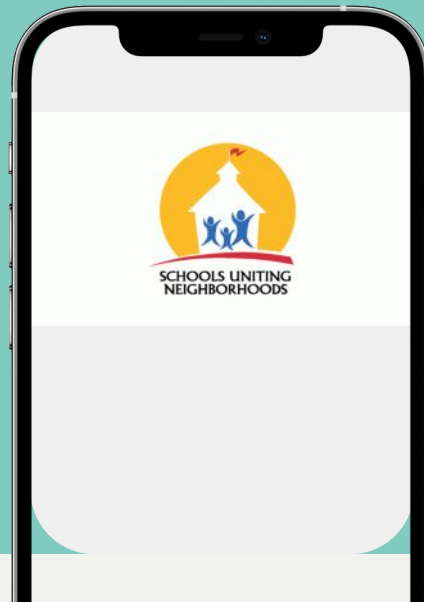




Grouptrail SUN Community School Overview

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
- **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_
- **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
- **For assistance with WellSky Community Services and/or**
Grouptrail email: yfsdatasupport@multco.us



Grouptrail

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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.

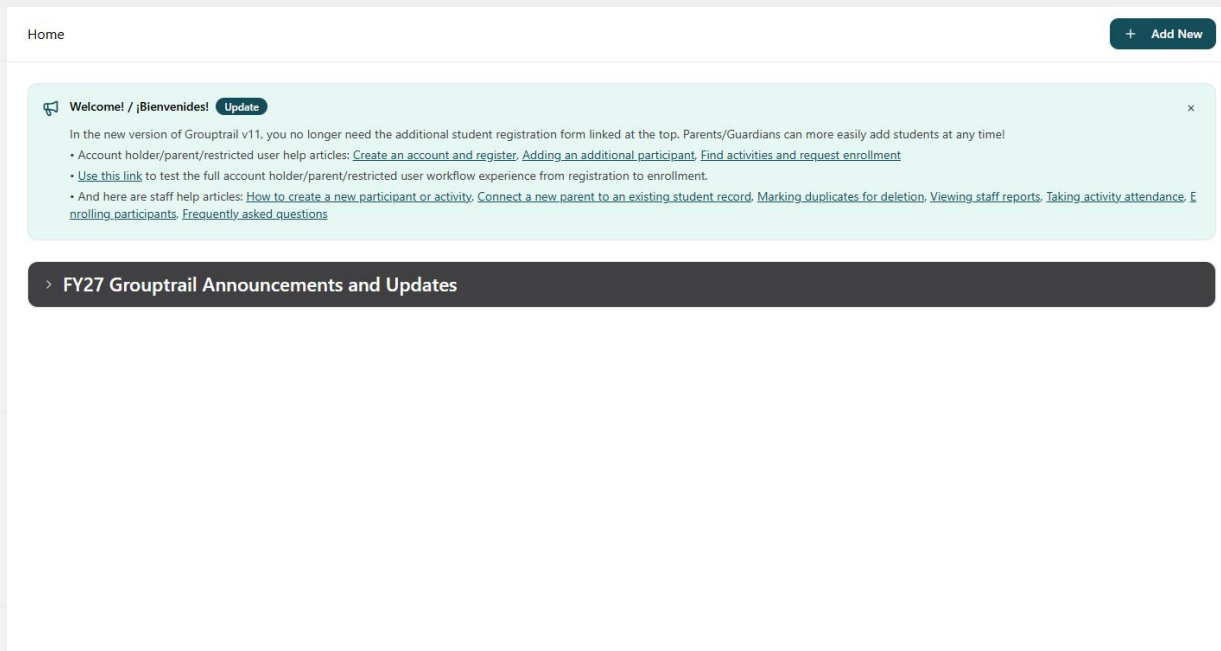
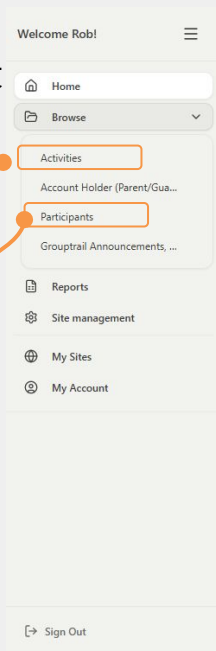


Creating a new activity or participant through the one-page creation forms (Step 1)

To create a workspace, select
“Activities”

OR

“Participants”
in your
navigation
window





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)**



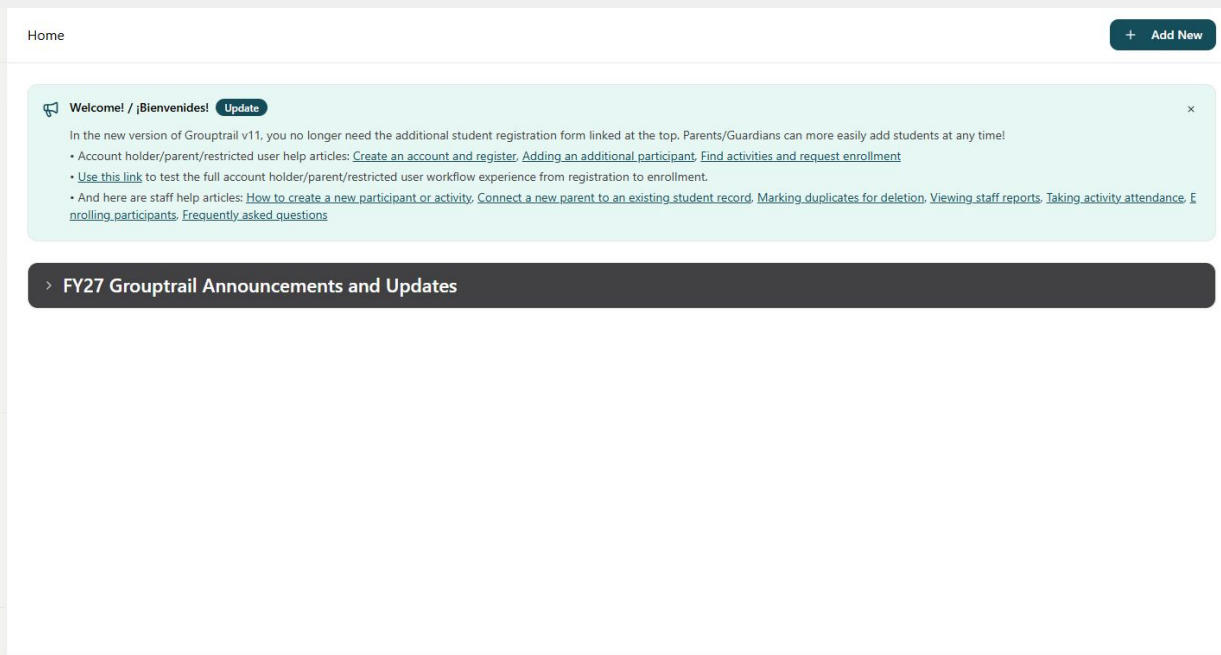
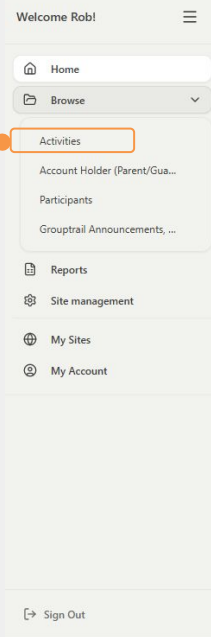
Staff Workflow: Creating a Non-Enrolled Activity in Grouptrail (Through the one-page creation forms)

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. 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 visible 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 visible 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 >

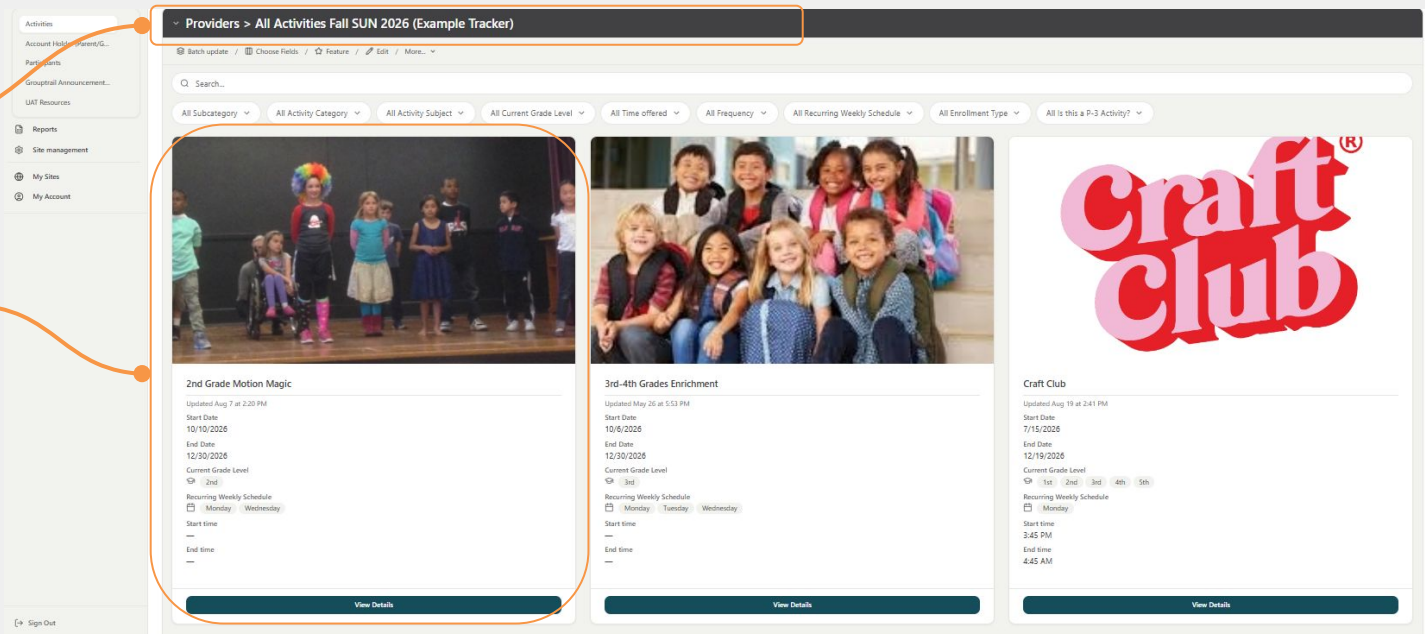


Staff workflow: Enrolling Participants

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 Activity Tracker interface. The left sidebar contains navigation links: Activities, Account History/Reports/SL, Participants, Grouptrail Announcement..., and UAT Resources. The main content area is titled 'Providers > All Activities Fall SUN 2026 (Example Tracker)'. It features a search bar and 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:

- 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 button.
- 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 button.
- 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 button.



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	Phc
☐ Sample student	Enrolled						
☐ Lukas Yuen	Enrolled						
☐ Nickel Yuen	Enrolled	Justin Yuen	971.222.3016	Katrina			
☐ Aja Wilson	Enrolled		(347)-841-6077				
☐ George A Caceres	Enrolled	George Caceres	5038059483	George Caceres	Parent	5038059483	
☐ Robert Lazenby (test 10/4)	Enrolled	Dad	444-444-4444	test grandpa	grandpa	444-222-2222	Yes

Enroll **Waitlist** **Drop**

Add student:

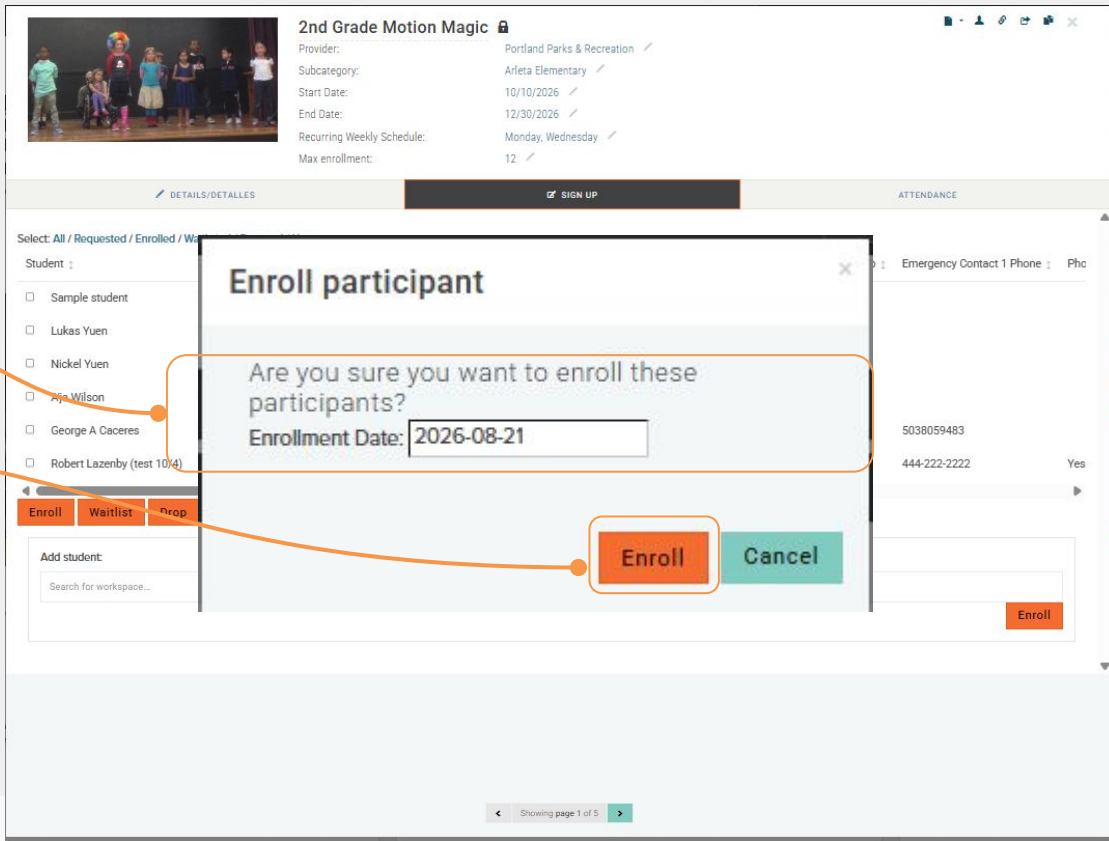
Search for workspace...

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

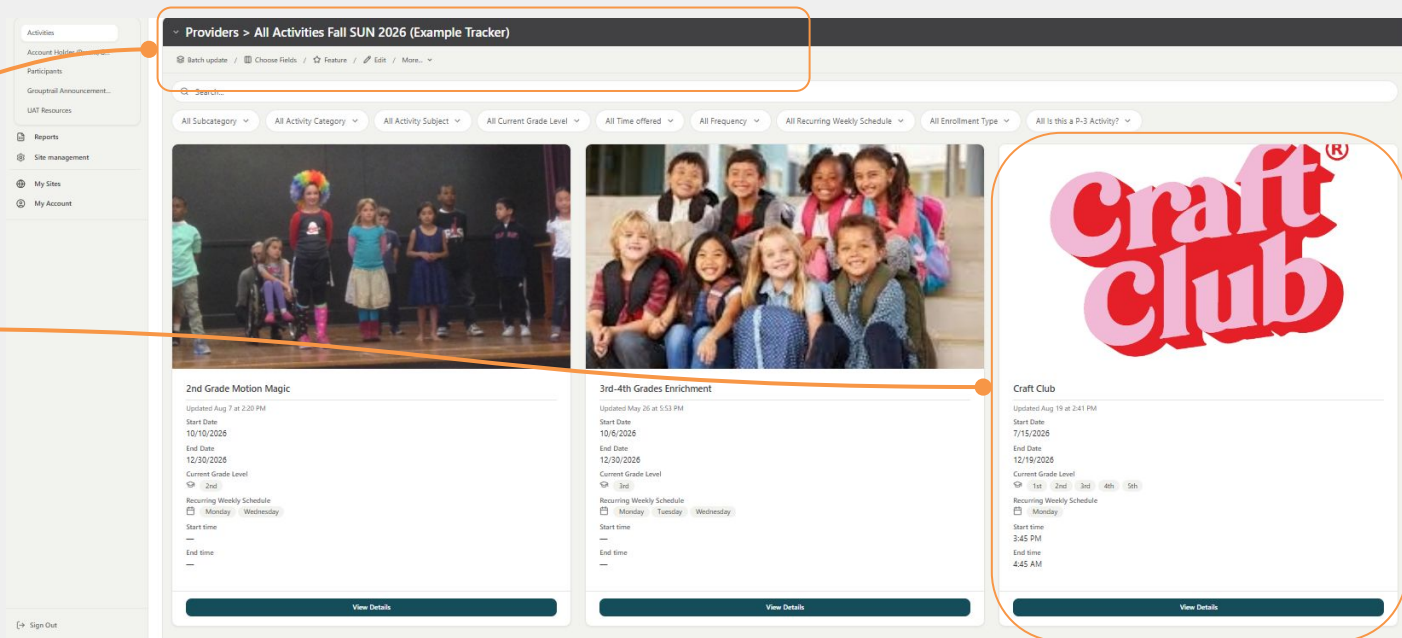
Emergency Contact 1 Phone : Phc
 5038059483
 444-222-2222 Yes

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 displays 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)'. It features a search bar and 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 for '2nd Grade Motion Magic', the second for '3rd-4th Grades Enrichment', and the third for 'Craft Club'. The 'Craft Club' card is highlighted with an orange border. Each card shows a photo of children, the activity name, update date, start and end dates, current grade level, and recurring weekly schedule. At the bottom of each card is a 'View Details' button. The 'Craft Club' card also shows a 'View Details' button at the bottom.

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:

Impact NW

Subcategory:

Sabin Elementary

Start Date:

07/15/2026

End Date:

12/19/2026

Recurring Weekly Schedule:

Monday

Max enrollment:

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
☒ Jamaal Brown	Requested Enrollment	Michael Brown	555-333-1350	Manny Tests	uncle	555-888-1350	Nc
☐ Rae Roberts	Enrolled	Olie					
☐ 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**

Enroll

Select:	All / Requested / Enrolled / Waitlisted / Dropped	Student	Status	Prim
☒	Jamaal Brown	Requested Enrollment	Mich	
☐	Rae Roberts	Enrolled	Olie	
☐	Dani Brown	Enrolled	Mich	

Enroll **Waitlist** **Drop**

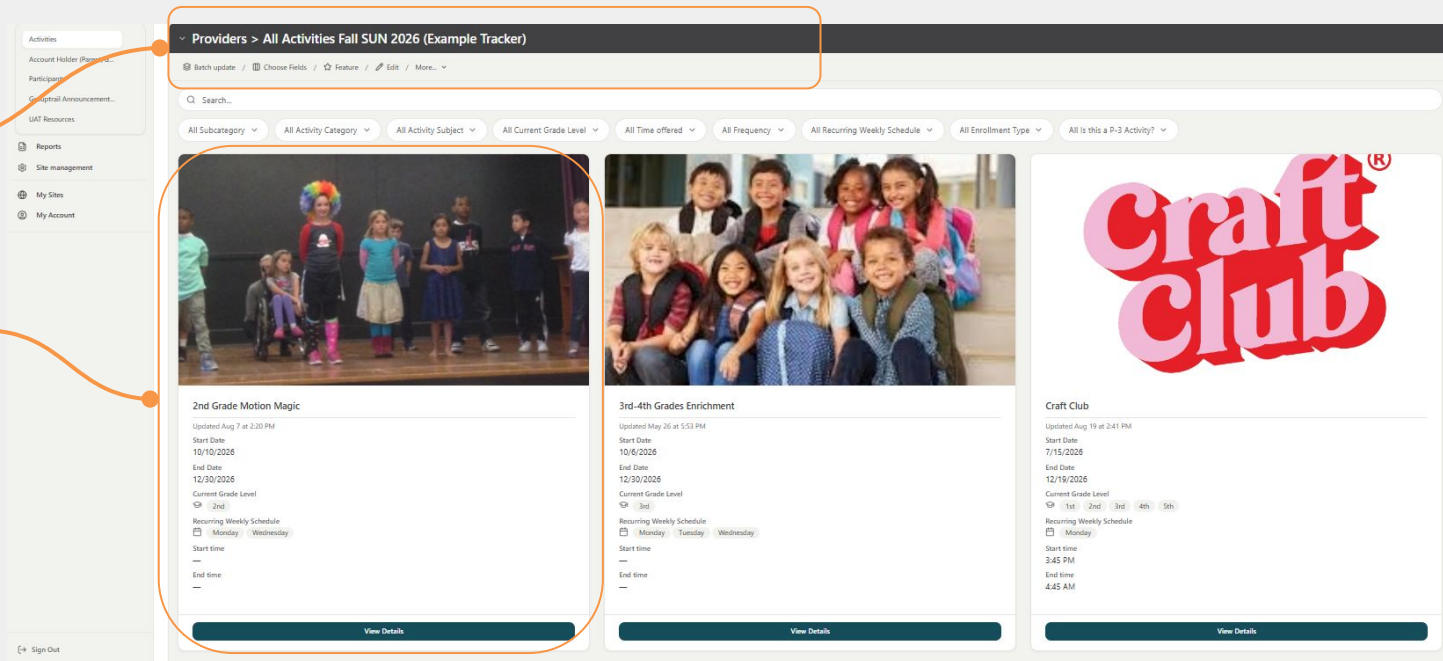
Add student:
 Enroll



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

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](#)

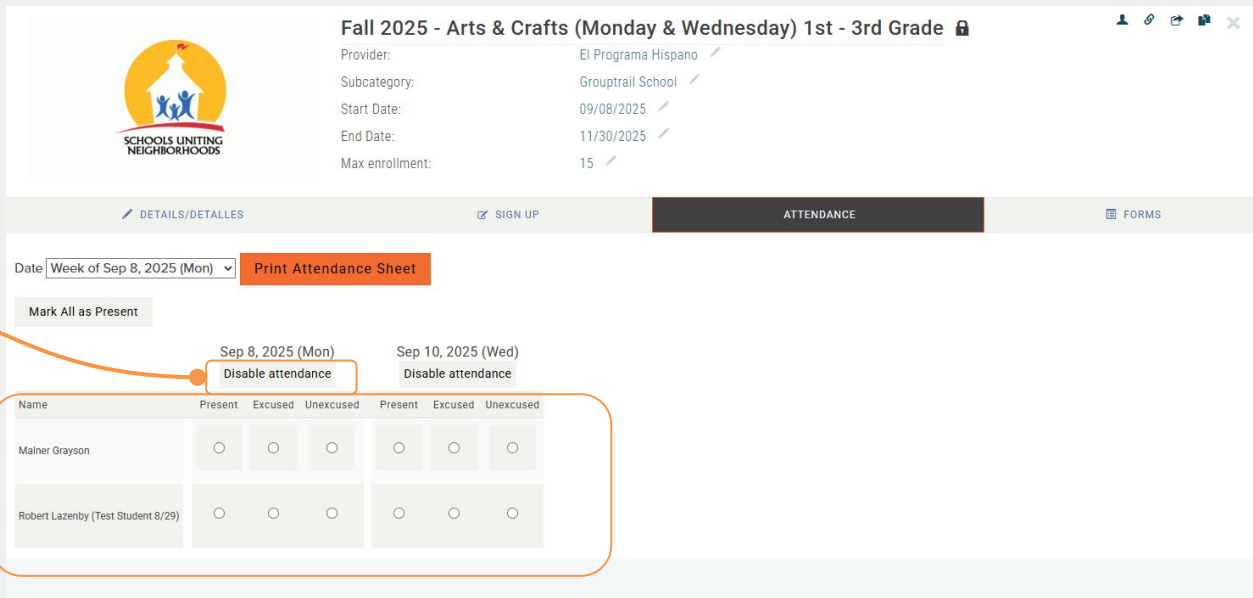
[Mark All as Present](#)

	Sep 8, 2025 (Mon)			Sep 10, 2025 (Wed)		
	Disable attendance			Disable attendance		
Name	Present	Excused	Unexcused	Present	Excused	Unexcused
Malner Grayson	☐	☐	☐	☐	☐	☐
Robert Lazenby (Test Student 8/29)	☐	☐	☐	☐	☐	☐

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	☐	☐	☐	☐	☐	☐
Robert Lazenby (Test Student 8/29)	☐	☐	☐	☐	☐	☐

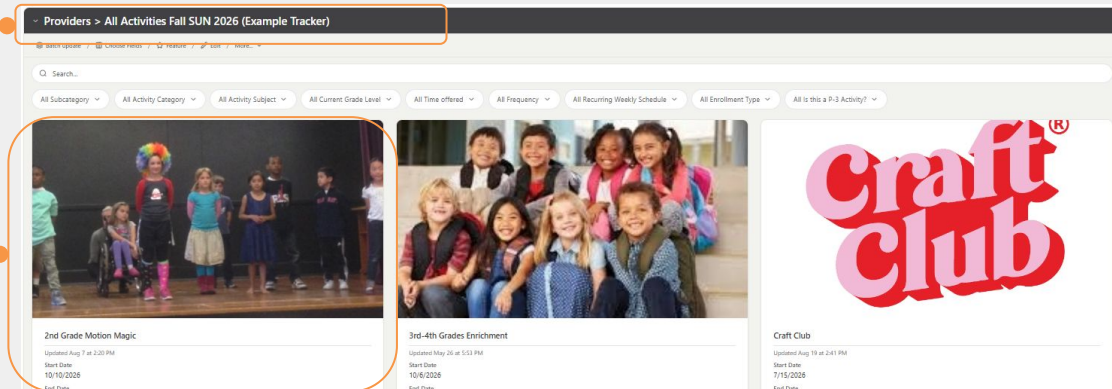
****Radio buttons (dots above under “Present/Excused/Unexcused”) automatically save - there is no save button to push as a second step****



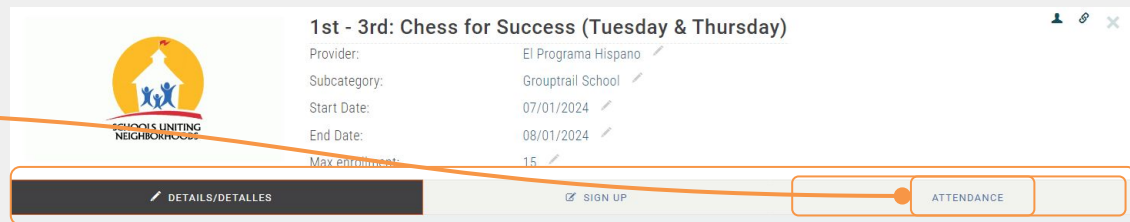
**Optional:
Integrated Printing Attendance
and
Dismissal Sheets**

Printing an attendance sheet

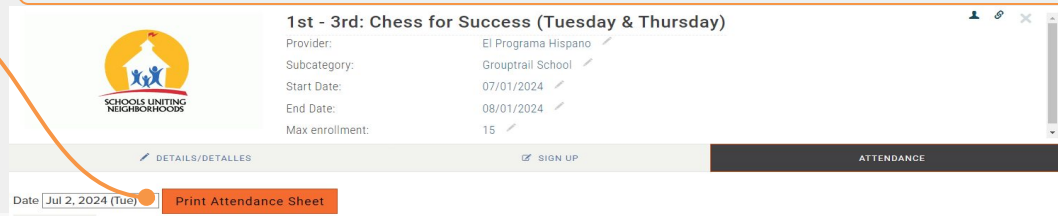
Step 1) To print an attendance sheet, go to your activity tracker and select the activity you would like to print-off an attendance sheet for



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



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



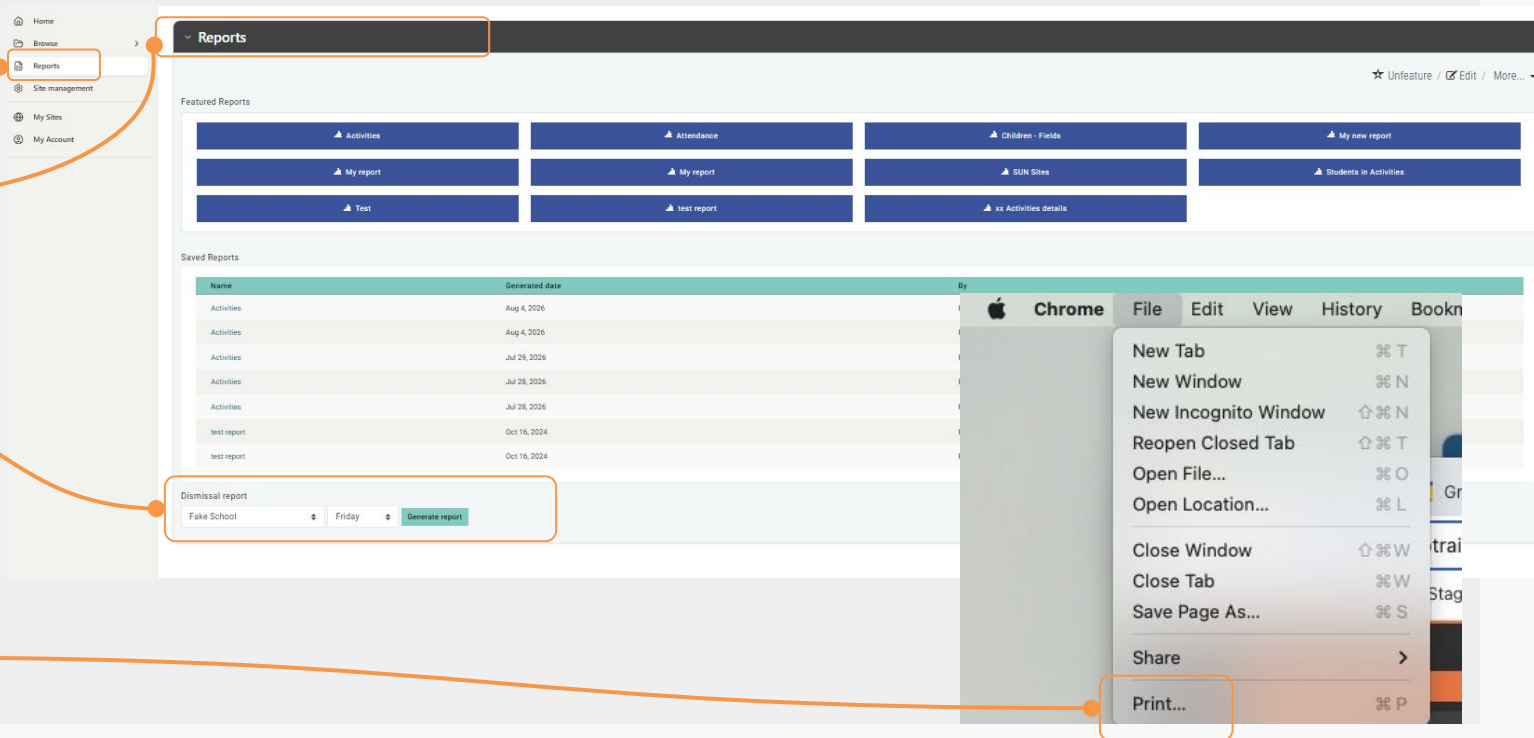
Note:

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 interface 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: 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 align separate name fields with participant workspace name
- 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

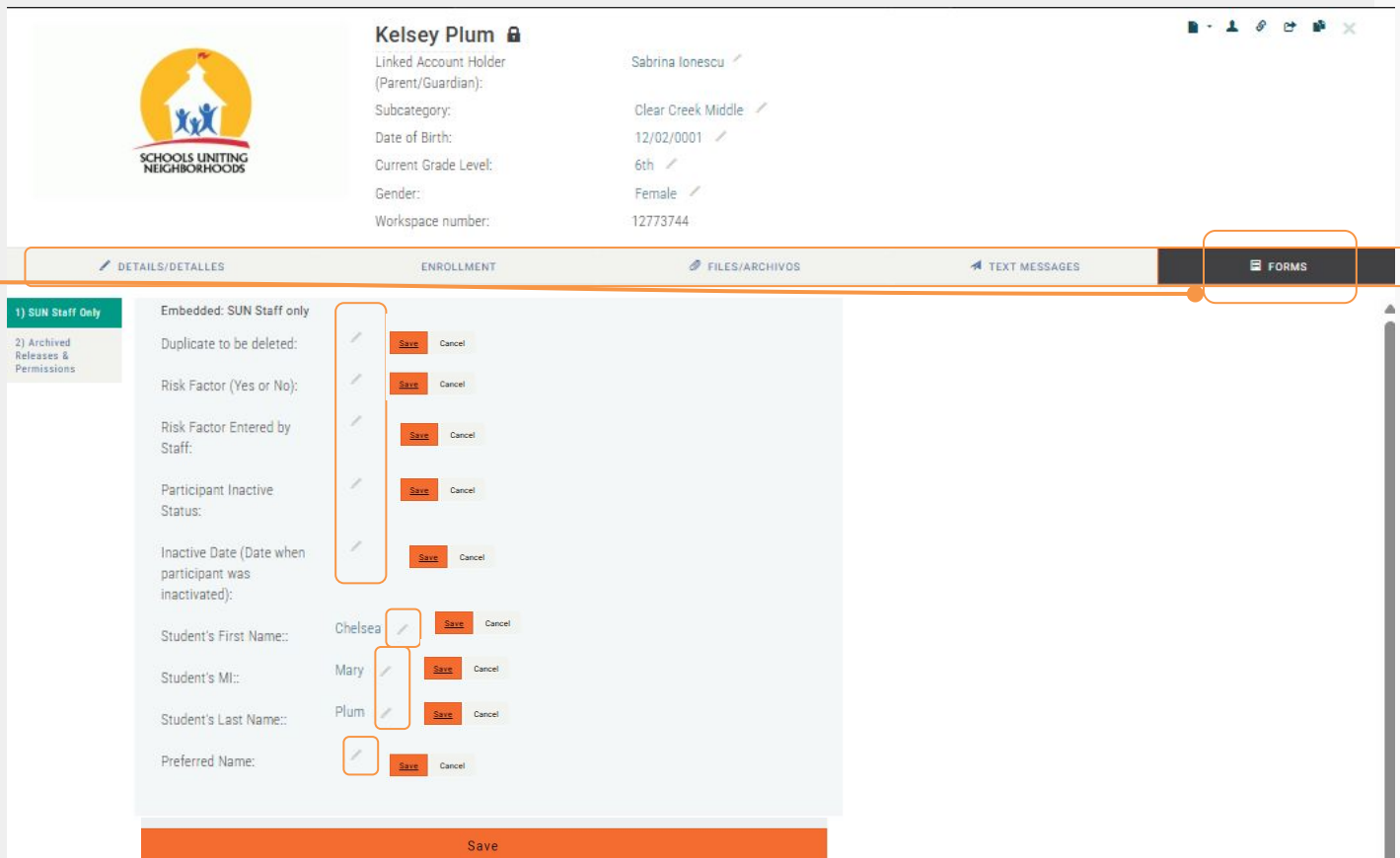
On a Participant's Workspace/Profile, click on **Forms**.

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



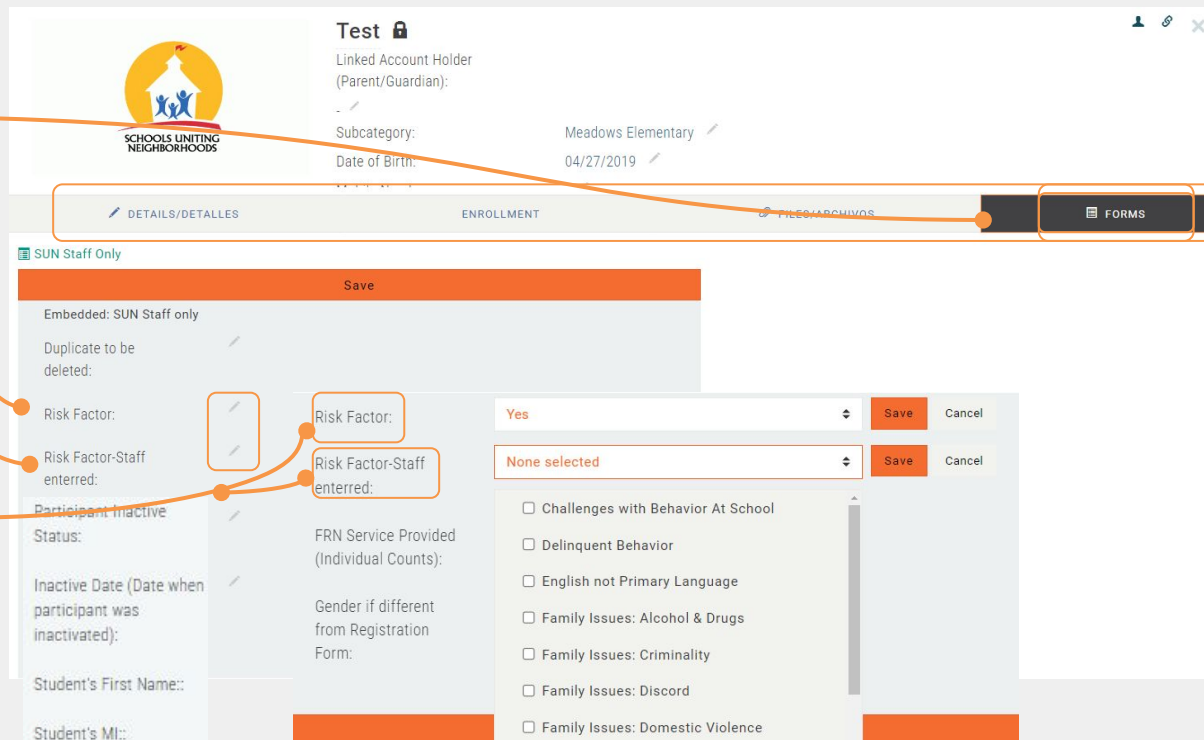
The screenshot displays the Grouptrail interface for a participant's profile. At the top, the participant's name 'Kelsey Plum' is shown with a lock icon. Below this, a list of fields includes 'Linked Account Holder (Parent/Guardian): Sabrina Ionescu', 'Subcategory: Clear Creek Middle', 'Date of Birth: 12/02/0001', 'Current Grade Level: 6th', 'Gender: Female', and 'Workspace number: 12773744'. A navigation bar at the bottom of the profile section contains tabs: 'DETAILS/DETALLES', 'ENROLLMENT', 'FILES/ARCHIVOS', 'TEXT MESSAGES', and 'FORMS'. The 'FORMS' tab is highlighted with an orange box. Below the navigation bar, a sidebar on the left lists '1) SUN Staff Only' and '2) Archived Releases & Permissions'. The main content area shows a form titled 'Embedded: SUN Staff only'. This form contains several fields with pencil icons for editing: 'Duplicate to be deleted:', 'Risk Factor (Yes or No):', 'Risk Factor Entered by Staff:', 'Participant Inactive Status:', and 'Inactive Date (Date when participant was inactivated):'. Each of these fields has an orange 'Save' button next to it. Below these are text input fields for 'Student's First Name:' (Chelsea), 'Student's MI:' (Mary), 'Student's Last Name:' (Plum), and 'Preferred Name:'. Each of these text fields also has a pencil icon and an orange 'Save' button. At the bottom of the form, there is a large orange 'Save' button.

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

SCHOOLS UNITING NEIGHBORHOODS

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.

Step 5) To help identify 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

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

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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.

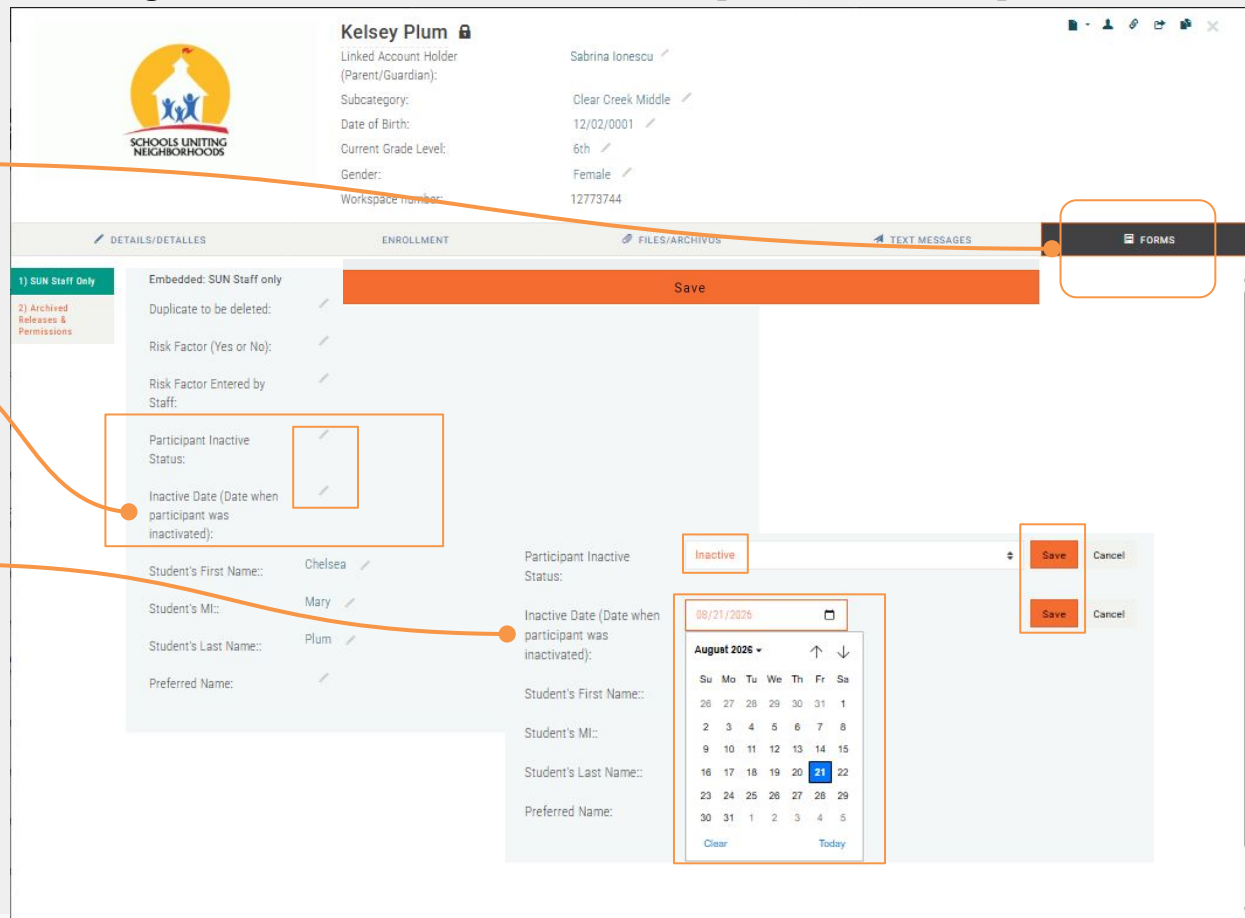
Step 2) To mark a participant’s record to be “Inactive” update the following two fields: “**Participant Inactive Status**” and the “**Inactive Date**” by clicking the pencil icon

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.



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 Date (Date when participant was inactivated): 

Student's First Name: Chelsea 

Student's MI: Mary 

Student's Last Name: Plum 

Preferred Name: 

Participant Inactive Status: Inactive 

Inactive Date (Date when participant was inactivated): 08/21/2025 

Student's First Name: 

Student's MI: 

Student's Last Name: 

Preferred Name: 

August 2025 

Su	Mo	Tu	We	Th	Fr	Sa
28	27	26	29	30	31	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

Save Cancel

Save Cancel

Save

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 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.

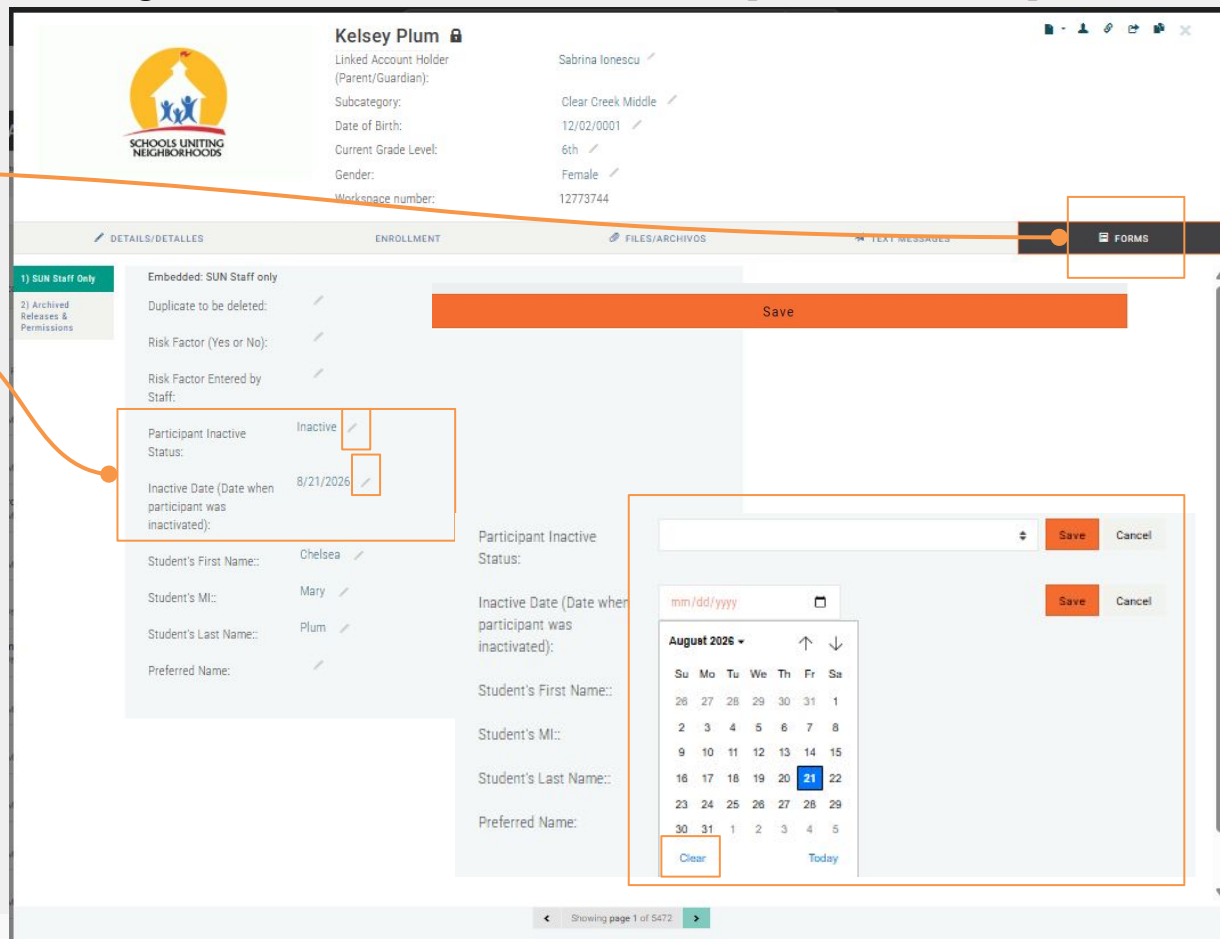
Step 2) To re-activate a participant’s workspace you will need to update the the following two fields: **“Participant Inactive Status”** and the **“Inactive Date”** by clicking the pencil icon

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 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**”



Updating and Aligning Separate Name Fields with Participant Workspace Name

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

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 **both “Save” buttons** (the one on the **right side** and the **top** save orange bar)

Important Note:

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”

Participant Profile: 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

Test Account , Robert Test (8/5), Robert Test

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

1) SUN Staff Only
2) Archived Releases & Permissions

Embedded: SUN Staff only

Duplicate to be deleted: ☐

Risk Factor (Yes or No): Yes ☐

Risk Factor Entered by Staff: Poverty ☐

Participant Inactive Status: ☐

Inactive Date (Date when participant was inactivated):

Name Fields:

Field	Current Value	Action
Student's First Name:	Jim	Save Cancel
Student's MI:		Save Cancel
Student's Last Name:	Love	Save Cancel
Preferred Name:		

Save Bar: Save



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)

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

Test Account , Robert Test (8/5), Robert Test

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

1) SUN Staff Only

2) Archived Releases & Permissions

Past SUN Releases & Permissions

Release to Participate Granted for 2023-2024:	
Release of Information Granted for 2023-2024:	
Photo Release Granted for 2023-2024:	
Release to Participate Granted for 2026-2027:	Yes
Release of Information Granted for 2026-2027:	Yes
Photo Release Granted for 2026-2027:	Yes

Save

Photo Release Granted for 2023-2024: **Save** **Cancel**

Release to Participate Granted for 2026-2027: Yes

Release of Information Granted for 2026-2027: Yes

Photo Release Granted for 2026-2027: Yes

Save



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

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
Fall 2025 - Arts & Crafts (Monday & Wednesday) 1st - 3rd Grade	Enrolled	09/08/2025

Past Activities

Activity	Status	Start date
Spring 2025 (Kinder Group) Monday - Thursday: Kindergarten	Enrolled	04/01/2025
Fall 2024 - Kinder Group (Monday - Thursday) Kindergartens	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:

Release of Information Granted for 2025-2026:

Photo Release Granted for 2025-2026:

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

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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
Fall 2025 - Arts & Crafts (Monday & Wednesday) 1st - 3rd Grade	Enrolled	09/08/2025

Past Activities

Activity	Status	Start date
Spring 2025 (Kinder Group) Monday - Thursday: Kindergarten	Enrolled	04/01/2025
Fall 2024 - Kinder Group (Monday - Thursday) Kindergartens	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
Fall 2025 - Math through Basketball (Monday & Wednesday) 1st - 3rd Grade	Enrolled	10/02/2025
Fall 2025 - Arts & Crafts (Monday & Wednesday) 1st - 3rd Grade	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
Fall 2025 - Math through Basketball (Monday & Wednesday) 1st - 3rd Grade	Enrolled	10/02/2025
Fall 2025 - Arts & Crafts (Monday & Wednesday) 1st - 3rd Grade	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
☐ 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
☐ Robert Lazenby - Delete	Enrolled	Mary J. Blige	222-222-2222	Damson Idris	Brother	333-333-3333	Yes	10/06	
☐ Robert Lazenby	Enrolled	Mary J. Blige	222-222-2222	Damson Idris	Brother	333-333-3333	Yes	10/06	

[Enroll](#) [Waitlist](#) [Drop](#)

Add student:

[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	☒	☐	☐	☐	☐	☒
Robert Lazenby - Delete	☒	☐	☐	☐	☐	☒

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
Fall 2025 - Math through Basketball (Monday & Wednesday) 1st - 3rd Grade	Enrolled	10/02/2025
Fall 2025 - Arts & Crafts (Monday & Wednesday) 1st - 3rd Grade	Enrolled	09/08/2025

Past Activities

Activity	Status	Start date
Spring 2025 (Kinder Group) Monday - Thursday: Kindergarten	Enrolled	04/01/2025
Fall 2024 - Kinder Group (Monday - Thursday) Kindergartens	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
Fall 2025 - Math through Basketball (Monday & Wednesday) 1st - 3rd Grade	Enrolled	10/02/2025
Fall 2025 - Arts & Crafts (Monday & Wednesday) 1st - 3rd Grade	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: 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

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: 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:
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
Fall 2025 - Arts & Crafts (Monday & Wednesday) 1st - 3rd Grade	Enrolled	09/08/2025

Past Activities

Activity	Status	Start date
Spring 2025 (Kinder Group) Monday - Thursday: Kindergarten	Enrolled	04/01/2025
Fall 2024 - Kinder Group (Monday - Thursday) Kindergartens	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
Fall 2025 - Math through Basketball (Monday & Wednesday) 1st - 3rd Grade	Enrolled	10/02/2025
Fall 2025 - Arts & Crafts (Monday & Wednesday) 1st - 3rd Grade	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:
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

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 - 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

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 1 (Keep)**
Workspace #: 11975718

Profile 2 (Delete) →
Workspace #: 11719234

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):

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

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 2 (Delete)

Workspace #: 11719234

Remove account holders first from profile 1

Profile 1 (Keep)

Workspace #: 11975718

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

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
Fall 2025 - Math through Basketball (Monday & Wednesday) 1st - 3rd Grade	Enrolled	10/02/2025
Fall 2025 - Arts & Crafts (Monday & Wednesday) 1st - 3rd Grade	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: Grouptail 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
☐ 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
☐ Robert Lazenby - Delete	Enrolled	Mary J. Blige	222-222-2222	Damson Idris	Brother	333-333-3333	Yes	10/06	
☐ 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	☒	☐	☐	☐	☐	☒
Robert Lazenby - Delete	☒	☐	☐	☐	☐	☒

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
Fall 2025 - Math through Basketball (Monday & Wednesday) 1st - 3rd Grade	Enrolled	10/02/2025
Fall 2025 - Arts & Crafts (Monday & Wednesday) 1st - 3rd Grade	Enrolled	09/08/2025

Past Activities

Activity	Status	Start date
Spring 2025 (Kinder Group) Monday - Thursday: Kindergarten	Enrolled	04/01/2025
Fall 2024 - Kinder Group (Monday - Thursday) Kindergartens	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
Fall 2025 - Math through Basketball (Monday & Wednesday) 1st - 3rd Grade	Enrolled	10/02/2025
Fall 2025 - Arts & Crafts (Monday & Wednesday) 1st - 3rd Grade	Enrolled	09/08/2025

Profile 2 (Delete)
Workspace #: 11719234

Old Profile

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



Robert Lazenby

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

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



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: 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

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

69

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



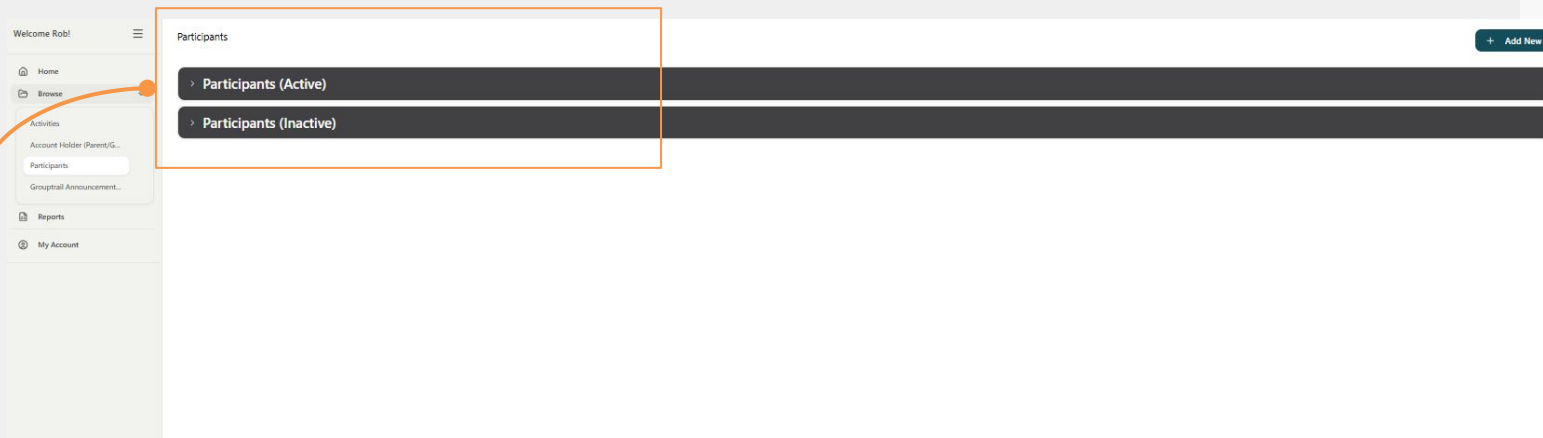
Other Grouptrail Features For Users:

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.

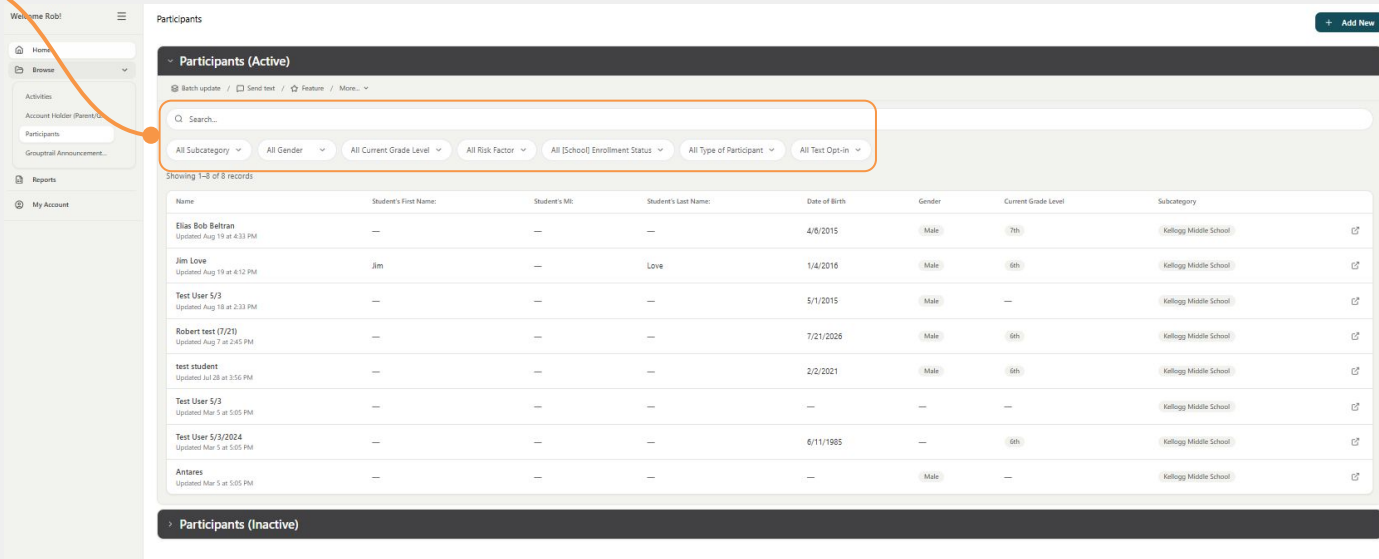
SSID Number

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), Participants, Grouptrail Announcement..., Reports, and My Account. The main 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 Updated Aug 19 at 4:33 PM	—	—	—	4/6/2015	Male	7th	Kellogg Middle School
Jim Love Updated Aug 19 at 4:12 PM	Jim	—	Love	1/4/2016	Male	6th	Kellogg Middle School
Test User 5/3 Updated Aug 18 at 2:33 PM	—	—	—	5/1/2015	Male	—	Kellogg Middle School
Robert test (7/21) Updated Aug 7 at 2:45 PM	—	—	—	7/21/2026	Male	6th	Kellogg Middle School
test student Updated Jul 28 at 3:56 PM	—	—	—	2/2/2021	Male	6th	Kellogg Middle School
Test User 5/3 Updated Mar 5 at 5:05 PM	—	—	—	—	—	—	Kellogg Middle School
Test User 5/3/2024 Updated Mar 5 at 5:05 PM	—	—	—	6/11/1985	—	6th	Kellogg Middle School
Antares Updated Mar 5 at 5:05 PM	—	—	—	—	Male	—	Kellogg Middle School

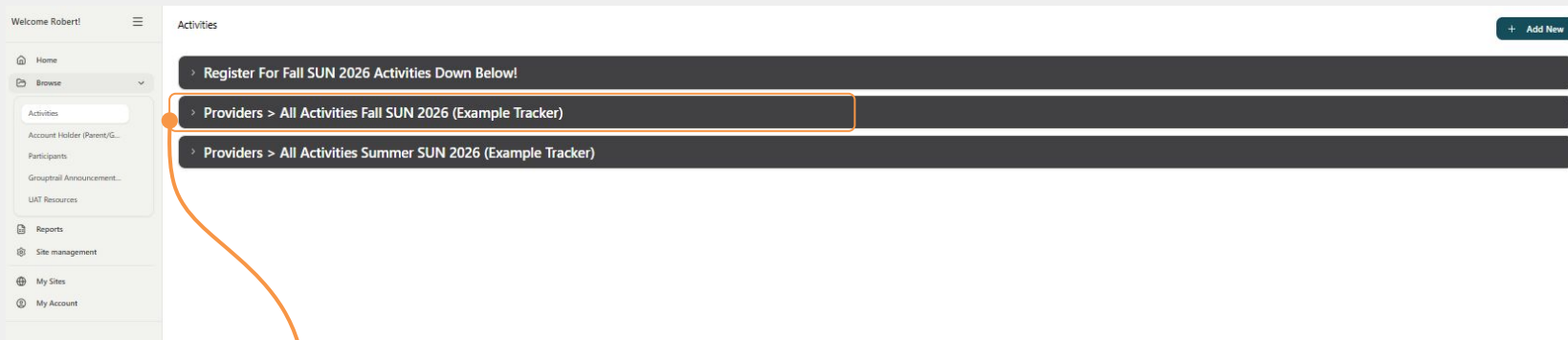
Below the table is a section for 'Participants (Inactive)'.

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:

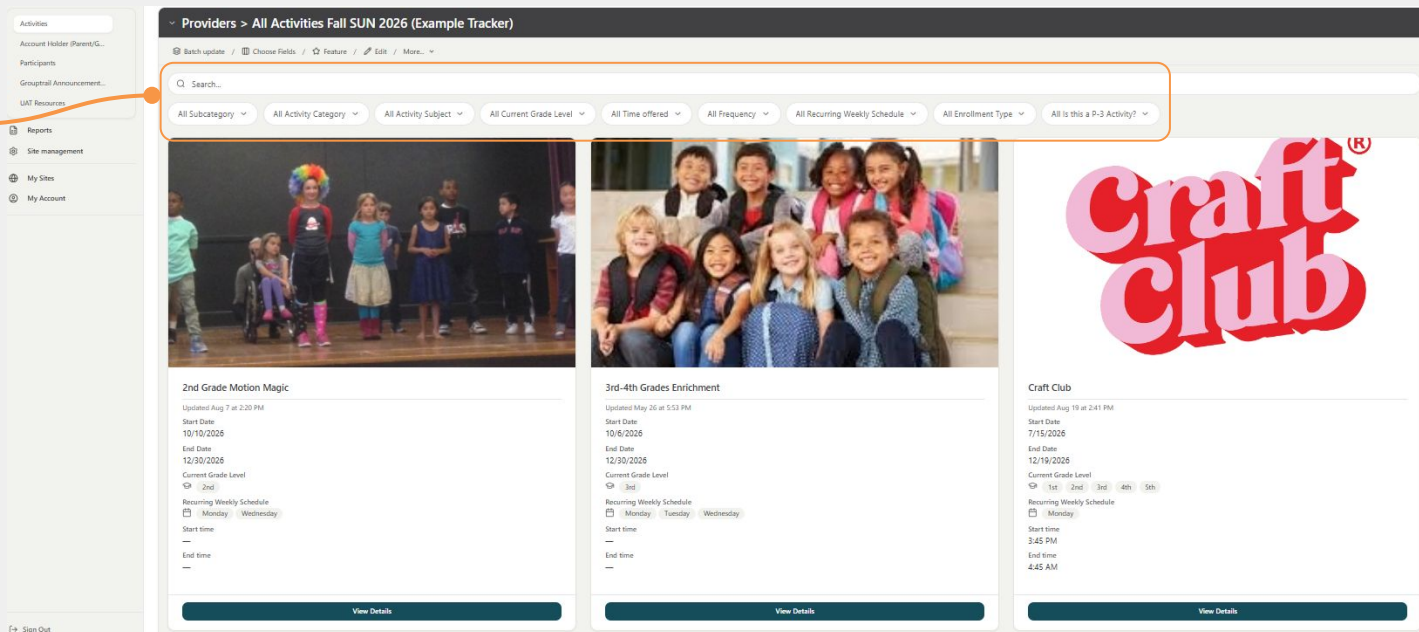
Name of the activity

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 displays 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 header shows the title "Providers > All Activities Fall SUN 2026 (Example Tracker)". Below the header is a search bar with a magnifying glass icon and a "Search..." placeholder. Under 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?. The main content area displays three activity cards. The first card is titled "2nd Grade Motion Magic" and features a photo of children on a stage. The second card is titled "3rd-4th Grades Enrichment" and features a photo of a group of children. The third card is titled "Craft Club" and features a large red and pink logo. Each card includes 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. A "Sign Out" link is located at the bottom left of the sidebar.

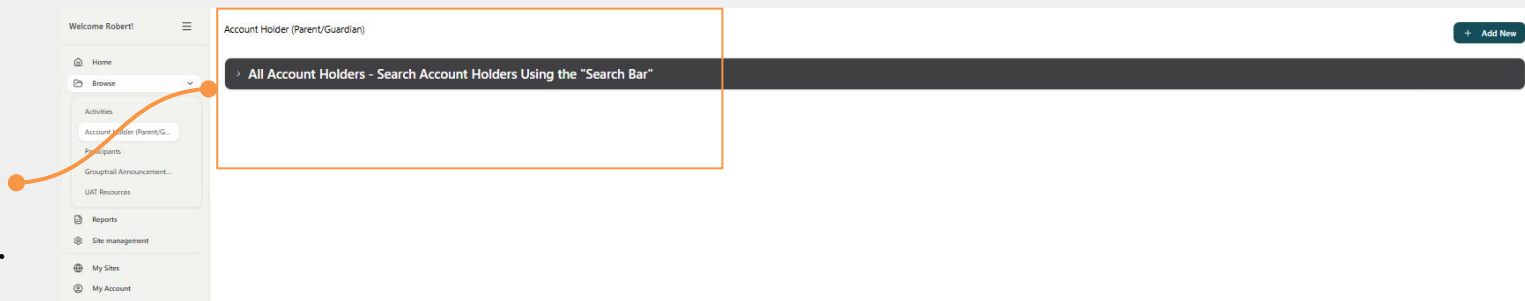
Important Note:

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

Grouptrail Searching Workspaces with All-System Search Bar

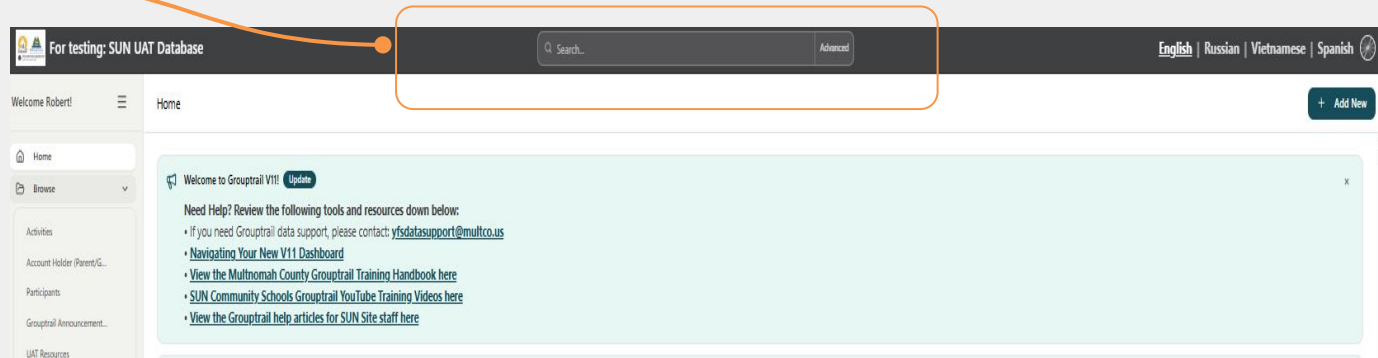
You may also search workspaces with the **all-system search bar** at the top of a user's dashboard

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

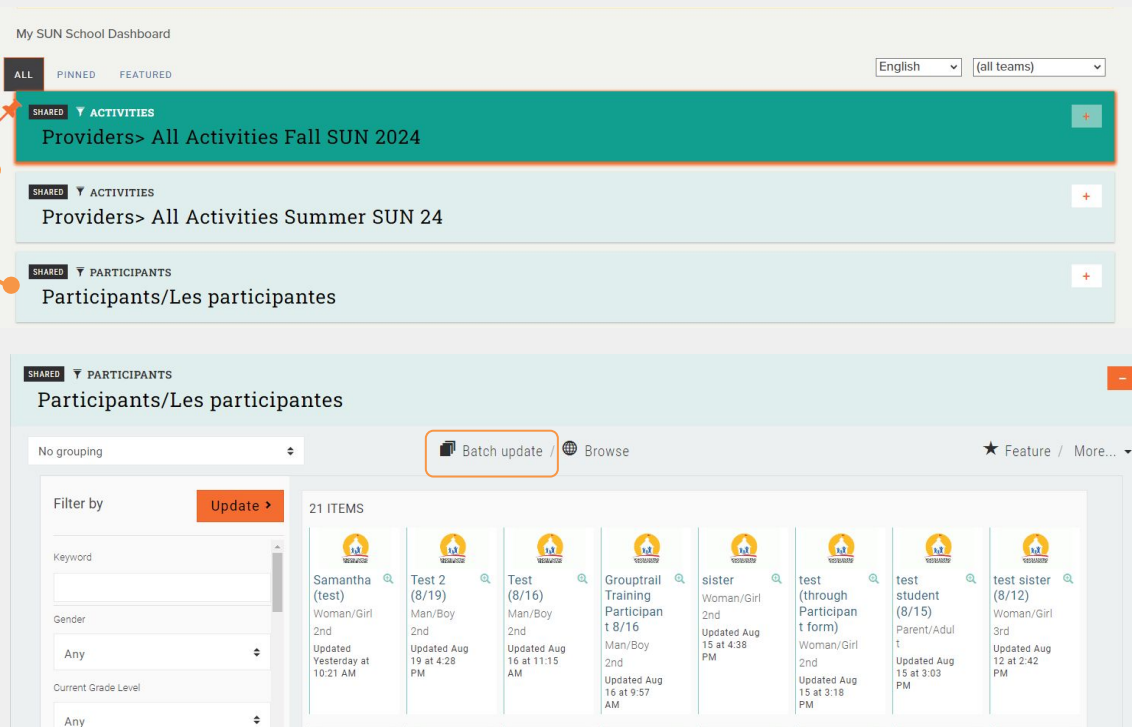
Please Note: This process reviews how a user can quickly update a universal field or tag in Grouptrail to multiple workspaces (activities and/or participants)

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



My SUN School Dashboard

English (all teams)

ALL PINNED FEATURED

SHARED ACTIVITIES Providers> All Activities Fall SUN 2024

SHARED ACTIVITIES Providers> All Activities Summer SUN 24

SHARED PARTICIPANTS Participants/Les participantes

SHARED PARTICIPANTS Participants/Les participantes

No grouping Batch update / Browse

Filter by Update

Keyword

Gender Any

Current Grade Level Any

21 ITEMS

Name	Gender	Updated
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

☐ 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)	

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

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

☐ 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



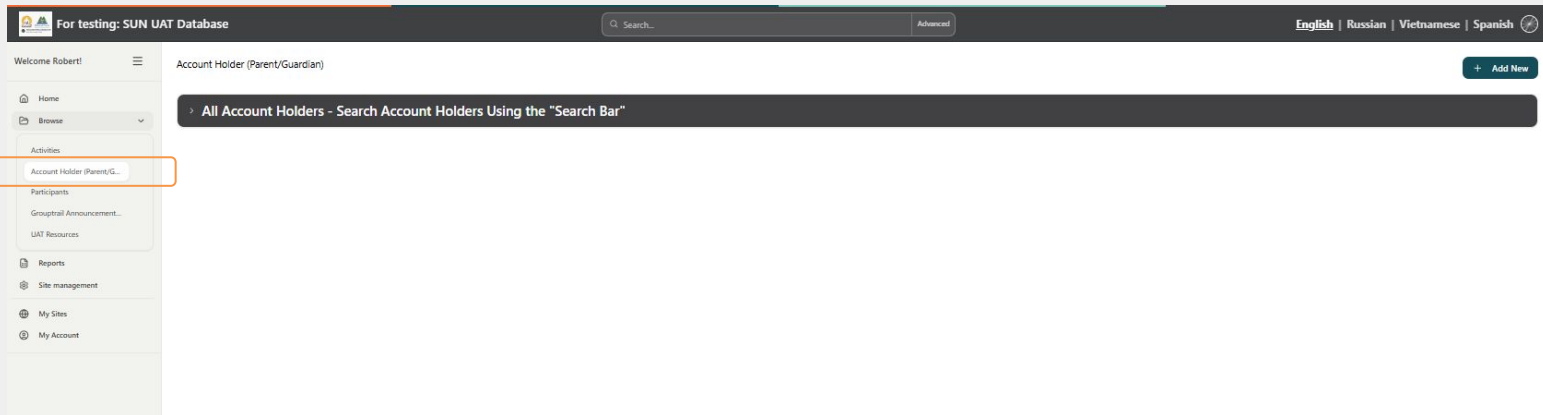
Other Grouptrail Features For Users:

Manually Creating and linking Account Holders to Participants

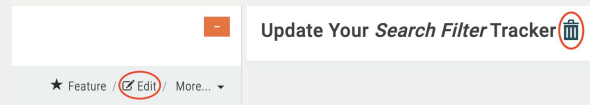
Please Note: This process reviews how to create and link participants that are manually created in the system and/or adding additional account holders to an existing student or adult record(s)

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

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

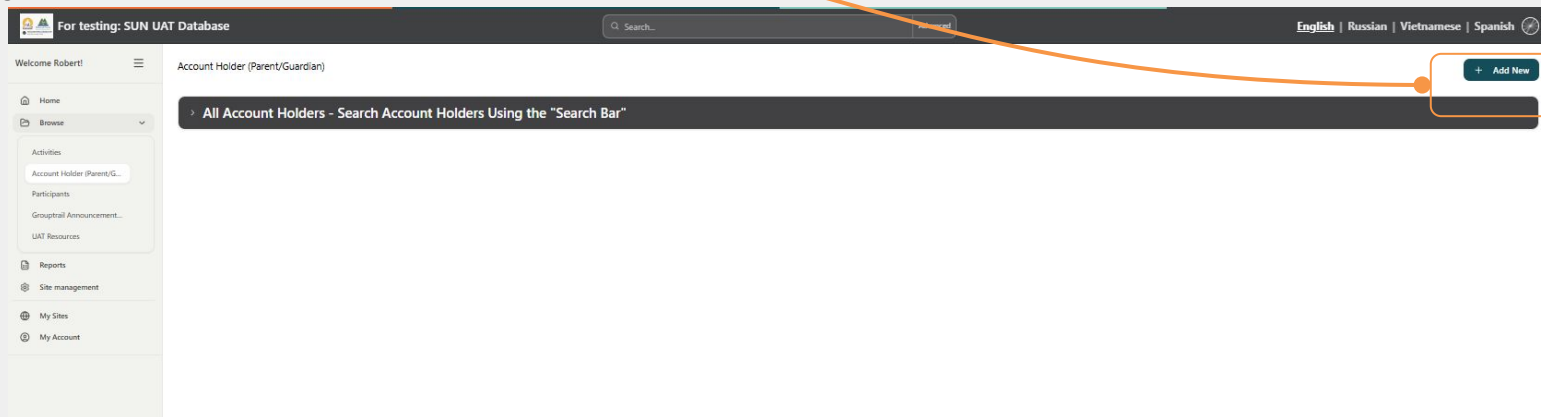


NOTE: Be sure not to “Create a Tracker” instead of clicking on “Add a Workspace.” If you do, you can open up and edit the tracker you created and delete it:



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

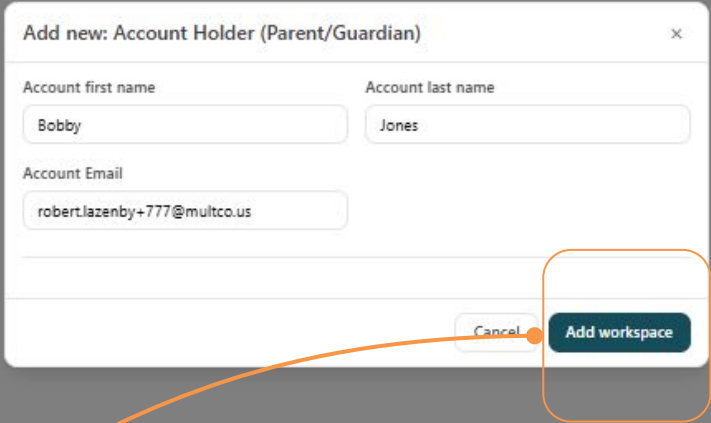
- 1) Account Holder First Name
- 2) Account Holder Last Name
- 3) Account Holder Email

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"**



Add new: Account Holder (Parent/Guardian) x

Account first name Account last name

Bobby Jones

Account Email

robert.lazenby+777@multco.us

Cancel Add workspace

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

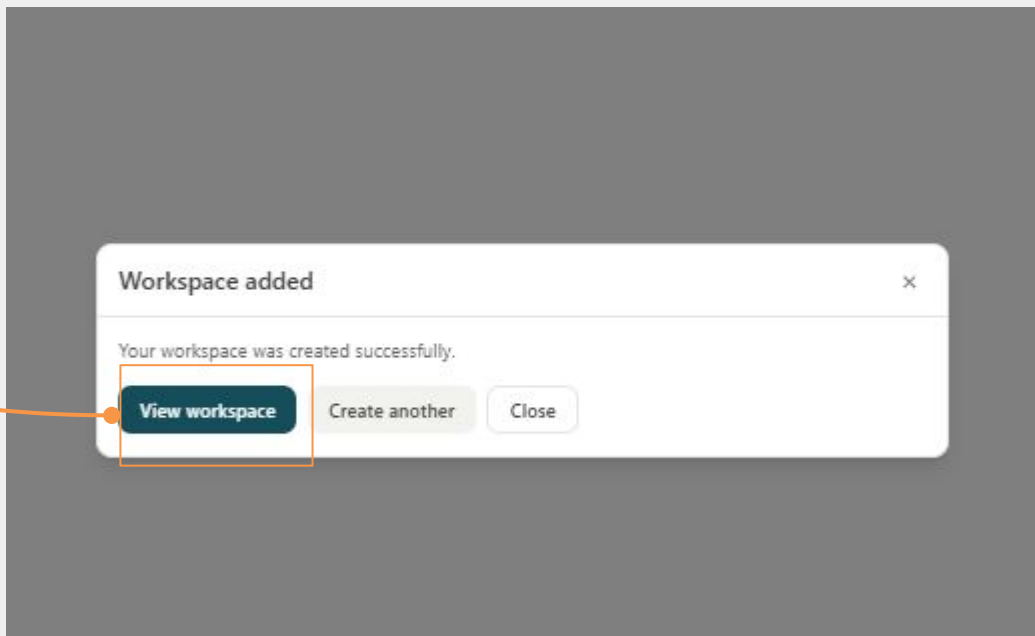
1. Once you have selected, “Add Workspace” you will receive a notification referencing that the workspace has been successfully created

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 'Jim Love' as a potential participant to be added. An orange arrow points from the search bar to the 'Jim Love' entry. Another orange arrow points from the 'Save' button at the bottom to the 'Save' button in the 'Linked Participants' section.

Account Information:

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

Linked Participants:

- Jim Love

Save **Cancel**

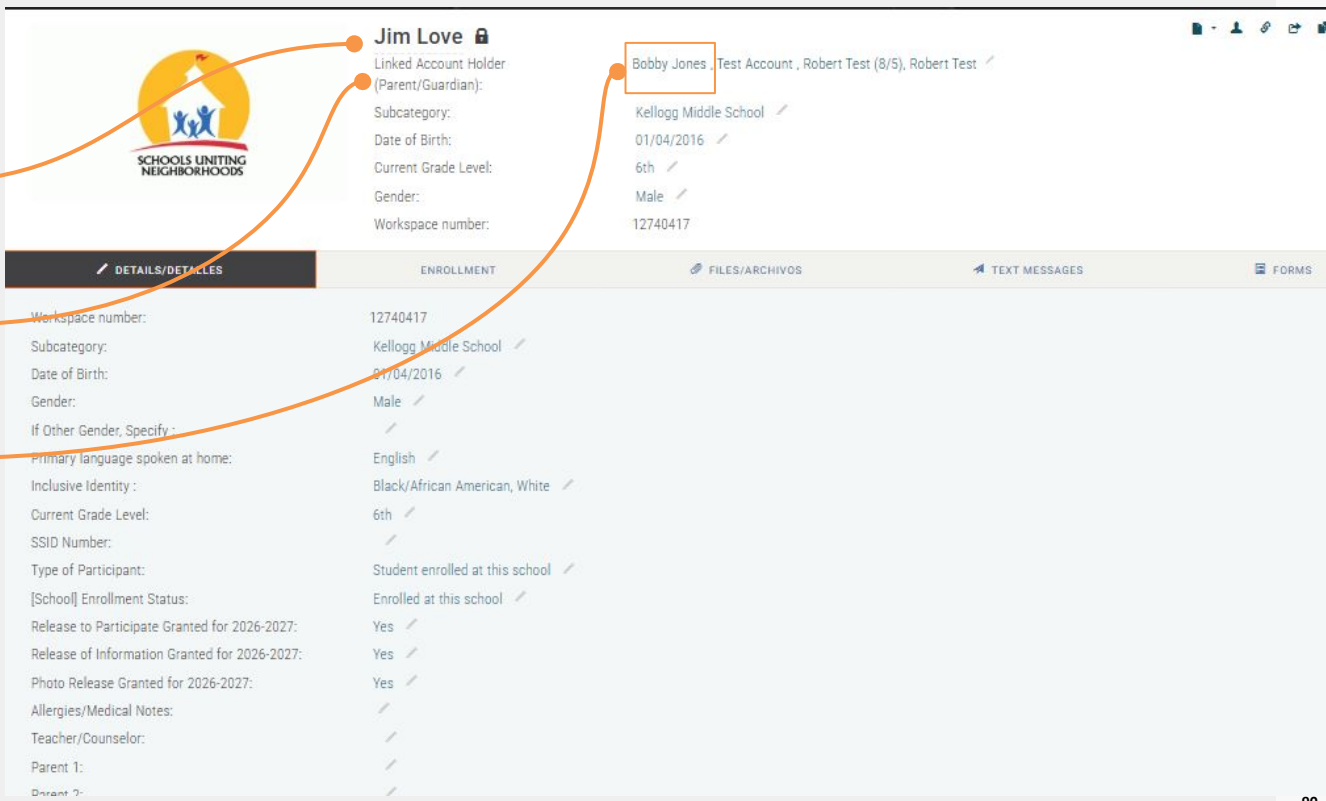
Step 6) Manually creating a NEW account holder for an Existing participant

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



The screenshot shows the 'DETAILS/DETALLES' tab of a student's profile. The student's name is 'Bobby Jones' (highlighted with a red box). The 'Linked Account Holder (Parent/Guardian)' field is 'Jim Love' (highlighted with a red box). The 'Workspace number' is '12740417'. The 'Subcategory' is 'Kellogg Middle School'. The 'Date of Birth' is '01/04/2016'. The 'Current Grade Level' is '6th'. The 'Gender' is 'Male'. The 'Workspace number' is '12740417'.

The 'DETAILS/DETALLES' tab is selected. Other tabs include 'ENROLLMENT', 'FILES/ARCHIVOS', 'TEXT MESSAGES', and 'FORMS'.

The 'DETAILS/DETALLES' section contains the following information:

- 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 / Unfeature / 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) Updated Today at 4:19 PM	Samantha	—	(test)	2/2/2012	Male	8th	Cesar Chavez K-8
Elias Bob Beltran 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 

Save Cancel



Thank you!

Multnomah County

Department of County Human Services

SUN Service System Data Team

yfsdataskysupport@multco.us