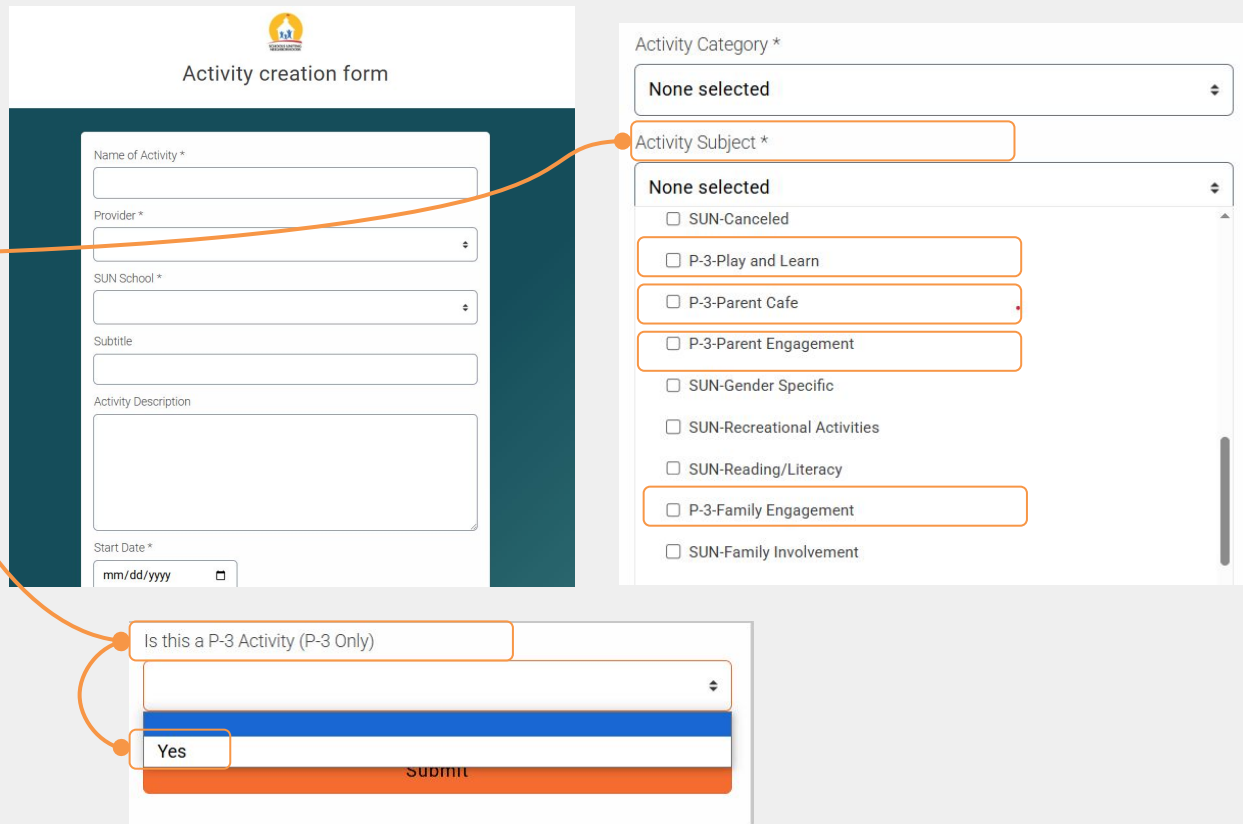
- **Activity Subject**
- **Is this a P-3 Activity (P-3 Only)**

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



Activity creation form

Name of Activity *

Provider *

SUN School *

Subtitle

Activity Description

Start Date *

mm/dd/yyyy

Activity Category *

None selected

Activity Subject *

None selected

☐ SUN-Canceled

☐ P-3-Play and Learn

☐ P-3-Parent Cafe

☐ P-3-Parent Engagement

☐ SUN-Gender Specific

☐ SUN-Recreational Activities

☐ SUN-Reading/Literacy

☐ P-3-Family Engagement

☐ SUN-Family Involvement

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

☒ Yes

Submit



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

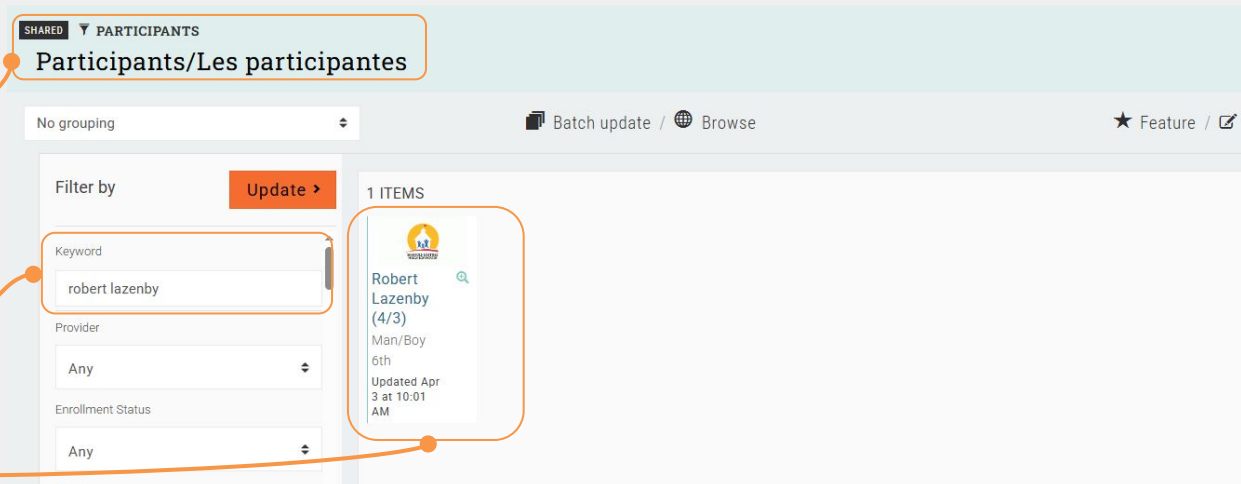
Step 1) Search up the participant and click their profile

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**



The screenshot shows the 'PARTICIPANTS' section of the Grouptrail interface. The title 'Participants/Les participantes' is highlighted with an orange box. Below it, a 'Filter by' section contains three fields: 'Keyword' (with 'robert lazenby' entered), 'Provider' (set to 'Any'), and 'Enrollment Status' (set to 'Any'). An orange box highlights the 'Keyword' field. To the right of the filters, a list of '1 ITEMS' is shown, featuring a profile card for 'Robert Lazenby (4/3)' with a magnifying glass icon. An orange box highlights this profile card. At the top right of the interface, there are links for 'Batch update' and 'Browse', and a 'Feature' link.

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

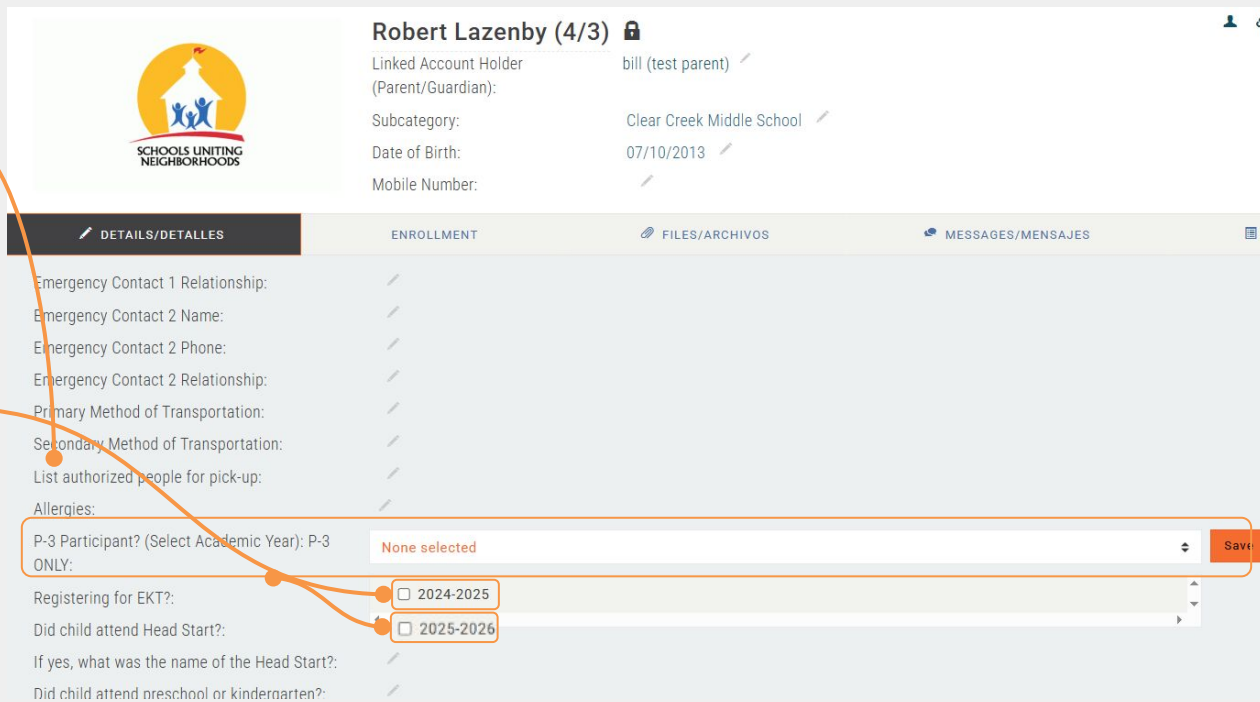
Once you have found the field, please update it to the new academic year listed

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



Robert Lazenby (4/3) 

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

Subcategory: Clear Creek Middle School 

Date of Birth: 07/10/2013 

Mobile Number: 

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

Emergency Contact 1 Relationship: 

Emergency Contact 2 Name: 

Emergency Contact 2 Phone: 

Emergency Contact 2 Relationship: 

Primary Method of Transportation: 

Secondary Method of Transportation: 

List authorized people for pick-up: 

Allergies: 

P-3 Participant? (Select Academic Year): P-3 ONLY: None selected  Save

Registering for EKT?: ☐ 2024-2025 

Did child attend Head Start?: ☐ 2025-2026 

If yes, what was the name of the Head Start?: 

Did child attend preschool or kindergarten?: 



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



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

Updating required fields for existing P-3 activities

P-3 Play & Learn 23-24 (summer) 🔒

Provider: Immigrant & Refugee Community Organization ✓

Subcategory: Powell Butte Elementary ✓

Start Date: 07/07/2023 ✓

End Date: 07/28/2023 ✓

Max enrollment: ✓

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

Activity Category:

Activity Subject:

Target Participant:

Age range:

Time offered:

Frequency :

Recurring Weekly Schedule:

Start time:

End time:

Teacher/Counselor:

Location:

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

Activity Subject:

None selected

☐ SUN-Canceled

☐ P-3-Play and Learn

☐ P-3-Parent Cafe

☐ P-3-Parent Engagement

☐ SUN-Gender Specific

☐ SUN-Recreational Activities

☐ SUN-Reading/Literacy

☐ P-3-Family Engagement

Submit



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

O&O P-3 Progress Summary Report

Reporting Context:

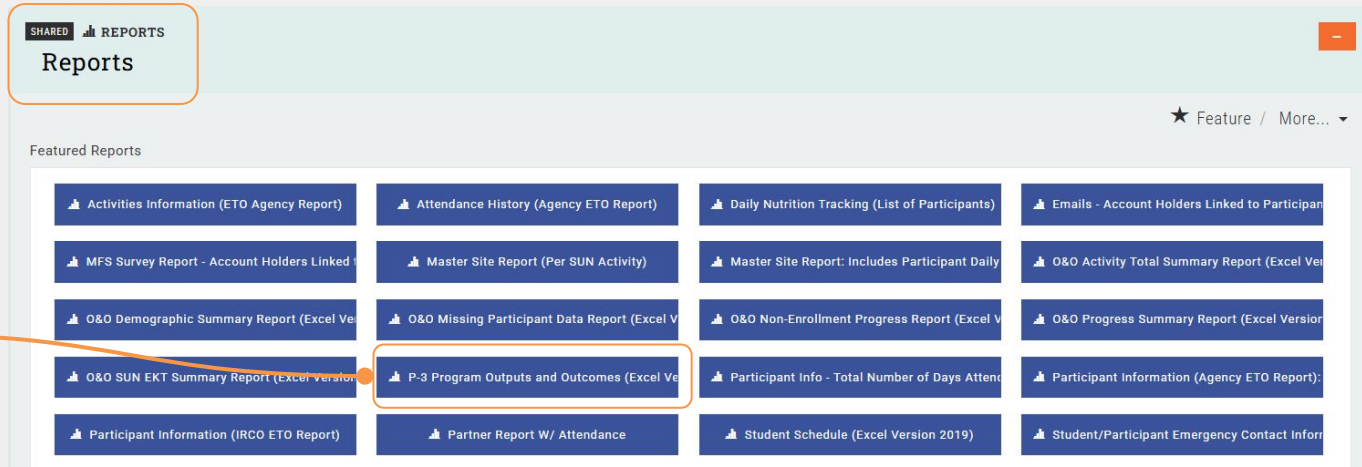
- This report in Grouptrail allows a user to check their current outputs in the system to understand the number of adults and children served for P-3 related activities
- This report includes three tabs that measure P-3 outputs
 - P-3 Overview Summary
 - P-3 Play & Learn Summary
 - P-3 Parent Cafe Summary
- 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



SHARED  REPORTS

Reports

★ Feature / More... ▼

Featured Reports

 Activities Information (ETO Agency Report)	 Attendance History (Agency ETO Report)	 Daily Nutrition Tracking (List of Participants)	 Emails - Account Holders Linked to Participant
 MFS Survey Report - Account Holders Linked	 Master Site Report (Per SUN Activity)	 Master Site Report: Includes Participant Daily	 O&O Activity Total Summary Report (Excel Version 2024)
 O&O Demographic Summary Report (Excel Version 2024)	 O&O Missing Participant Data Report (Excel Version 2024)	 O&O Non-Enrollment Progress Report (Excel Version 2024)	 O&O Progress Summary Report (Excel Version 2024)
 O&O SUN EKT Summary Report (Excel Version 2024)	 P-3 Program Outputs and Outcomes (Excel Version 2024)	 Participant Info - Total Number of Days Attended	 Participant Information (Agency ETO Report)
 Participant Information (IRCO ETO Report)	 Partner Report W/ Attendance	 Student Schedule (Excel Version 2019)	 Student/Participant Emergency Contact Information

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**"


P-3 Program Outputs and Outcomes (Excel Version 2024)
×

Filters

Filter date

Date of Activity

Range

Custom

From:

2024-07-01

To:

2025-05-20

Categories

Form: Attendance

Tags

Any

Linked Tags

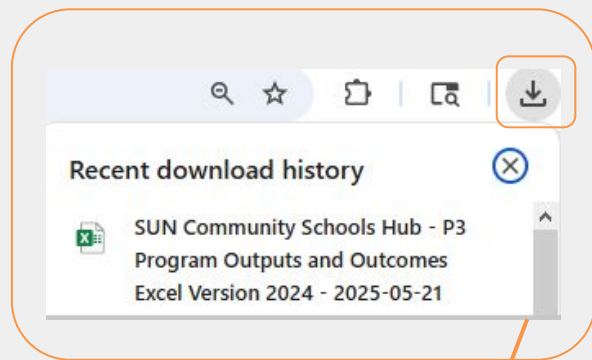
2024-2025

Linked Workspace Categories

Present

Generate report

Cancel



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

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**)

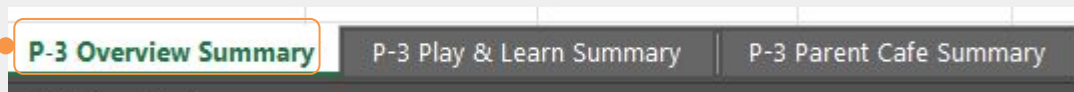
This report will contain three different progress tabs

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		9	130	67	0	63
3						
4						
5						
6						
7						
8						



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		114	112	
3				
4				
5				
6				

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

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		28	
3			
4			

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



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

O&O P-3 Demographic Summary Report

Reporting Context:

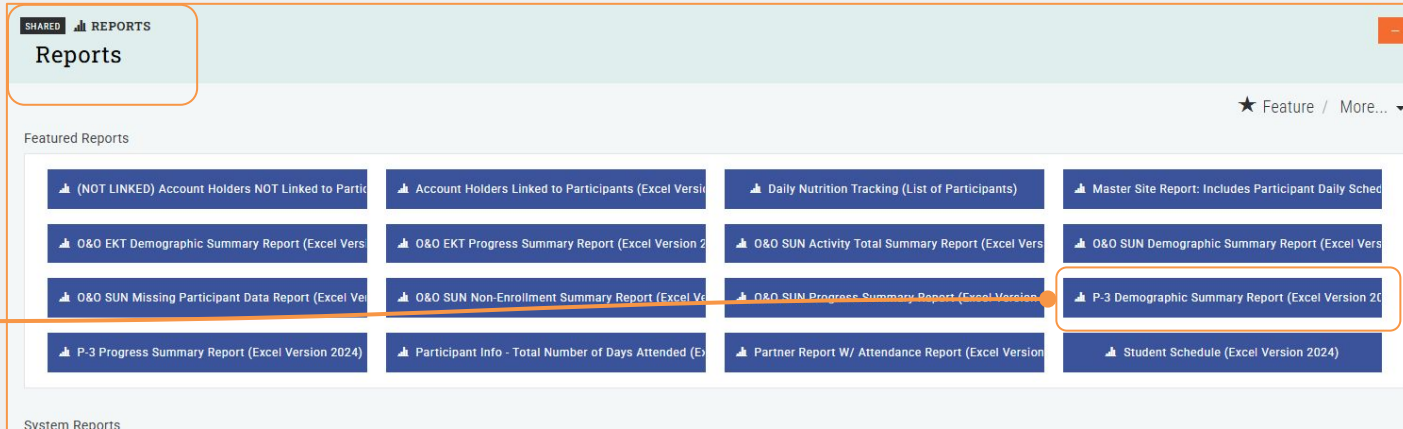
- This report in Grouptrail provides a breakdown of inclusive identities based on the P-3 participants a site is serving
- Users should keep in mind that inclusive identity totals will not equal 100%
- To view entire break down of inclusive identities, users should use the scroll bar to locate more data 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



The screenshot shows the 'Reports' section of the Grouptrail interface. At the top, there's a header with 'SHARED' and 'REPORTS' tabs. Below this is a 'Featured Reports' section containing a grid of report cards. Each card has a small icon and a title. The report titled 'P-3 Demographic Summary Report (Excel Version 2024)' is highlighted with an orange border. A line from the text on the left points to this specific report card. Below the featured reports is a 'System Reports' section.

Featured Reports			
(NOT LINKED) Account Holders NOT Linked to Partic	Account Holders Linked to Participants (Excel Versi	Daily Nutrition Tracking (List of Participants)	Master Site Report: Includes Participant Daily Sched
O&O EKT Demographic Summary Report (Excel Vers	O&O EKT Progress Summary Report (Excel Version 2	O&O SUN Activity Total Summary Report (Excel Vers	O&O SUN Demographic Summary Report (Excel Vers
O&O SUN Missing Participant Data Report (Excel Ver	O&O SUN Non-Enrollment Summary Report (Excel Ver	O&O SUN Progress Summary Report (Excel Version	P-3 Demographic Summary Report (Excel Version 2024)
P-3 Progress Summary Report (Excel Version 2024)	Participant Info - Total Number of Days Attended (E	Partner Report W/ Attendance Report (Excel Version	Student Schedule (Excel Version 2024)

System Reports

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**"

P-3 Demographic Summary Report (Excel Version 2024)

Filters

Filter date: Date of Activity

Range: Custom

From: To:

Categories: Form: Attendance

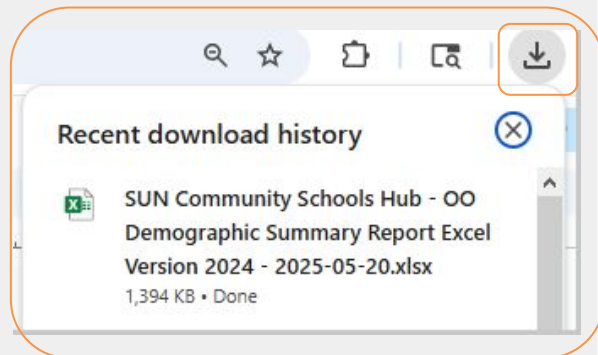
Tags: Any

Single submission forms/data types: Activities

Linked Tags: 2025-2026

Linked Workspace Categories: Present

Generate report Cancel





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				
Site	Total Served			African						Asian						Black / African American						Hispanic / L							
	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 (Kinder - 3rd Grade)						
	N	N	N	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%				
		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	20.0%

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)

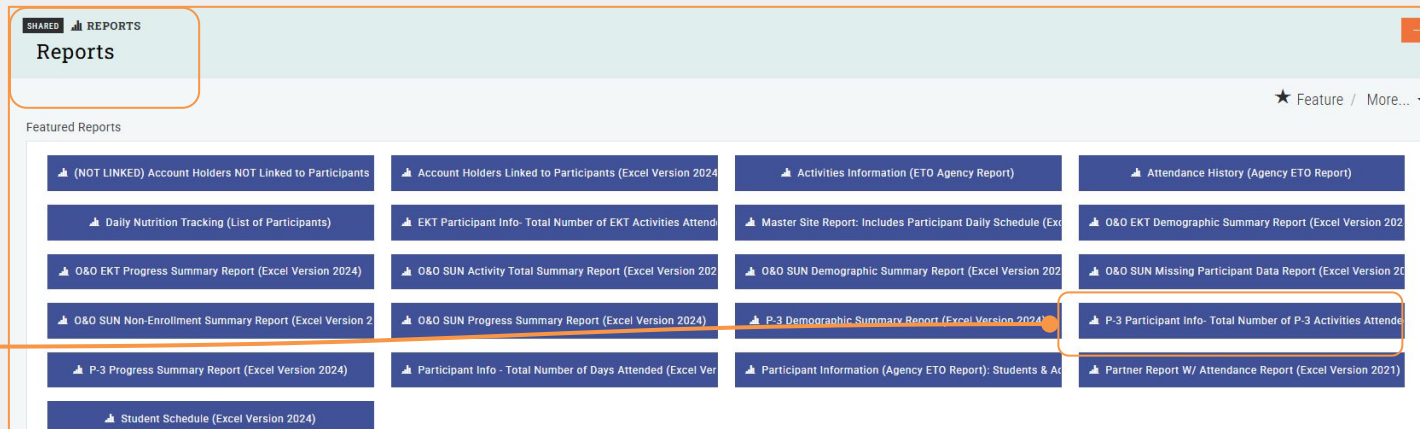
Please Note:

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)



SHARED  REPORTS

Reports

★ Feature / More... ▾

Featured Reports

 (NOT LINKED) Account Holders NOT Linked to Participants	 Account Holders Linked to Participants (Excel Version 2024)	 Activities Information (ETO Agency Report)	 Attendance History (Agency ETO Report)
 Daily Nutrition Tracking (List of Participants)	 EKT Participant Info- Total Number of EKT Activities Attended	 Master Site Report: Includes Participant Daily Schedule (Excel Version 2024)	 O&O EKT Demographic Summary Report (Excel Version 2024)
 O&O EKT Progress Summary Report (Excel Version 2024)	 O&O SUN Activity Total Summary Report (Excel Version 2024)	 O&O SUN Demographic Summary Report (Excel Version 2024)	 O&O SUN Missing Participant Data Report (Excel Version 2024)
 O&O SUN Non-Enrollment Summary Report (Excel Version 2024)	 O&O SUN Progress Summary Report (Excel Version 2024)	 P-3 Demographic Summary Report (Excel Version 2024)	 P-3 Participant Info- Total Number of P-3 Activities Attended (Excel Version 2024)
 P-3 Progress Summary Report (Excel Version 2024)	 Participant Info - Total Number of Days Attended (Excel Version 2024)	 Participant Information (Agency ETO Report): Students & Activities	 Partner Report W/ Attendance Report (Excel Version 2021)
 Student Schedule (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**"


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

Filters

Filter date Date of Activity

Range Custom

From:

To:

Categories Form: Attendance

Tags Any

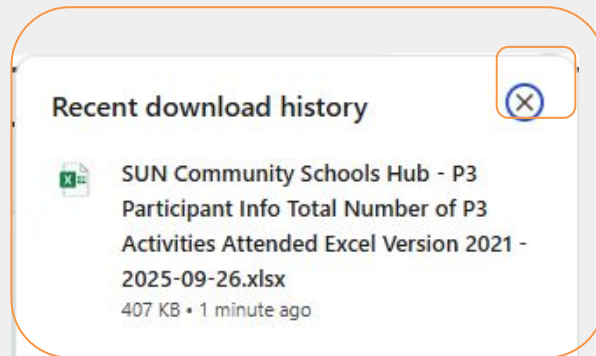
Single submission forms/data types Activities

Linked Tags 2025-2026

Linked Workspace Categories Present

Generate report

Cancel





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 Ide
1											
2	Metropolitan Family Service	Fairview Elementary	10000000		María R. [redacted]		2024-2025, 2025-2026	No	36	118.7	Latino/Hispanic
3	Metropolitan Family Service	Fairview Elementary	10000000		Carlos [redacted]		2024-2025, 2025-2026	No	80	243.8	Declined to Answer
4	Metropolitan Family Service	Fairview Elementary	10000000		Alexander [redacted]		2024-2025, 2025-2026	No	47	164.3	Latino/Hispanic
5	Metropolitan Family Service	Fairview Elementary	10000000		Fernando [redacted]	Other	2024-2025, 2025-2026	No	36	107.5	Latino/Hispanic
6	Metropolitan Family Service	Fairview Elementary	10000000		Alexander [redacted]	Other	2024-2025, 2025-2026	No	48	146.5	Latino/Hispanic
7	Metropolitan Family Service	Fairview Elementary	10000000		Guillermo [redacted]	Other	2024-2025, 2025-2026	No	27	84.0	Latino/Hispanic
8	Metropolitan Family Service	Fairview Elementary	10000000		Diego [redacted]		2024-2025, 2025-2026	No	28	100.0	Latino/Hispanic
9	Metropolitan Family Service	Fairview Elementary	10000000		Diego [redacted]		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



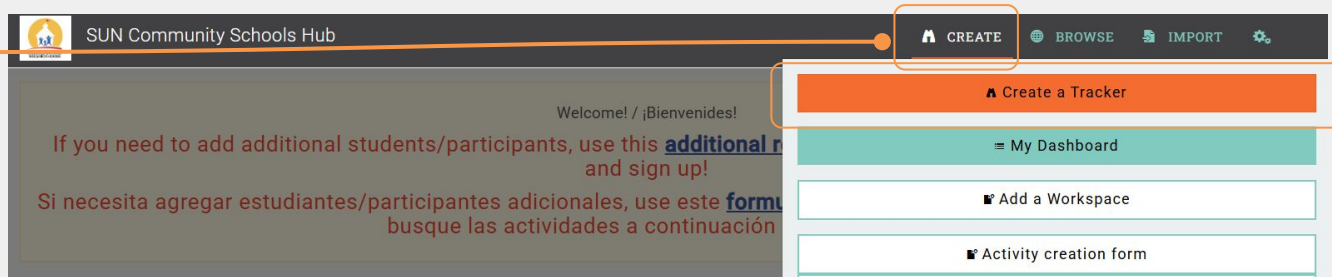
Staff Workflow: Creating a Personalized P-3 Participant Tracker

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

Step 1) Hover and click

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



Step 2) Select and click:

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

+ Create a Tracker

☒ **Search Filter**

Track a **subset of Workspaces /pages**. Choose your own filters or select a Group by option which allows you to easily make updates via drag 'n drop.

☐ **Featured Goal**

Track your site's **top ten goal tasks**.

☐ **Checklist**

Track **goal tasks** or **one-off (ad-hoc) tasks** with multiple filtering and grouping options. For one-off tasks, easily update assignees and due dates by drag 'n drop.

☐ **Goal Snapshot**

Track individual **goal scores** with a visual, color-coded snapshot showing overall progress and the drilldown status by topic.

☐ **Latest Activity**

Track **site updates** by user or activity type, such as message posts, form submissions, or task updates. You can also post comments and send email alerts from within the activity feed.

☐ **Reports**

Export and **download featured or system reports** as Excel spreadsheets.

☐ **Form Counts**

Choose a form and track **total answers submitted for each question**. Choose your own filters and view subtotals by user.

☐ **Status Counts**

Track **live counts of total Workspaces /pages** created, segments by your choice of tags (search labels).

Choose Options >

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”

+ Create a *Search Filter* Tracker 

< Back

Name Your Tracker

P-3 Participant Tracker (2024-2025)

Featured Options

Data Category

Forms/linked data categories

Group by

Other sites

Sort by

Participants

☐ Activities

☐ Account Holder (Parent/Guardian)

☒ Participants

☐ SUN Sites

☐ Providers

☐ Staff

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

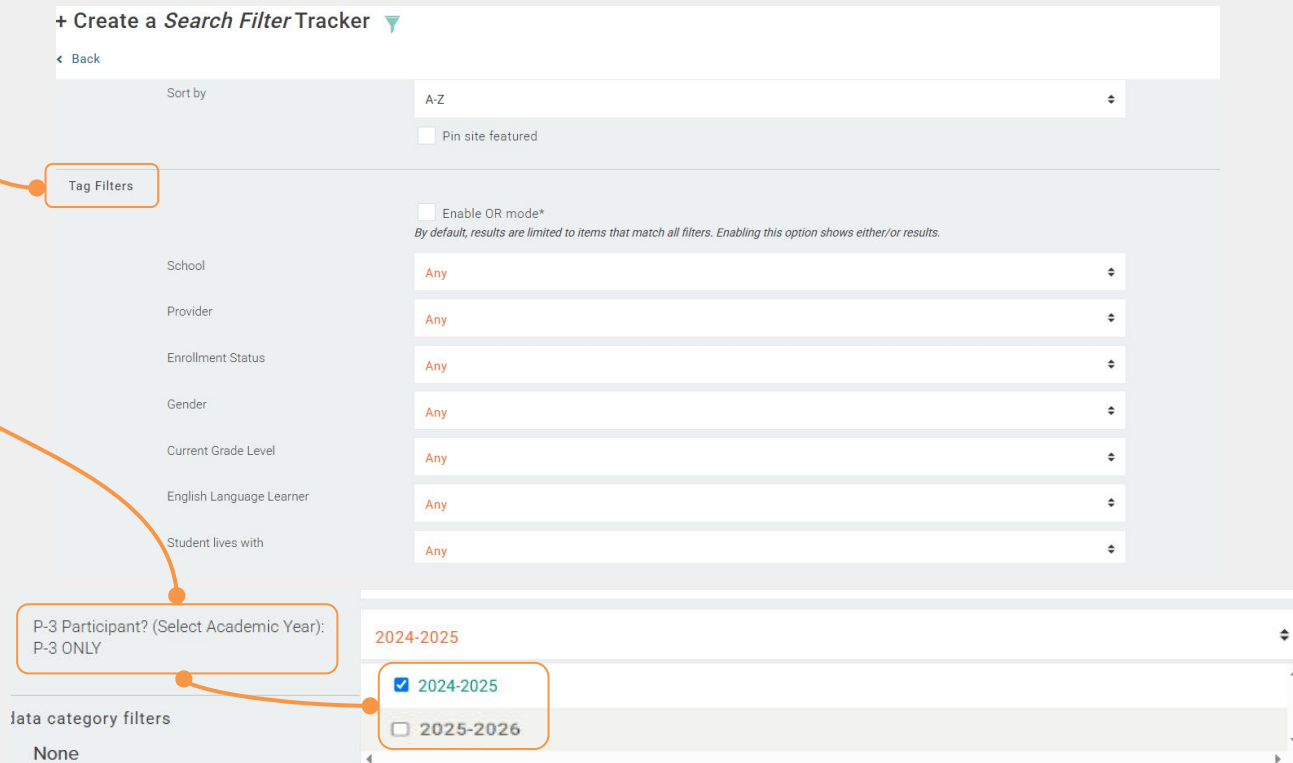
After you change the “data category” to participants scroll down and find a section called: “**Tag Filters**”

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



+ Create a *Search Filter Tracker* ▼

< Back

Sort by A-Z

☐ Pin site featured

☐ Enable OR mode*
By default, results are limited to items that match all filters. Enabling this option shows either/or results.

Tag Filters

School Any

Provider Any

Enrollment Status Any

Gender Any

Current Grade Level Any

English Language Learner Any

Student lives with Any

P-3 Participant? (Select Academic Year):
P-3 ONLY

Data category filters

None

2024-2025

☒ 2024-2025

☐ 2025-2026

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"**

+ Create a *Search Filter* Tracker

Display Options

Show links to

(none)

☒ Show images
 ☒ Enable filter by options in tracker

☒ Show keyword filter

☐ Show last sync date and details
 ☐ Limit workspaces to those who were in sync this past week (Sunday to Monday)

Publish Options

☐ Open tracker by default
 ☐ Pin to top of User dashboard
 ☐ Feature tracker on top of User dashboard
 ☐ Require and show this tracker for all the users in this site

Or, show this tracker to these teams/users only:

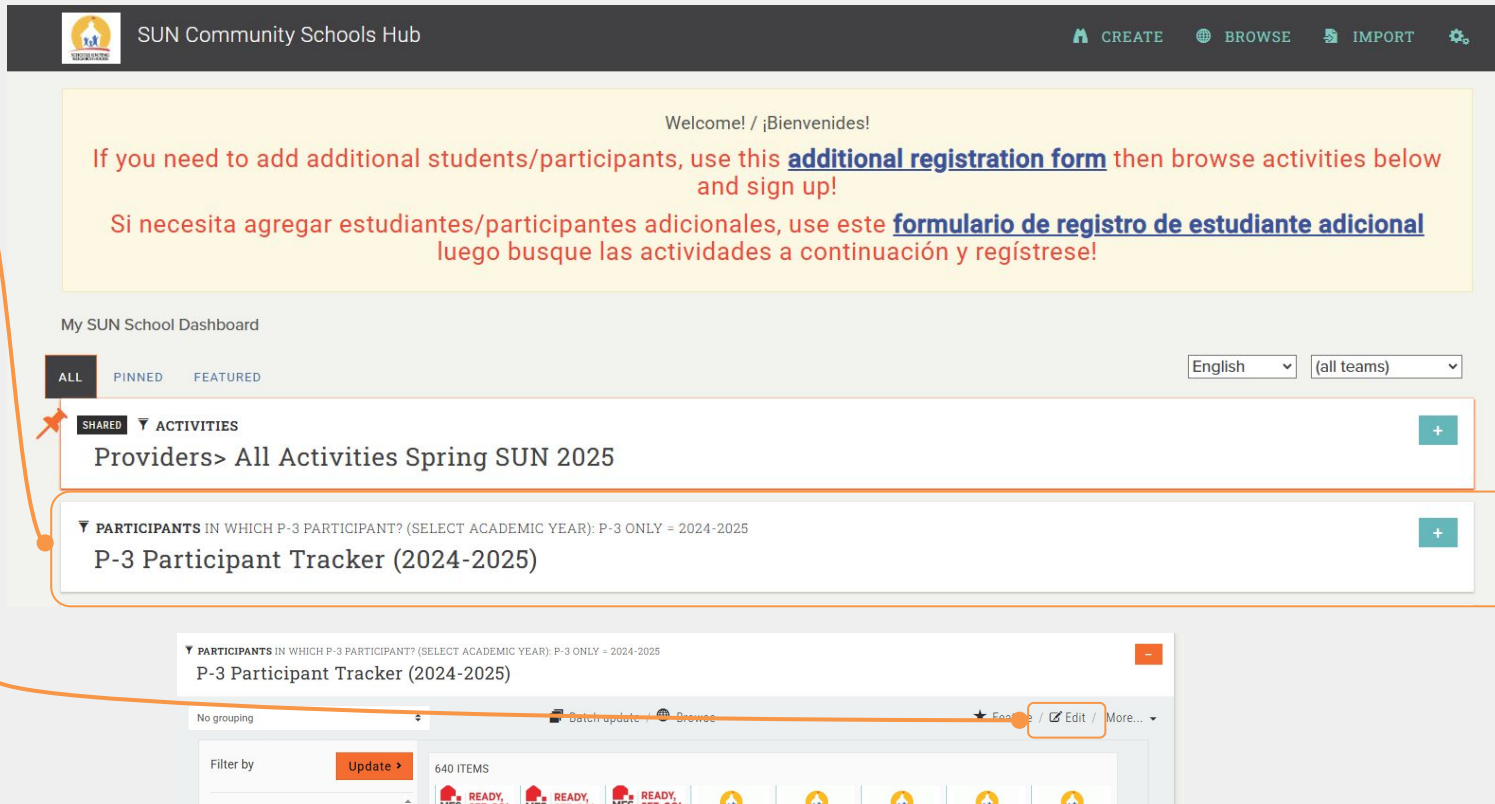
Add to Dashboard

36

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



The screenshot shows the SUN Community Schools Hub dashboard. At the top, there's a header with the SUN logo and navigation links: CREATE, BROWSE, IMPORT, and a settings icon. Below the header, a welcome message is displayed in Spanish and English. A large yellow box contains instructions in both languages to add additional students/participants using a registration form. The main content area is titled 'My SUN School Dashboard' and features tabs for ALL, PINNED, and FEATURED. A dropdown menu is set to 'English' and '(all teams)'. Below this, there's a section for 'SHARED' and 'ACTIVITIES'. The 'ACTIVITIES' tab is selected, showing 'Providers> All Activities Spring SUN 2025'. Below this, there's a section for 'PARTICIPANTS IN WHICH P-3 PARTICIPANT? (SELECT ACADEMIC YEAR): P-3 ONLY = 2024-2025'. This section contains a card for 'P-3 Participant Tracker (2024-2025)'. An orange box highlights the 'Edit' button in the top right corner of this card. Below the card, there's a table with 640 items, showing columns for 'Filter by', 'Update', and 'Items'. The 'Items' column shows a list of items with status indicators (e.g., READY, GET GO) and a 'Batch update' button.



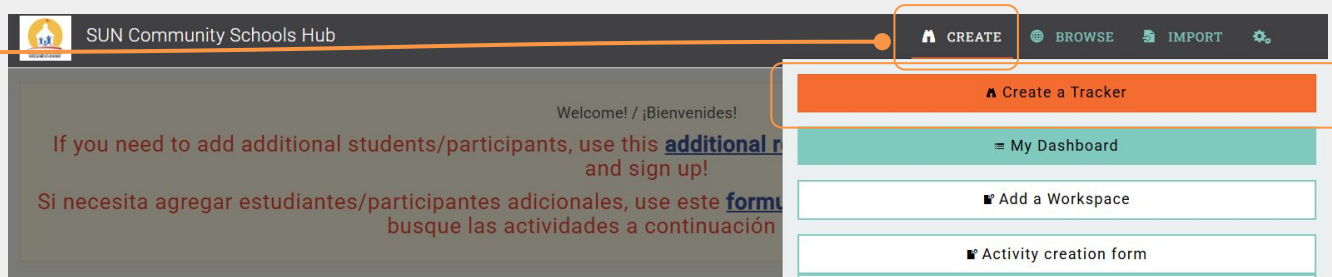
Staff Workflow: Creating a Personalized P-3 Activity Tracker

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

Step 1) Select Create a Tracker

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



Step 2) Select and click:

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

+ Create a Tracker

☒ **Search Filter**

Track a **subset of Workspaces /pages**. Choose your own filters or select a Group by option which allows you to easily make updates via drag 'n drop.

☐ **Featured Goal**

Track your site's **top ten goal tasks**.

☐ **Checklist**

Track **goal tasks** or **one-off (ad-hoc) tasks** with multiple filtering and grouping options. For one-off tasks, easily update assignees and due dates by drag 'n drop.

☐ **Goal Snapshot**

Track individual **goal scores** with a visual, color-coded snapshot showing overall progress and the drilldown status by topic.

☐ **Latest Activity**

Track **site updates** by user or activity type, such as message posts, form submissions, or task updates. You can also post comments and send email alerts from within the activity feed.

☐ **Reports**

Export and **download featured or system reports** as Excel spreadsheets.

☐ **Form Counts**

Choose a form and track **total answers submitted for each question**. Choose your own filters and view subtotals by user.

☐ **Status Counts**

Track **live counts of total Workspaces /pages** created, segments by your choice of tags (search labels).

Choose Options >

Step 3) Create a name and select data category

Step 1: Name your Tracker:

“P-3 Activity Tracker”

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”**

+ Create a *Search Filter* Tracker 

< Back

Name Your Tracker

P-3 Activity Tracker (2024-2025)

Featured Options

Data Category

Activities

Forms/linked data categories

☒ Activities

Group by

☐ Account Holder (Parent/Guardian)

Other sites

☐ Participants

Sort by

☐ SUN Sites

☐ Providers

☐ Staff

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

Tag Filters

☐ Enable OR mode*
By default, results are limited to items that match all filters. Enabling this option shows either/or results.

Any

Any

Any

Any

Any

Any

Any

Is this a P-3 Activity?

Yes

☒ Yes

School

Activity Category

Activity Subject

Provider

Current Grade Level

Primary Method of Transportation

Time offered

Activity Term

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”**

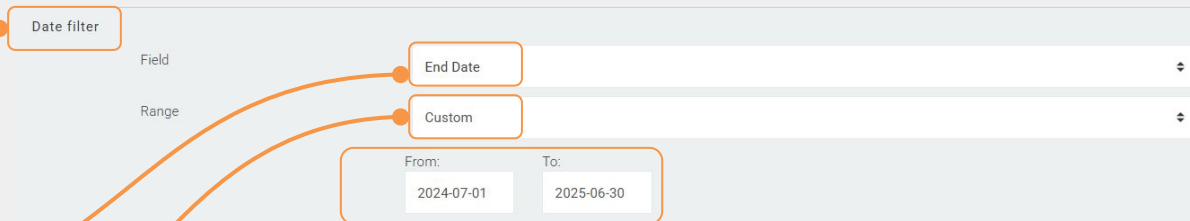
Once you have found that section, update the following:

- **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)



The screenshot shows the 'Date filter' section of a web interface. It has two main sections: 'Field' and 'Range'. The 'Field' section has a dropdown menu with 'End Date' selected. The 'Range' section has a dropdown menu with 'Custom' selected. Below these, there is a 'From:' field with the date '2024-07-01' and a 'To:' field with the date '2025-06-30'. Orange lines and dots connect the text instructions to these specific elements in the form.

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"**

+ Create a *Search Filter* Tracker

Display Options

Show links to

(none)

☒ Show images
 ☒ Enable filter by options in tracker

☒ Show keyword filter

☐ Show last sync date and details
 ☐ Limit workspaces to those who were in sync this past week (Sunday to Monday)

Publish Options

☐ Open tracker by default
 ☐ Pin to top of User dashboard
 ☐ Feature tracker on top of User dashboard
 ☐ Require and show this tracker for all the users in this site

Or, show this tracker to these teams/users only:

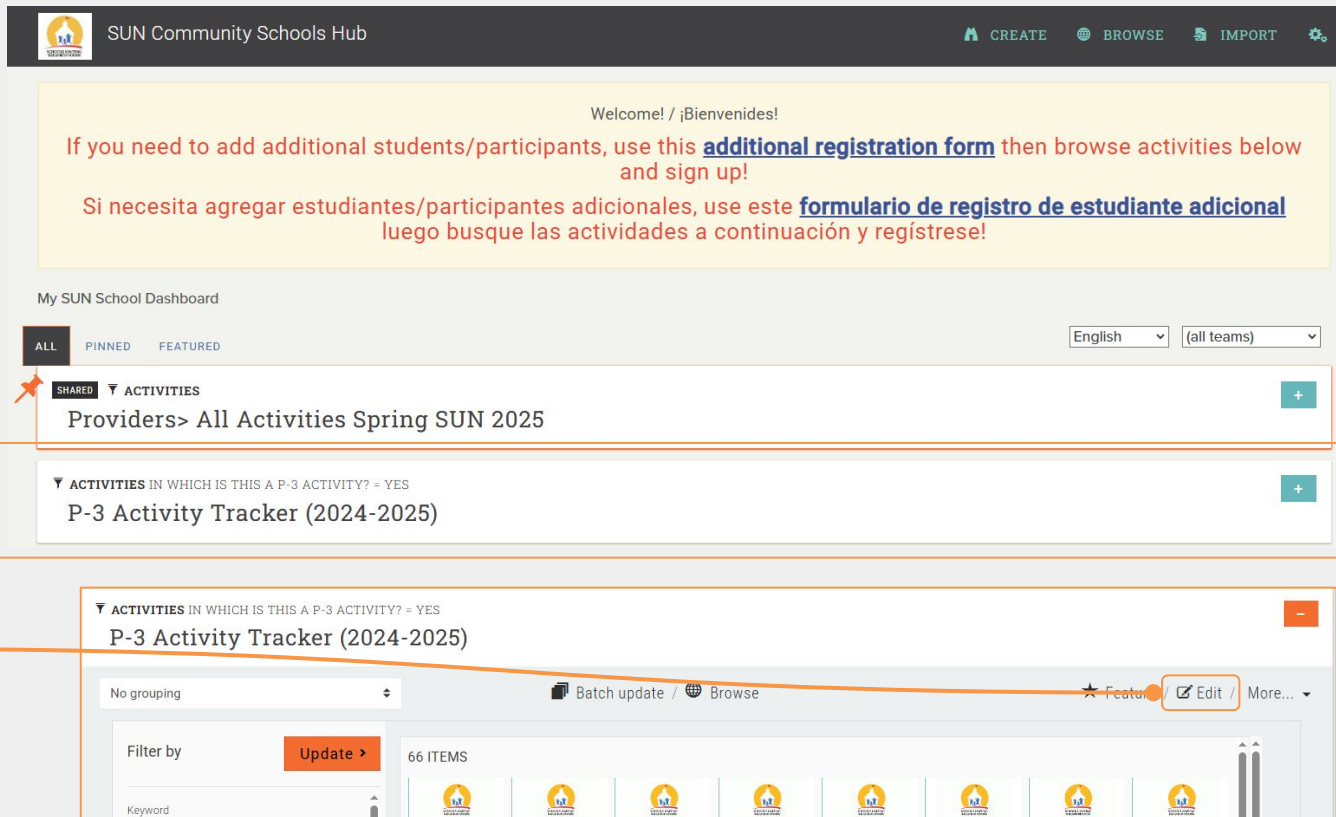
Add to Dashboard

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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

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



The screenshot shows the SUN Community Schools Hub dashboard. At the top, there is a header with the SUN logo and the text "SUN Community Schools Hub". To the right of the header are links for "CREATE", "BROWSE", "IMPORT", and a settings icon. Below the header is a yellow banner with a welcome message in English and Spanish, and links to an "additional registration form" and a "formulario de registro de estudiante adicional".

Below the banner is the "My SUN School Dashboard" section. It has tabs for "ALL", "PINNED", and "FEATURED". On the right, there are dropdown menus for "English" and "(all teams)". Below the tabs, there is a section for "SHARED ACTIVITIES" with a sub-header "Providers> All Activities Spring SUN 2025". Under this, there is a list of activities, including "P-3 Activity Tracker (2024-2025)".

The "P-3 Activity Tracker (2024-2025)" activity is highlighted with an orange box. Below this box, there is a detailed view of the activity. It shows the title "P-3 Activity Tracker (2024-2025)" and a list of items. At the bottom of this view, there is a row of buttons: "No grouping", "Batch update", "Browse", "Feature", "Edit", and "More...". The "Edit" button is highlighted with an orange box and an arrow pointing to it from the text "Click 'Edit' on the right side".



Thank you!

Multnomah County

Youth & Family Services

SUN Service System Data Team

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