P-3 Schools ServicePoint Instructions

P-3 PROGRAM

Prental-3ʳᵈ Grade (P-3) Schools focus on engaging diverse families to improve kindergarten transitions, to build a welcoming school climate, and to provide outreach advocacy and support to families with young children. P-3 Schools' will vary by each community's needs and all P-3 Schools will provide the following activities.

- Play and Learn groups for families and their children ages 0-5.
- Parent Cafés hosted throughout the school year.
- Early Kindergarten Transition (EKT) programs at the school.

All ServicePoint Data for the previous month must be entered by the 15ᵗʰ of every month. (September data is due on October 15ᵗʰ)

CLIENTPOINT

- Find Student/Adult in ServicePoint. If child/student/adult is not in ServicePoint then **Add** them to the system
- Create Household (Include at least 1 parent and at least 1 child)
- Fill out Profile page for each household member – red questions are required
- Enroll student and parent in the correct P-3 classes

ACTIVITYPOINT

Create Activities (following P-3 naming conventions)
The names of the activities must start with the following title 'P-3'. Below are examples
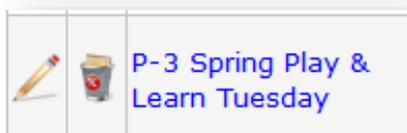
Important Data Points for Activity Point

- Parent Café and Play and Learn Groups are Enrolled Events
    - Parent Café Activities should only enroll adults.
    - Play and Learn should enroll child and adult
    - There should be at least one Play and Learn and one Parent group per-session (Summer,Fall,Winter,Spring)

- **Non Enrolled Events:** You tally the number of people that attended the ONE TIME EVENT (Family Night, Health Fair)

- **Attendance:** Take attendance for your P-3 activities. Best practice is to enter all attendance within that week.

- **Attendance report can be run in Art. If you do not have access to ART, contact your SUN Site Manager and request ART reports though that person.**

CREATING A NEW CLIENT IN CLIENTPOINT

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

SEARCHING FOR A CLIENT

- Always search for a participant's name before adding them as a new client. Participants may already be in ServicePoint if they (or their family) have been served in other programs.

- Search by first name, last name, or a portion of either name.

- If a name match is found, check that the DOB also matches. If no match is found, click 'Add New Client with This Information.'

Client Search

ⓘ Please Search the System before adding a New Client.

Name	First	Middle	Last	Suffix
	little bro		SUN-Fam	

Name Data Quality   -Select-

Alias

Social Security Number   ___-___-___

Social Security Number Data Quality   -Select-

U.S. Military Veteran?   -Select-

Exact Match   ☐

[Search] [Clear] [Add New Client With This Information]   [Add Anonymous Client]

Client Number

Enter or scan a Client ID number to go directly to that Client's profile.

Client ID # [   ] [Submit]

Client Results

		ID	Name ▲	Social Security Number	Date of Birth	Alias	Gender	Banned	Household Count
✏️	👪	313	SUN-Family, Big Sister		11/30/2005		Female		1 🔍
✏️	👪	312	SUN-Family, Mom		03/10/1975		Female		1 🔍

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Setting Up A Household

Households are required for all child and adult participants in P-3 activities. This is important, so that we can track numbers of families (rather just tracking individuals) participating

ADDING TO AN EXISTING HOUSEHOLD

❶ Once inside of the client's record, click on the Households tab

❷ Click 'Search Existing Households 'and search for the other household members

❸ If you find a matching family, click the green plus sign to add the new family member

❹ Click the magnifying glass under client count to see the names of household members

If you don't find a match, add them to the system. This will put them in ServicePoint and in the Household

STARTING A HOUSEHOLD UP

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

❶ Click on "Start New Household

❷ Choose the Household Type

❸ Search for/add any additional household members.

❹ Choose 1 Head of Household and add specify the Relationship of all members. Joined HH should be date they completed application

❺ Click 'Save & Exit'

Answer All Required Questions

For ALL Participants

1. **Date of Birth**
2. **Gender**
3. **Primary Language:** If 'Other,' specify below
4. **Inclusive Identity**
   Click 'Add' and choose all that apply
   To add another Click on Save and Add Another
   If finished click 'Save'
5. **Release Granted by Parent: 17-18**

Answer the Questions Below for ALL Participants

❶ Date of Birth [ ] / [ ] / [ ] G
❷ Gender -Select- G
  If Other Gender, specify [ ] G
❸ Primary Language -Select- G
  Primary Language - Other (must specify) [ ] G

🔍 Inclusive Identity (Race/Ethnicity/Origin)

❹ Start Date *   Please add all that apply (Race/Ethnicity/Origin):
  Add

Answer the Questions Below for ALL STUDENTS

SSID Number [ ] G
Risk Factor(s)? (Y/N) -Select- G
❺ Release granted by parent? -Select- G

Answer the questions below for ALL EKT STUDENTS

In the past year, was child involved in any of these programs?

Did child attend Head Start? -Select- G
  If yes, what was the name of the Head Start? [ ]
Did child attend preschool or kindergarten? -Select- G
  If yes, what was the name of the school? [ ]
Child is receiving special education services -Select- G

Inclusive Identity (Race/Ethnicity/Origin) ❹

Start Date *	01 / 24 / 2018
N/A: Leave Blank	[ ] / [ ] / [ ]
Please add all that apply (Race/Ethnicity/Origin):	Latino/Hispanic

Save   Save and Add Another   Cancel

CREATING ACTIVITIES IN ACTIVITYPOINT

- **Enrolled Activities** are groups that meet regularly with consistent attendees (ex: *Fall P-3 Play and Learn, Winter P-3 Parent Class,* etc.)
- **Non-enrolled Activities** are open events where you only want to track the total number of attendees
- (ex: P-3 Field Trips , P-3 Parent Night, etc.)
- **Before creating a new activity, always search for the activity name.** Click 'My Provider' to search only within your own program. Always click 'Include Past if the activity has ended.

ACTIVITY INFO

❶ "P-3" must be in the title, ex: 'Fall P-3 Play and Learn, Winter P-3 Parent Group

❷ *Activity Type* is always 'Local'

❸ Set all activity parameters.

❹ For enrolled activities, leave *Enrollment Type* as 'Open'

❺ Set Max enrollment

❻ Choose the most appropriate category. Only select from the options that begin with 'SUN.'

❼ Always leave *Assign Service* as 'No'

❽ Under *"Subject"* select *"P-3 Play Learn"*, *"P-3 Parent Café, or P-3 Family Engagement"* Under *"Target"* select *"P-3 0-5 "P-3 K-3, or "P-3 Families"*

❾ If applicable, write in any activity partners and click 'Add.' Add as many as apply.

❿ Click 'Save' then continue on to the 'Sessions' tab (see following page)

IMPORTANT: Always add a Target Participant Group. Many ART reports rely on this field to pull the correct participants.

CREATING SESSIONS FOR ENROLLED ACTIVITIES

Activities must have session dates in order to appear in ART reports.

❶ Click on the Sessions tab

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

or…

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

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

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

COPYING AN ACTIVITY

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

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

ENROLLING PARTICIPANTS IN AN ACTIVITY

Participants can be enrolled in activities in two different ways:

Option 1: by *Participant* (in ClientPoint)

❶ Click on the Activities tab in the participant's record

❷ Click 'Enroll in Activities'

❸ Search for the activity you'd like to enroll that participant in. Click 'My Provider' to look only at activities at *your* school. Remember to click '**Include Past Activities**' if the activity has ended already.
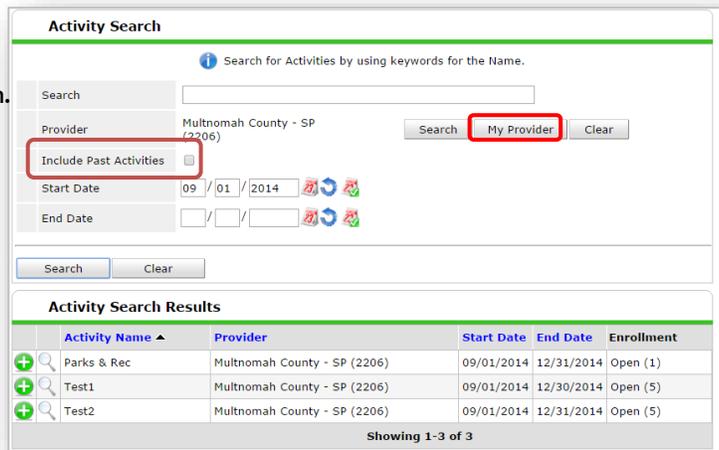
❹ Click the green plus sign to enroll the participant

❺ Set the Enrollment Date on or before the first day that the participant attended/will attend or first day of activity
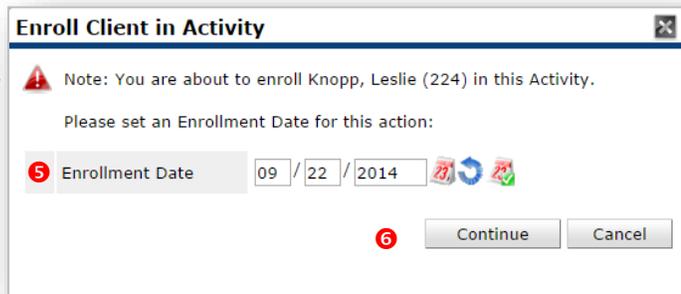
❻ Click 'Continue'

Option 2: by *Activity* (in ActivityPoint)

❶ In ActivityPoint, open up the activity and click on the Enrollment tab

Activity Info	Sessions	Enrollment ❶
Activity	Incredible Years 2013 (38847)	
Provider	Bienestar de la Familia - SP (2454)	
Activity Dates	04/01/2013 - 08/31/2013	
Max Enrollment	20	

Enrollment List (20 Slots Remaining)

	Client ID	Name ▲	Enrolln
❷ | Add New Participant | Print Enrollment | | No r

❷ Click 'Add New Participant'

❸ Search for participants by name. Participants will only appear if they have a profile in ClientPoint.

Enroll Clients in Activity ⊠

Search for Clients By Name or Client ID	Search for Clients In My Provider By Entry

	First	Middle	Last	Suffix
Name			Test	
Alias				
Client ID				
Exact Match	☐			

❸ Search   Clear

Submit   Cancel

❹ Continue searching for and checking off all of the names of the participants you'd like to enroll.
Just click 'Submit' once when you're finished.

Client Search Results

Enroll	Client ID	Client Name
☑	58100	Test, Just A, Jr
☐	1	Test, Just A, Sr
		Showing 1-2 of 2

❹ Submit   Cancel

❺ Set the 'Enrollment Date' to on or before the first day that the participant attended the activity and click 'Continue.' Or day class tart

Enroll Client in Activity ⊠

⚠ Note: You are about to enroll 1 clients into this Activity.

Please set an Enrollment Date for this action:

Enrollment Date   06 / 27 / 2014 🗓🔄🗓

❺ Continue   Cancel

Enrollment List (18 Slots Remaining)

			Client ID	Name ▲	Enrollment Date	Date of Birth	Gender
🔒	📋	🗑	203	Bon Jovi, Jon	🖉 03/24/2016		
🔒	📋	🗑	59	Organa, Leia	🖉 03/24/2016	08/22/1995	Female
Add New Participant		Print Enrollment			Showing 1-2 of 2		

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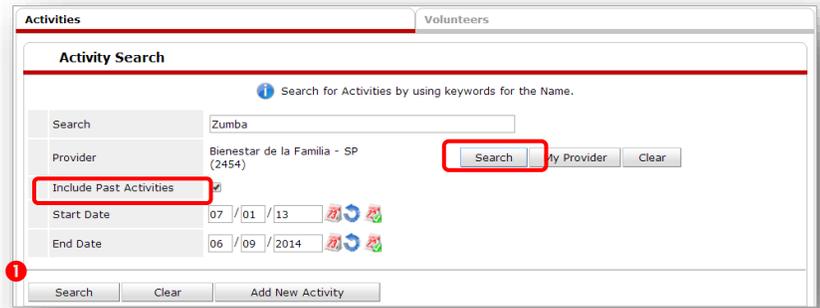
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ENTERING ATTENDANCE

❶ In ActivityPoint, search for the class you want to enter attendance for - either by class title or by date range. Click 'My Provider' to search only within your own school. Remember to click 'Include Past Activities' if the activity has ended already.

❷ Click on the Attendance tab

❸ Click 'Choose Sessions.' You can enter attendance for up to 5 sessions at once.
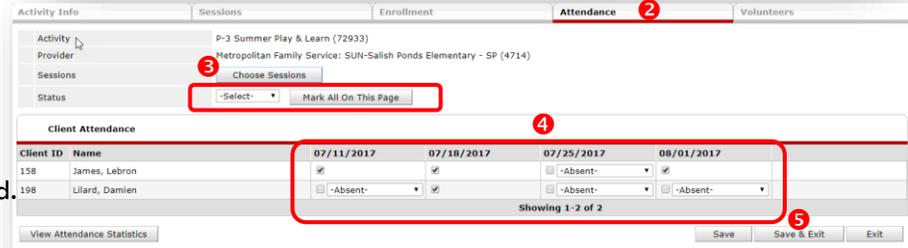
❹ Fill in each day for all enrolled students attendance. There are three options: Excused, Absent and Attended. Please Choose one that apply.

❺ Click Save & Exit

TIP: Change Status to 'Attended' and click 'Mark All on this Page,' then uncheck any absent participants

CREATING NON-ENROLLED ACTIVITIES

❶ Follow the same steps as creating an enrolled activity, except **for Enrollment Type, click 'Non-enrollment'** (see pg. 5)

❷ Create session(s) following the same steps as for an enrolled activity (see pg. 6)

Activity Info

Provider	Metropolitan Family Services: SUN-Davis Elementary - SP (2581)
Name*	Spring 2016 SUN Open House
Activity Type*	⦿ Local ○ Public
Ages*	1 - 100
Time Offered*	Before School
Frequency*	One-time event
Recurring Weekly Schedule	☐Sunday ☐Monday ☐Tuesday ☐Wednesday ☑Thursday ☐Friday
Start Date*	03 / 24 / 2016
End Date*	03 / 24 / 2016
Start Time*	5 : 00 PM
End Time*	7 : 00 PM
Teacher	
Location	
Enrollment Type*	○ Open ⦿ Non-Enrollment
Category*	SUN-Community Involvement

RECORDING ATTENDANCE FOR NON-ENROLLED ACTIVITIES

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

❹ Enter the total youth and adult participants (race/ethnicity is optional)

❺ Click 'Save' to exit

Questions? Contact the Multnomah County ServicePoint helpline at: **(503) 970-4408 or servicepoint@multco.us**

Activity Info	Sessions	Attendance ❸	Volunteers

Activity	Spring 2016 SUN Open House (58592)
Provider	Metropolitan Family Services: SUN-Davis Elementary - SP (2581)
Activity Dates	03/24/2016 - 03/24/2016
Session Date Range	/ / to / /

Update Date Range

Session List

Session Date	Description	Total Attendance	Total Ethnicity Counts
✏ 03/24/2016		0	0

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Edit Session Attendance

Activity	Spring 2016 SUN Open House (58592)
Date	03/24/2016

❹ **Session Attendance Totals**

Youth Attendance	150
Adult Attendance	75
Total Attendance	**225**

Asian/Indian Attendance	0
Bi-Racial/Multi-Racial Attendance	0
Black/African American Attendance	0
Caucasian Attendance	0
Hawaiian/Pacific Islander Attendance	0
Hispanic/Latino Attendance	0
Native American/Alaskan Attendance	0
Unreported Attendance	0
Total Ethnicity Counts	**0**

Save   Cancel