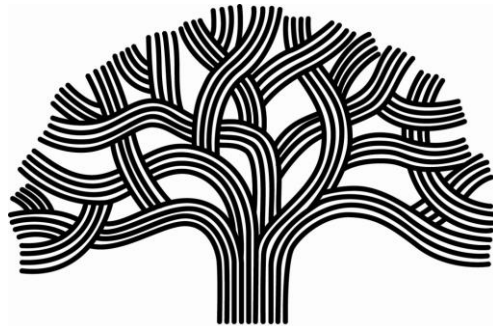


Department of Violence Prevention

Cityspan Database Instructions



CITY OF OAKLAND

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Introduction

This guide is designed to provide you with a general overview of the Cityspan database - how to use the database to enter, track and report on services provided through Department of Violence Prevention funding.

Cityspan is an online data management system used to monitor your grant performance and manage grant payments. All Department of Violence Prevention funded programs have a unique Cityspan account that you will use to enter clients, track their participation in activities, manage your program budget and invoice for payment, and provide quarterly reporting on progress.


While the guide provides an overview for many of the critical functions and features, it does not provide a complete overview on all the Cityspan features.

For more information on Cityspan, please visit <http://oaklandunite.org/grantee-corner/tools-for-current-grantees/cityspan/>. Here you will find a Cityspan training video that provides information on how to access the database, enter staff and participant information, and run reports. These instructions include time stamps that reference when topics are mentioned during a training available [here](#).

Additional support can be accessed by reaching out to the Cityspan Help Desk at 1-866-469-6884 Monday through Friday, 8am-5pm. The Department of Violence Prevention will provide trainings annually in the City of Oakland computer labs and on an as needed basis. For more information about training opportunities, contact Valerie Okelola. For assistance with your grant, contact your Program Officer directly.

Logging on to Cityspan

1. Log in to your Cityspan account at <http://www.youthservices.net/oakland>. You will find that notices from The Department of Violence Prevention are posted on the right-hand side of the page.

City of Oakland	
 CITY OF OAKLAND DEPARTMENT OF VIOLENCE PREVENTION	NOTICES:
LOGIN Username: <input type="text"/> Password: <input type="password"/> Forgot Password? <input type="button" value="ENTER SYSTEM"/>	Thursday, August 26, 2021 QOTD: Leaders are just grown-up followers.
	Thursday, July 8, 2021 Quarter 4 Progress Reports are due Friday July 16!
	Wednesday, January 6, 2021 Quarter 2 Progress Reports are due Friday January 8!
	Friday, August 16, 2019 Grantees can now access the 2019-2020 database. Existing users can use current credentials to log in. New users will receive instructions on how to create a Cityspan account via email.
	Friday, August 16, 2019 Client Consent to Release Information is available in the Documents Module of Cityspan and on the Oakland Unite website. Click here to go to the Oakland Unite website to access the form.

- If you do not remember your user name, please contact the Cityspan Helpdesk at 1- 866-469-6884 (toll-free).
 - If you do not have a username and password – please review the 'Creating and Maintaining User Accounts' for directions on how to create an account.
2. Once you enter Cityspan – the blue navigation menu will appear on the left. This guide will provide directions for utilizing this navigation menu.

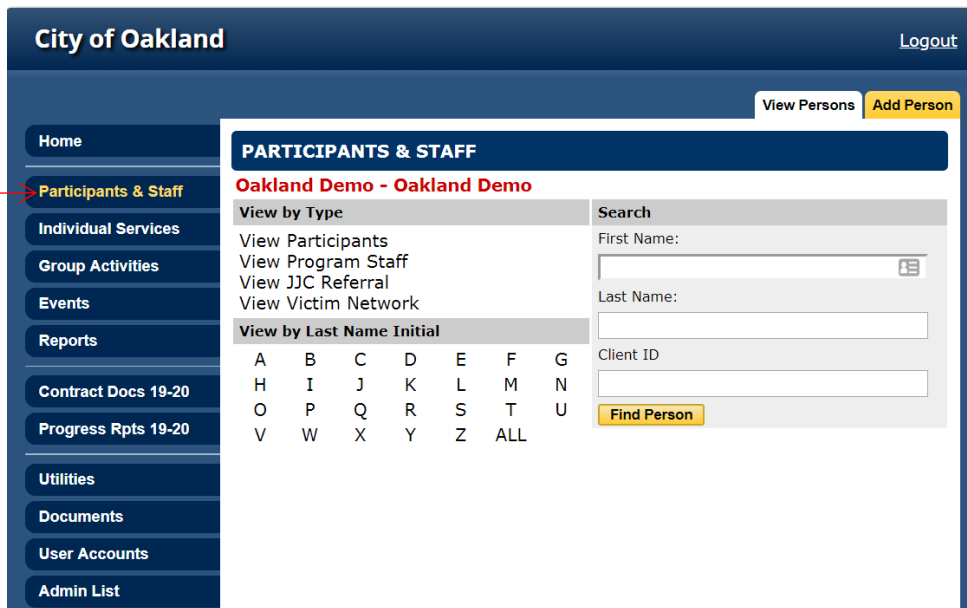


Creating a Participant & Staff Records

Participant Records

Can be viewed on YouTube from 6:46 - 7:40

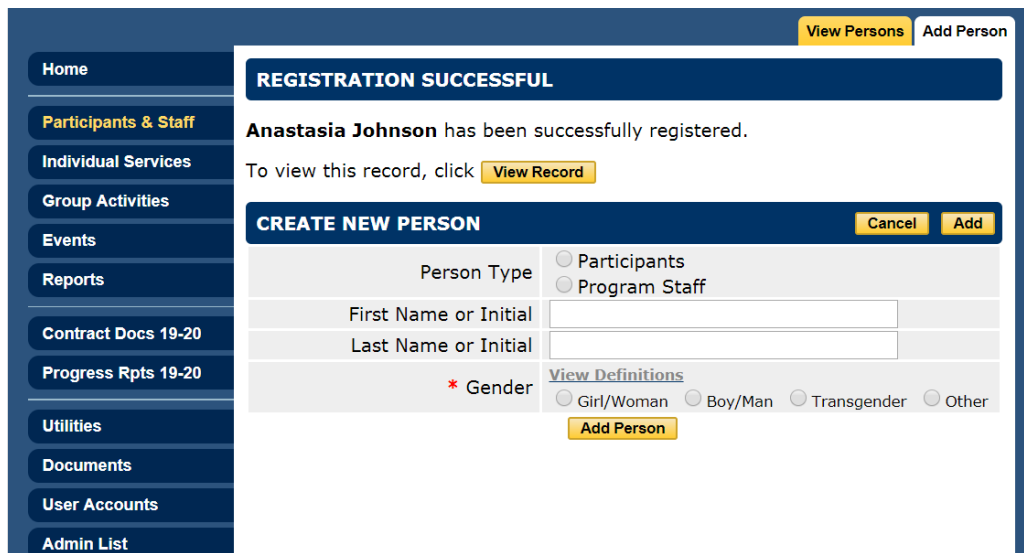
1. Select 'Participants & Staff' in blue menu on the left-hand side of the screen



2. Search for the name of the individual **first** to avoid duplicate records
Note: User may enter partial names or initials (ideal to avoid no matches because Participant's name was originally misspelled)
3. Select 'Find Person'
4. If no match, select 'Add Person'



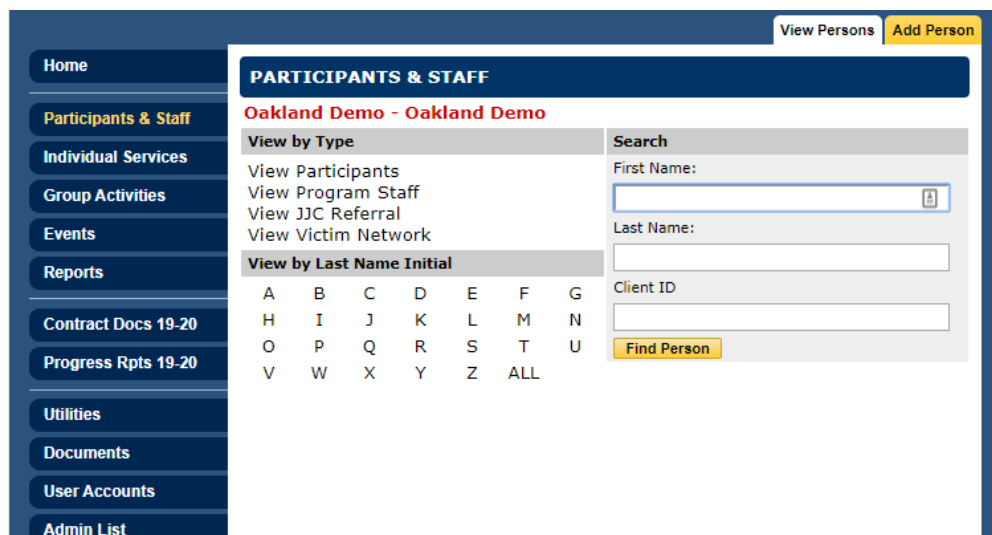
5. Select 'Participant' under 'Person Type' and enter the name of the Participant
 Note: Ideal to double-check with Participant to ensure accurate spelling of their name
6. Then, select 'Add Person'
 Note: If recorded correctly, a message stating '[Name] has been successfully registered' to indicate that the Participant has been added to the database



7. Select 'View Record' and begin to enter the data for the Participant's 'Baseline' tab

Notes for Creating a Participant Record:

- Once recorded, Participant can be found by selecting 'Participants & Staff' on the blue menu and selecting the first letter of the Participant's last name in the alphabet section or by typing part/all of their name into the designated cells



- HIGHLY** recommended using 'Return' vs. browser back button when creating and viewing participant records

Staff Records

Note: The same process used to create Participant records can be used to create Staff records.

- Select 'Participants & Staff' in blue menu on the left-hand side of the screen
- Search for the name of the individual **first** to avoid duplicate records
- Select 'Find Person'
- If no match, select 'Add Person'
- Select 'Program Staff'
- Then, select 'Add Person'
 - Note: If recorded correctly, a message stating '[Name] has been successfully registered' to indicate
- 'View Record'
- For Staff, first and last name are required fields; all additional information is optional
- Select 'Save'

Entering and Updating Participant Information

Demographics Tab

Can be viewed on YouTube from 7:40 – 8:35

Note: Cannot change the Client ID as it is a read only space created by Cityspan and cannot be altered

The screenshot shows the 'City of Oakland' Cityspan interface. On the left is a navigation menu with 'Participants & Staff' selected. The main content area shows the 'PARTICIPANT' form under the 'Demographics' tab. The form is divided into sections: 'Data required to set up a record' (First Name or Initial: Anastasia, Last Name or Initial: Johnson, Date of Birth: [empty], Client ID: 48450908), 'Other required data' (Street Address, Zip, City: Oakland, State: CA, Home Phone, Mobile Phone, Email), 'Client Marked Yes on Consent Form' (radio buttons for Y, N, Not Yet), and 'Sexual Orientation and Gender Identity' (Gender: Girl/Woman, Sex at Birth: Unspecified, Sexual Orientation: Unspecified).

1. After selecting 'View Record', user will see, a screen with the 'Demographics' tab selected

2. The following fields are required:

- Name
- DOB
- Consent Form on File
 - The consent Form is for Participant data to be used in evaluation and is not required to participate in services: mark yes if the Participant consents, mark no if they do not consent, mark not yet if you have not had a chance to get consent from a Participant
- Zip code
- Gender

- Race

Notes for Entering Participant Information and Demographics:

- Users will be unable to move forward without completing the following: DOB, Zip, and Consent Form on File; **however**, it is in the program's **best** interest to input as much data as possible within the first meeting. Please refer to your Program Supervisor for other requirements regarding data input to avoid being penalized
- Full names are required by The Department of Violence Prevention to match Participants by future Evaluators
- All Participants being funded through The Department of Violence Prevention strategies **must** be entered in database.
- **REMEMBER:** Always update the Participant's information as it changes. Providing the most up-to-date information is crucial, especially if communications and/or incentives are being provided to the Participant's address on file

Oakland Unite Tab

Can be viewed on YouTube from 8:38 – 13:00

1. After completing 'Demographics' tab, select 'Oakland Unite' tab
2. Under 'Enrollment': Select 'Oakland Unite'

Note: When in doubt, please consult with your Program Officer to ensure you are selecting the appropriate strategy. An improperly selected strategy will affect your deliverables

3. Under 'Oakland Unite Strategies 2016-present', select the strategy relevant to the Participant and/or strategy named in your agency's Scope of Work
 - If there is ever any uncertainty about which strategy to select, reach out to your Program Officer
4. When a strategy is selected, a set of 'Risk Factors' **specific** to the strategy will appear. The completion of 'Risk Factors' is required to save and continue to another tab
5. Indicate the referral source under the referrals section of the Oakland Unite tab. For each referral, indicate one referral source from either the Oakland Unite network or outside of the Oakland Unite network

- If your Participant was referred to your agency from another agency in the Oakland Unite network, select the dropdown next to Oakland Unite network and select grantee who referred Participant to your agency

The screenshot shows a web application interface for managing participant information. The main content area is titled "OAKLAND UNITE - RISK FACTORS" and displays details for "Anastasia Johnson". The form is divided into several sections:

- Enrollment:** Includes a "Program?" field with checkboxes for "Oakland Unite/Measure Z" (checked), "CalVIP", "CDCR/GSW", "OPRI", and "Other Funding Source".
- Oakland Unite Strategies 2016-present:** A grid of checkboxes for various support programs like "Youth Employment/Education Support", "Healthy, Wealthy, Wise", etc.
- Risk Factors 2016-present:** A section for identifying current risk factors.
- STATUS:** Shows the participant's status as "Active" with "Activate" and "Inactivate" buttons.
- REFERRALS:** A section for managing referrals. It shows one referral with a "Delete" button. Below this, a message states: "Please select an option from either Oakland Unite Network or Outside Oakland Unite Network." A dropdown menu is open, showing "Oakland Unite Network" selected. A list of referral sources is visible, including "Asian Pacific Islander Legal Outreach", "Bay Area Women Against Rape", "Building Opportunities for Self-Sufficiency", "Catholic Charities of the East Bay", "Center for Employment Opportunities", "Communities United for Restorative Youth Justice", "Community & Youth Outreach, Inc.", "Community Works West, Inc.", "Covenant House Dreamcatchers", "East Bay Asian Youth Center", "Family Violence Law Center", "JJC Referral Site", "MISSEY", and "Oakland Private Industry Council, Inc.". A red arrow points to this dropdown list.

6. If your agency is responsible for the Participant's enrollment in your program, select your agency from the drop-down list
7. If the Participant was referred to your agency from outside of the Oakland Unite network, select the dropdown next to Outside of Unite network and select the appropriate referral source

- If you select Outside of Oakland Unite – Other, enter the referral source in the referral specify field

8. To add a new referral, select, 'Click here to add 'Referral''

Notes about Referrals Section of Oakland Unite Tab:

- Before adding a new referral, close the previous referral out by inputting an exit date and exit reason.

Making Participants Inactive

When a Participant is added to the database, the default status associated with the Participant is active. To make a Participant Inactive, use the following directions

1. Select 'Individual Services' from the blue menu on the left side of the screen
2. Find Participant
3. Select Participant
4. Select Oakland Unite tab
5. Scroll to the Status section of the Oakland Unite tab
6. Select, 'Inactivate'

- If you make a Participant inactive, enter an end date in the referral associated with the Participant

Making Participants Active

When a Participant is added to the database, the default status associated with the Participant is active. If a Participant is made inactive in the database, use the following instructions to make the Participant active again

1. Select 'Individual Services' from the blue menu on the left side of the screen
2. Find Participant
3. Select Participant
4. Select Oakland Unite tab
5. Scroll to the Status section of the Oakland Unite tab
6. Select, 'Activate'
 - If you make a Participant active after they were made inactive, create a new referral entry to account for the Participant returning to the program

Individual Services

Creating a Contact for a Participant

Can be viewed on YouTube from 14:36 – 16:15

1. Select 'Individual Services' in blue menu on the left-hand side of the screen
2. Select Participant by:
 - a. Clicking on 'View Participants' tab at the top of the screen
 - b. Ensure 'Active' is selected in the dropdown below the 'View Participants' tab
 - c. Choose a Participant from the list OR select the first letter of the last name of your Participant to quickly find a specific Participant

City of Oakland Logout

View Staff View Participants

CONTACTS & MILESTONES - PARTICIPANT LIST Active ▾

Oakland Demo - Oakland Demo

View by Initial

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z ALL

Page 1 2 3 Next 25 >

Participant Name	Age	Phone
kevain agrant		
Shandra Bagley ii	21	964-8896
Kevin Bailey	19	399-8867
nele baker	19	556-9984
Klayel Barfield	23	678-8865
Timothy Barnes	26	869-5598
Talarrie Barr	17	561-8538
Jacqui Bean	24	459-8896
Anastasia Beaverhausen	29	
Terrence Black	36	988-3990

3. Select the appropriate Staff person

City of Oakland Logout

View Staff View Participants General Info

PARTICIPANT

kevain agrant Staff Filter: All ▾

View by Initial

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z ALL

Staff	Begin Date	End Date
baker, nele	6/7/18	9/18/19
Blaney, Claire	9/12/19	9/12/19
Booth, Harry	8/1/19	8/1/19
Christie, D	9/18/19	9/18/19
Dumbledore, Albus	10/18/18	10/18/18

4. Select the appropriate contact from the 'Session Type' dropdown menu
5. Input date and select 'Add'

City of Oakland Logout

View Staff View Participants General Info

CONTACTS & MILESTONES Return

Oakland Demo - Oakland Demo

Staff Name: nele baker Participant Name: Kevin Bailey

Add Record

Session Type: Contact Work Experience Work Placement Date:

Dates	Type	Action
Mon, Apr 6, 2020	Contact	<input type="button" value="View/Edit"/> <input type="button" value="Delete"/>
Wed, Mar 25, 2020	Contact	<input type="button" value="View/Edit"/> <input type="button" value="Delete"/>
Tue, Feb 18, 2020	Work Placement	<input type="button" value="View/Edit"/> <input type="button" value="Delete"/>
Sun, Dec 1, 2019	Work Experience	<input type="button" value="View/Edit"/> <input type="button" value="Delete"/>
Wed, Nov 6, 2019	Contact	<input type="button" value="View/Edit"/> <input type="button" value="Delete"/>
Fri, Nov 1, 2019	Contact	<input type="button" value="View/Edit"/> <input type="button" value="Delete"/>
Wed, Oct 23, 2019	Social Emotional Learning	<input type="button" value="View/Edit"/> <input type="button" value="Delete"/>
Wed, Sep 18, 2019	Contact	<input type="button" value="View/Edit"/> <input type="button" value="Delete"/>
Thu, Sep 5, 2019	Milestones & Access to Services	<input type="button" value="View/Edit"/> <input type="button" value="Delete"/>
Tue, Sep 3, 2019	Contact	<input type="button" value="View/Edit"/> <input type="button" value="Delete"/>
Mon, Jul 15, 2019	Work Experience	<input type="button" value="View/Edit"/> <input type="button" value="Delete"/>
Mon, Jul 15, 2019	Work Placement	<input type="button" value="View/Edit"/> <input type="button" value="Delete"/>

6. Select the appropriate form of contact from the 'Service Category' dropdown menu
7. Complete the following fields: amount of time, contact method, individuals in meeting, and provide notes
 - Note: Make sure that notes written are adequate to justify the amount of time spent with a Participant; examples provided on the next page

CONTACT Cancel Print Save & Return

Staff	Participant	Entry Date
baker, nele	Johnson, Anastasia	7/1/2019
Service Category *	Minutes *	Action
Case Management	45	<input type="button" value="ADD CATEGORY"/>
Contact Method		
Contact - In person? <input type="radio"/> Y <input type="radio"/> N <input checked="" type="radio"/> Unspecified		
Contact with (may check more than one):		
<input checked="" type="checkbox"/> Client	<input type="checkbox"/> Employer	
<input type="checkbox"/> Client's family	<input type="checkbox"/> Parole/Probation	
<input type="checkbox"/> Teacher/School Staff	<input type="checkbox"/> Other	

8. Select 'Save & Return'

Below is an example of an appropriate case note given the amount of time documented. When in doubt, consult with your Program Officer for a better understanding of appropriate documentation.

CONTACT Cancel Print Save & Return

Staff	Participant	Date of Visit
R, Erica	Beaverhausen, Anastasia	2/11/2016

Service Category	Minutes	Action
Case Management	45	ADD CATEGORY

Contact Method

Contact - In person? Y N Unspecified

Contact with (may check more than one):

Client Employer
 Client's family Parole/Probation
 Teacher/School Staff Other

Case Manager met with the Participant at his home. Case Manager and Participant discussed safety concerns. Case Manager drafted a safety plan for Participant to follow for the month of February. Participant agreed to follow the plan. Participant signed off on the safety plan with Case Manager after Case Manager explained the conditions of the plan. Case Manager will confirm with Participant's assigned P.O. to make sure Participant is on good terms during the month of February.

Notes for Creating a Contact for a Participant:

- If Participant does not appear in the list when attempting to create a contact, it is likely because the Participant is new to the system and does not have any contacts entered yet. To add a contact for a new participant:
 1. Select 'Participants & Staff' in left hand menu
 2. Select Participant
 3. Select Enrollment tab at the top of the screen

City of Oakland Logout

Enrollment Reports View Persons

Demographics Oakland Unite Case Plan

PARTICIPANT Print Delete Save

Data required to set up a record

* First Name or Initial: nele

* Last Name or Initial: baker

* Date of Birth (mm/dd/yyyy): 9/8/1999

Age: 20

Client ID: 34406590

Other required data

* Indicates Required Field

Street Address: []

* Zip: 96158

City: Oakland

State: CA

Home Phone: 556-9984

Mobile Phone: []

Email: []

4. Under the Contacts section, select, 'Add'

Demographics Oakland Unite Case Plan

Enrollment Reports View Persons

PARTICIPANT ENROLLMENT

Shandra Bagley ii Current Term ▼

GROUP ACTIVITIES Add Group Bulk Drop

No Enrollment

CONTACTS Add

No Enrollment

WORK EXPERIENCE Add

No Enrollment

WORK PLACEMENT Add

No Enrollment

5. Select a Staff Person from the dropdown
6. Select a date
7. Select 'Create New Record'

Home

Participants & Staff

Individual Services

Group Activities

Events

Reports

Contract Docs 19-20

Progress Rpts 19-20

Utilities

Documents

User Accounts

Admin List

CONTACTS & MILESTONES (NEW RECORD)

Oakland Demo - Oakland Demo

Step 1: Select a staff and date.

	Date
<input type="text"/>	<input type="text"/> Today

Step 2: Click "Create New Record"

Choose	Participant Name
<input checked="" type="radio"/>	nele baker

Create New Record

Creating a Milestone

Can be viewed on YouTube from 16:15 – 17:00

1. Select 'Individual Services' from the blue menu on the left side of the screen
2. Find Participant
3. Select Participant
4. Select the name of the appropriate Staff working with the Participant
5. Select 'Contact' from the Session Type dropdown menu
6. Select a date
7. Select, 'Add'

CONTACTS & MILESTONES Return

Oakland Demo - Oakland Demo

Staff Name: [nele baker](#) Participant Name: [Kevin Bailey](#)

Add Record

Session Type: ▼ Date: Add

Dates	Type	Action
Mon, Apr 6, 2020	Contact	View/Edit Delete
Wed, Mar 25, 2020	Contact	View/Edit Delete
Tue, Feb 18, 2020	Work Placement	View/Edit Delete
Sun, Dec 1, 2019	Work Experience	View/Edit Delete
Wed, Nov 6, 2019	Contact	View/Edit Delete
Fri, Nov 1, 2019	Contact	View/Edit Delete
Wed, Oct 23, 2019	Social Emotional Learning	View/Edit Delete
Wed, Sep 18, 2019	Contact	View/Edit Delete
Thu, Sep 5, 2019	Milestones & Access to Services	View/Edit Delete
Tue, Sep 3, 2019	Contact	View/Edit Delete
Mon, Jul 15, 2019	Work Experience	View/Edit Delete
Mon, Jul 15, 2019	Work Placement	View/Edit Delete

City of Oakland Logout

Home
Participants & Staff
Individual Services
Group Activities
Events
Reports
Contract Docs 19-20
Progress Rpts 19-20
Utilities
Documents
User Accounts
Admin List

CONTACT
Cancel
Print
Save & Return

Staff baker, nele	Participant Johnson, Anastasia	Entry Date 8/21/2019
Service Category *	Minutes *	Action
<input type="text" value=""/>	<input type="text" value=""/>	ADD CATEGORY

Contact Method

Contact - In person? Y N Unspecified

Contact with (may check more than one):

<input checked="" type="checkbox"/> Client	<input type="checkbox"/> Employer
<input type="checkbox"/> Client's family	<input type="checkbox"/> Parole/Probation
<input type="checkbox"/> Teacher/School Staff	<input type="checkbox"/> Other

Services/Milestones Obtained

- Basic/Access to Services - Life Map/Case Plan Created
- Basic/Access to Services - Life Map/Case Plan Completed
- Basic/Financial (clothing, food, transportation)
- Basic/Financial - Ongoing Income Secured (from SSI, CalWORKS, etc.)
- Behavioral Health - Mental Health Services
- Behavioral Health - Substance Abuse Services
- Community Engagement (peer support, mentor connection, community event participation)
- Community Service Hours
- Education - GED

8. Select each Milestone or Access to Service that the Participant **has achieved** since the previous data update
9. Select 'Save & Return' to add another Milestone for another date

Notes for Creating a Milestone:

- On a regular basis, select each Milestone or Access to Service that the Participant has achieved within that time period. Think of it as a regular update.
- When creating a Milestone, secure **supporting documentation** for the Participant's file. Document(s) will be reviewed during an audit if the Participant's file is selected. [Example: Certificate of completion for training program].

Creating a Work Experience Entry

Can be viewed on YouTube from 17:05 – 18:30

1. Select 'Individual Services' from the blue menu on the left side of the screen
2. Find Participant
3. Select Participant
4. Select the name of the Staff person working with the Participant
5. Select 'Work Experience' from the 'Session Type' dropdown menu
6. Select a date
7. Select 'Add'

City of Oakland [Logout](#)

[View Staff](#) [View Participants](#) [General Info](#)

CONTACTS & MILESTONES [Return](#)

Oakland Demo - Oakland Demo

Staff Name	Participant Name
nele baker	Kevin Bailey

Add Record

Session Type: Work Experience Date: [Add](#)

Dates	Type	Action
Mon, Apr 6, 2020	Contact	View/Edit Delete
Wed, Mar 25, 2020	Contact	View/Edit Delete
Tue, Feb 18, 2020	Work Placement	View/Edit Delete
Sun, Dec 1, 2019	Work Experience	View/Edit Delete
Wed, Nov 6, 2019	Contact	View/Edit Delete
Fri, Nov 1, 2019	Contact	View/Edit Delete
Wed, Oct 23, 2019	Social Emotional Learning	View/Edit Delete
Wed, Sep 18, 2019	Contact	View/Edit Delete
Thu, Sep 5, 2019	Milestones & Access to Services	View/Edit Delete
Tue, Sep 3, 2019	Contact	View/Edit Delete
Mon, Jul 15, 2019	Work Experience	View/Edit Delete
Mon, Jul 15, 2019	Work Placement	View/Edit Delete

WORK EXPERIENCE		
Staff	Participant	Entry Date
baker, nele	Johnson, Anastasia	8/1/2019
Details		
Industry	<input type="text"/>	
Month	<input type="text"/>	
Year	<input type="text"/>	
Amount of Time Worked		
<p>Please enter the total number of hours worked as well as the total number of days worked to complete those hours. To indicate partial hours, round to the nearest 15 minutes, such as 7.25 for 7 hours and 15 minutes, or 7.5 for 7 hours and 30 minutes.</p>		
* Days	<input type="text"/>	
* Hours	<input type="text"/>	
Notes		
<input type="text"/>		

8. Select the work experience industry, month and year the work experience took place. If the industry type is not listed, select 'Other Services' from the 'Industry' dropdown list and write in the specific industry.
9. Enter the total number of hours worked as well as the total number of days worked to complete those hours. To indicate partial hours, round to the nearest 15 minutes, such as 7.25 for 7 hours and 15 minutes, or 7.5 for 7 hours and 30 minutes
10. Select 'Save & Return'

Notes for Creating a Work Experience Entry:

- Enter the number of days and hours associated with a Participant's work experience monthly.
- When creating a work placement entries, ensure you have **supporting documentation** for the Participant's file. Document(s) will be reviewed during an audit if the Participant's file is selected.

Creating a Work Placement Entry

Can be viewed on YouTube from 18:31 – 21:08

1. Select 'Individual Services' from the blue menu on the left side of the screen
2. Find Participant
3. Select Participant
4. Select the name of the Staff working with the Participant
5. Select 'Work Placement' from the 'Session Type' dropdown menu
6. Select a date
7. Select, 'Add'

City of Oakland [Logout](#)

[View Staff](#) [View Participants](#) [General Info](#)

CONTACTS & MILESTONES [Return](#)

Oakland Demo - Oakland Demo

Staff Name: [nele baker](#) Participant Name: [Kevin Bailey](#)

Add Record

Session Type: Contact Date: [Add](#)

Dates	Type	Action
Mon, Apr 6, 2020	Contact	View/Edit Delete
Wed, Mar 25, 2020	Contact	View/Edit Delete
Tue, Feb 18, 2020	Work Placement	View/Edit Delete
Sun, Dec 1, 2019	Work Experience	View/Edit Delete
Wed, Nov 6, 2019	Contact	View/Edit Delete
Fri, Nov 1, 2019	Contact	View/Edit Delete
Wed, Oct 23, 2019	Social Emotional Learning	View/Edit Delete
Wed, Sep 18, 2019	Contact	View/Edit Delete
Thu, Sep 5, 2019	Milestones & Access to Services	View/Edit Delete
Tue, Sep 3, 2019	Contact	View/Edit Delete
Mon, Jul 15, 2019	Work Experience	View/Edit Delete
Mon, Jul 15, 2019	Work Placement	View/Edit Delete

8. Complete the following fields:

- Start Date
- End Date
- End Reason
 - i. When a Participant stops working with an employer, enter the date the Participant stopped working and the reason why in the 'End Date' and 'End Date Reason' fields, respectively.

- Industry
- Hourly Wage

WORK PLACEMENT Cancel Print Save & Return

Staff	Participant	Entry Date
baker, nele	Johnson, Anastasia	8/1/2019

Details

Start Date

End Date

End Date Reason

Industry

Hourly Wage

Notes

Notes for Creating a Work Placement Entry:

- Please make updates to the work experience tab regularly. If you find that a Participant has stopped or completed his or her work placement, please enter the end date and reason associated with that work placement.
- If a Participant starts a new placement, confirm that previous placements have an end date and reason before entering a new work placement entry. Utilize the individual services filters, to sort and locate existing work experience entries.

Group Activities

Creating a Group Activity

Can be viewed on YouTube from 22:42 – 24:58

1. Select 'Group Activities' from the blue menu on the left-hand side of the screen
2. Select the 'Add Activity' tab
3. Complete the following:
 - Service Name
 - Note: May be helpful to add the relevant FY to name of group
 - Description of the Group
 - General Category – If the user does not know how to categorize the group based on Scope of Work requirements, reach out to the Program Officer

The screenshot displays the 'City of Oakland' web application interface. On the left is a dark blue navigation menu with the following items: Home, Participants & Staff, Individual Services, Group Activities (highlighted with a red arrow), Events, Reports, Contract Docs 19-20, Progress Rpts 19-20, Utilities, Documents, User Accounts, and Admin List. The main content area is titled 'SERVICE DETAILS' and includes a 'Logout' link in the top right corner. Below the title are 'View Groups', 'View by Date', and 'Add Activity' buttons. The form contains the following fields and options:

- Service Name:** A text input field containing 'Group of Skills FY 19-20'.
- Description (Please specify the purpose, content, and audience/target population.):** A large text area.
- General Categories (Please select ONE):** A list of radio button options:
 - Basic Education Training
 - Community Training
 - Family Involvement
 - Job Skills/Vocational Training
 - Life Skills and Pre-employment Skills
 - Mental Health
 - Other Service Category
 - Outreach
 - Peer Support / Counseling
 - Social
 - Sports/Physical Activity
 - Street Outreach
 - Substance Abuse
 - Violence Prevention/Anger Management/Conflict Resolution
 - Work Experience

At the bottom of the form are 'Cancel' and 'Save & Proceed' buttons. A red arrow points to the 'Group Activities' menu item, and another red arrow points to the 'Logout' link.

4. Select, 'Save & Proceed'
5. Select 'Edit' on Schedule line to add the appropriate dates and times for group meetings
 - Select 'To add Multiple Dates to the schedule' if the group meets repeatedly

- Select 'To add a Single Date to the schedule' if the group is a one-time meeting
6. Complete the schedule and select the 'Add Multiple Dates' button to view the complete group schedule

City of Oakland [Logout](#)

General Info | Enrollment | Attendance | Reports | Group List

SCHEDULE Add Dates | Delete Selected | Return

Group of Skills FY 19-20

Page 1 2 [Next >](#)

Select All | Unselect All

Select	Date	Begin	End	Time
<input type="checkbox"/>	Monday, July 1, 2019	9:00 AM	12:00 PM	(Time)
<input type="checkbox"/>	Tuesday, July 2, 2019	9:00 AM	12:00 PM	(Time)
<input type="checkbox"/>	Wednesday, July 3, 2019	9:00 AM	12:00 PM	(Time)
<input type="checkbox"/>	Thursday, July 4, 2019	9:00 AM	12:00 PM	(Time)
<input type="checkbox"/>	Friday, July 5, 2019	9:00 AM	12:00 PM	(Time)
<input type="checkbox"/>	Monday, July 8, 2019	9:00 AM	12:00 PM	(Time)
<input type="checkbox"/>	Tuesday, July 9, 2019	9:00 AM	12:00 PM	(Time)
<input type="checkbox"/>	Wednesday, July 10, 2019	9:00 AM	12:00 PM	(Time)
<input type="checkbox"/>	Thursday, July 11, 2019	9:00 AM	12:00 PM	(Time)
<input type="checkbox"/>	Friday, July 12, 2019	9:00 AM	12:00 PM	(Time)
<input type="checkbox"/>	Monday, July 15, 2019	9:00 AM	12:00 PM	(Time)
<input type="checkbox"/>	Tuesday, July 16, 2019	9:00 AM	12:00 PM	(Time)
<input type="checkbox"/>	Wednesday, July 17, 2019	9:00 AM	12:00 PM	(Time)
<input type="checkbox"/>	Thursday, July 18, 2019	9:00 AM	12:00 PM	(Time)
<input type="checkbox"/>	Friday, July 19, 2019	9:00 AM	12:00 PM	(Time)
<input type="checkbox"/>	Monday, July 22, 2019	9:00 AM	12:00 PM	(Time)
<input type="checkbox"/>	Tuesday, July 23, 2019	9:00 AM	12:00 PM	(Time)
<input type="checkbox"/>	Wednesday, July 24, 2019	9:00 AM	12:00 PM	(Time)
<input type="checkbox"/>	Thursday, July 25, 2019	9:00 AM	12:00 PM	(Time)
<input type="checkbox"/>	Friday, July 26, 2019	9:00 AM	12:00 PM	(Time)
<input type="checkbox"/>	Monday, July 29, 2019	9:00 AM	12:00 PM	(Time)
<input type="checkbox"/>	Tuesday, July 30, 2019	9:00 AM	12:00 PM	(Time)
<input type="checkbox"/>	Wednesday, July 31, 2019	9:00 AM	12:00 PM	(Time)

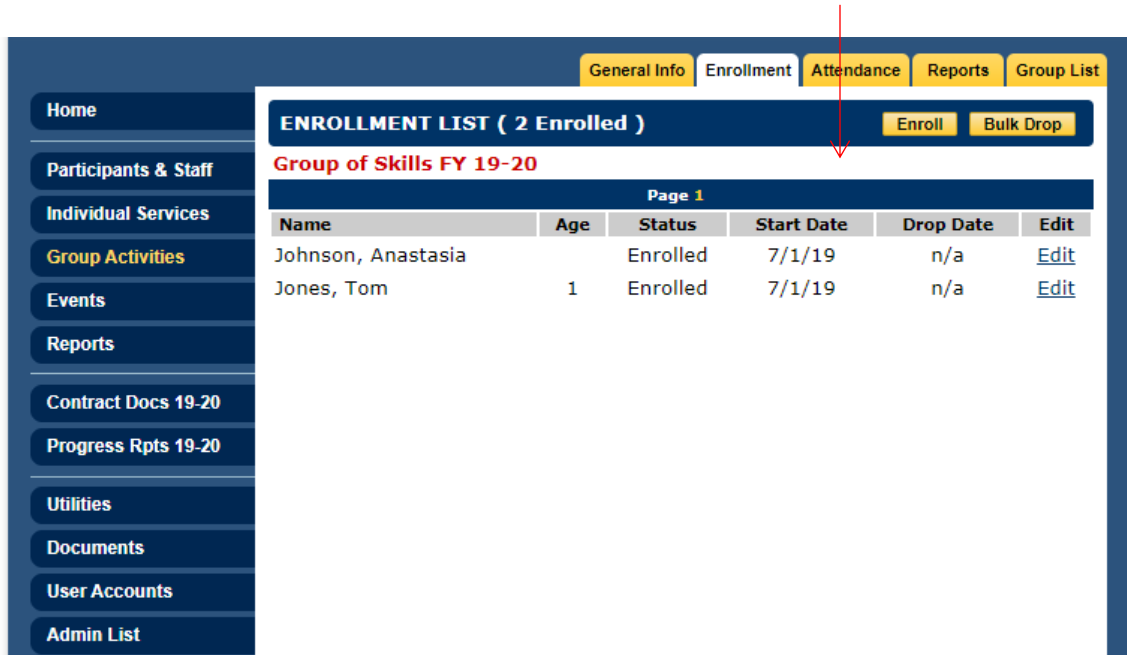
7. On this screen, user can delete dates when classes will not be held i.e. holidays or office closings. To delete dates:
 - a. Select dates to be deleted
 - b. Click 'Delete Selected' at the top of the screen

*****Note: Once a date is deleted, it cannot be undone. Date will have to be manually re-entered.*****
8. When satisfied with schedule, select 'Return'

Enrolling Participants in a Group Activity

Can be viewed on YouTube from 25:00 – 25:38

1. Select 'Group Activities' from blue menu on left-hand side of the screen
2. Select the group desired
3. Select 'Enrollment' tab at the top of the screen
4. Select 'Enroll'



The screenshot displays a web application interface. On the left is a dark blue sidebar menu with options: Home, Participants & Staff, Individual Services, Group Activities (highlighted in yellow), Events, Reports, Contract Docs 19-20, Progress Rpts 19-20, Utilities, Documents, User Accounts, and Admin List. The main content area has a top navigation bar with tabs: General Info, Enrollment (selected), Attendance, Reports, and Group List. Below the tabs, there's a header for 'ENROLLMENT LIST (2 Enrolled)' with 'Enroll' and 'Bulk Drop' buttons. A red arrow points to the 'Enroll' button. Below this is the group name 'Group of Skills FY 19-20' and 'Page 1'. A table lists participants:

Name	Age	Status	Start Date	Drop Date	Edit
Johnson, Anastasia		Enrolled	7/1/19	n/a	Edit
Jones, Tom	1	Enrolled	7/1/19	n/a	Edit

5. Select Participants for enrollment using one of the following ways:
 - Enter the first and last name (whole or initials) and 'Person Type' → 'Find Person'
 - Select the first letter of their last name in the alphabet chart
 - Select 'ALL' in the alphabet chart (only if user would like to add multiple Participants at once)
6. Once Participant is found, select the Participant and click 'Next Step'

- Enter the date the Participant will start the class
Note: The system will automatically default to the first date of the group **unless** the enroll date is changed by the user

- Select 'Next Step'
 Note: If Participant is enrolled in another group at the same time, user will receive a message from the system notifying them of the scheduling.
- User will receive an 'Enrollment Confirmed' message, select 'Done'

Completing Group Activity Attendance

Can be viewed on YouTube from 25:51 – 26:30

1. Select 'Group Activities' from blue menu on left-hand side of the screen
2. Select the group desired
3. Select 'Attendance' tab at the top of the screen
4. Select the date desired
5. Mark Participants as 'Present' or 'Absent' based on sign-in sheets
Note: Sign-in sheets will be reviewed during audits. Please maintain all sign-in sheets for evaluators.

The screenshot shows the 'Attendance' page for the 'Group of Skills FY 19-20' on Monday, July 1, 2019. The interface includes a left-hand navigation menu with 'Group Activities' selected. The main content area has a header with 'ATTENDANCE', 'Print', 'Save', and 'Return' buttons. Below the header, there are buttons for 'All Present', 'All Absent', and 'Clear'. A table lists participants with columns for 'Participant Name', 'Present', 'Absent', 'Begin', and 'End'. Two participants are listed: Johnson, Anastasia and Jones, Tom, both marked as present with radio buttons. The table also shows the time range from 9:00 AM to 12:00 PM. At the bottom, there are 'Save & Next Day >' buttons.

6. Select 'Save' and 'Return', or
7. Select 'Save & Next Day' to input multiple dates of attendance from previous weeks

***Note: When viewing all group meeting dates, user will see attendance records in a few different colors:

- Green: Completed attendance records for all Participants
- Brown/Yellow: Did not complete attendance for some Participants
- Red: Did not complete attendance for any Participants for the day

The screenshot shows the 'Attendance' page for the 'Group of Skills FY 19-20' with a summary table. The interface includes a left-hand navigation menu with 'Group Activities' selected. The main content area has a header with 'ATTENDANCE' and tabs for 'General Info', 'Enrollment', 'Attendance', 'Reports', and 'Group List'. Below the header, there are buttons for 'All Dates', 'All Thru Today', 'Incomplete Thru Today', and 'Empty Thru Today'. A table lists attendance records for the dates Monday, July 1, 2019, Tuesday, July 2, 2019, Wednesday, July 3, 2019, and Thursday, July 4, 2019. The table has columns for 'Date', 'Begin', 'End', and 'Present / Total'. The 'Present / Total' column shows the number of participants present out of the total number of participants for each date.

Date	Begin	End	Present / Total
Monday, July 1, 2019	9:00 AM	12:00 PM	2 / 2
Tuesday, July 2, 2019	9:00 AM	12:00 PM	1 / 2
Wednesday, July 3, 2019	9:00 AM	12:00 PM	0 / 2
Thursday, July 4, 2019	9:00 AM	12:00 PM	0 / 2

Assign Staff to a Group Activity

Can be viewed on YouTube from 26:31 – 28:38

1. Select 'Group Activities' from blue menu on left-hand side of the screen
2. Select the group desired
3. Select 'Edit' on Staff line to add Staff
4. Select a Staff member from the dropdown next to 'Select a Staff Name'
5. Select a role from the dropdown next to 'Select a Role'
 - Note: only one Staff person can be named as 'Lead Staff'; however, there can be multiple Staff assigned to a group

The screenshot shows the 'City of Oakland' web application interface. On the left is a navigation menu with 'Group Activities' highlighted. The main content area is titled 'ASSIGN OR EDIT STAFF' and includes a 'Return' button. Below this, the group name 'Group of Skills FY 19-20' and the date '9/23/2019' are displayed. The 'To Assign Staff' section contains three numbered instructions: 1. Select a Staff Name (with a dropdown menu), 2. Select a Role (with a dropdown menu showing 'Support Staff'), and 3. Click Assign Staff Now (with an 'Assign Staff Now' button). Below this is a table for 'Current Assigned Staff' with columns for Name and Role. One staff member, 'nele baker', is listed with the role 'Lead Staff'. There are 'Update' and 'Remove' buttons next to the role. A note states: 'Note: Only one Lead Staff can be assigned per class.' Below the table, there are instructions on how to update a role and how to remove a staff member.

6. Select "Assign Staff Now"
7. Select 'Return'

Creating Event Activities

Can be viewed on YouTube from 28:45 – 30:10

All Events data is entered under the Events tab. Events are entered for activities where individual Participant attendance is not taken. Examples of events include: street outreach, block parties, and memorial services.

1. Select 'Events' from blue menu on left-hand side of the screen
2. Select, 'Add Events' tab
3. Complete the following:
 - Service Name
 - Note: May be helpful to add the relevant FY to name of group
 - Description
 - Provide an explanation for the purpose of the event
 - Funding Source
 - General Category – If the user does not know how to categorize the group based on Scope of Work requirements, reach out to the Program Officer
 - You must select the category that matches your event deliverables for it to count towards your deliverables under Progress Reports.

The screenshot shows a web application interface for adding an event. On the left is a dark blue navigation menu with the following items: Home, Participants & Staff, Individual Services, Group Activities, Events (highlighted in yellow), Reports, Contract Docs 19-20, Progress Rpts 19-20, Utilities, Documents, User Accounts, and Admin List. The main content area is titled 'SERVICE DETAILS' and includes a 'Cancel' button and a 'Save & Proceed' button. The form fields are: 'Service Name' (text input), 'Description (Please specify the purpose, content, and audience/target population.)' (text area), 'Funding Source' (checkboxes for Oakland Unite/Measure Z, CalVIP, CDCR/GSW, OPRI, and Other Funding Source), and 'General Categories (Please select ONE)' (radio buttons for Basic Education Training, Community Event, Community Training, Family Involvement, Job Skills/Vocational Training, Life Skills and Pre-employment Skills, Networking/Collaboration Meetings, Other Service Category, Outreach, Peer Support / Counseling, Social, Sports/Physical Activity, Street Outreach, Violence Prevention/Anger Management/Conflict Resolution, and Work Experience).

4. Select, 'Save and Proceed'

Completing Event Activity Attendance

1. Select 'Attendance' tab
2. Select, "Add' button

The screenshot shows the City of Oakland web application interface. At the top, there is a navigation bar with the City of Oakland logo and a 'Logout' link. Below the navigation bar, there are three tabs: 'View Events', 'Attendance', and 'Add Events'. The 'Attendance' tab is currently selected. On the left side, there is a sidebar menu with the following items: 'Home', 'Participants & Staff', 'Individual Services', 'Group Activities', 'Events', and 'Reports'. The 'Events' item is highlighted in yellow. The main content area displays the 'ADD EVENT DATE' form. The form has a title bar with 'ADD EVENT DATE' and three buttons: 'Cancel', 'Save', and 'Save & Return'. The form fields are as follows:

Field	Value
Activity	First Event FY 19-20
Date of Visit	
Total Attendees	
First Time Attendees	
Total Staff Attendees	
Time Spent (min)	

3. Complete the following fields:

- Date of Event Activity
- Total # of Attendees (Total number of people at event)
- First Time Attendees (If this event meets regularly, you may be entering multiple incidents for the event – here you enter how many people were new to the event on this date)
- Total Staff Attendees – How many program Staff were present
- Time Spent – entered in minutes

4. Select, 'Save and Return'

5. Once you have returned – you can always go back to add additional incidents of the event by selecting the event from the event list – go to Attendance (Step 1 above), and go to Add (Step 2), and repeat data entry for the new date (Step 3).

Commonly Used Reports

Cityspan has a number of reports created specifically for Department of Violence grantees. An overview of commonly requested reports is available below.

Stats Report

Can be viewed on YouTube from 1:13:00 – 39:19

The stats report provides demographic and service information for clients enrolled in your program. The Department of Violence Prevention recommends running this report to confirm that enrolled clients appear in your Cityspan database and to conduct quality assurance on client data entries.

1. Select 'Reports' from blue menu on left-hand side of the screen
2. Select Oakland Stats (2020 – 2021)



3. Select a reporting period (e.g. Quarter 1, Quarter 2)
 - a. If you would like to use a custom date range, select custom and enter the date range of interest

OAKLAND STATS (2020 - 2021)

Oakland Demo - Oakland Demo

Enter Report Parameters	
Query Tool (Optional)	<input type="checkbox"/> Filter using results from Query Tool
From	<input checked="" type="radio"/> Q1 FY2021 (7/1/20 - 9/30/20) <input type="radio"/> Q2 FY2021 (10/1/20 - 12/31/20) <input type="radio"/> Q3 FY2021 (1/1/21 - 3/31/21) <input type="radio"/> Q4 FY2021 (4/1/21 - 6/30/21) <input type="radio"/> Custom
Include participants without Measure Y?	<input type="radio"/> Yes <input checked="" type="radio"/> No

Next

- 4. Select, 'Next'
- 5. Select, your strategy and select 'Next'
- 6. Select, 'Generate'
 - a. If the report does not open automatically, select 'Click Here' to open the report in your internet browser

OAKLAND STATS (2020 - 2021)

Oakland Demo - Oakland Demo

Your report has been generated (at 10:58:44 AM)

→ [Click here](#) if the report did not open in a new window

Enter Report Parameters

Cancel **Generate**

- b. The stats report will open in a new window

Agency:	Mailee's House
Program:	Demo Site Measure Y
Report Period:	7/1/20 to 9/30/20
Participant Filter:	All Measure Z participants

CLIENT SUMMARY

Total Clients	Clients Receiving Individual Services	Clients Receiving Group Services
1	1	0

SUMMARY (DEMOGRAPHIC)

Race/Ethnicity		
Value	# of Clients	Percent
African	0	0.0%
African American/Black	0	0.0%
Asian - Cambodian	0	0.0%
Asian - Chinese	0	0.0%
Asian - Filipino	0	0.0%
Asian - South Asian, Indian	0	0.0%
Asian - Japanese	0	0.0%
Asian - Korean	0	0.0%
Asian - Laotian	0	0.0%
Asian - Vietnamese	0	0.0%
Asian - Other (please specify below)	0	0.0%
Latino - Mexican, Chicano	0	0.0%
Latino - Other (please specify below)	0	0.0%
Native American/Alaskan Native	0	0.0%
Pacific Isl. - Guamanian/Chamorro	0	0.0%
Pacific Isl. - Native Hawaiian	0	0.0%
Pacific Islander - Samoan	0	0.0%
Pacific Islander - Tongan	0	0.0%
Pacific Isl.- Other (please specify below)	1	100.0%
White	0	0.0%
Other Race (please specify below)	0	0.0%
Decline to State	0	0.0%
Missing	0	0.0%

Age		
Value	# of Clients	Percent
Missing	1	100.0%

Gender		
Value	# of Clients	Percent
Girl/Woman	0	0.0%
Boy/Man	1	100.0%
Transgender	0	0.0%
Other	0	0.0%
Missing	0	0.0%

Oakland Deliverables

Can be viewed on YouTube from 1:13:00 – 1:15:00

The Oakland Deliverables report will show your agency's progress meeting deliverables in each quarter and for the entire year. This is a great report to use to determine if you are meeting deliverables without going into the Progress Report module.

1. Select 'Reports' from blue menu on left-hand side of the screen
2. Select, 'Oakland Deliverables'

REPORTS

Oakland Demo - Oakland Demo

Choose a Report

City of Oakland Reports

- [Oakland Stats \(2020 - 2021\)](#)
- [Oakland Stats \(2019 - 2020\)](#)
- [Oakland Stats \(2018 - 2019\)](#)
- [Oakland Stats \(2016 - 2018\)](#)
- [Oakland Stats \(2009 - 2015\)](#)
- [Oakland Stats \(2008 - 2009\)](#)
- [Oakland Deliverables](#)
Data on service events, groups, contacts, case notes, attendance, hours, etc.

3. Select a reporting period (e.g. Q1, Q2)
 - c. If you would like to use a custom date range, select custom and enter the date range of interest

OAKLAND DELIVERABLES

Oakland Demo - Oakland Demo

Enter Report Parameters

From	<input checked="" type="radio"/> Q1 (July - Sept.) <input type="radio"/> Q2 (Oct. - Dec.) <input type="radio"/> Q3 (Jan. - March) <input type="radio"/> Q4 (April - June) <input type="radio"/> Custom
Report Year	<input type="radio"/> 2008-2009 <input type="radio"/> 2009-2016 <input type="radio"/> 2016-2018 <input type="radio"/> 2018-2019 <input checked="" type="radio"/> 2019-2021
Query Tool (Optional)	<input type="checkbox"/> Filter using results from Query Tool

Next

4. Select, 'Next'
5. Select, your strategy and select 'Next'
6. Select, 'Generate' and the report will download as an excel file

5	Agency:	Mailee's House
6	Program:	Demo Site Measure Y
7	Report Period:	7/1/2020 to 9/30/2020
8	YTD Period:	7/1/2020 to 9/30/2020
9	Participant Filter:	All Measure Z participants
10		
11	OVERALL SUMMARY (EXCLUDING EVENTS)	
12		
13	Description	Value
14	# of clients served	1
15	# of enrolled clients	1
16		
17	CONTACTS	
18		
19	Description	Value
20	# Clients	0
21	# Contacts	0
22	# Hours	0
23	# of case managed clients	0
24	# of case management contacts	0
25	# of case management hours	0
26	# of intensive outreach clients	0
27	# of intensive outreach contacts	0
28	# of intensive outreach hours	0
29	# of mental health service clients	0
30	# of mental health service contacts	0
31	# of mental health service hours	0
32	# of academic case management clients	0
33	# of academic case management contacts	0
34	# of academic case management hours	0
35	# of clients 100 hours of work experience	0
36	# of case managed clients YTD	0
37		
38	CASE NOTES	
39		
40	Description	Value
41	# of clients provided with referral	0
42	# of clients referred to mental health services	0
	# of clients enrolled in substance abuse	

Missing Demographics

Your program officer reserves the right to withhold up to 5% of the scheduled payment if the Grantee does not demonstrate a sufficient effort to collect consent forms from each participant for whom individual-level services are provided.

Users can run this report to confirm that clients are not missing consent forms and other required demographic information in their records.

1. Select 'Reports' from blue menu on left-hand side of the screen
2. Select Missing Demographics Summary

Additional Reports

Unenrolled Participants
Lists all participants who are not enrolled in any services within the given date range. This report can be helpful in determining which participants are being excluded from demographics reports.



Missing Demographics Summary
Missing core demographic information for persons in this program.

Missing Staff Data Summary
Missing data for staff working in this program.

3. Enter the date range of interest in the begin date and end date fields
4. Choose the way you would like to sort report results
 - a. If you select by demographic category, also check off the option to include participants names

MISSING DEMOGRAPHICS SUMMARY

Oakland Demo - Oakland Demo

Enter Report Parameters	
Begin Date (mm/dd/yyyy)	<input type="text" value="7/1/19"/> 
End Date (mm/dd/yyyy)	<input type="text" value="8/1/20"/> 
Sort By	<input checked="" type="radio"/> Demographic Category <input type="radio"/> Participant
Include Names When Sorting By Demographic Category? (Optional)	<input checked="" type="checkbox"/> Include Names
Query Tool (Optional)	<input type="checkbox"/> Filter using results from Query Tool



5. Select, 'Generate'
 - a. If the report does not open automatically, select 'Click Here' to open the report in your internet browser

MISSING DEMOGRAPHICS SUMMARY

Oakland Demo - Oakland Demo

Your report has been generated (at 1:19:55 PM)

→ [Click here](#) if the report did not open in a new window

Enter Report Parameters	
Begin Date (mm/dd/yyyy)	<input type="text" value="7/1/19"/> 
End Date (mm/dd/yyyy)	<input type="text" value="8/1/20"/> 
Sort By	<input checked="" type="radio"/> Demographic Category <input type="radio"/> Participant
Include Names When Sorting By Demographic Category? (Optional)	<input checked="" type="checkbox"/> Include Names
Query Tool (Optional)	<input type="checkbox"/> Filter using results from Query Tool

Agency:	Mailee's House
Program:	Demo Site Measure Y
Report Period:	7/1/19 to 8/1/20
Include Names?	Yes

Gender

Participants with Missing Data: 12/44

baker, nele
Barr, Talarrie
Bassett, Shanyna
Battle, Kisha
Bean, Jacqui
Dailey, Joyce
Dee, Jay
Diaz, Gabe
Kane, Kandy
Manilow, Barry
Nelson, Bobby
Rhodes, Callie

Sex at Birth

Participants with Missing Data: 32/44

Adams, Jane
ae, ae
Avis, Andy
Bagley ii, Shandra
Bailey, Kevin
baker, nele
Barfield, Kiayel
Barnes, Timothy
Rarr, Talarrie

Individual Services List

Can be viewed on YouTube from 1:15:00 – 1:16:16

The individual services report provides all the contacts and case notes for with a client and the service category associated with each contact.

1. Select 'Reports' from blue menu on left-hand side of the screen
2. Select 'Individual Services List'

Attendance Data Export (Excel)
Outputs an Excel spreadsheet with a row for each participant and a column for each date in the report period. Attendance Data Export reports on marked attendance records.

Services with Missing Attendance
Missing attendance data, broken down by service. This report will identify scheduled service sessions where zero attendance was entered. It will not identify partially complete attendance. To find partially complete dates, run Missing Attendance by Participant instead.

Missing Attendance by Participant
Lists, for each participant and service, the dates when no attendance was recorded.

→ **Individual Services List**
Lists all Individual Service (including SEL) sessions and notes within a specified date range. The report can be grouped by Staff or Participant.


Individual Services List (Excel)
Lists all Individual Service (including SEL) sessions and notes within a specified date range. The report can be grouped by Staff or Participant.

3. Enter begin and end date

INDIVIDUAL SERVICES LIST

Oakland Demo - Oakland Demo

Enter Report Parameters

Begin Date (mm/dd/yy)	<input type="text" value="7/1/19"/>	
End Date (mm/dd/yy)	<input type="text" value="12/31/19"/>	
Group Results By	<input type="radio"/> Staff <input checked="" type="radio"/> Participant	
Show Individual Service Notes?	<input type="radio"/> Yes <input checked="" type="radio"/> No	
Query Tool (Optional)	<input type="checkbox"/> Filter using results from Query Tool	

4. If you would like to see the case notes associated with each contact, select 'Yes' for the parameter, 'Show Individual Case Notes'
5. Select, 'Generate'
 - a. If the report does not open automatically, select 'Click Here' to open the report in your internet browser

INDIVIDUAL SERVICES LIST

Oakland Demo - Oakland Demo

Your report has been generated (at 12:46:42 PM)

→ [Click here](#) if the report did not open in a new window

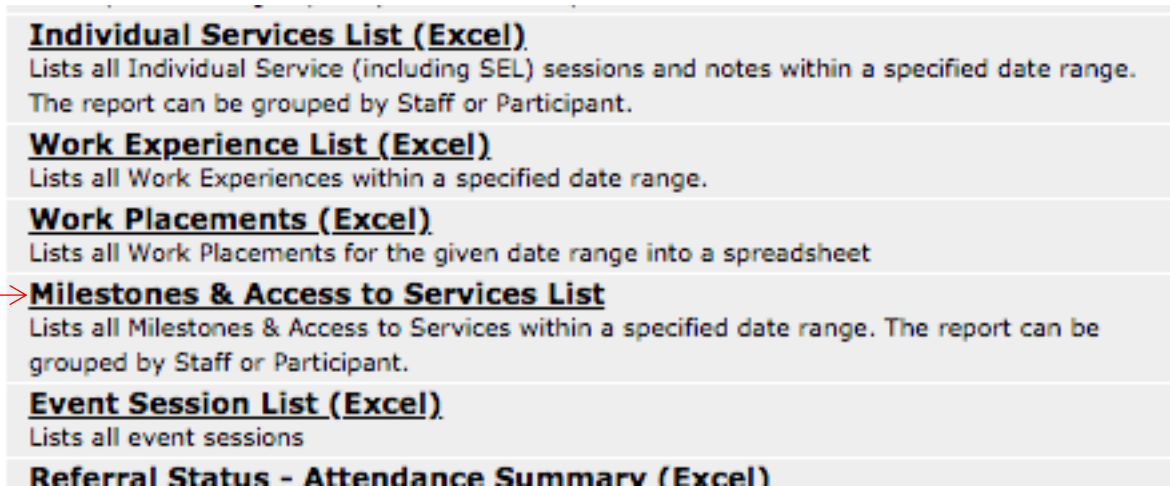
Please Note:

- **The individual services list now includes a downloadable table that provides the total number of hours clients have received case management and academic case management services. This table is available on the last page of the individual services list. To access this file, use these same instructions in the report titled, Individual Services List (EXCEL)**

Milestones and Access to Services

This report will allow you to see the milestones and services achieved by clients. This report can be used to confirm that client's milestones are accounted for in Cityspan.

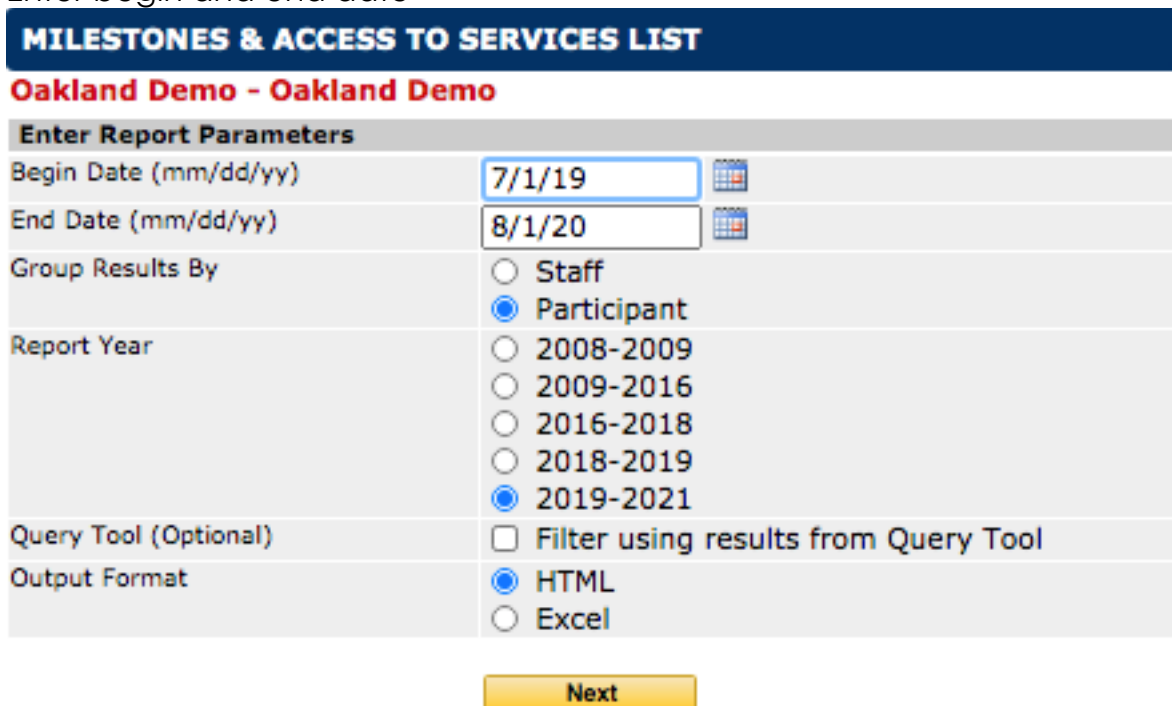
1. Select 'Reports' from blue menu on left-hand side of the screen
2. Select Milestones & Access to Services List



A screenshot of a report selection menu. The menu items are listed in a vertical stack, each with a title and a brief description. A red arrow points to the 'Milestones & Access to Services List' option.

- Individual Services List (Excel)**
Lists all Individual Service (including SEL) sessions and notes within a specified date range. The report can be grouped by Staff or Participant.
- Work Experience List (Excel)**
Lists all Work Experiences within a specified date range.
- Work Placements (Excel)**
Lists all Work Placements for the given date range into a spreadsheet
- Milestones & Access to Services List**
Lists all Milestones & Access to Services within a specified date range. The report can be grouped by Staff or Participant.
- Event Session List (Excel)**
Lists all event sessions
- Referral Status - Attendance Summary (Excel)**

3. Enter begin and end date



A screenshot of the 'MILESTONES & ACCESS TO SERVICES LIST' report parameter form. The form is titled 'Oakland Demo - Oakland Demo' and has a section 'Enter Report Parameters'. The parameters are as follows:

Enter Report Parameters	
Begin Date (mm/dd/yy)	7/1/19
End Date (mm/dd/yy)	8/1/20
Group Results By	<input type="radio"/> Staff <input checked="" type="radio"/> Participant
Report Year	<input type="radio"/> 2008-2009 <input type="radio"/> 2009-2016 <input type="radio"/> 2016-2018 <input type="radio"/> 2018-2019 <input checked="" type="radio"/> 2019-2021
Query Tool (Optional)	<input type="checkbox"/> Filter using results from Query Tool
Output Format	<input checked="" type="radio"/> HTML <input type="radio"/> Excel

Next

4. Select the way you would like to group report results
 - a. Sorting by staff sorts the report so that the report shows all of the participants associated with a staff person
 - b. Sorting by participants shows all of the different staff that may have worked with the same participant

5. Select output format
6. Select, 'Next'
7. Select appropriate strategy

MILESTONES & ACCESS TO SERVICES LIST

Oakland Demo - Oakland Demo

Enter Report Parameters

Measure Z Strategie(s)
 (Select All/None)

Adult &TAY Employment/Education Support
 Adult Life Coaching
 Commercially Sexually Exploited Children Intervention
 Community Healing
 Family Violence Intervention
 Healthy, Wealthy, Wise
 Shooting/Homicide Response and Support Network
 Youth Diversion and Life Coaching
 Youth Employment/Education Support

Cancel
Generate

8. Select 'Generate'

Agency: Mailee's House
Program: Demo Site Measure Y
Report Period: 9/1/19 to 8/1/20
Grouping Results By: Participant

Avis, Andy

Staff Name	Date of Visit	Services/Milestones Obtained	Service Referrals
Allen, John	12/13/2019		
	12/13/2019		
	12/13/2019		
	12/13/2019		
	12/13/2019		
	12/13/2019		

Bagley ii, Shandra

Staff Name	Date of Visit	Services/Milestones Obtained	Service Referrals
Blaney, Claire	10/2/2019		
	12/3/2019	Basic/Access to Services - Life Map/Case Plan Created	
Booth, Harry	9/17/2019		
	2/6/2020		
Carrol, David	5/8/2020	Housing - Emergency/Crisis/Shelter	
Christie, Dyanna	11/6/2019		
	11/6/2019		

- a. If the report does not open automatically, select 'Click Here' to open the report in your internet browser

MILESTONES & ACCESS TO SERVICES LIST

Oakland Demo - Oakland Demo

Your report has been generated (at 1:46:45 PM)

→ [Click here](#) if the report did not open in a new window

Enter Report Parameters

Measure Z Strategie(s) (Select All / None)	<input checked="" type="checkbox"/> Adult &TAY Employment/Education Support <input type="checkbox"/> Adult Life Coaching <input type="checkbox"/> Commercially Sexually Exploited Children Intervention <input type="checkbox"/> Community Healing <input type="checkbox"/> Family Violence Intervention <input type="checkbox"/> Healthy, Wealthy, Wise <input type="checkbox"/> Shooting/Homicide Response and Support Network <input type="checkbox"/> Youth Diversion and Life Coaching <input type="checkbox"/> Youth Employment/Education Support
--	---

Cancel

Generate

Work Placement Reports

This reports which clients have obtained employment as well as descriptive information about those employment opportunities.

1. Select 'Reports' from blue menu on left-hand side of the screen
2. Select Work placement reports

WORK EXPERIENCE LIST (Excel)

Lists all Work Experiences within a specified date range.

→ **Work Placements (Excel)**

Lists all Work Placements for the given date range into a spreadsheet

Milestones & Access to Services List


Lists all Milestones & Access to Services within a specified date range. The report can be grouped by Staff or Participant.


3. Enter begin and end date

WORK PLACEMENTS (EXCEL)

Oakland Demo - Oakland Demo

Enter Report Parameters

Begin Date (mm/dd/yy) 

End Date (mm/dd/yy) 

Query Tool (Optional) Filter using results from Query Tool

4. Select, 'Generate'
 - a. The report will download to your computer as an excel file

Agency:	Mallee's House						
Program:	Demo Site Measure Y						
Report Period:	9/1/19 to 12/31/2019						
Garcia, Juan	Client ID: 48758896	Placements: 1					
Staff	Entry Date	Start Date	End Date	# Days	End Date Reason	Industry	Hourly Wage
Doe, John	10/2/19	8/1/19	8/5/20	371		Construction	20
Haywood, Leonard	Client ID: 48757885	Placements: 1					
Staff	Entry Date	Start Date	End Date	# Days	End Date Reason	Industry	Hourly Wage
baker, nele	10/2/19	10/2/19	8/5/20	309		Other Services	18
Jones, Vale	Client ID: 47996083	Placements: 1					
Staff	Entry Date	Start Date	End Date	# Days	End Date Reason	Industry	Hourly Wage
baker, nele	9/3/19	9/1/19	8/5/20	340		Accommodation and Food Services	

Work Experience Reports

The work experience report provides you with information on clients work experiences. It provides the number of experiences as well as information on how long a client worked with an employer.

1. Select 'Reports' from blue menu on left-hand side of the screen
2. Select work experience list

→ **Work Experience List (Excel)**
Lists all Work Experiences within a specified date range.

Work Placements (Excel)
Lists all Work Placements for the given date range into a spreadsheet

Milestones & Access to Services List
Lists all Milestones & Access to Services within a specified date range. The report can be grouped by Staff or Participant.

3. Enter begin and end date

WORK EXPERIENCE LIST (EXCEL)

Oakland Demo - Oakland Demo

Enter Report Parameters

Begin Date (mm/dd/yy)	<input type="text" value="7/1/19"/>	
End Date (mm/dd/yy)	<input type="text" value="12/31/2019"/>	
Query Tool (Optional)	<input type="checkbox"/> Filter using results from Query Tool	

Cancel

Generate

4. Select, 'Generate'
 - a. The report will download to your computer as an excel file

Agency: Mallee's House
Program: Demo Site Measure Y
Report Period: 7/1/19 to 12/31/2019

ae, ae Client ID: 46187072		Month	Year	Days	Hours
Entry Date	Industry	Month	Year	Days	Hours
7/2/19	Accommodation and Food Services	August	2019	5	10
7/3/19				365	100
8/2/19	Educational Services	August	2019	900	12000
8/7/19	Accommodation and Food Services	August	2019	5	
Total				1275	12110

Bagley ii, Shandra Client ID: 1087594		Month	Year	Days	Hours
Entry Date	Industry	Month	Year	Days	Hours
7/1/19					
9/9/19					
7/4/19					
Total					

Bailey, Kevin Client ID: 1087779		Month	Year	Days	Hours
Entry Date	Industry	Month	Year	Days	Hours
7/15/19	Construction	July	2019	60.6	1200.12
12/1/19	Administrative and Support Services	December	2019	20	40.5
7/3/19					
10/4/19	Administrative and Support Services	August	2019	10	16
Total				90.6	1256.62

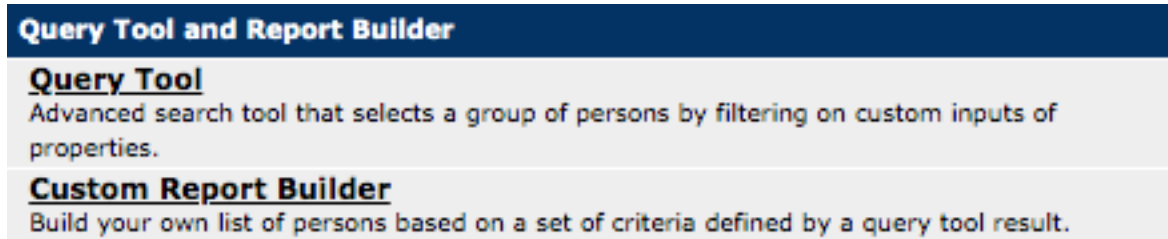
Query Tool

Can be viewed on YouTube from 1:20:38 – 1:24:30

The query tool is available for users who would like to find a subset of clients, based on client characteristics (parameters) such as age, grade, sex and participation dates. Furthermore, you can use the query tool as a filter on other Cityspan reports based on these characteristics. This tool is often used to troubleshoot concerns with clients not being included in quarterly progress reports.

The following example will produce a subset of clients who participate in a program during Quarter 1 of 2019 who are female and have Adult Life Coaching as their Oakland Unite strategy.

1. Select 'Reports' from blue menu on left-hand side of the screen
2. Select 'Query Tool'

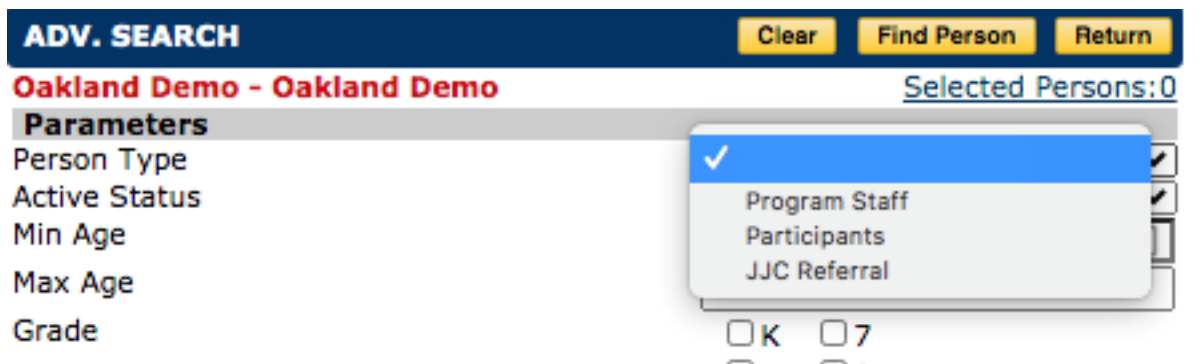


Query Tool and Report Builder

Query Tool
Advanced search tool that selects a group of persons by filtering on custom inputs of properties.

Custom Report Builder
Build your own list of persons based on a set of criteria defined by a query tool result.

3. Select 'Participants' from the person type menu



ADV. SEARCH Clear Find Person Return

Oakland Demo - Oakland Demo Selected Persons:0

Parameters

Person Type
Active Status
Min Age
Max Age
Grade

Program Staff
 Participants
 JJC Referral

K 7

4. Select 'Yes' from the Adult Life Coaching menu
 - a. Selecting yes will pull client records that have "Intensive Adult Case Management" selected in the strategy section of the participant record

Enrollment Reports View Persons

Demographics Oakland Unite Case Plan

OAKLAND UNITE - RISK FACTORS Save

Anastasia Johnson

Enrollment

Program?

- Oakland Unite/Measure Z
- CalVIP
- CDCR/GSW
- OPRI
- Other Funding Source

Oakland Unite Strategies 2016-present

<input checked="" type="checkbox"/> Youth Employment/Education Support	<input type="checkbox"/> Healthy, Wealthy, Wise
<input type="checkbox"/> Adult & TAY Employment/Education Support	<input type="checkbox"/> Community Healing
<input type="checkbox"/> Shooting/Homicide Response and Support Network	<input type="checkbox"/> Youth Diversion and Life Coaching
<input type="checkbox"/> Commercially Sexually Exploited Children Intervention	<input type="checkbox"/> Adult Life Coaching
<input type="checkbox"/> Family Violence Intervention	

5. Scroll to the bottom of the page and enter the dates associated with quarter 1 in the fields attendance date range (begin) and attendance date range (end)

Service Parameters	
Staff	<input type="text"/> ▼
Service Formats	<input type="text"/> ▼
Service Category	Click to edit field
Activity Name	Click to edit field
Session Types	<input type="checkbox"/> Contact <input type="checkbox"/> Milestones & Access to Services <input type="checkbox"/> Youth Intake & Needs Assessment <input type="checkbox"/> Social Emotional Learning <input type="checkbox"/> Work Experience <input type="checkbox"/> Work Placement <input type="checkbox"/> Value Missing
Attendance Date Range (Begin)	<input type="text"/>
Attendance Date Range (End)	7/31/2019 ←
Min Days of Attendance	12/31/2019 ←
Max Days of Attendance	<input type="text"/>

6. Scroll to the top of the menu and select, 'Find Person'

ADV. SEARCH		Clear	Find Person	Return
Oakland Demo - Oakland Demo		Selected Persons:0		
Parameters				
Person Type	<input type="text"/> ▼			
Active Status	<input type="text"/> ▼			
Min Age	<input type="text"/> 🔒			
Max Age	<input type="text"/>			
Grade	<input type="checkbox"/> K <input type="checkbox"/> 7 <input type="checkbox"/> 1 <input type="checkbox"/> 8 <input type="checkbox"/> 2 <input type="checkbox"/> 9 <input type="checkbox"/> 3 <input type="checkbox"/> 10 <input type="checkbox"/> 4 <input type="checkbox"/> 11			



a. The page will load a list of clients who meet the parameters you set in the previous page.

QUERY TOOL RESULTS**Return****Oakland Demo - Oakland Demo**21
people
found

Name	DOB
Armstrong, Dominic	8/13/1989
asdfsad, Jason	9/1/2005
Avis, Andy	9/8/1997
Bagley ii, Shandra	8/5/1998
Barr, Talarrie	2/2/2002
Bean, Jacqui	9/8/1994
Beaverhousen, Anastasia	1/15/1990
Bee, Stacey	
Black, Terrence	5/1/1983
Breeze, Cool	2/10/1989
Caire, Charles	5/5/1976
Collins II, Bootsy	1/1/1960
Gomez, Selena	10/23/1989
guy, my	2/10/1998
jenkins, john	
MacDonald, Ronald	
Mack, Joe	2/2/1965
Moore, Demi	10/23/1990
Ramsey II, Ismael	3/1/1976
Smith, Delilah	2/19/1985
Tester, Johnny	11/16/1964

- b. If you would like to use the filters you created on another report, select 'Return' instead of 'Find Person' and you will be redirected to the reports menu where you can run a report with this filter by selecting the option, 'use query tool results'.
 - i. Select report of interest
 - ii. In the report window of the report, check off 'Filter using results from Query Tool' and the report will only pull information for clients who met your query tool parameters.

INDIVIDUAL SERVICES LIST (EXCEL)**Oakland Demo - Oakland Demo**

Enter Report Parameters	
Begin Date (mm/dd/yy)	<input type="text"/> 
End Date (mm/dd/yy)	<input type="text"/> 
Group Results By	<input type="radio"/> Staff <input checked="" type="radio"/> Participant
Show Individual Service Notes?	<input type="radio"/> Yes <input checked="" type="radio"/> No
Query Tool (Optional)	<input type="checkbox"/> Filter using results from Query Tool



Cancel **Generate**

Custom Report Builder

Can be viewed on YouTube from 1:20:38 – 1:24:30

This report allows users to build a list of clients based on search criteria from the query tool report. This report allows you to export data on clients.

1. Complete steps 1 through 5 associated with running the query tool using your parameters of interest.
2. Select, 'Return' to go reports
3. Select Custom Report Builder

Query Tool and Report Builder

Query Tool

Advanced search tool that selects a group of persons by filtering on custom inputs of properties.

Custom Report Builder

Build your own list of persons based on a set of criteria defined by a query tool result.

4. Select, 'Participants'
5. Select 'Next Step'
6. Check, 'Use QueryTool Results'
7. Select, 'Next Step'
8. Select the fields you would like to display in your custom report

PARTICIPANT	
Data required to set up a record	
* First Name or Initial	<input checked="" type="checkbox"/>
* Last Name or Initial	<input checked="" type="checkbox"/>
* Date of Birth (mm/dd/yyyy)	<input type="checkbox"/>
Age	<input type="checkbox"/>
Client ID	<input checked="" type="checkbox"/>
Other required data	
* Indicates Required Field	
Street Address	<input type="checkbox"/>
* Zip	<input type="checkbox"/>
City	<input type="checkbox"/>
State	<input type="checkbox"/>
Home Phone	<input type="checkbox"/>
Mobile Phone	<input type="checkbox"/>
Email	<input type="checkbox"/>
* Client Marked Yes on Consent Form	<input type="checkbox"/>
Oakland Unite Client Consent Form	Print Doc
Sexual Orientation and Gender Identity	
* Gender	<input checked="" type="checkbox"/>
If other, please specify	<input type="checkbox"/>
Sex at Birth	<input type="checkbox"/>
Sexual Orientation	<input type="checkbox"/>
If other, please specify	<input type="checkbox"/>

9. Select, 'Next Step' at the top or bottom of the window
10. Choose the output format of the file

Person Type: Participants
Filtering on Query Tool Results? Yes
Active Persons Only? No

Query Tool Params

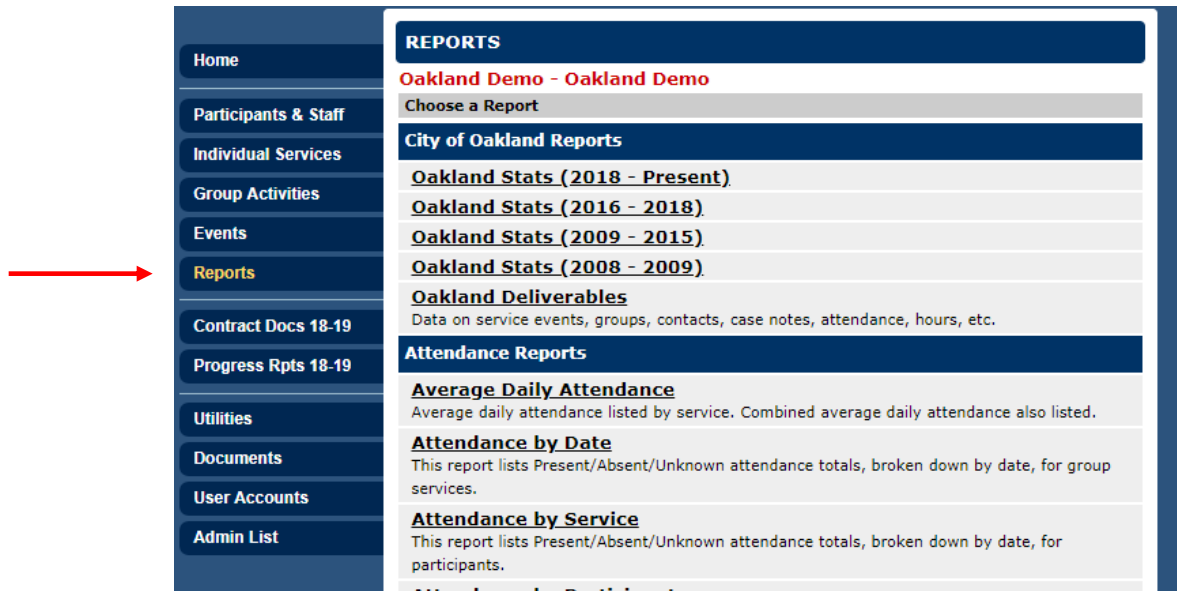
Attendance Date Range (End): 7/31/2019
Intensive Adult Case Management: 1
Min Days of Attendance: 12/31/2019
Person Type: Participants

	First Name or Initial	Last Name or Initial	Client ID	Gender	Oakland Unite/Measure Z
1	Dominic	Armstrong	1087489	Boy/Man	X
2	Jason	asdfsad	1087652	Boy/Man	X
3	Andy	Avis	2010826	Girl/Woman	X
4	Shandra	Bagley ii	1087594	Transgender	X
5	Talarrie	Barr	1087579		X
6	Jacqui	Bean	1540872		X
7	Anastasia	Beaverhousen	44172988	Girl/Woman	X

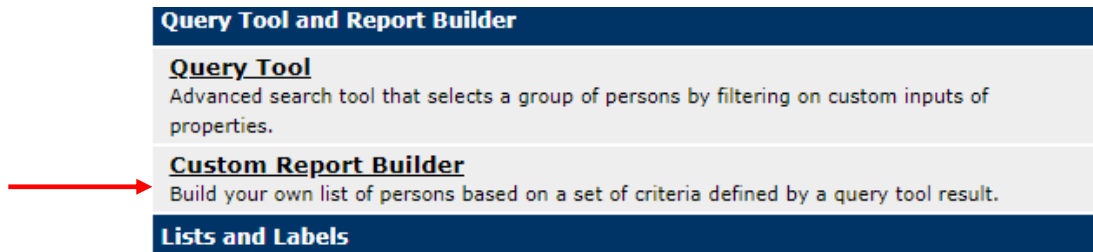
Reports to Use to Troubleshoot Data Entry Concerns

Running Reports to Identify Clients Who Do Not Have Oakland Unite as Funding Source and/or Clients Who Are Not Linked to a Strategy

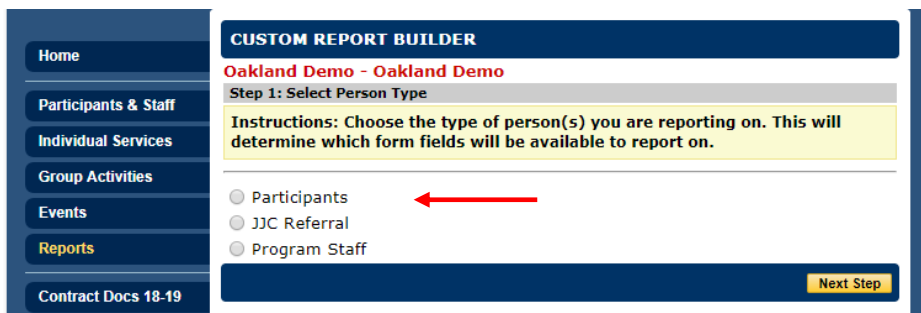
1. Select 'Reports' from blue menu on left-hand side of the screen



2. Select, Custom Report Builder:



3. Select Participants from the Person Type Menu and Select Next Step.



4. Select, "Click Here to Set" to select parameters that will allow you to create a filter to pull information for individuals who do not have the strategy selected (in this case Intensive Adult Case Management).

CUSTOM REPORT BUILDER

Oakland Demo - Oakland Demo

Step 2: Select Result Set (Optional)

Instructions: Choose a result set to narrow your report results. If you choose not to select a result set, all persons will be reported on for the person type selected in Step 1.

Use QueryTool Results: 0 Selected (Click here to set) ←

Active Person(s)

Next Step

5. In the search window, select/enter the following for the parameters and select Return:
 - Person Type: Participants
 - Intensive Adult Case Management: Value Missing
 - Funded by Oakland Unite: Value Missing
 - Attendance Date Range (Begin): 07/01/2018
 - Attendance Date Range (End): 06/18/19
6. Once you are redirected to the Custom Report Builder page, select the checkmark next to Use QueryTool Results and select Next Step

CUSTOM REPORT BUILDER

Oakland Demo - Oakland Demo

Step 2: Select Result Set (Optional)

Instructions: Choose a result set to narrow your report results. If you choose not to select a result set, all persons will be reported on for the person type selected in Step 1.

Use QueryTool Results: 0 Selected (Click here to set)

Active Person(s)

Next Step

7. Select the Person Fields associated with the participant and their referral from the custom report builder menu and select Next Step.
 - First Name or Initial
 - Last Name of Initial
 - Program: Oakland Unite/Measure Z
 - Oakland Unite Strategies 2016-Present: Adult Life Coaching

CUSTOM REPORT BUILDER
Next Step

Oakland Demo - Oakland Demo

Step 3: Select Person Fields

Instructions: Choose at least one field to display on your report. Every field chosen in this step will be displayed as a column in your custom report.

Select [All](#) / [None](#)

PARTICIPANT	
Data required to set up a record	
* First Name or Initial	<input checked="" type="checkbox"/>
* Last Name or Initial	<input checked="" type="checkbox"/>
* Date of Birth (mm/dd/yy)	<input type="checkbox"/>
Age	<input type="checkbox"/>
Client ID	<input type="checkbox"/>
Other required data	
* Indicates Required Field	
Street Address	<input type="checkbox"/>
* Zip	<input type="checkbox"/>
City	<input type="checkbox"/>
State	<input type="checkbox"/>
Home Phone	<input type="checkbox"/>
Mobile Phone	<input type="checkbox"/>
Email	<input type="checkbox"/>
Status	<input type="checkbox"/>
Intake Date (mm/dd/yy)	<input type="checkbox"/>
* Client Marked Yes on Consent Form	<input type="checkbox"/>
Oakland Unite Client Consent Form	Print Doc
Referral	
Oakland Unite Network	<input checked="" type="checkbox"/>
Outside of Oakland Unite Network	<input checked="" type="checkbox"/>
Referral Specify	<input checked="" type="checkbox"/>
LGBTQ	
* Gender	<input type="checkbox"/>
If other, please specify	<input type="checkbox"/>
Sex at Birth	<input type="checkbox"/>
Sexual Orientation	<input type="checkbox"/>

8. In the next window, select Excel Format to get an excel file that contains participants names. You can search for participants using their first and last name and thereafter update their Oakland Unite strategy information.

CUSTOM REPORT BUILDER
Start Over

Oakland Demo - Oakland Demo

Person Type

Participants

Result Set

Use Query Tool

Fields Selected

First Name or Initial

Last Name or Initial

Oakland Unite Network

Outside of Oakland Unite Network

Referral Specify

Output Type

Web Format

Excel Format

- a. A report will populate, participants who have a strategy and funding source will have an X to denote that they have data for this field. A blank field indicates that the client is missing this information.

Person Type: Participants
 Filtering on Query Tool Results? Yes
 Active Persons Only? No

Query Tool Params

Attendance Date Range (End): 6/18/19
 Attendance Date Range (Begin): 7/1/2018
 Funded By Oakland Unite: PROPERTY_MISSING_VALUE
 Intensive Adult Case Management: PROPERTY_MISSING_VALUE
 Person Type: Participants

	First Name or Initial	Last Name or Initial	Oakland Unite/Measure Z	Adult Life Coaching
1	Qiao	Acosta		
2	nele	baker		
3	Vaughn	Carson		

User Accounts

Each program should have at least one person who is in charge of User Accounts. This person needs to have access to the 'User Accounts' tab at the bottom of the left hand blue menu.

When the person in charge of User Accounts is logged on, this person can create new database users for your program and manage existing users' access levels.

- ➔ **Caution:** You do not want everyone to have access to User Accounts. When a person has access to User Accounts, they can create new users, change passwords for existing users or delete users.

Creating User Accounts

Have your agency's Staff person log on to Cityspan with their username and password and then follow these directions to create a new user.

1. Go to 'User Accounts'– blue menu on left
2. To add a user, select, 'Add User'
3. Complete the fields in the Personal Information section of the user account form

4. Select the users contract management system access (gives access to Scope of Work and Progress Reports)
 - Power User here gives access to Scope of Work and Progress Reports **AND** User Accounts
 - Regular User here gives access to Scope of Work and Progress Reports, but NOT User Accounts
 - No Access here ensures that this user will NOT see Scope of Work and Progress Reports (Scope of Work and Progress Reports tabs include budget/salary and program information that you may not want everyone to see).
5. Select the users service management system access (gives access to users to enter service data - entering group and individual activity attendance and events)
 - Power User here gives access to Service data entry AND User Accounts
 - Regular User here gives access to Service data entry, but NOT User Accounts
 - No Access here ensures that this user will NOT see Service data entry tabs

Maintaining User Accounts

1. Go to 'User Accounts' – blue menu on left
You will see the following:
 - **Current User** – The person who is currently logged on
 - **Signatory** – The only person for your program that can Sign Off to submit your quarterly report and invoice. See Notes on Signing Off and Submitting Quarterly Reports and Invoice
 - **Power Users** – People who are users of your database AND have access to the User Accounts tab (when they log on, they have the User Accounts tab available)
 - **Regular Users** – The rest of the people who are registered as users of your database
2. Review the list of Power and Regular Users – are all of these people current users of the database? Click on each name and update each users' access levels:
 - **Contract Management System** (gives access to the tabs: Scope of Work and Progress Reports)
 - Power User here gives access to Scope of Work and Progress Reports **AND** User Accounts
 - Regular User here gives access to Scope of Work and Progress Reports, but **NOT** User Accounts
 - No Access here ensures that this user will NOT see Scope of Work and Progress Reports (Scope of Work and Progress Reports tabs include

budget/salary and program information that you may not want everyone to see).

- **Service Management System** (gives access for Service data entry (for entering group and individual activity attendance and events)
 - Power User here gives access to Service data entry **AND** User Accounts
 - Regular User here gives access to Service data entry, but **NOT** User Accounts
 - No Access here ensures that this user will NOT see Service data entry tabs

Caution: You do not want people to have access to the database that are no longer Staff for your program. When people no longer need access to the database – give them No Access for both Contract Management System and Service Management System.

Submitting Reports

Submitting Quarterly Reports

Can be viewed on YouTube from 39:20 – 42:30

Quarterly Reports are submitted through visiting the Progress Reports Tab for the present contract year. Under Progress Reports, for each reporting quarter, you will need to go to each of the sections listed below and do the following:

- **Narrative** – Type in a narrative response to each question and click **Submit** when done.
- **Stats** – Generate your stat report and review it for thoroughness and accuracy. Participant data entry should have no or minimal numbers missing for ethnicity, gender, age, zipcode (Oakland), referral source, consent form on file. Service data should be current and accurate. Once you have verified the Stat report, you must click **Submit** when done.
- **Deliverables** – For each deliverable listed, review your **Year-to-date Benchmark** in relation to your **Year-to-date Actual** to ensure that deliverable benchmarks for the quarter have been met. If they have not, you will need to provide a narrative explanation. Any deliverable with a **Year-to-date Actual** that has a text box present, instead of a number, you are to manually enter the correct total for that particular deliverable. For all other **Year-to-date Actual**, the total number of services delivered will appear automatically, based on the service data entry that has been done up until that point. Once you have verified that the Deliverable numbers are correct, you must click **Submit** when done.

- **Expenditures – Oakland Unite** – Enter the amount you are requesting for the quarter and complete the line item budget of expenditures. You must click **Submit** when done.
- **Corrective Actions** – If there are corrective actions listed, enter a narrative description of how the corrective action has been addressed. You must click **Submit** when done.
- **Signoff** – You must be logged-on to Cityspan with the Username and Password of the Grantee Signatory in order to officially submit your report and invoice.
- **Signature is the assigned signatory’s password for their Cityspan account.**
 - **Don’t know who your assigned signatory is?** Go to the User Accounts tab to view the name of the Signatory for your agency.
 - **Need to change the assigned signatory?** Email your Department of Violence Prevention Program Officer and Valerie Okelola (Vokelola@oaklandca.gov) to request a change of signatory. Include the name and email of the person who should be assigned as signatory. Someone from Cityspan will email that person to provide them with their username and password as the updated signatory.
 - **Grant Pay. Auth. – Oakland Unite** – This is for your program officer to complete. You do not do anything here.