

SUN COMMUNITY SCHOOLS

WellSky Community Services Handbook

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Questions? Contact the Community Services Helpline at 503.970.4408 or
servicepoint@multco.us

<http://multco.us/servicepoint>

Revised 8. 24. 23

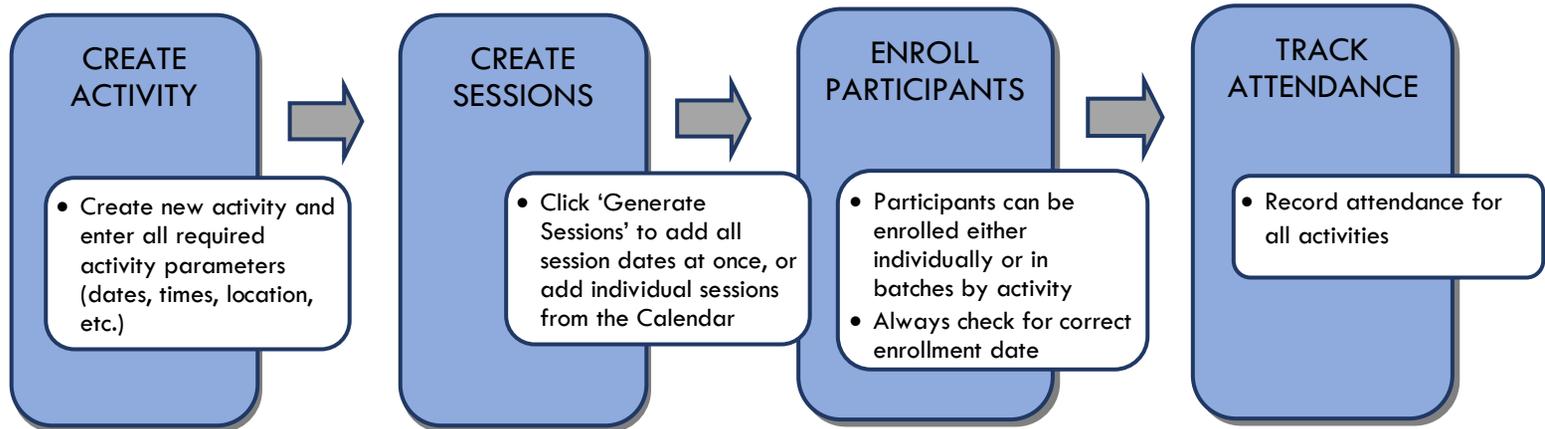
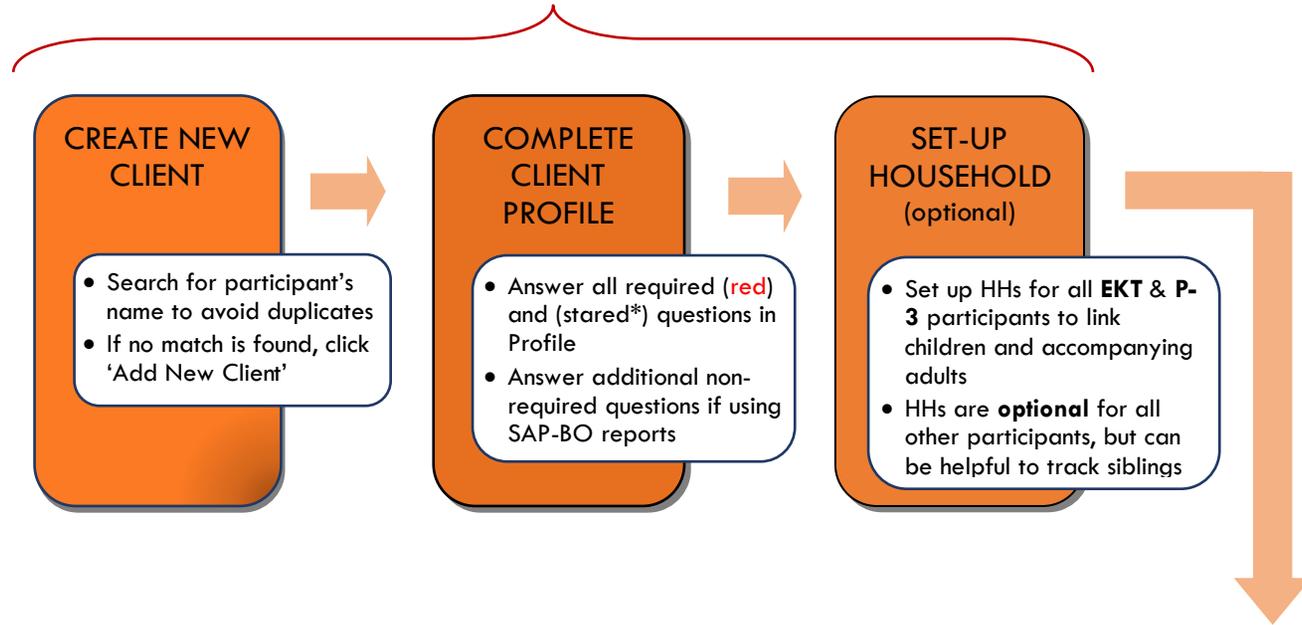
SUN Community Schools Community Services Handbook

- Revision History

- **Revised August 2015** - Updated ART Report section with changes made for 2015-16 school year, added section on ReportWriter
- **Revised March 2016** - Program Entries are no longer required. All Required Data Elements are located in the Client Profile. Households are optional, except for EKT participants.
- **Revised September 2016** - Added requirement of building households for P3 activities (in addition to EKT)
- **Revised August 2023** – Updated text ART Report to SAP-BO Report. Updated text and images from ServicePoint to WellSky Community Services.

SUN COMMUNITY SCHOOLS DATA MILESTONES

Clients



Activities

CREATING A NEW CLIENT IN CLIENTS

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

SEARCHING FOR A CLIENT

- Always search for a participant’s name before adding them as a new client. Participants may already be in Community Services if they (or their family) have been served in other programs.
- Search by first name, last name, or a portion of either name.
- If a name match is found, check that the DOB also matches. If no match is found, click ‘Add New Client with This Information.’

In this example, you’ve found mom and big sister, but little brother isn’t in Community Services yet. You’ll need to add him as a new client.

COMPLETING THE CLIENT PROFILE

Answer All Required Questions (in red):

For ALL Participants:

- **DOB**
- **Gender**
- **Primary Language:** If ‘Other,’ specify below
- **Inclusive Identity:** Click ‘Add’ and choose all that apply

For ALL STUDENTS:

- **SSID Number**
- **Risk Factors (Y/N) *See List Below**
- **Release Granted by Parent?**
- **Release Year**

For All Early Kindergarten Transition (EKT) Students:

- **Did child attend Head Start?:** If yes, provide name
- **Did child attend preschool or kindergarten?:** If yes, provide name
- **Child is receiving SPED services?**

***Student Risk Factors Include:**

- Behavioral Issues
- Delinquent Behavior
- English not Primary Language
- Family Issues: Alcohol & Drugs
- Family Issues: Criminality
- Family Issues: Discord
- Family Issues: Domestic Violence
- Family Issues: Mental Health
- Foster Care
- Gang Involvement (or Risk of)
- Homelessness
- Individualized Education Plan (IEP)
- Mental Health
- Poor Academic Performance
- Poor Class Attendance
- Poverty
- Substance Abuse
- Suspension/Expulsion
- Teen Pregnancy

All other questions are OPTIONAL, but they're very helpful if using SAP-BO reports. Be sure to update questions for returning students.

The questions below are OPTIONAL, but can greatly enhance SUN School reports

Additional Client Identification

Parent 1 G

Parent 2 G

Photo Release? -Select- v G

Agency Client ID G

Synergy Number (For optional use only) G

School Information

Enrollment Status -Select- v G

Current Grade Level -Select- v G

Teacher/Counselor G

Other G

Contact Information

Primary Contact Name G

Primary Contact Phone G

Primary Contact Phone Desc G

Email Address G

Street Address G

Street Address (Additional) G

City G

State -Select- v G

Zip Code G

Q Contact Phone Numbers

Contact Name	Phone Number	Phone Desc	Start Date*
<input type="button" value="Add"/>			

Q Contacts (Emergency and Other)

Emergency Contact	Contact's Name	Contact ROI Expiration	Contact's City	Phone Number	Second Phone Number	Relationship to Client
<input type="button" value="Add"/>						

Transportation Information

Primary Method of Transportation -Select- v G

Secondary Method of Transportation -Select- v G

Bus Number G

Bus Stop G

Authorized Pick-Up G

Special Considerations

Medical Notes G

Other Issues G

OPTIONAL Risk Factor Details

Q Risk Factor Type

Entry Date*	Risk Factor
<input type="button" value="Add"/>	

TEST TEXT AREA G

SETTING UP A HOUSEHOLD

Households are required for all child and adult participants in **Early Kindergarten Transition (EKT)** and **P3 School Project** activities. Beyond that, setting up households in Community Services is **OPTIONAL**. Setting up households can be helpful, particularly at elementary and K-8 sites, to track siblings and coordinate their enrollment.

ADDING TO AN EXISTING HOUSEHOLD

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

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

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

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

STARTING A NEW HOUSEHOLD

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

1 Choose the Household Type

2 Search for/add any additional household members.

ID	Name	Social Security Number	Date of Birth	Alias	Gender	Banned	Household Count
1022	Test, SUN 1		08/09/2008				1
1023	Test, SUN 2		02/27/2014				1

3 Choose 1 Head of Household and add specify the Relationship of all members

4 Click 'Save & Exit'

Name	Age	Head of Household	Relationship to Head of Household	Joined Household+	Previous Associations	Household Count
(1022) Test, SUN 1	15	Yes	Self	09 / 06 / 2023	0	2
(1023) Test, SUN 2	9	No	Daughter	09 / 06 / 2023	0	2
(1084) Test, SUN 3	4	No	Son	09 / 06 / 2023	0	1

CREATING ACTIVITIES IN ACTIVITYPOINT

- **Enrolled Activities** are groups that meet regularly with consistent attendees (ex: 15-16 Soccer League, Fall 1st - 2nd Grade Arts & Crafts, etc.)
- **Non-enrolled Activities** are open events where you only want to track the total number of attendees (ex: SUN Showcase, Back-to-School Fair, etc.)
- **Before creating a new activity, always search for the activity name.** Click 'My Provider' to search only within your own program. Always click 'Include Past' if the activity has ended.

ACTIVITY INFO

- 1 Choose an activity name that clearly describes the class, ex: '2015-16 Book Club' or 'Summer 2016 Adult ESL'
- 2 Activity Type is always 'Local'
- 3 Set all activity parameters.
- 4 For enrolled activities, leave Enrollment Type as 'Open'
- 5 Set Max enrollment
- 6 Choose the most appropriate category. Only select from the options that begin with 'SUN.'
- 7 Always leave Assign Service as 'No'
- 8 Select the appropriate Subject and Target Participant Group and click 'Add.' Add all that apply from the options that begin with 'SUN.'
- 9 If applicable, write in any activity partners and click 'Add.' Add as many as apply.
- 10 Click 'Save' then continue on to the 'Sessions' tab (see following page)

IMPORTANT: Always add a Target Participant Group. Many SAP-BO reports rely on this field to pull the correct participants. See pages 10-15 for details.

CREATING SESSIONS FOR ENROLLED ACTIVITIES

Activities must have session dates in order to appear in SAP-BO reports.

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

or...

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

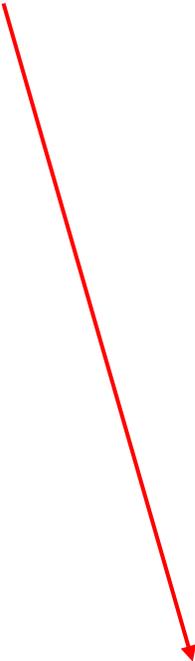
This feature can be useful for activities with irregular session dates or, for instance, to add a Saturday field trip to an activity that normally meets Mon/Wed.

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

Date	Description	Attendance	Volunteers
09/11/2023		0/0	0
09/13/2023		0/0	0
09/18/2023		0/0	0
09/20/2023		0/0	0
09/25/2023		0/0	0
09/27/2023		0/0	0

COPYING AN ACTIVITY

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



Activity ID	99705
Provider	Multnomah County - SP (2016)
Name *	Fall 2023 Science 6th-8th
Activity Type *	<input checked="" type="radio"/> Local <input type="radio"/> Public
Ages *	12 - 15
Time Offered *	After School
Frequency *	Twice a week
Recurring Weekly Schedule	<input type="checkbox"/> Sunday <input checked="" type="checkbox"/> Monday <input type="checkbox"/> Tuesday <input checked="" type="checkbox"/> Wednesday <input type="checkbox"/> Thursday <input type="checkbox"/> Friday <input type="checkbox"/> Saturday
Start Date *	09 / 08 / 2023
End Date *	10 / 18 / 2023
Start Time *	3 : 00 PM
End Time *	4 : 20 PM
Teacher	
Location	
Enrollment Type	Open
Max Enrollment *	15
Enrollment Status	15 Slots Remaining
Category *	SUN-Recreational Activities

Added on 09/18/2023 by Rachel Roberts for Multnomah County - SP (Level 2)
Last Updated on 09/18/2023 by Rachel Roberts for Multnomah County - SP (Level 2)

Subject

Subject Name

SUN-Recreational Activities

SUN-Sports

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Target Participant Groups

Target Participant Group

No matches.

Partners (Activity Sponsors)

Partner/Activity Sponsor

No matches.

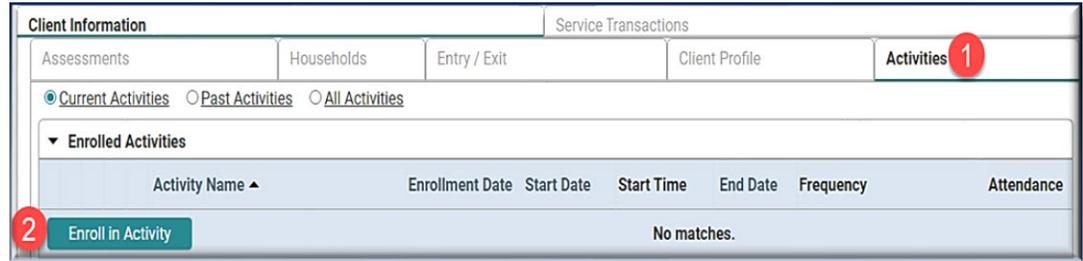
NOTE: Remember to generate sessions and enroll participants on the copied activity. Sessions and enrollment in the original activity DO NOT carry over.

ENROLLING PARTICIPANTS IN AN ACTIVITY

Participants can be enrolled in activities in two different ways:

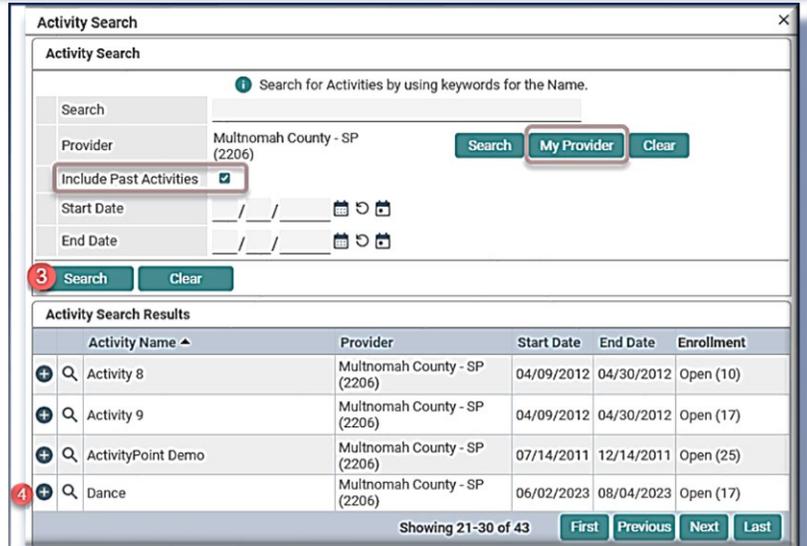
Option 1: by Participant (in Clients)

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



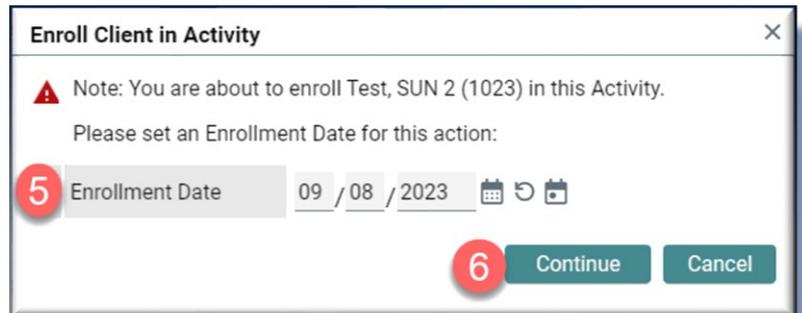
2 Click 'Enroll in Activities'

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



4 Click the green plus sign to enroll the participant

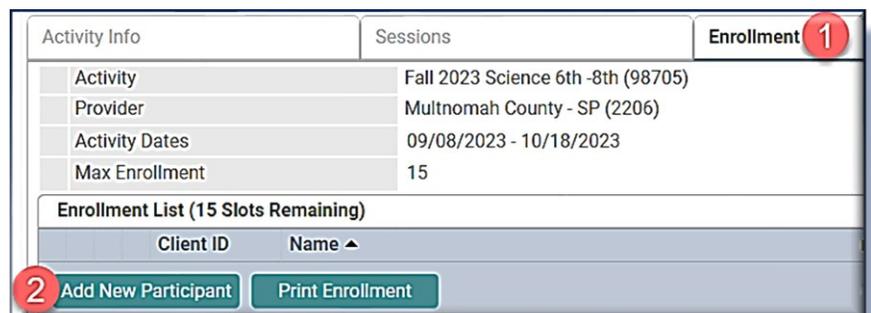
5 Set the Enrollment Date on or before the first day that the participant attended/will attend



6 Click 'Continue'

Option 2: by Activity (in Activities)

1 In Activities, open up the activity and click on the Enrollment tab



2 Click 'Add New Participant'

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

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

5 Set the 'Enrollment Date' to on or before the first day that the participant attended the activity and click 'Continue.'

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

Client ID	Name	Enrollment Date	Date of Birth	Gender
1022	Test, SUN 1	09/08/2023	08/09/2008	A gender other than singularly female or male (e.g., non-binary, genderfluid, agender, culturally specific gender)
1023	Test, SUN 2	09/08/2023	02/27/2014	Data not collected

ENTERING ATTENDANCE

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

2 Click on the Attendance tab

3 Click 'Choose Sessions.' You can enter attendance for up to 5 sessions at once.

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

Client ID	Name	Status
1022	Test, SUN 1	- Absent -
1023	Test, SUN 2	- Absent -
1084	Test, SUN 3	- Absent -

CREATING NON-ENROLLED ACTIVITIES

- 1 Follow the same steps as creating an enrolled activity, except for **Enrollment Type**, click **'Non-enrollment'** (see pg. 5)
- 2 Create session(s) following the same steps as for an enrolled activity (see pg. 6)

Activity Info | Attendance

Provider: Multnomah County - SP (2206)

Name: Spring 2023 SUN Open House

Activity Type: Local Public

Ages: 1 - 100

Time Offered: Before School

Frequency: One-time event

Recurring Weekly Schedule: Sunday Monday Tuesday Wednesday Thursday Friday Saturday

Start Date: 05 / 05 / 2023

End Date: 05 / 05 / 2023

Start Time: 5 : 00 PM

End Time: 7 : 00 PM

Teacher:

Location:

1 Enrollment Type: Open Conditional Non-Enrollment

Category: SUN-Community Involvement

RECORDING ATTENDANCE FOR NON-ENROLLED ACTIVITIES

- 3 Go to the Attendance tab and click the pencil next to the session date

Attendance 3 | Volunteers

Activity: Spring 2023 SUN Open House (98708)

Provider: Multnomah County - SP (2206)

Activity Dates: 05/05/2023 - 05/05/2023

Session Date Range: / / to / /

Update Date Range

Session Date	Description	Total Attendance	Total Ethnicity Counts
05/05/2023		0	0

Showing 1-1 of 1

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

Edit Session Attendance X

Activity: Spring 2023 SUN Open House (98708)

Date: 05/05/2023

Session Attendance Totals		Total Ethnicity Counts	
Youth Attendance	150	Asian/Indian Attendance	0
4 Adult Attendance	75	Bi-Racial/Multi-Racial Attendance	0
Total Attendance	225	Black/African American Attendance	0
		Caucasian Attendance	0
		Hawaiian/Pacific Islander Attendance	0
		Hispanic/Latino Attendance	0
		Native American/Alaskan Attendance	0
		Unreported Attendance	0
		Total Ethnicity Counts	0

5 Save Cancel

- 5 Click 'Save' to exit

SUN COMMUNITY SCHOOL SAP-BO REPORTS

Report Name	Content and Purpose	Report Prompts	Trouble-Shooting
<h3>ATTENDANCE HISTORY</h3>	<p>TABS:</p> <ul style="list-style-type: none"> • Overview: All attendees and their attendance rate and # of sessions attended/enrolled/excused/unexcused/absent or not recorded • By Activity: All activities that were offered in the report range, including the daily attendance status of each participant • By Participant: All attendees and their # of sessions attended/enrolled/excused/unexcused/absent or not recorded broken down by activity • Average Daily Attendance: All activities offered in the session with the average # of participants who attended per day <p>PURPOSE:</p> <ul style="list-style-type: none"> • Track absenteeism, reward high attendance rates, track who has met 30 days of attendance (and who's close to meeting) • Use by Activity tab to find gaps in attendance data entry 	<ul style="list-style-type: none"> • Run as either Excel or PDF • Set Start and End dates as the whole date range (+1 day) that you want to see in your report 	<ul style="list-style-type: none"> • Only pulls activities where sessions have been created • This report has trouble accurately counting sessions enrolled when a participant has enrolled, dropped, then re-enrolled in an activity. If a participant's attendance rate on the Overview tab is incorrect (<0% or >100%) check the By Participant tab to see which activity is generating the error.
<h3>ATTENDANCE SHEETS</h3>	<p>TABS:</p> <ul style="list-style-type: none"> • Attendance Sheets by Activity: Activity name, start time, days offered, location, all enrolled participants and their Community Services ID, grade, photo release (Y/N), primary transportation, and authorized pick-up • Attendance Sheets by Day: one list of all students enrolled that day - useful for centralized 'check-in' or daily meal tracking. Includes: all enrolled participants and their Community Services ID, grade, photo release (Y/N), primary transportation, and authorized pick-up, and first and last activities of the day <p>PURPOSE:</p> <ul style="list-style-type: none"> • Tracking daily attendance in extended-day activities 	<ul style="list-style-type: none"> • If run as PDF - max of 5 session dates per page • If run as Excel - unlimited session dates 	<ul style="list-style-type: none"> • Only pulls activities where sessions have been created and participants have been enrolled • Only pulls participants whose Activity Enrollment Date is on or before the report start date

Report Name	Content and Purpose	Report Prompts	Trouble-Shooting
<p style="text-align: center;">CONFIRMATION LETTERS</p>	<p>TABS:</p> <ul style="list-style-type: none"> • For Families: Prints 1 pg/student with: name, teacher, grade, primary contact name & phone, primary transportation, authorized pick-up, bus stop, and weekly class schedule with: activity name, time, date range, and location. Also flags any students who do not have a current release year. (Does NOT flag current release year w/ 'No' response.) Prints grouped by classroom teacher name for easy distribution. Is bilingual Spanish/English. • For Teachers: Prints a list for each teacher of which of their students are enrolled in SUN each day, including: activity name, time, and date range • For Admin: Master list of all enrolled students, including: student name, grade, primary contact name & phone, primary transportation, and weekly schedule with: activity names, days, location, and date range • Mini Student Schedule: A simpler version of the "For Families" tab. Includes just student's name and weekly class schedule with: activity name, time, date range, and location. <p>PURPOSE:</p> <ul style="list-style-type: none"> • Distribute prior to session start date to inform all parties of enrollment 	<ul style="list-style-type: none"> • Run as PDF only • Set Start and End dates to include only 1 full week (+1 day) 	<ul style="list-style-type: none"> • Only pulls activities where Target Participant Group = Students/Youth • Only pulls activities where sessions have been created • Only pulls participants whose Activity Enrollment Date is on or before the report start date • Teacher names come from the 'Teacher' field in the Client Profile. Spelling and capitalization must match. For instance, SAP- BO will recognize "Brown", "brown" and "Mr. Brown" as 3 different teachers and they'll each get their own confirmation letter.
<p style="text-align: center;">CONTACT INFO</p>	<p>TABS:</p> <ul style="list-style-type: none"> • Contact Information: For each enrolled student: (1) primary contact name, primary phone #, phone description, and email (2) contact name, phone and phone type, and (3) emergency contact, relationship to student, 1st phone, 2nd phone • Addresses: For all enrolled students: street address, address (additional), city, state, zip • Email List: a list of email addresses of all enrolled students - easy to copy and paste <p>PURPOSE:</p> <ul style="list-style-type: none"> • Quick access to contact info for clipboards, field trips, staff without Synergy access, etc. 	<ul style="list-style-type: none"> • Run as either Excel or PDF • Set Start and End dates to include at least 1 full week (+1 day) 	<ul style="list-style-type: none"> • Only pulls students enrolled in activities where Target Participant Group = Students/Youth • Only pulls participants whose Activity Enrollment Date is on or before the report start date

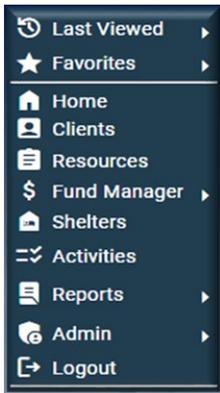
Report Name	Content and Purpose	Report Prompts	Trouble-Shooting
<p style="text-align: center;">DAILY COUNT for NUTRITION DEPT.</p>	<p>TABS:</p> <ul style="list-style-type: none"> • Daily Student Count: a day-by-day list of all students who attended <p>PURPOSE:</p> <ul style="list-style-type: none"> • Send to District Nutrition Dept. for attendance verification 	<ul style="list-style-type: none"> • Run as either Excel or PDF • Set Start and End dates as the whole date range (+1 day) that you want to see in your report 	<ul style="list-style-type: none"> • Only counts attendance for afternoon activities where Target Participant Group = Students/Youth • Only pulls activities where sessions have been created and attendance has been entered
<p style="text-align: center;">DAILY DISMISSAL</p>	<p>TABS:</p> <ul style="list-style-type: none"> • Daily Sign-Out (pick-ups): Lists all enrolled students whose primary (or secondary) transportation = Parent or Authorized Person, including their: name, grade, first and last activities of the day, primary contact, primary phone, primary and secondary transportation, authorized pick-up, and a space to sign and date. Prints one section for each day in report range. • Bus Roster: Lists all enrolled students whose primary (or secondary) transportation = Activity Bus, including their: name, grade, primary contact, primary phone, last activity of the day, bus #, and bus stop. Prints one section for each day in report range. • Other (Walking, Trimet, etc.): Lists all enrolled students whose primary (or secondary) transportation = Student's Discretion, Walking, or Tri-Met including their: name, grade, primary and secondary transportation, primary contact, primary phone, last activity of the day, and authorized pick-up. <p>PURPOSE:</p> <ul style="list-style-type: none"> • Facilitates end-of-day dismissal routines 	<ul style="list-style-type: none"> • Run as either Excel or PDF • Set Start and End dates to include at least 1 full week (+1 day) 	<ul style="list-style-type: none"> • Only pulls activities where Target Participant Group = Students/Youth • Only pulls activities where sessions have been created and students have been enrolled • Only pulls participants whose Activity Enrollment Date is on or before the report start date

Report Name	Content and Purpose	Report Prompts	Trouble-Shooting
<p style="text-align: center;">GENERIC PARTNER REPORT</p>	<p>TABS:</p> <ul style="list-style-type: none"> • Youth Activities: A spreadsheet of all activities where ‘Target Participant Group’ = Students/Youth, including: all participants and their SvcPt ID, SSID#, school, grade, DOB, age, primary language, photo release (Y/N), street address, primary contact, primary phone, Inclusive Identity, total # of session attended and daily breakdown of attendance. This tab is filtered to only display data for youth with a current ‘Yes’ Parental Release • All Activities - UNFILTERED: The same data points listed above, but with <i>ALL</i> data displayed, regardless of Target Participant Group and Parental Release. Unfiltered tab will also display activities that have not had attendance entered yet. • Prompts & PCL Instructions: If using this report for a PCL-funded partner, please read and follow these instructions. <p>PURPOSE: Share basic participant demographics and attendance with partners for all participants with current Releases of Information</p>	<ul style="list-style-type: none"> • Run as Excel • Set Start and End dates as the whole date range (+1 day) that you want to see in your report 	<ul style="list-style-type: none"> • Only pulls activities where sessions have been created • ‘Youth Activities’ tab only displays info for students who have a ‘Yes’ Parental Release for the current school year. Will not show activities that have had no attendance entered. • Activities with <i>no</i> Target Participant Group will only appear on the unfiltered tab. To make them appear on the Youth Activities tab with ROI filters, add the Students/Youth Target Participant Group, wait for the system refresh, then re-run the report.
<p style="text-align: center;">MASTER SITE ROSTER AKA the <i>Master Blaster</i></p>	<p>TABS:</p> <ul style="list-style-type: none"> • Youth Activities: A spreadsheet of all enrolled students including: SvcPt ID, SSID#, Synergy #, name, alias, age, gender, primary language, language (other), risk factor (Y/N), grade, teacher, weekly schedule of AM and PM activities (M-F), primary contact name & phone, email, photo release, parental release, release year, medical notes, primary and secondary transportation, authorized pick-up, and inclusive identity • All Activities (Unfiltered): The same data points listed above, but with <i>ALL</i> activities included, regardless of Target Participant Group <p>PURPOSE:</p> <ul style="list-style-type: none"> • A raw data set for folks who prefer to use excel spreadsheets to track data and build program tools. • Apply filters to activity columns to find any errors in enrollment, such as students enrolled in 2nd period activities but not in 1st or students enrolled in 2 activities with the same start time 	<ul style="list-style-type: none"> • Run as Excel only • Set Start and End dates to include only 1 full week (+1 day) 	<ul style="list-style-type: none"> • ‘Youth Activities’ tab only pulls activities where Target Participant Group = Students/Youth • Only pulls activities where sessions have been created and students have been enrolled • Only pulls one morning activity and the first and last afternoon activities. If a participant is enrolled in 3 or more activities in the <i>same afternoon</i>, this report will not display all of them.

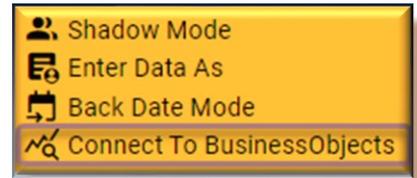
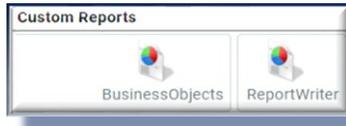
Report Name	Content and Purpose	Report Prompts	Trouble-Shooting
<p style="text-align: center;">MISSING DATA REPORT</p>	<p>TABS:</p> <ul style="list-style-type: none"> • MISSING Data: a list of all required data elements (RDEs) for attendees with flags where fields are missing. If fields are unanswered because they're not required (e.g. an adult with no SSID #) this report will display 'N/A' instead of 'MISSING.' RDEs include: SSID#, DOB, gender, primary language, language - other (only required if primary language = 'other'), risk factors (Y/N), parental release, release year, and inclusive identity. SSIDs are also flagged as "Fishy" if they are 6 digits or less. • EKT Data: Flags any missing data, missing households, or errors in enrollment for participants who have attended Early Kindergarten Transition. This tab only applies to sites who offer EKT. • Multi-Site Summary: gives a list of % missing data for multiple schools in a format that is convenient for sorting/filtering <p>PURPOSE:</p> <ul style="list-style-type: none"> • Facilitates quick data clean-up by flagging all missing data 	<ul style="list-style-type: none"> • Run as Excel only • Set Start and End dates as the whole date range (+1 day) that you want to see in your report 	<ul style="list-style-type: none"> • Only pulls activities where sessions have been created and attendance has been entered • Only pulls participants who have a attended an activity within the report date range. • For fields that are only required for students, this report is wired to look for ages 5-20 yrs old. • To do data clean-up on participants who are enrolled, but do not have attendance entered, use the Master Site Roster and filter RDE columns for blanks. (RDE column headers are in red.) • The EKT Data tab only finds participants who have attended and activity with "EKT" in the activity title.
<p style="text-align: center;">NAME TAGS</p>	<p>TABS:</p> <ul style="list-style-type: none"> • Avery 5395 (Adhesive): Name tags for all enrolled students with: name, Mon-Thurs afternoon activities, teacher, primary transportation • Avery 5390 (Lanyard Inserts): Same as above, just formatted for a different template style • 5 Days (Avery 5390): Same as above, but Mon-Fri <p>PURPOSE:</p> <ul style="list-style-type: none"> • Distribute on 1st week of activities so that staff can help students find their activities and follow dismissal routines 	<ul style="list-style-type: none"> • Run as either Excel or PDF • Set Start and End dates to include only 1 full week (+1 day) 	<ul style="list-style-type: none"> • Only pulls afternoon activities where Target Participant Group = Students/Youth • Only pulls activities where sessions have been created and students have been enrolled • Only pulls participants whose Activity Enrollment Date is on or before the report start date

Report Name	Content and Purpose	Report Prompts	Trouble-Shooting
<p style="text-align: center;">SUN COMMUNITY SCHOOL PROGRESS REPORT</p>	<p>TABS:</p> <ul style="list-style-type: none"> • Site-by-Site Report: An overview of program outputs, including: # activities offered, youth served, repeat attendees, adults served, and demographic breakdown of participants. If more than 1 site is included in the report, this tab breaks down 1 pg/site • Multi-Site Report: Same as above, but cumulative totals for all sites included in the report • Participant Detail: Individual level detail that backs up the 1st 2 tabs • Activity Detail: lists all activities in the reporting period and their dates, times, category, target participant group(s), and total # of adult and student attendees <p>PURPOSE:</p> <ul style="list-style-type: none"> • Use to monitor progress towards contractual targets 	<ul style="list-style-type: none"> • Run as either Excel or PDF • Set Start and End dates as the whole date range (+1 day) that you want to see in your report 	<ul style="list-style-type: none"> • Only pulls activities where sessions have been created and attendance has been entered • For measures that differentiate between students and adults, students = ages 0-20 yrs old, adults = 21+ • Only Community Services users with multi-site access should run this report for multiple schools at once. Note: it's not advised to pull more than 5-7 schools into this report at once. Results can become less accurate if the report is processing too much data. Call the Community Services Helpline for assistance with large-scale reports.
<p style="text-align: center;">WAIT-LISTED STUDENTS</p>	<p>TABS:</p> <ul style="list-style-type: none"> • Wait-Listed Students: A list of all waitlisted students including: SvcPt ID, date waitlisted, name, grade, teacher, activity name, activity dates, primary contact, and primary phone <p>PURPOSE:</p> <ul style="list-style-type: none"> • Use to track how long students have been waiting to be enrolled in certain classes and contact families when a spot becomes available 	<ul style="list-style-type: none"> • Run as Excel • Set Start and End dates as the whole date range (+1 day) that you want to see in your report 	<ul style="list-style-type: none"> • Only pulls activities where sessions have been created and students have been wait-listed

GENERATING SAP - BO REPORTS



To get into SAP - BO click on the Reports tab on the left-hand menu, or click the quick link in the top right corner of your screen



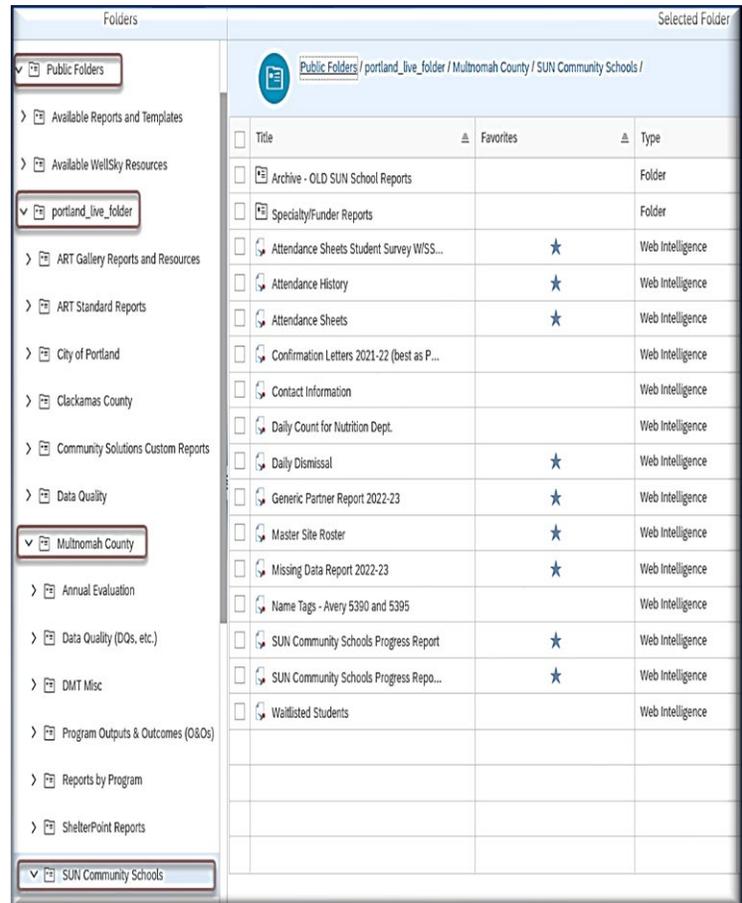
Finding the Reports, You Need

To open a folder, click on the triangle next to the folder name. All SUN School reports can be found by opening the following folders:

Public Folders > Portland_live_Folder > Multnomah County > **SUN Community Schools**

Scheduling SAP - BO Reports

- ❶ Click the magnifying glass to the left of the report name
- ❷ Click 'Schedule Report'
- ❸ Enter Report Prompts: Prompts can vary, but typically include:
 - EDA Provider:* If you have multi-site access, enter the school you're looking for. Otherwise, leave blank.
 - School:* Click 'School' then click 'Select.' Choose your program (same program as above).
 - Begin Date:* Set as the beginning of the time period you want to look at.
 - End Date:* Set as the day after the end of your reporting period. Otherwise, your last day of data will not be included.
 - Effective Date:* Change to tomorrow's date – this tells SAP - BO how current you want your data to be.
- ❹ Click 'Next'
- ❺ Select Report Format (either excel or PDF)
- ❻ Select Interval (either once or repeated)
- ❼ Click 'Send' and report will appear in your SAP- BO inbox in several minutes



Start and End Dates here refer to how long you want your report to keep showing up in your inbox

Schedule

Name *

Report Format *

Users Inbox *

Interval *

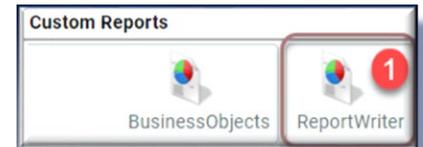
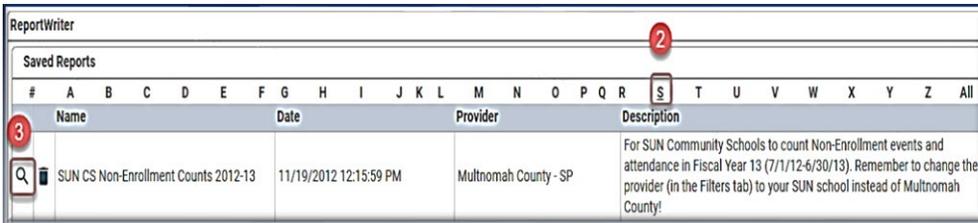
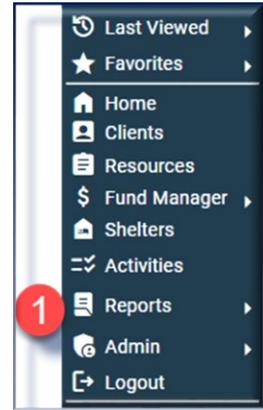
Start Date *

End Date *

USING REPORTWRITER FOR NON-ENROLLED EVENTS

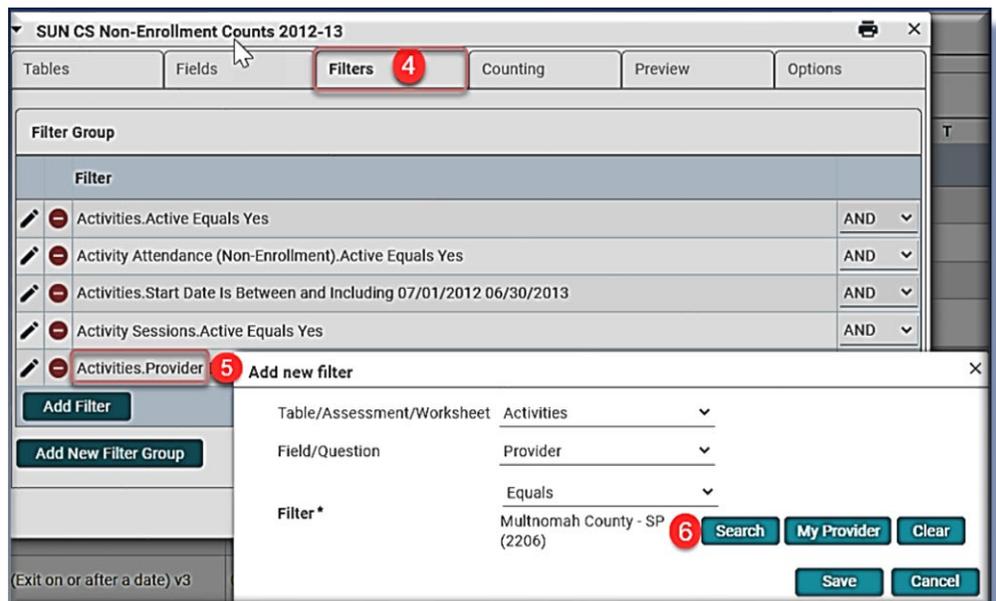
Follow the steps below to pull a report of non-enrolled activities:

- 1 Click the drop-down triangle to open the Reports menu, then click 'ReportWriter'
- 2 Navigate to the 'S' section
- 3 Click the magnifying glass next to the current year's SUN CS Non-Enrollment Counts report

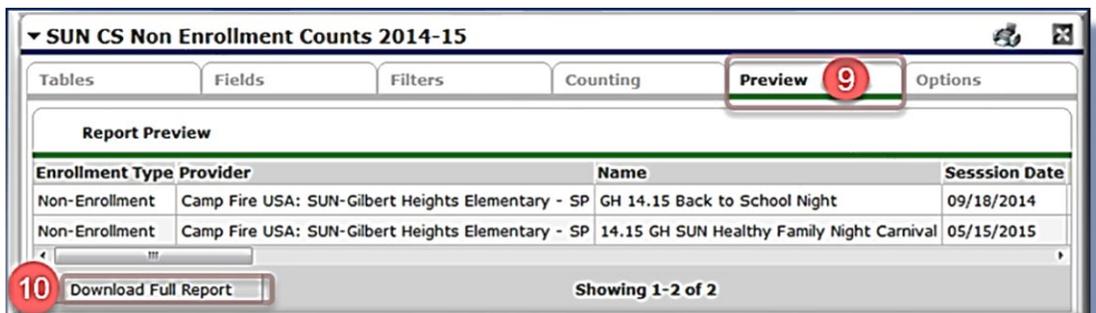


The report is set to default to a generic 'Multnomah County' provider. You need to CHANGE that provider to your school's provider.

- 4 Click the Filters tab
- 5 Click the pencil next to 'Activities.Provider Equals Multnomah County - SP'
- 6 Click the search button to find your school
- 7 In the window that pops up, choose your school by clicking the green plus sign
- 8 Click 'Save' in the prompt screen



- 9 Click the Preview tab



- 10 Click 'Download Full Report'