Department of Violence Prevention

Cityspan Database Instructions

CITY OF OAKLAND

Contents

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.

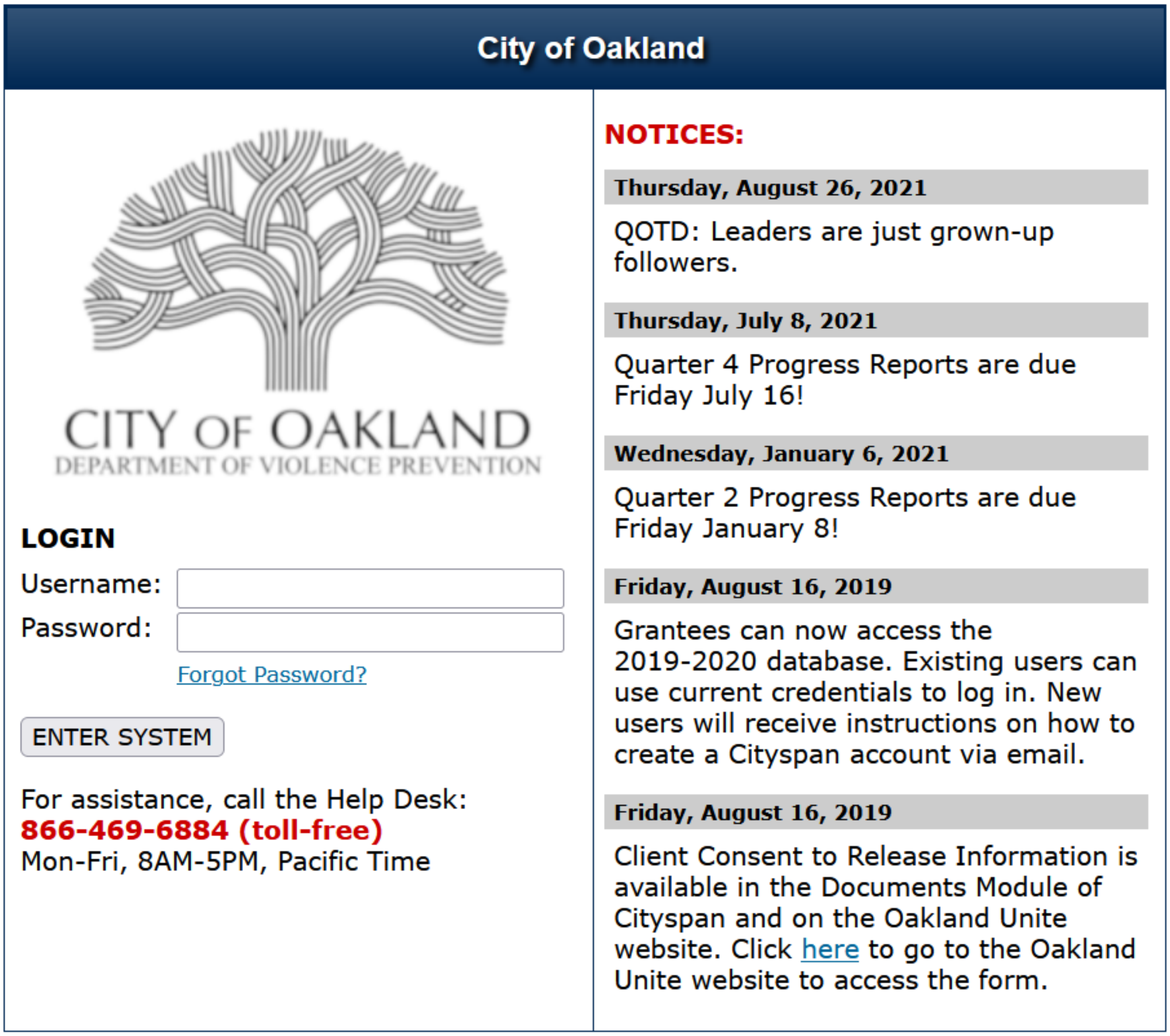
While the guide provides an overview for many of the critical functions and features, it does not provide a complete overview on all the Cityspan features.

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.



- 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

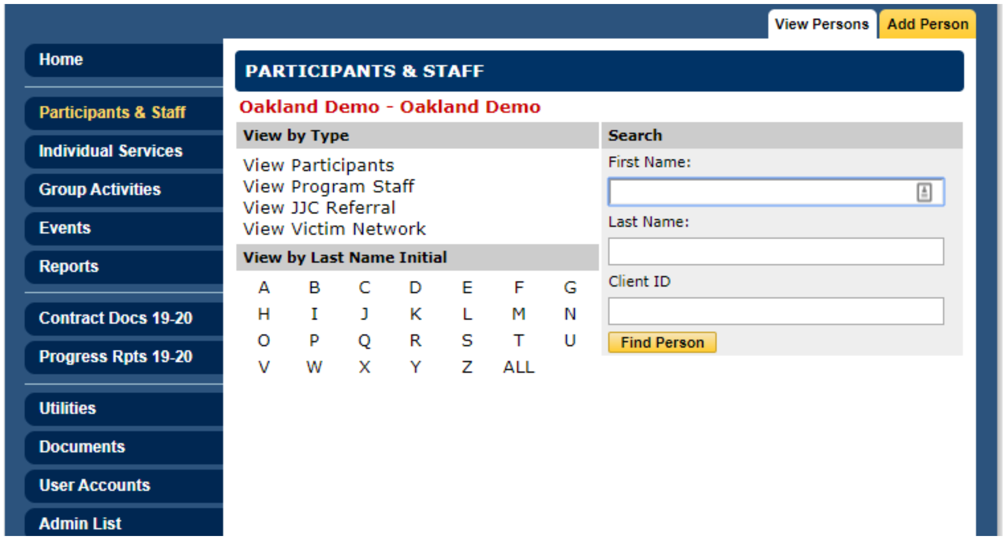
2. Search for the name of the individual **first** to avoid duplicate records
   Note: User may enter partial names or initials (ideal to avoid no matches because Participant's name was originally misspelled)
3. Select 'Find Person'
4. If no match, select 'Add Person'

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.

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
3. Select 'Find Person'
4. If no match, select 'Add Person'
5. Select 'Program Staff'
6. Then, select 'Add Person'

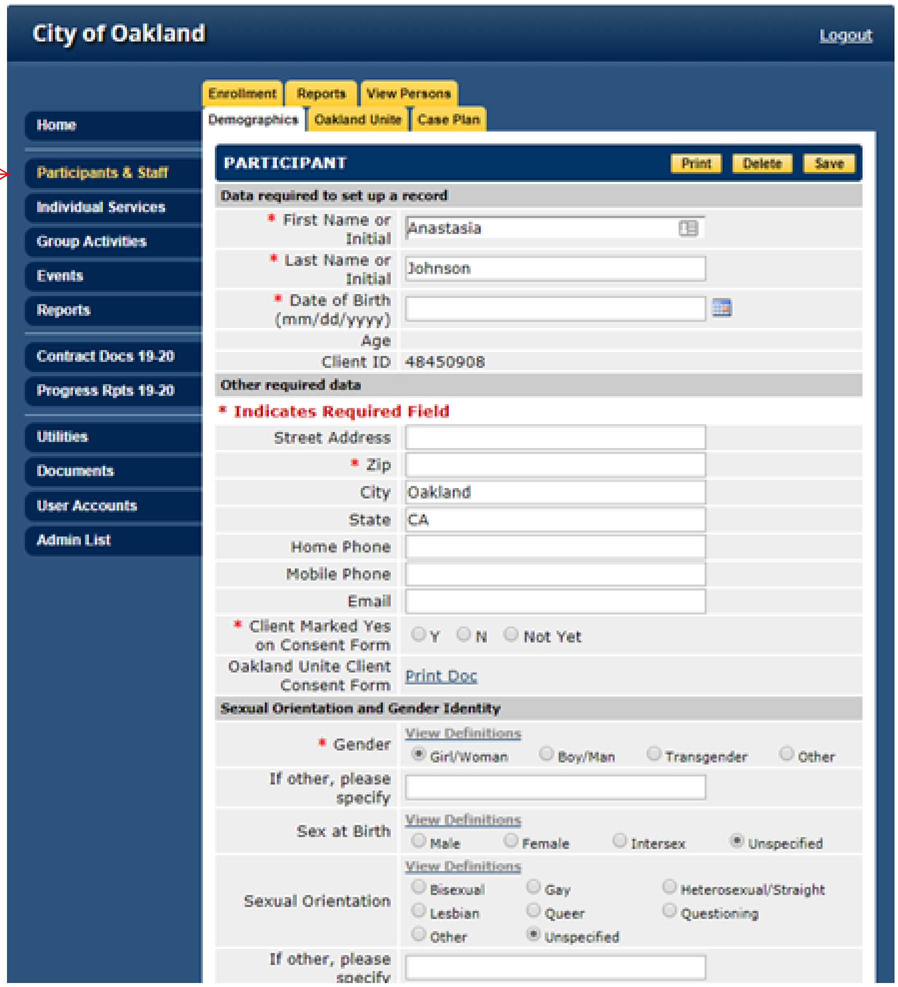
   Note: If recorded correctly, a message stating '[Name] has been successfully registered' to indicate
7. 'View Record'
8. For Staff, first and last name are required fields; all additional information is optional
9. Select 'Save'

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



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 **<u>must</u>** 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

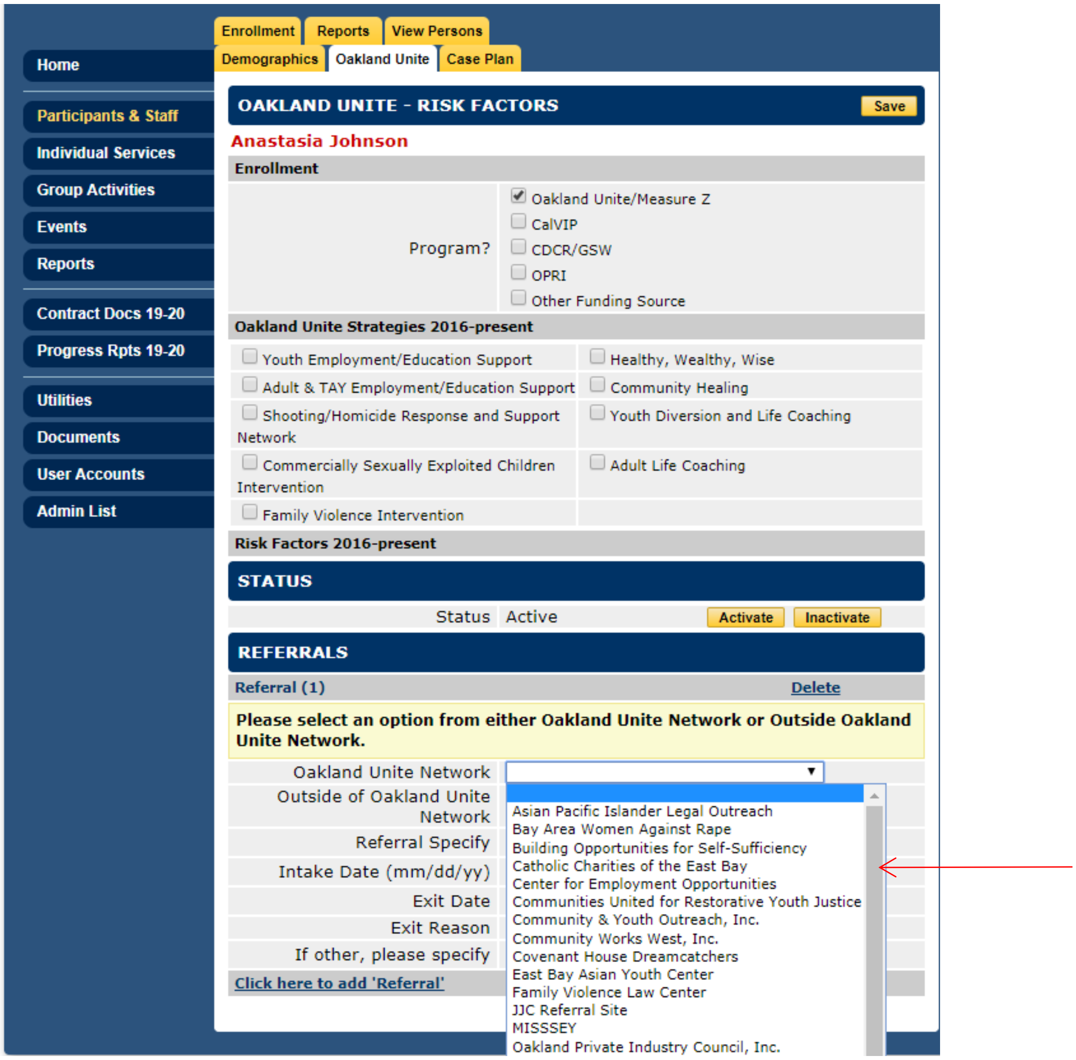
Can be viewed on YouTube from 8:38 – 13:00

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

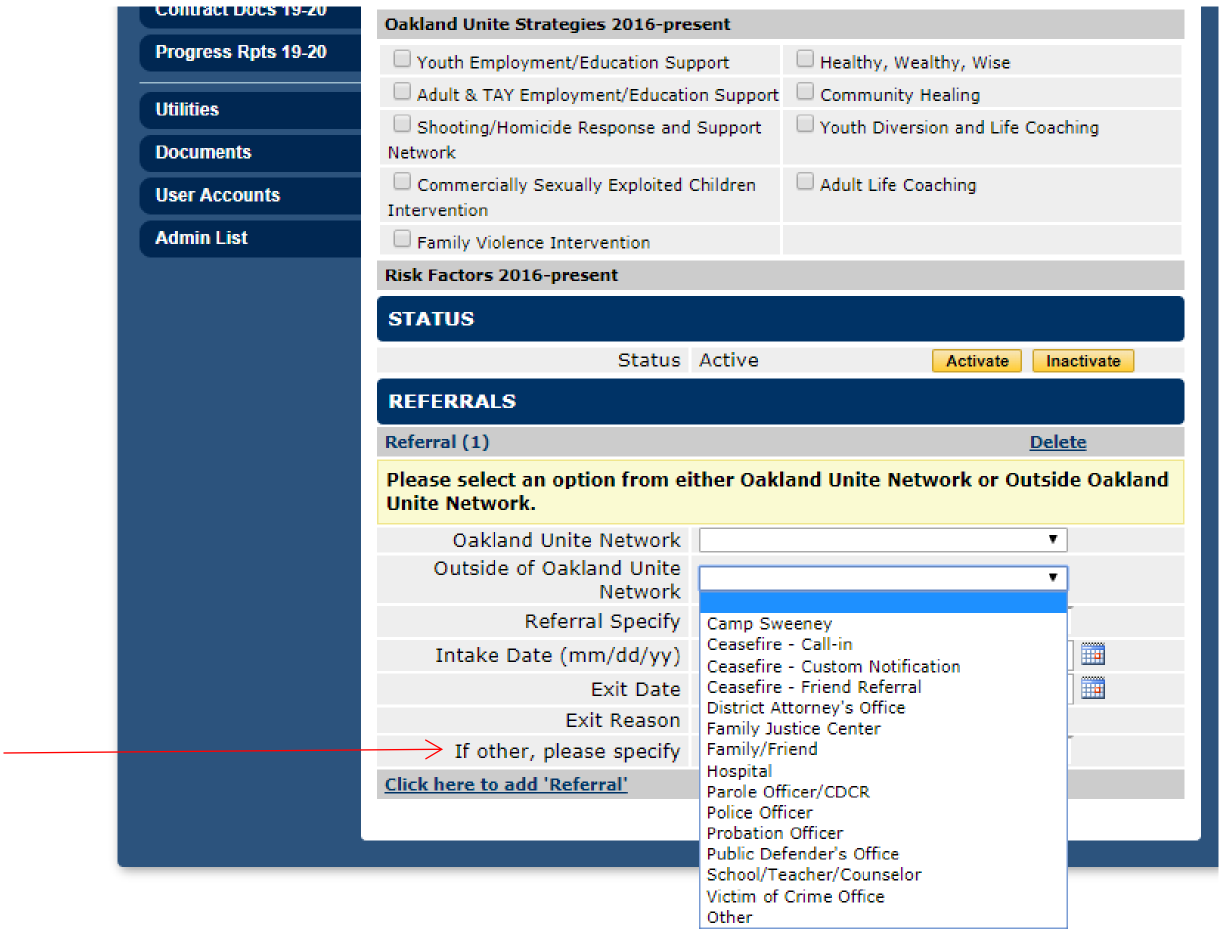
Note: When in doubt, please consult with your Program Officer to ensure you are selecting the appropriate strategy. An improperly selected strategy will affect your deliverables.

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



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

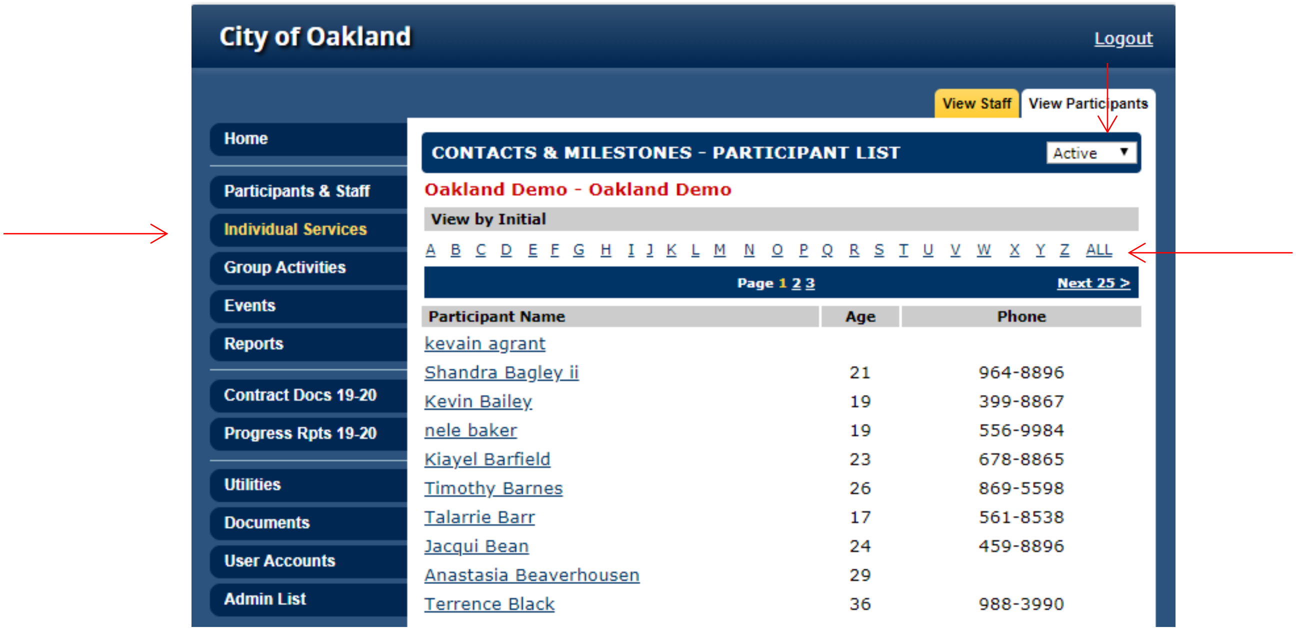
1. Select 'Individual Services' from the blue menu on the left side of the screen
2. Find Participant
3. Select Participant
4. Select Oakland Unite tab
5. Scroll to the Status section of the Oakland Unite tab
6. Select, 'Activate
    - If you make a Participant active after they were made inactive, create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

Individual Services

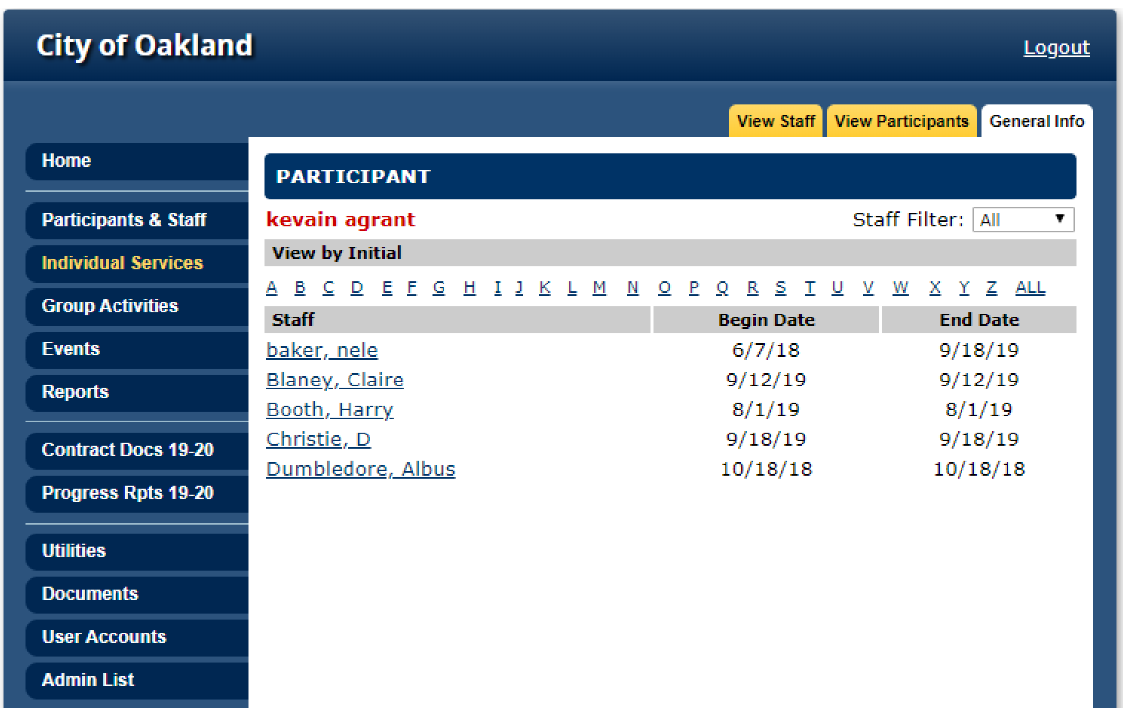
Creating a Contact for a Participant

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

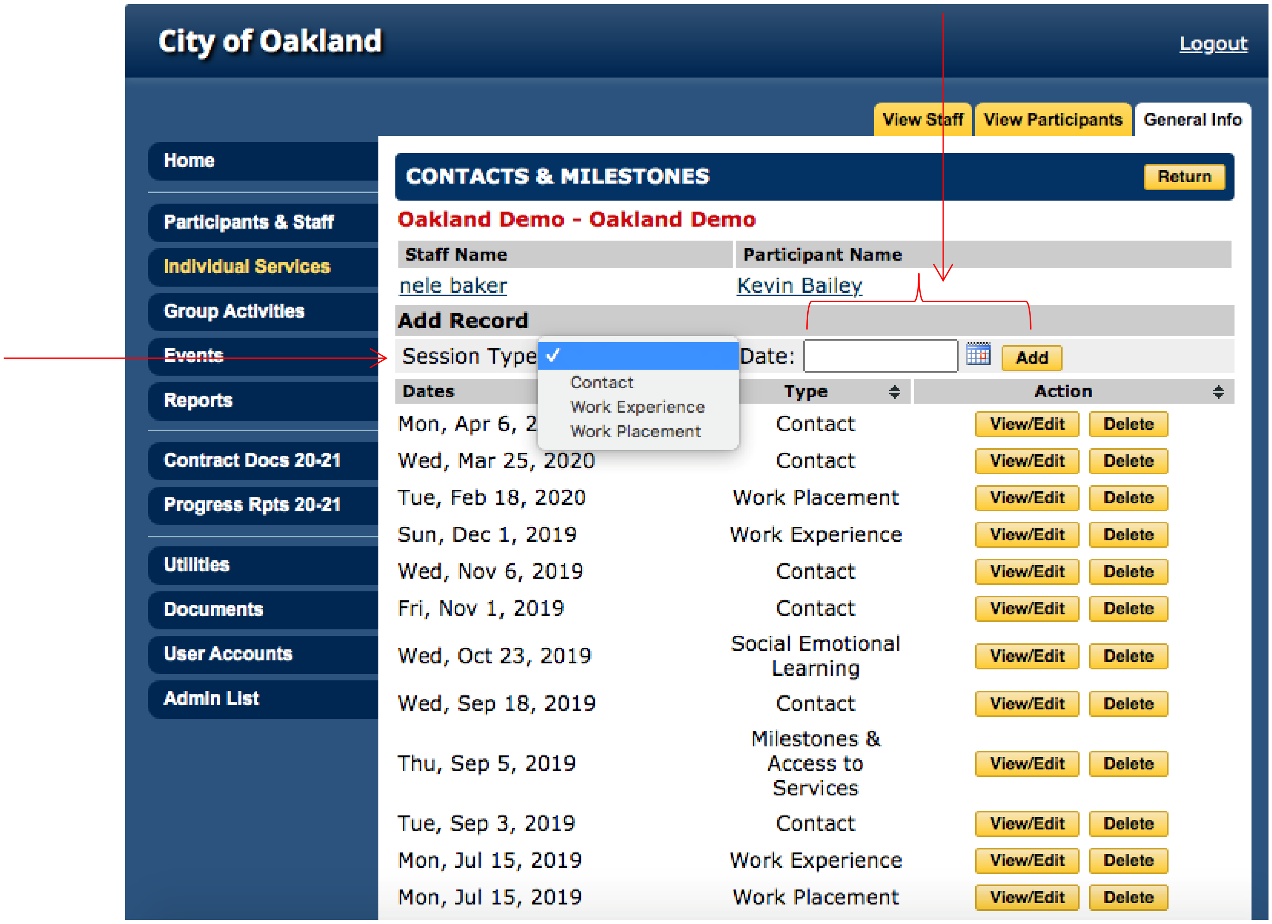
1. Select 'Individual Services' in blue menu on the left-hand side of the screen
2. Select Participant by:
    a. Clicking on 'View Participants' tab at the top of the screen
    b. Ensure 'Active' is selected in the dropdown below the 'View Participants' tab
    c. Choose a Participant from the list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



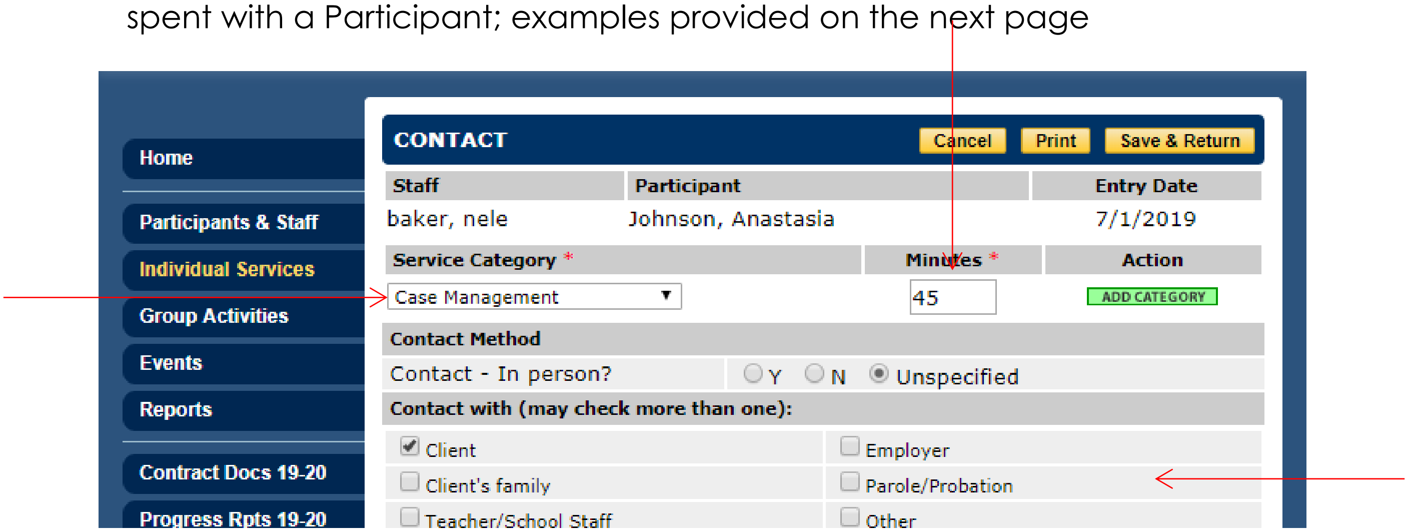
3. Select the appropriate Staff person



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

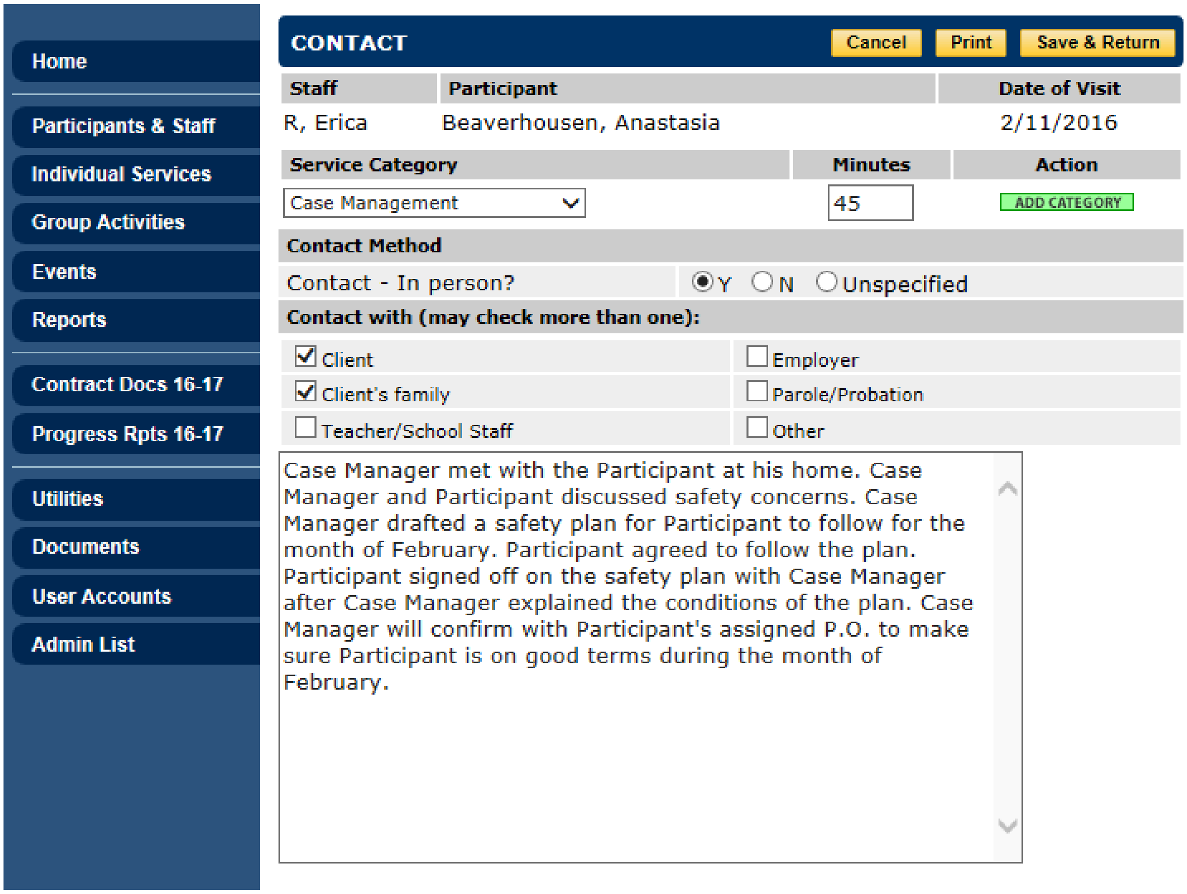


6. Select the appropriate form of contact from the 'Service Category' dropdown menu
7. Complete the following fields: amount of time, contact method, individuals in meeting, and provide notes
   - Note: Make sure that notes written are adequate to justify the amount of time spent with a Participant;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



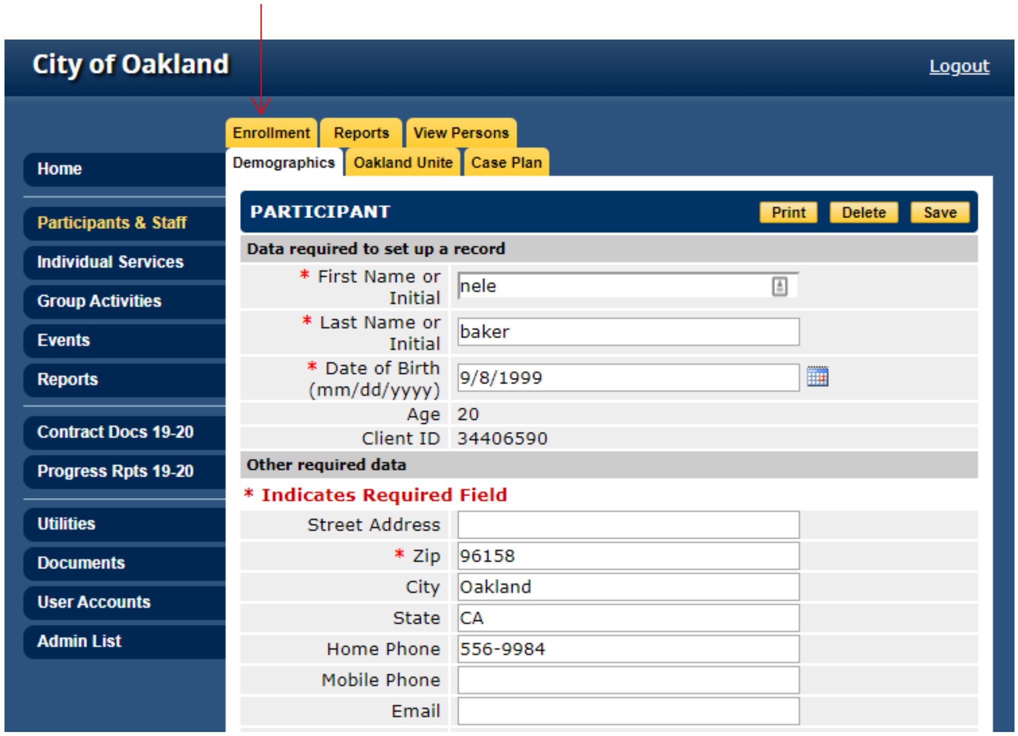
8. Select 'Save & Return'

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.

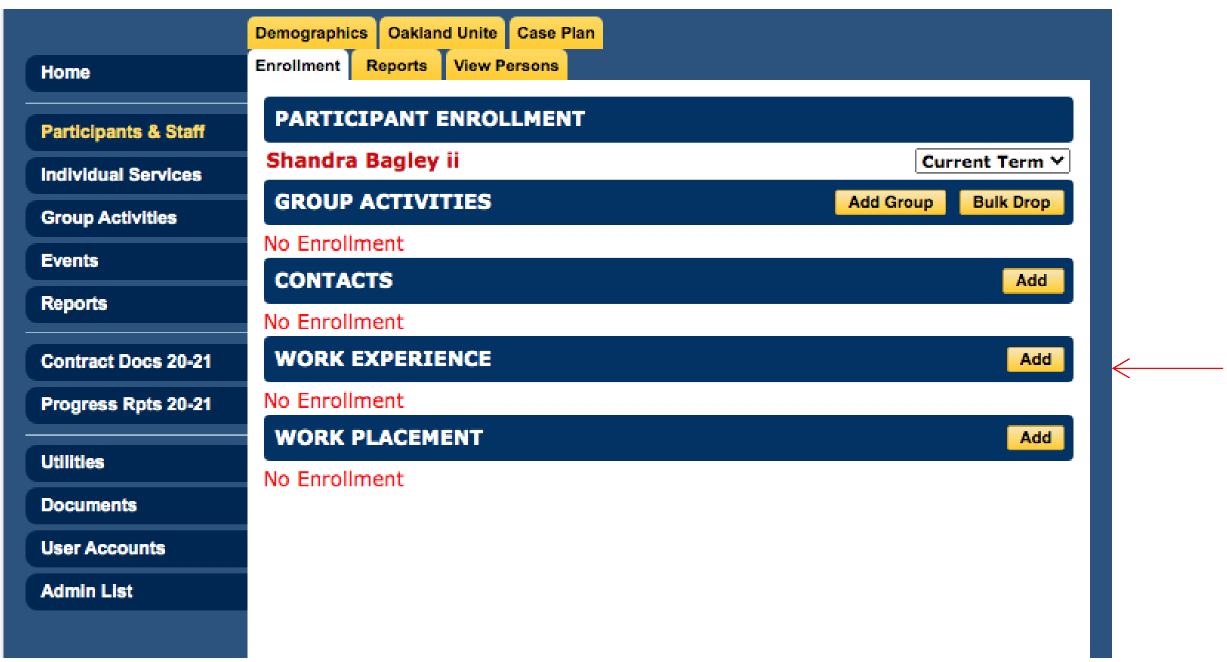


Notes for Creating a Contact for a Participant:

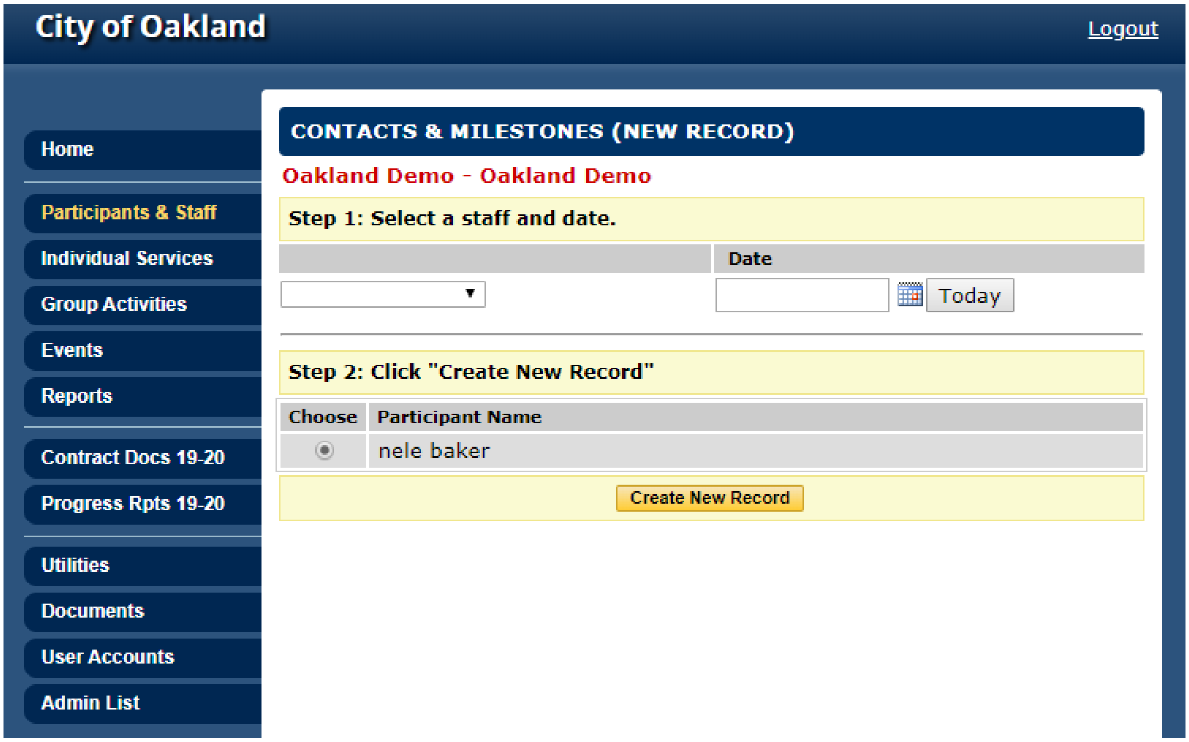
- If Participant does not appear in the list when attempting to create a contact, it is likely because the Participant is new to the system and does not have any contacts entered yet. To add a contact for a new participant:
  1. Select 'Participants & Staff' in left hand menu
  2. Select Participant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



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



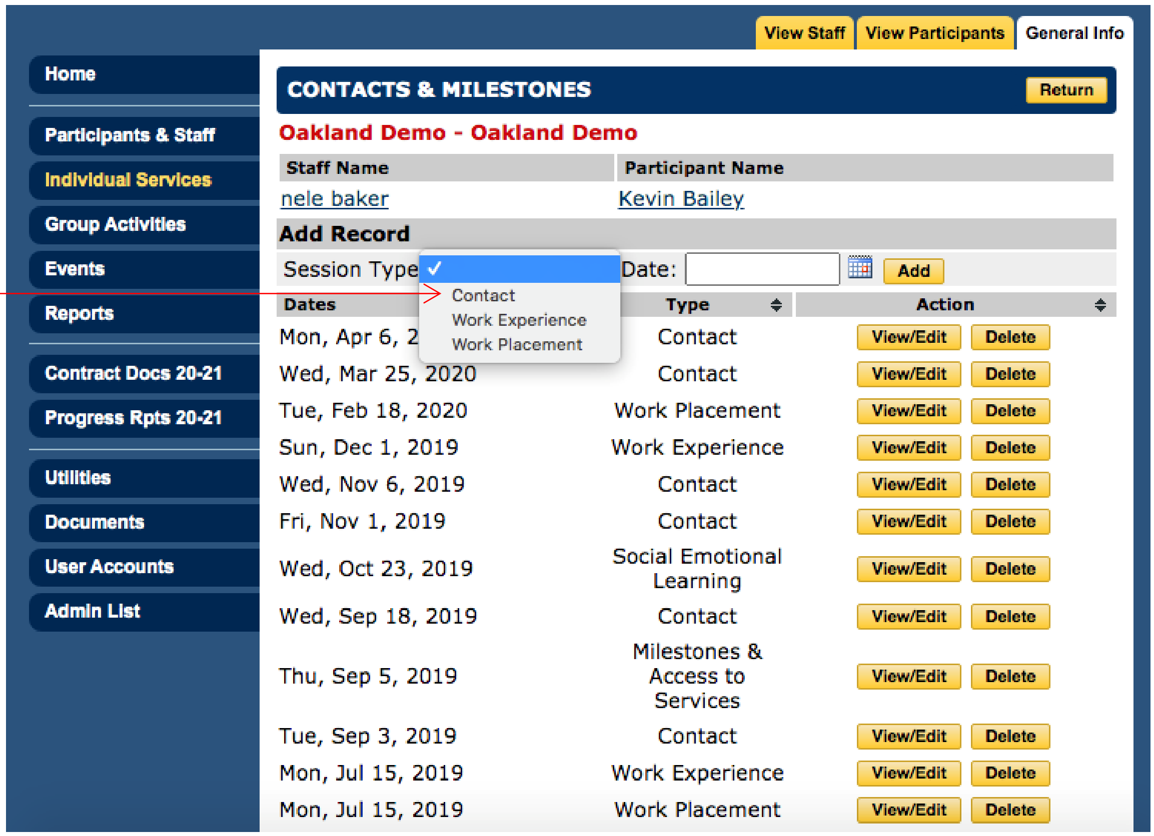
5. Select a Staff Person from the dropdown
6. Select a date
7. Select 'Create New Record'

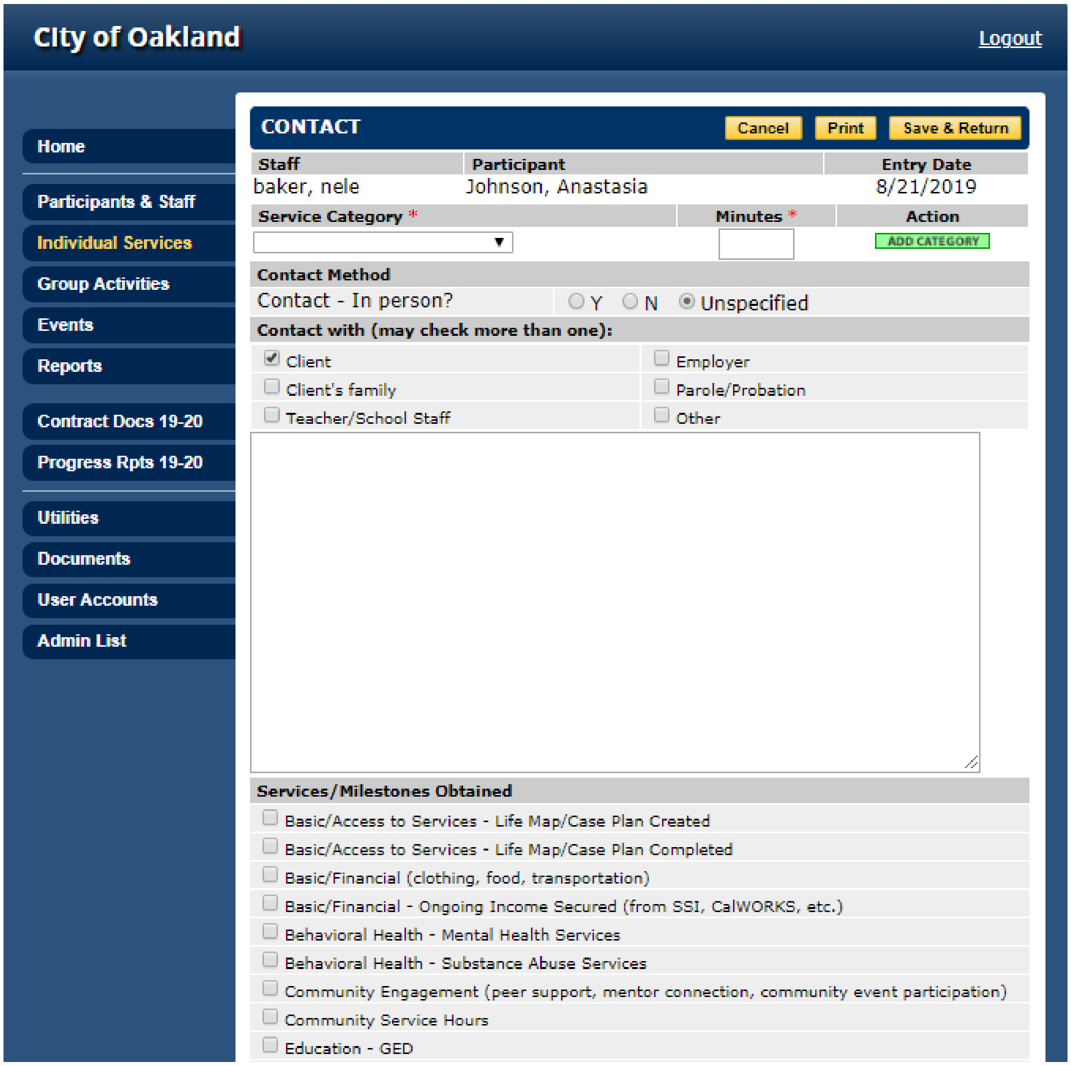

City of Oakland
Logout
Home
Participants & Staff
Individual Services
Group Activities
Events
Reports
Contract Docs 19-20
Progress Rpts 19-20
Utilities
Documents
User Accounts
Admin List
CONTACTS & MILESTONES (NEW RECORD)
Oakland Demo - Oakland Demo
Step 1: Select a staff and date.
Date
Today
Step 2: Click "Create New Record"
Choose
Participant Name
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'





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

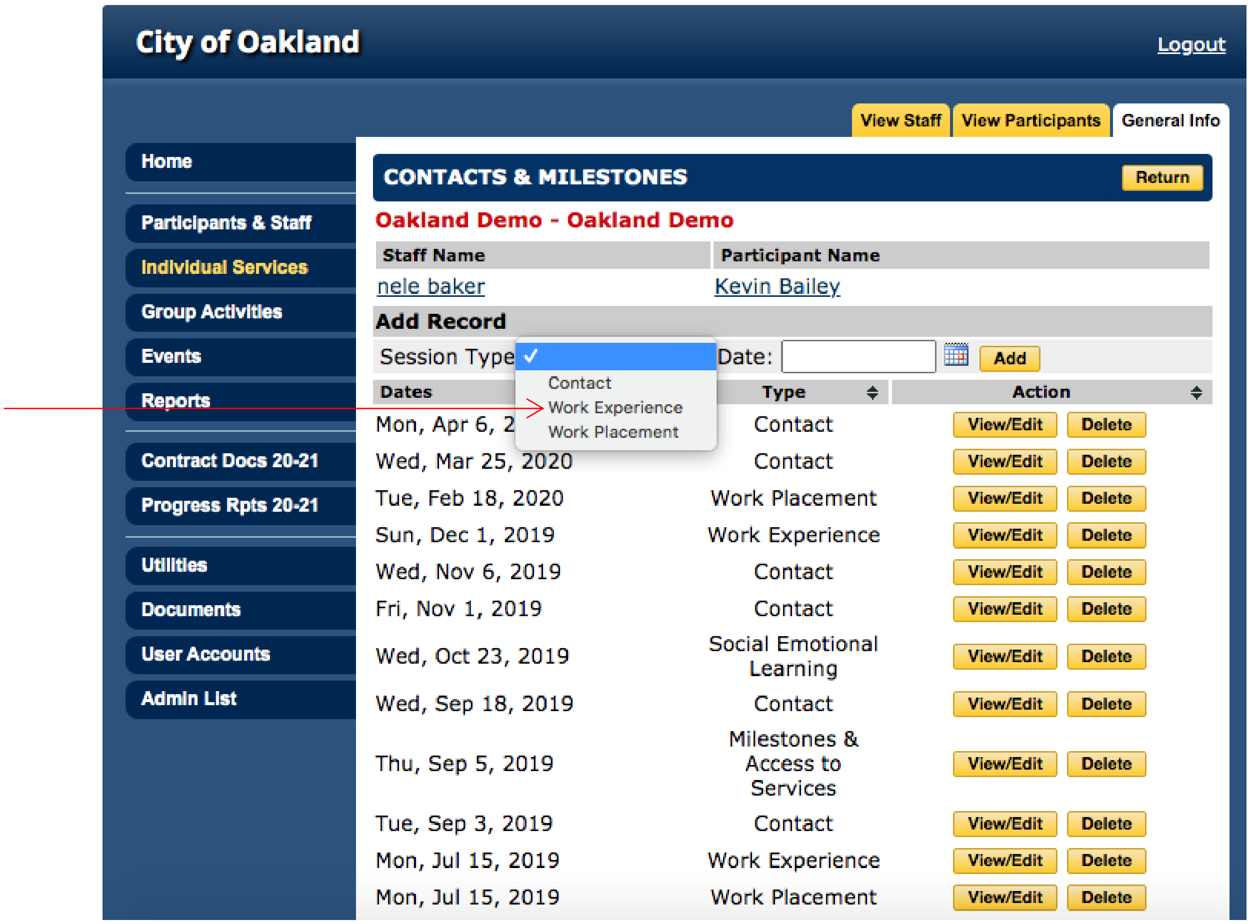
Notes for Creating a Milestone:

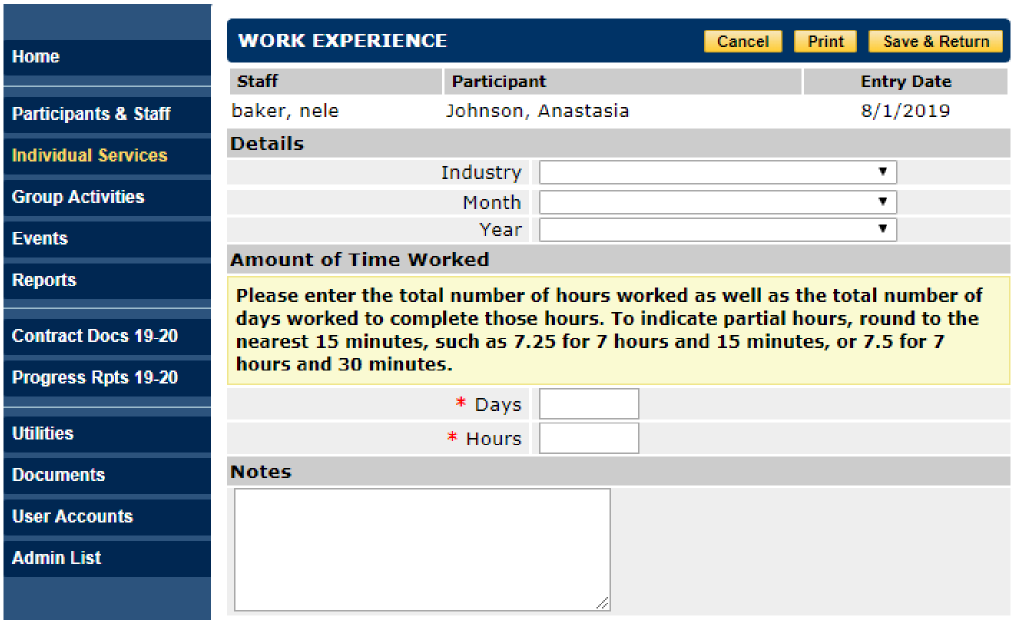
- On a regular basis, select each Milestone or Access to Service that the Participant has achieved within that time period. Think of it as a regular update.
- When creating a Milestone, secure **supporting documentation** for the Participant's file. Document(s) will be reviewed during an audit if the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





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'

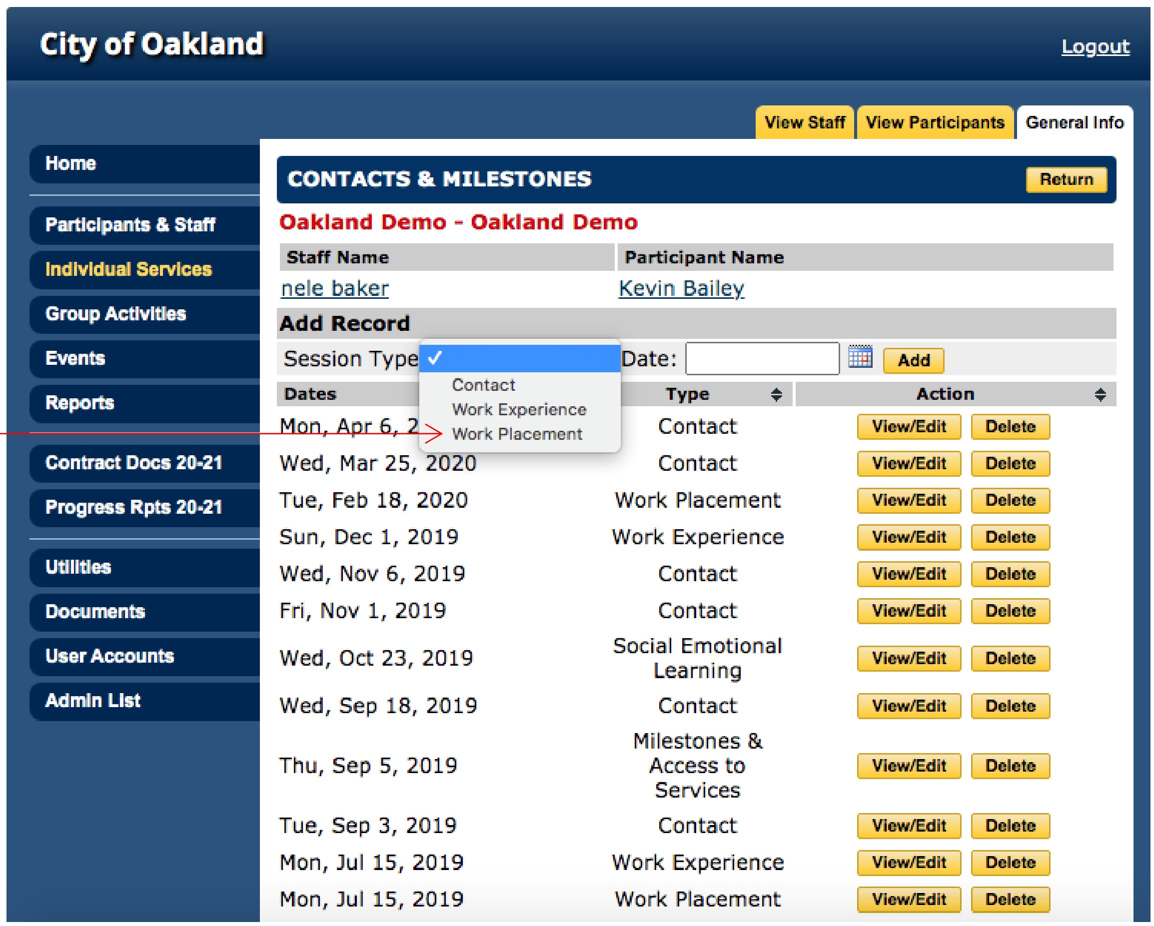
Notes for Creating a Work Experience Entry:

- 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

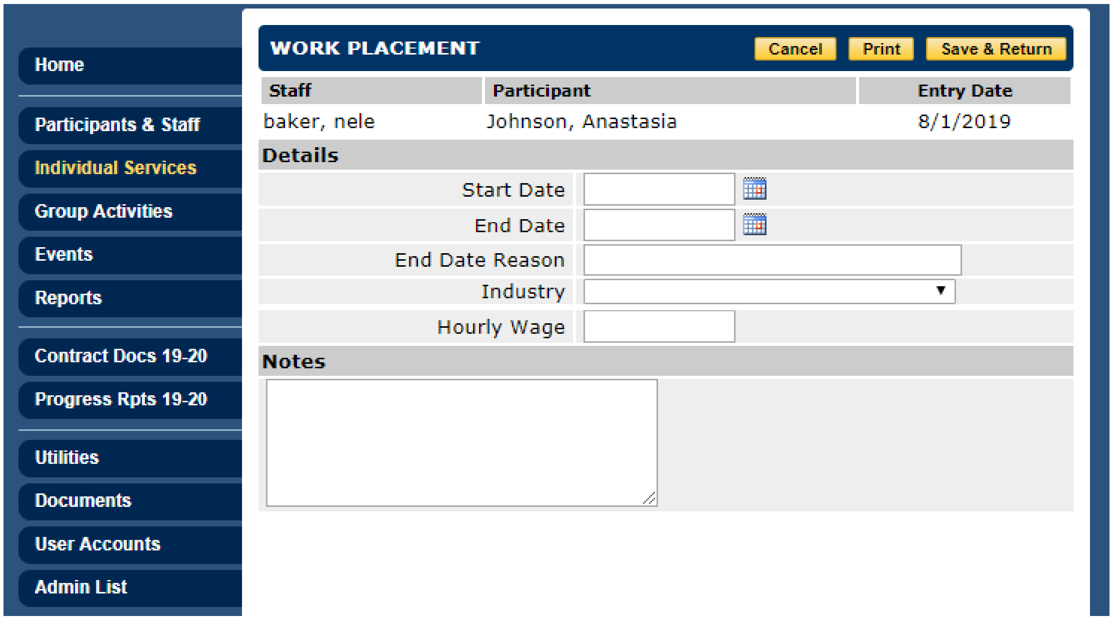
Can be viewed on YouTube from 18:31 – 21:08

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'



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



Notes for Creating a Work Placement Entry:

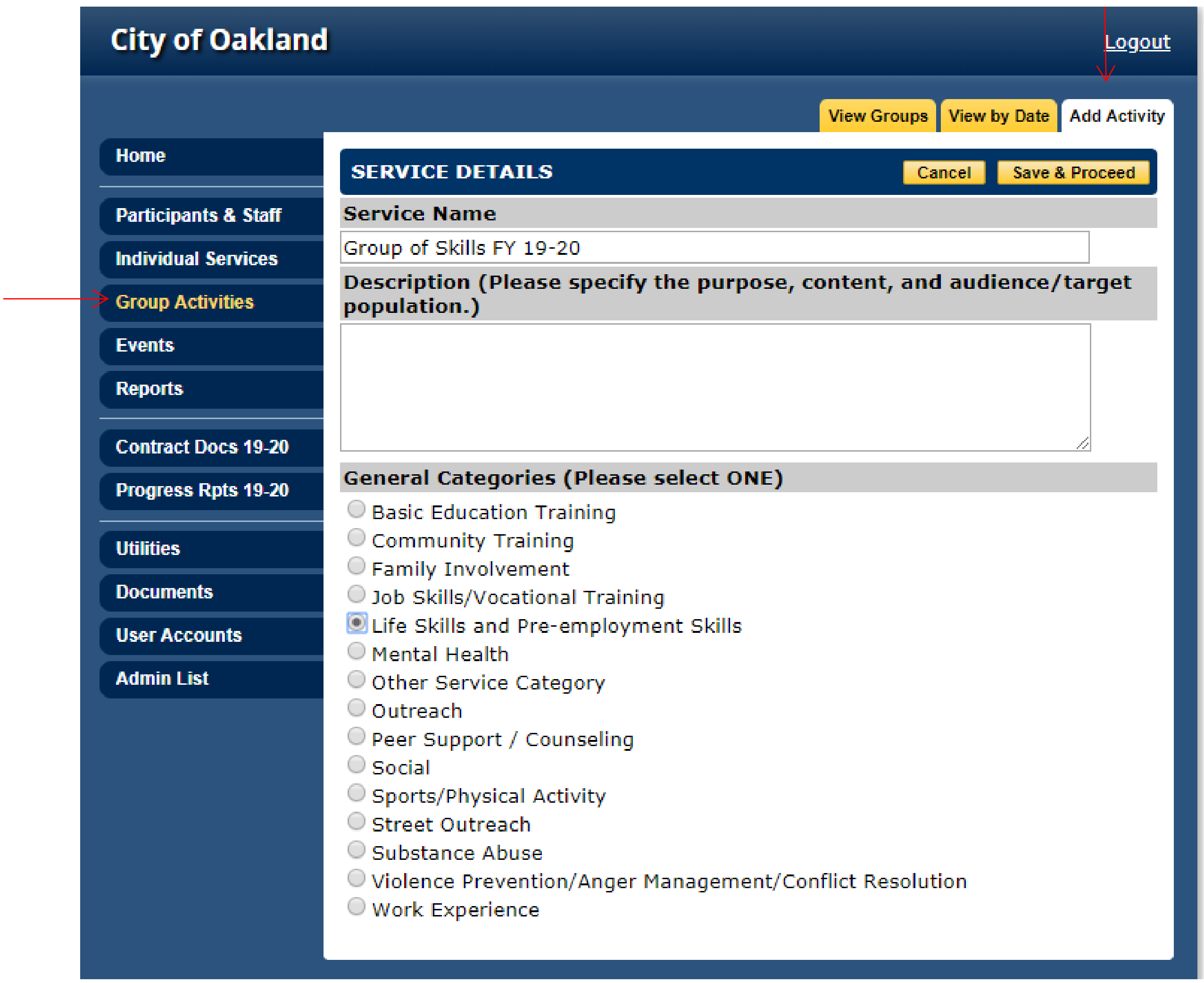
- Please make updates to the work experience tab regularly. If you find that a Participant has stopped or completed his or her work placement, please enter the end date and reason associated with that work placement.
- If a Participant starts a new placement, confirm that previous placements have an 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

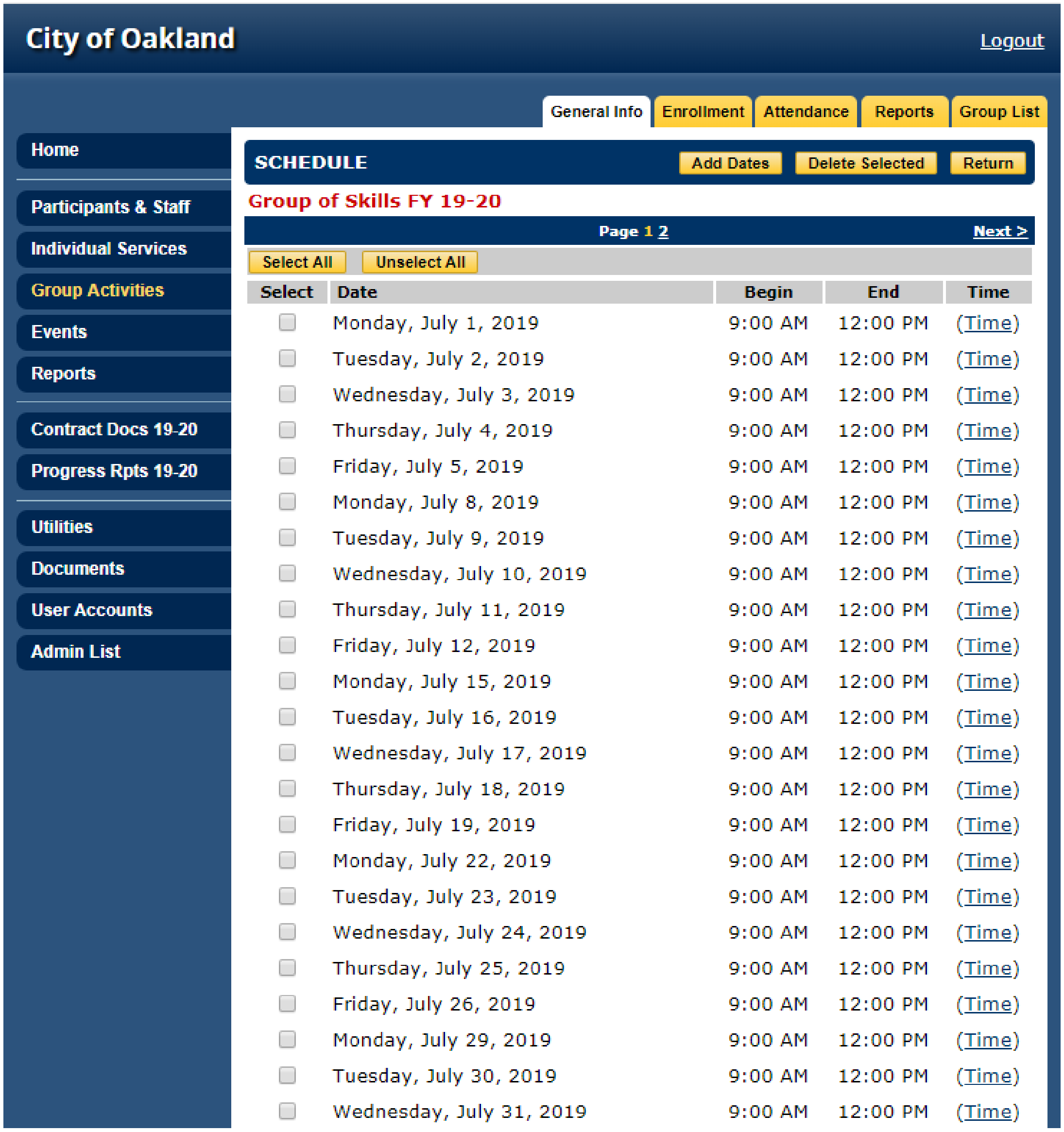
1. Select 'Group Activities' from the blue menu on the left-hand side of the screen
2. Select the 'Add Activity' tab
3. Complete the following:
    - Service Name
        - Note: May be helpful to add the relevant FY to name of group
    - Description of the Group
    - General Category – If the user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



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



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.*****

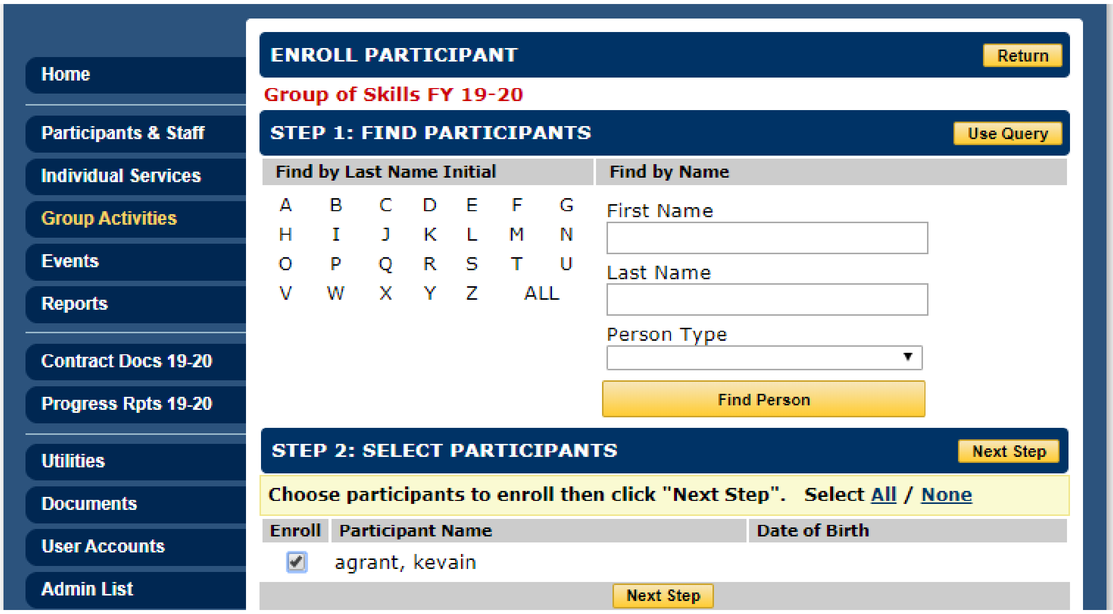
8. When satisfied with schedule, select 'Return'

Enrolling Participants in a Group Activity

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

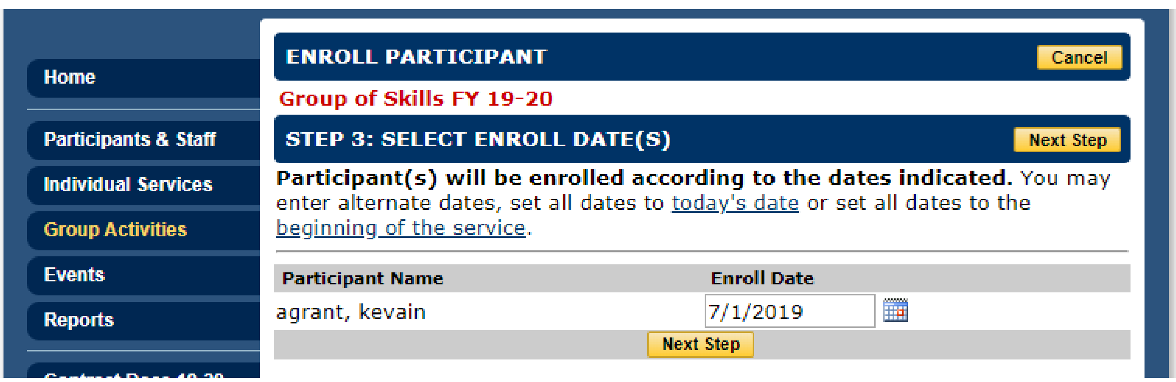
1. Select 'Group Activities' from blue menu on left-hand side of the screen
2. Select the group desired
3. Select 'Enrollment' tab at the top of the screen
4. Select 'Enroll'

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'



7. 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



8. Select 'Next Step'

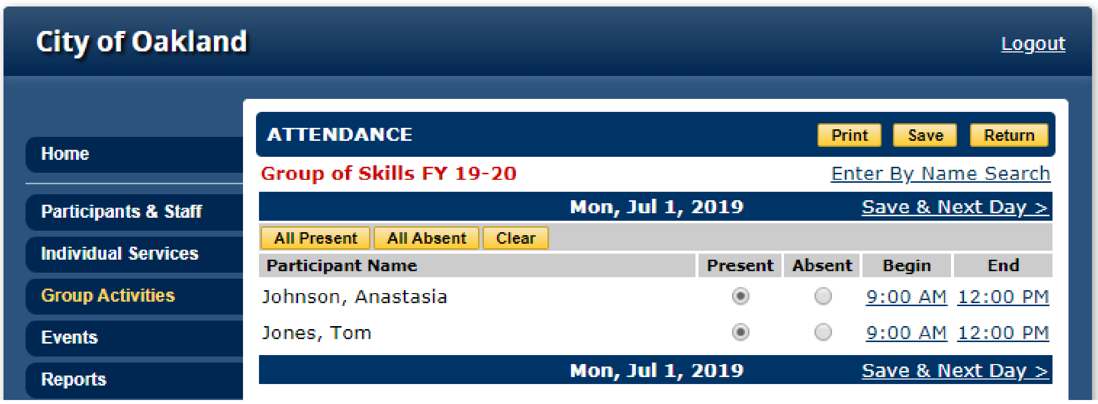
   Note: If Participant is enrolled in another group at the same time, user will receive a message from the system notifying them of the scheduling.
9. User will receive an 'Enrollment Confirmed' message, select 'Done'

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

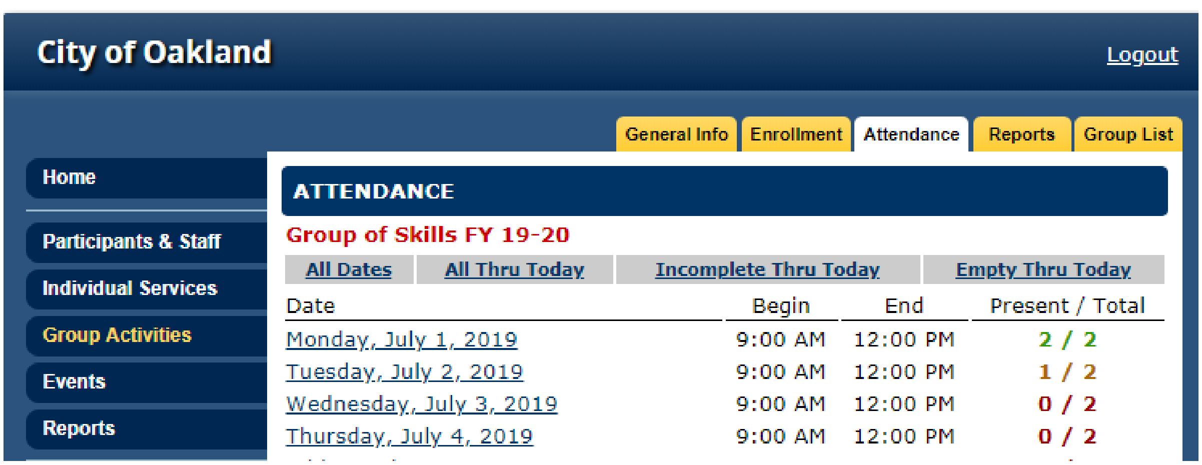
   Note: Sign-in sheets will be reviewed during audits. Please maintain all sign-in sheets for evaluators.



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:**

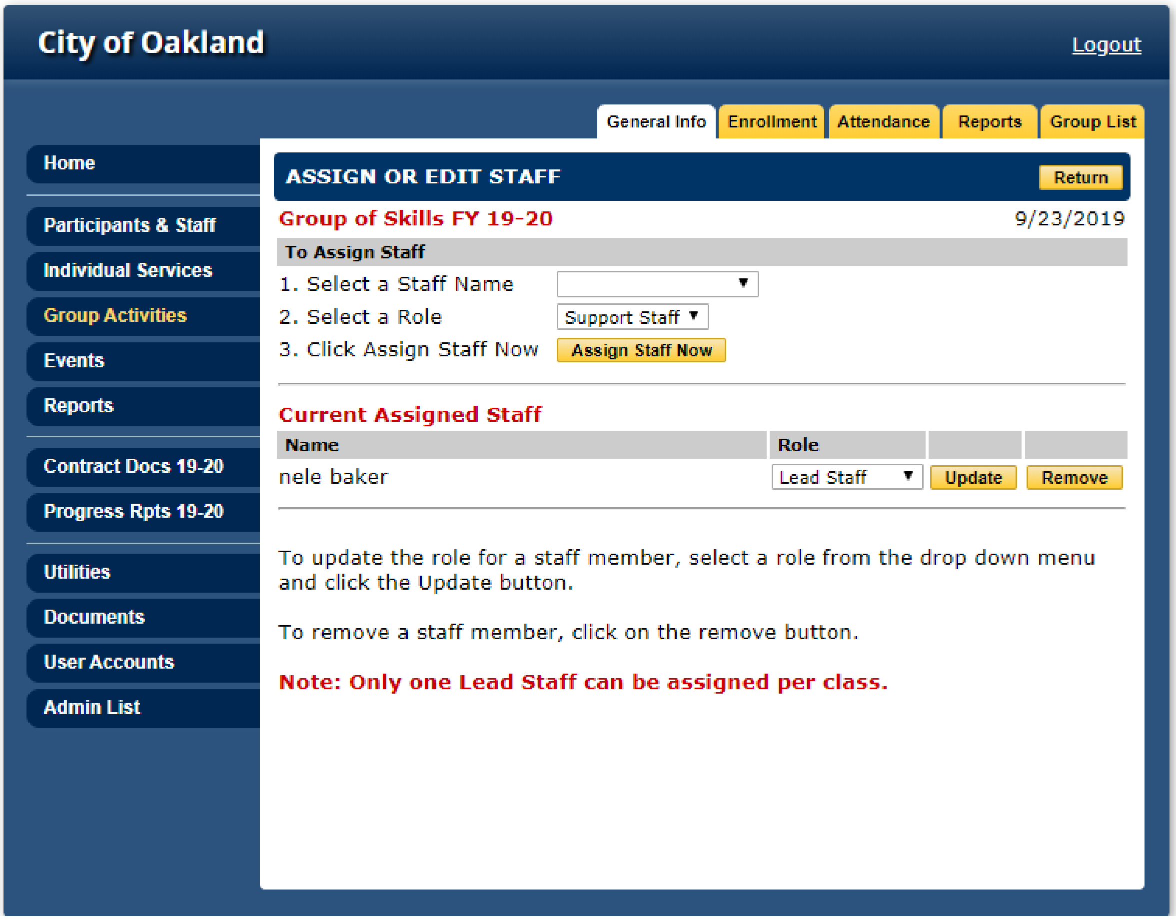
- Green: Completed attendance records for all Participants
- Brown/Yellow: Did not complete attendance for some Participants
- Red: Did not complete attendance for any Participants for the day



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



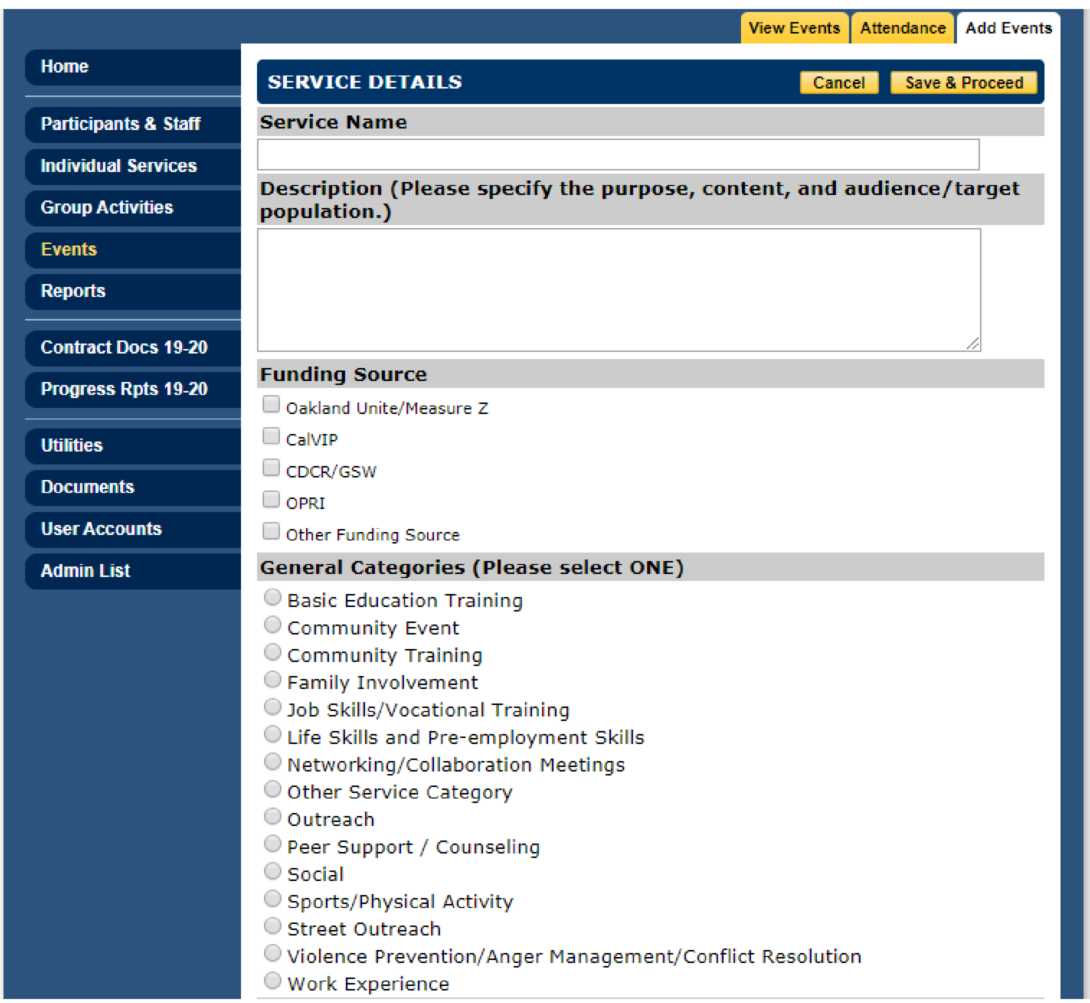
6. Select "Assign Staff Now"
7. Select 'Return'

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.



4. Select, 'Save and Proceed'

Completing Event Activity Attendance

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

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.

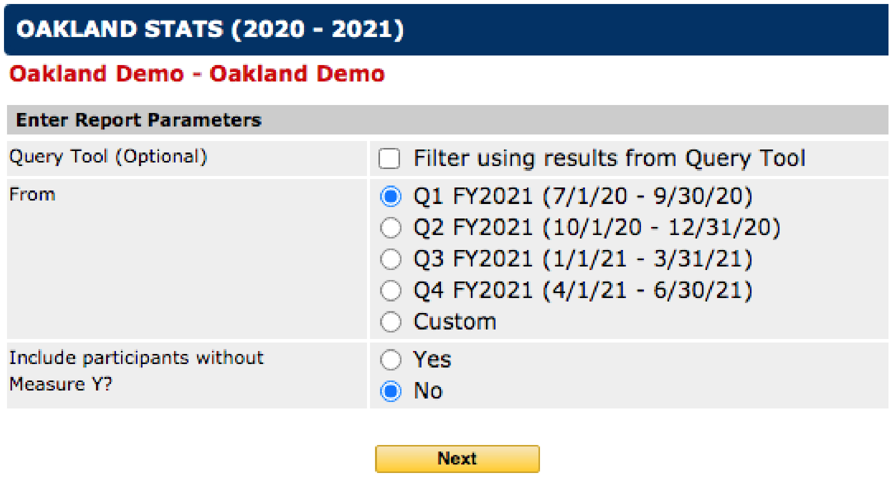
Stats Report

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.

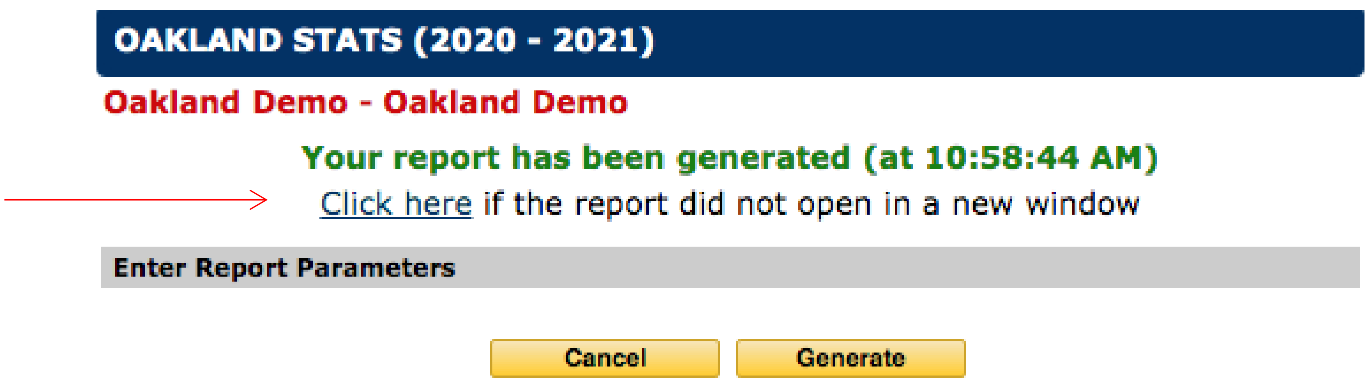
1. Select 'Reports' from blue menu on left-hand side of the screen
2. Select Oakland Stats (2020 – 2021)

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



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



    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

Missing	1	100.0%

Gender

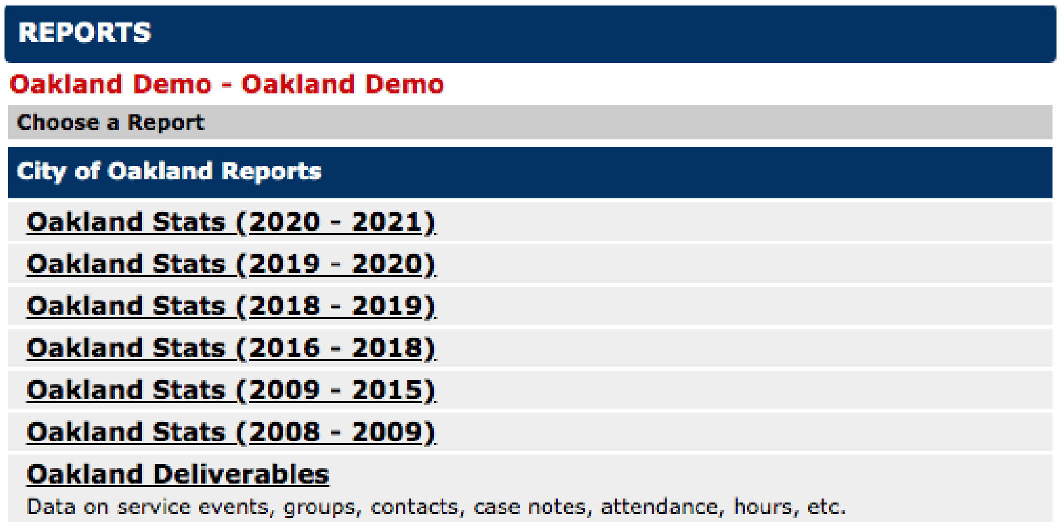
Value	# of Clients	Percent
Girl/Woman	0	0.0%
Boy/Man	1	100.0%
Transgender	0	0.0%
Other	0	0.0%
Missing	0	0.0%

Oakland Deliverables

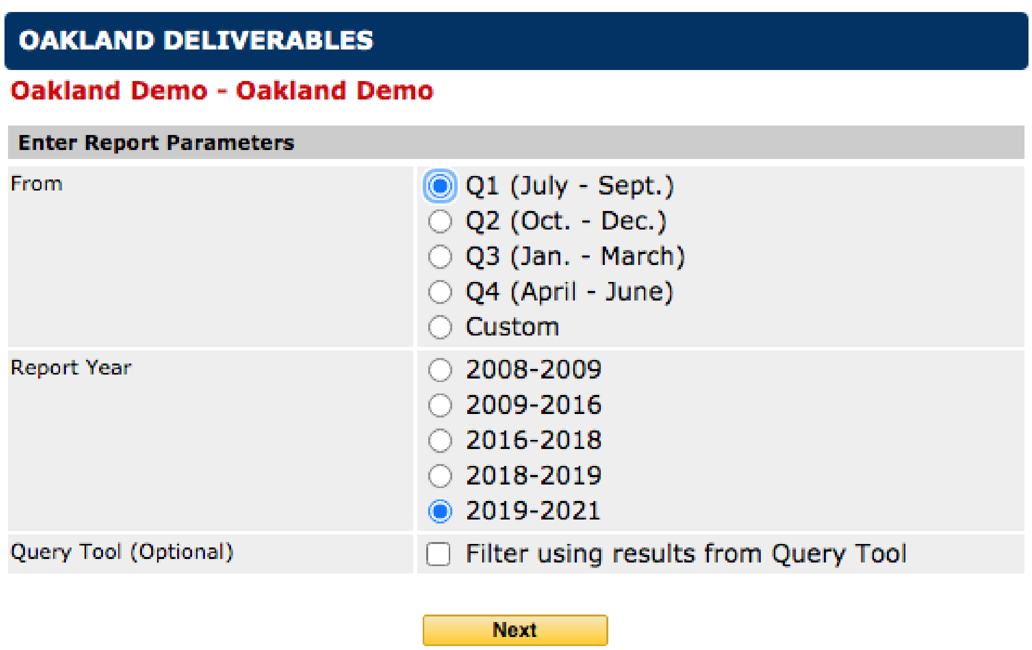
Can be viewed on YouTube from 1:13:00 – 1:15:00

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



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



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

Agency:	Mailee's House
Program:	Demo Site Measure Y
Report Period:	7/1/2020 to 9/30/2020
YTD Period:	7/1/2020 to 9/30/2020
Participant Filter:	All Measure Z participants

OVERALL SUMMARY (EXCLUDING EVENTS)

Description	Value
# of clients served	1
# of enrolled clients	1

CONTACTS

Description	Value
# Clients	0
# Contacts	0
# Hours	0
# of case managed clients	0
# of case management contacts	0
# of case management hours	0
# of intensive outreach clients	0
# of intensive outreach contacts	0
# of intensive outreach hours	0
# of mental health service clients	0
# of mental health service contacts	0
# of mental health service hours	0
# of academic case management clients	0
# of academic case management contacts	0
# of academic case management hours	0
# of clients 100 hours of work experience	0
# of case managed clients YTD	0

CASE NOTES

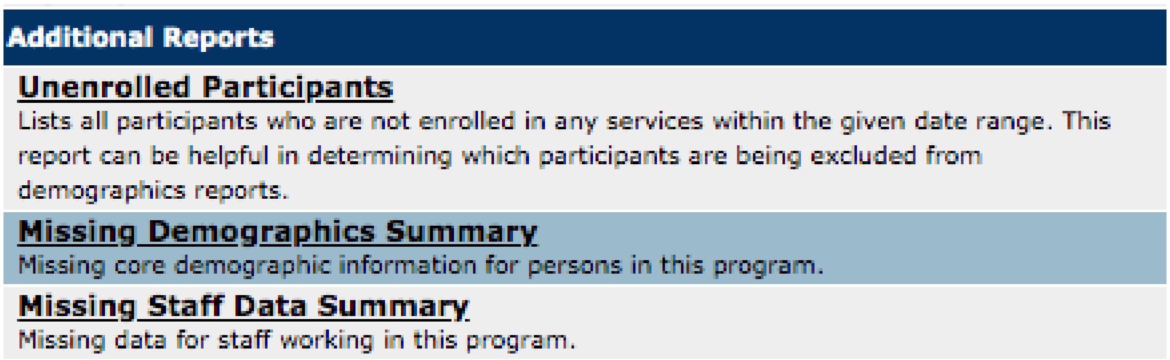
Description	Value
# of clients provided with referral	0
# of clients referred to mental health services	0
# of clients enrolled in substance abuse	

Missing Demographics

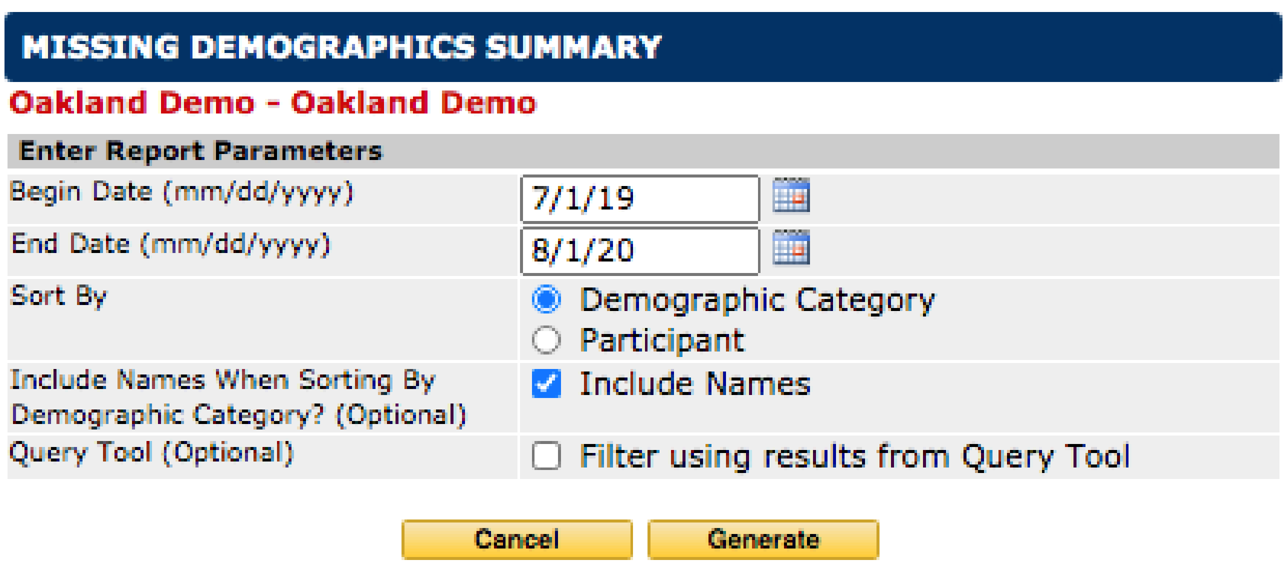
Your program officer reserves the right to withhold up to 5% of the scheduled payment if the Grantee does not demonstrate a sufficient effort to collect consent forms from each participant for whom individual-level services are provided.

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



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



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)	7/1/19
End Date (mm/dd/yyyy)	8/1/20
Sort By	(•) Demographic Category ( ) Participant
Include Names When Sorting By Demographic Category? (Optional)	[x] Include Names
Query Tool (Optional)	[ ] 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

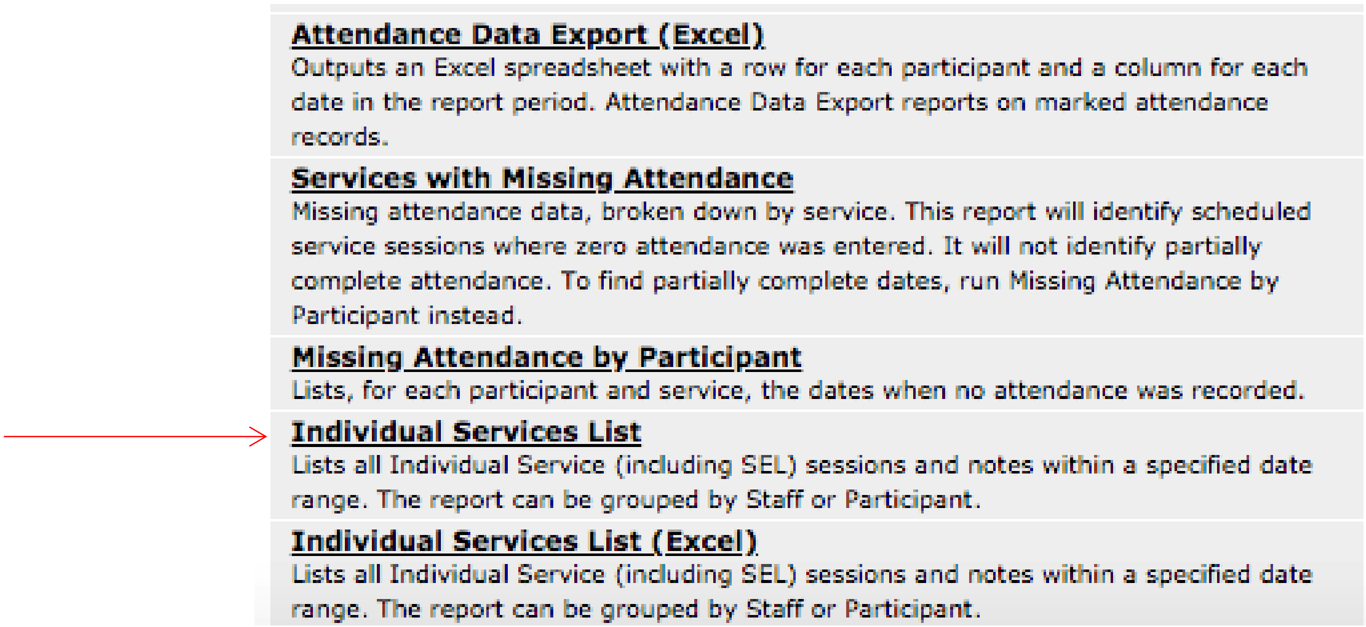
Adams, Jane
ae, ae
Avis, Andy
Bagley ii, Shandra
Bailey, Kevin
baker, nele
Barfield, Kiayel
Barnes, Timothy
Barr, Talarrie

Individual Services List

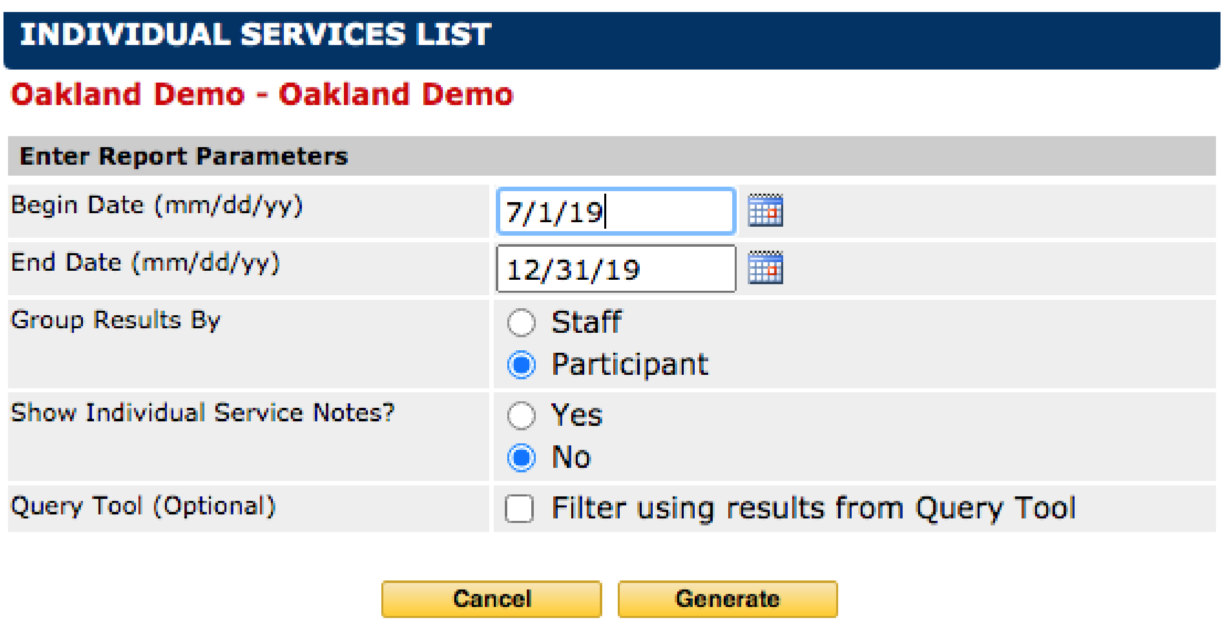
Can be viewed on YouTube from 1:15:00 – 1:16:16

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

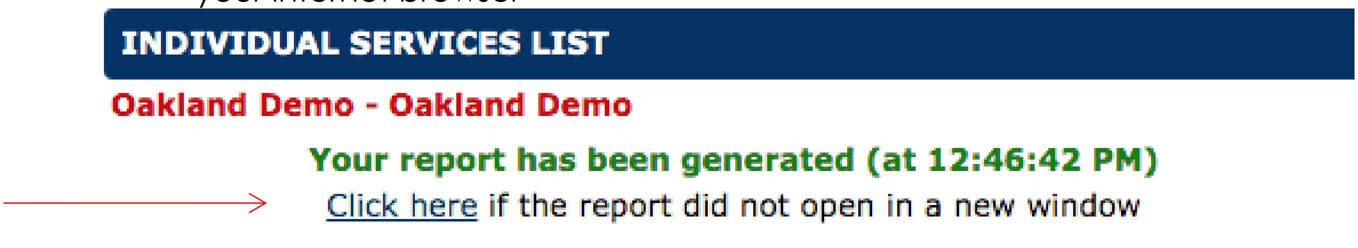
1. Select 'Reports' from blue menu on left-hand side of the screen
2. Select 'Individual Services List'



3. Enter begin and end date



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



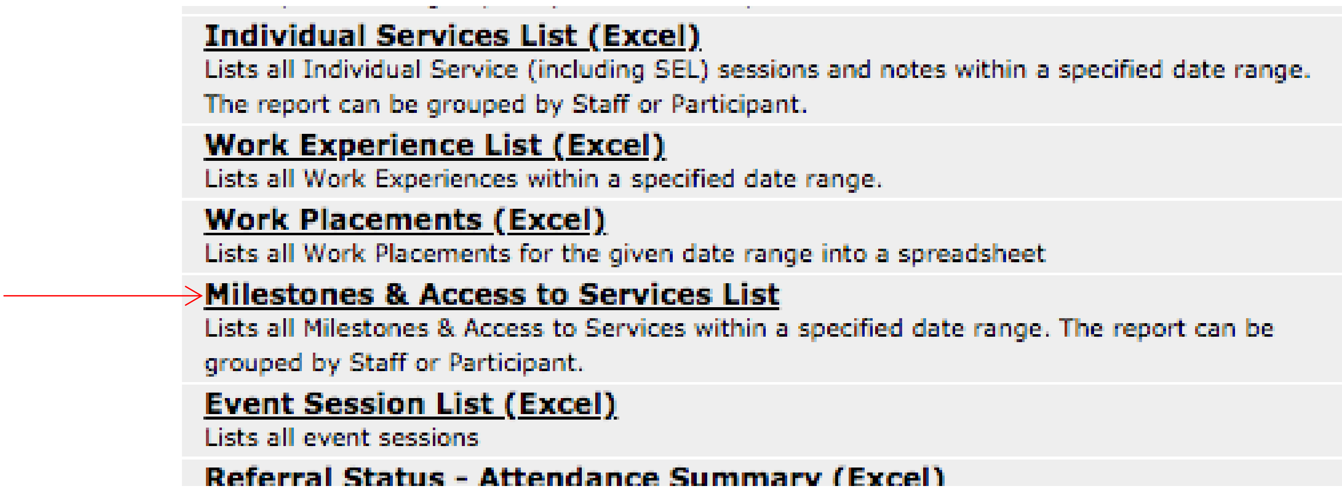
Please Note:

- **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)**

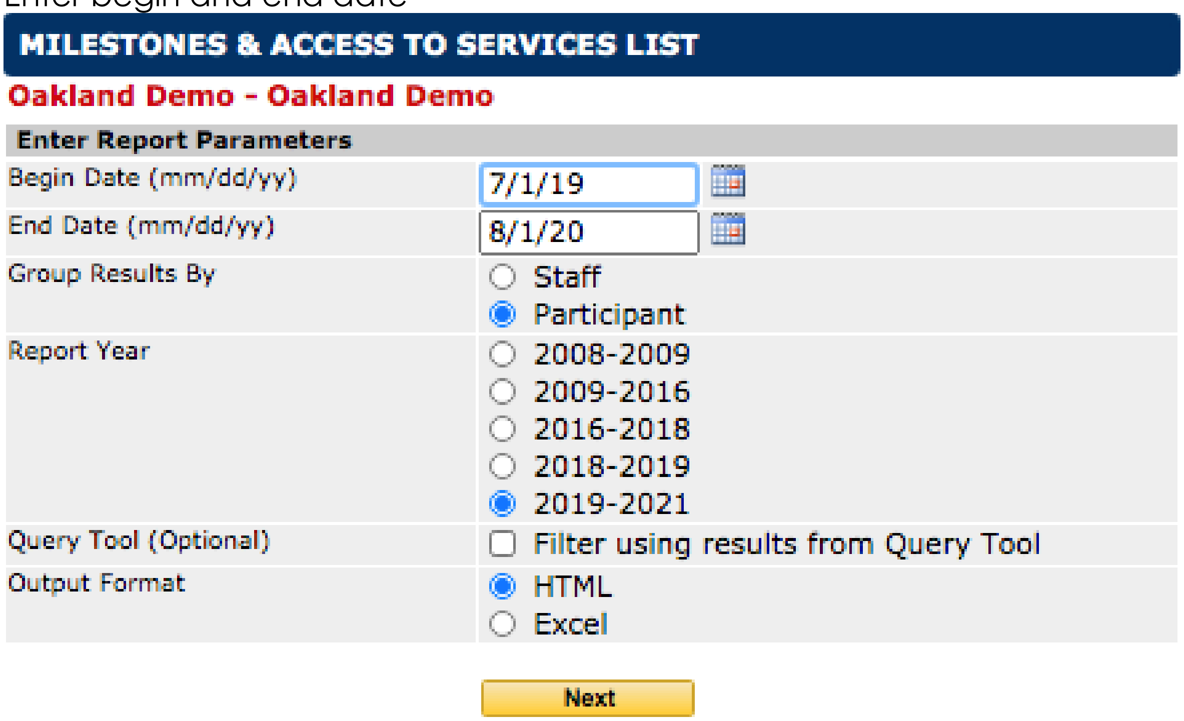
Milestones and Access to Services

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



3. Enter begin and end date



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

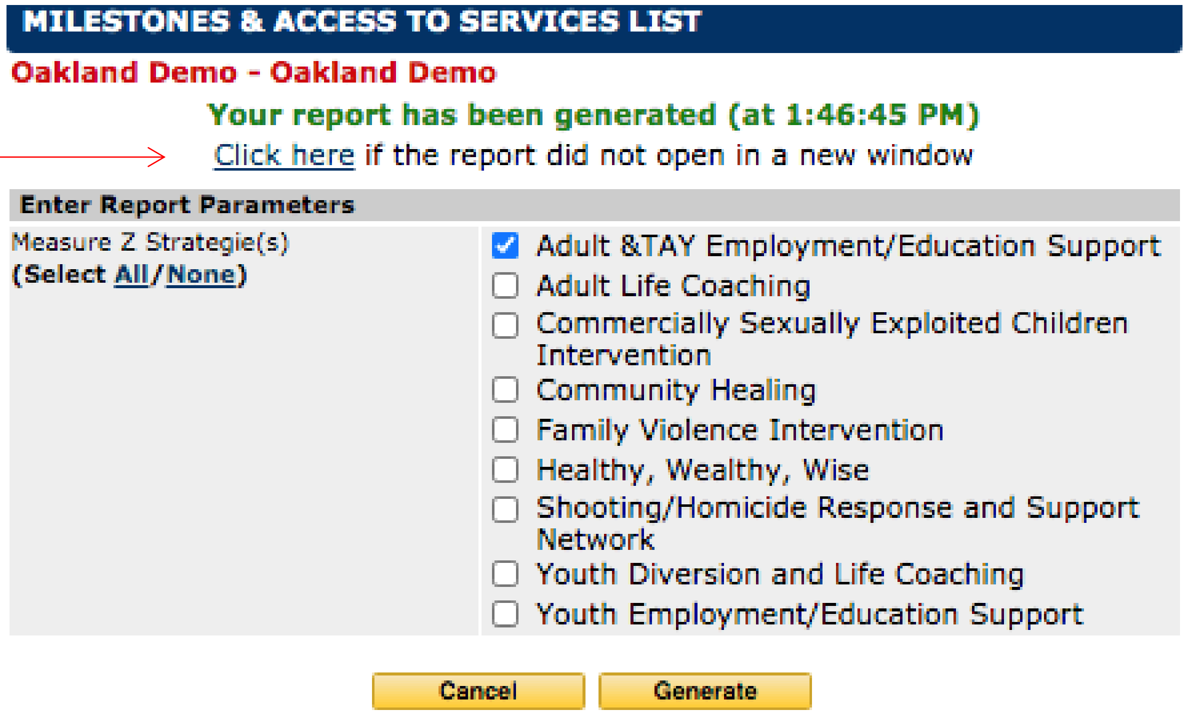
Avis, Andy

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		

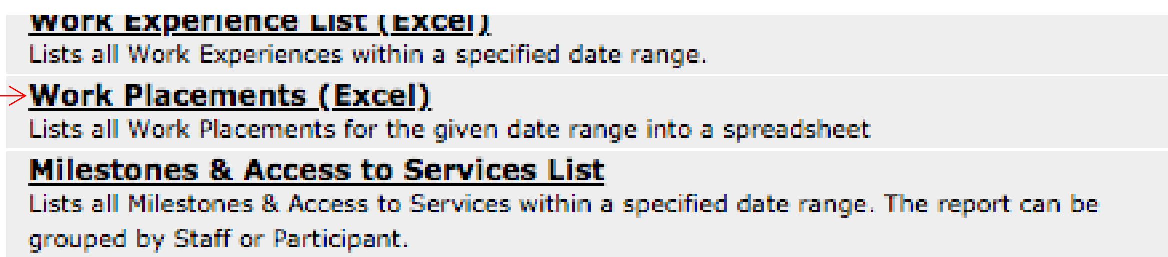
a. If the report does not open automatically, select ‘Click Here’ to open the report in your internet browser



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



3. Enter begin and end date

WORK PLACEMENTS (EXCEL)

Oakland Demo - Oakland Demo

Enter Report Parameters

Begin Date (mm/dd/yy)	9/1/19
End Date (mm/dd/yy)	12/31/2019
Query Tool (Optional)	☐ 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: 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)	7/1/19
End Date (mm/dd/yy)	12/31/2019
Query Tool (Optional)	☐ Filter using results from Query Tool

Cancel | Generate

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

Agency:	**Mailee's House**				
Program:	**Demo Site Measure Y**				
Report Period:	**7/1/19 to 12/31/2019**				
ae, ae Client ID: 46187072					
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					
Entry Date	**Industry**	**Month**	**Year**	**Days**	**Hours**
7/1/19					
9/9/19					
7/4/19					
Total					
Bailey, Kevin Client ID: 1087779					
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

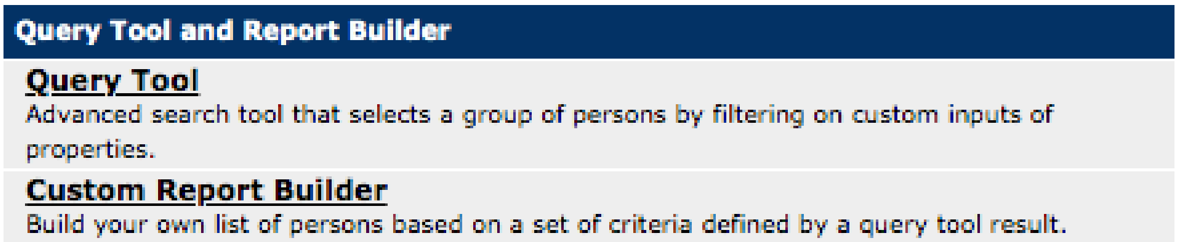
Query Tool

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

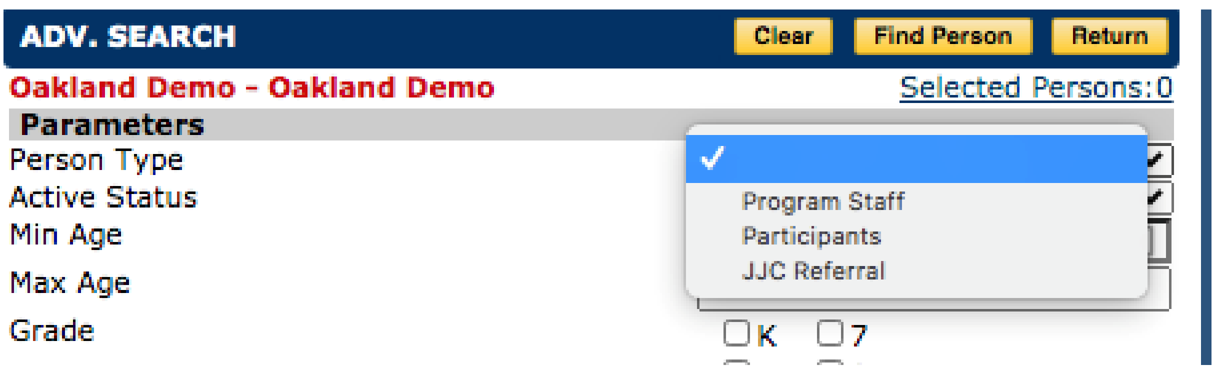
The query tool is available for users who would like to find a subset of clients, based on client characteristics (parameters) such as age, grade, sex and participation dates. Furthermore, you can use the query tool as a filter on other Cityspan reports based on these characteristics. This tool is often 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.

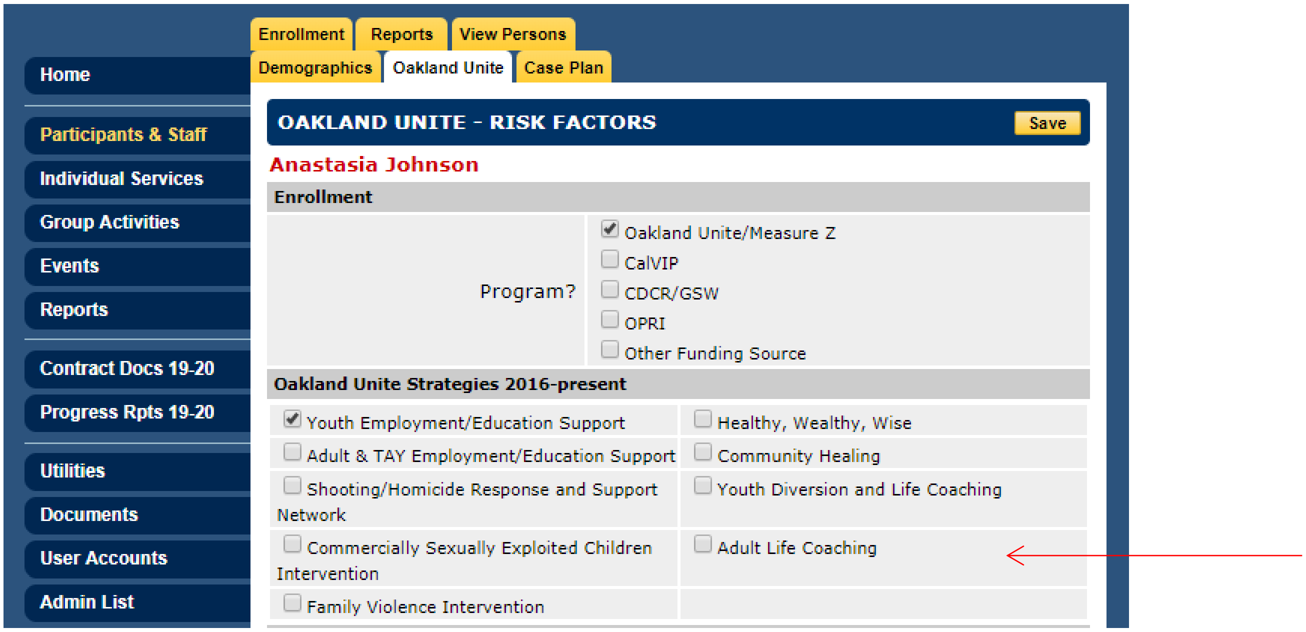
1. Select 'Reports' from blue menu on left-hand side of the screen
2. Select 'Query Tool'



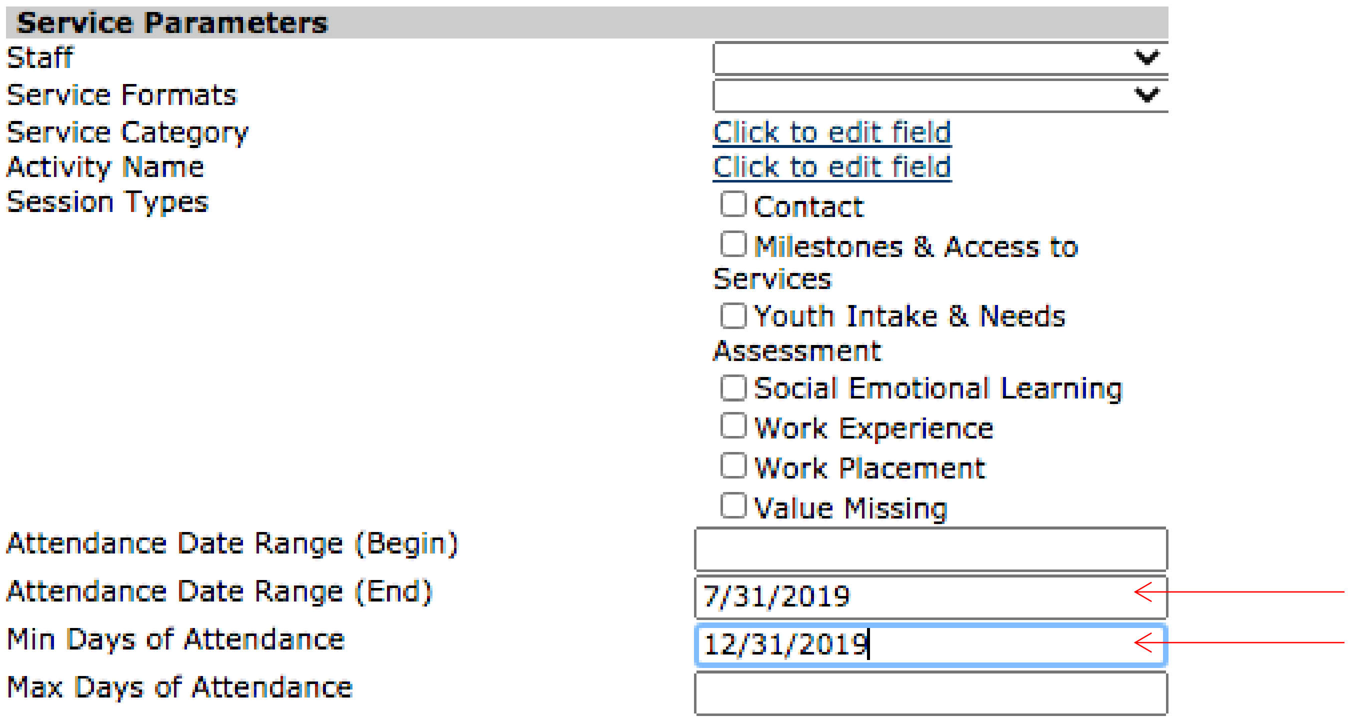
3. Select 'Participants' from the person type menu



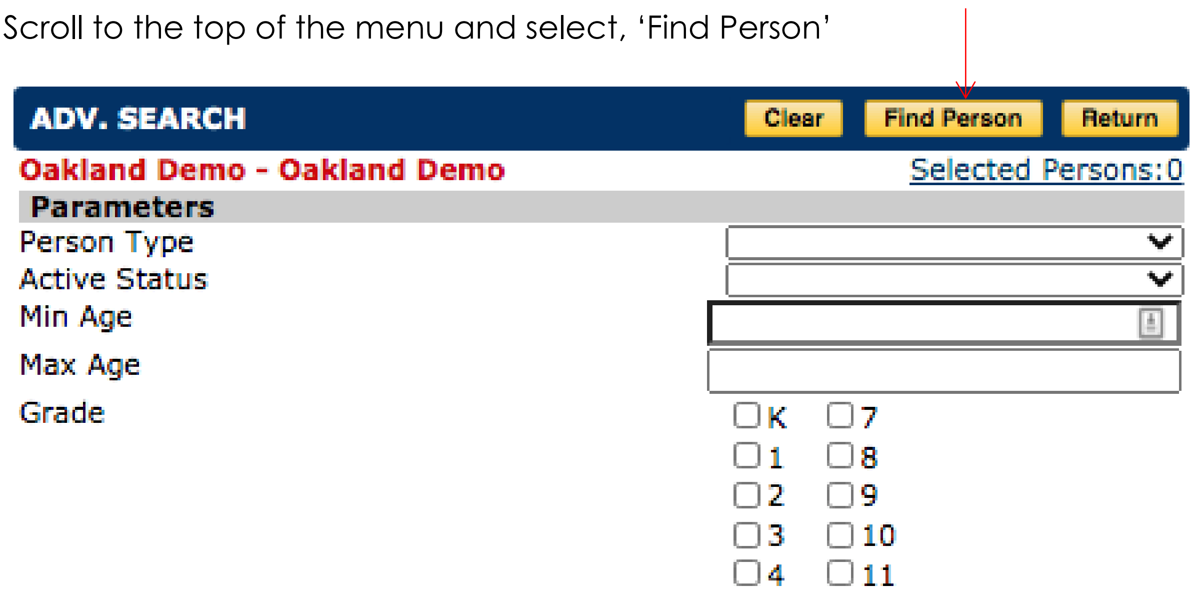
4. Select 'Yes' from the Adult Life Coaching menu
    a. Selecting yes will pull client records that have "Intensive Adult Case Management" selected in the strategy section of the participant record



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)



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



   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)	
End Date (mm/dd/yy)	
Group Results By	○ Staff ◉ Participant
Show Individual Service Notes?	○ Yes ◉ No
Query Tool (Optional)	☐ Filter using results from Query Tool

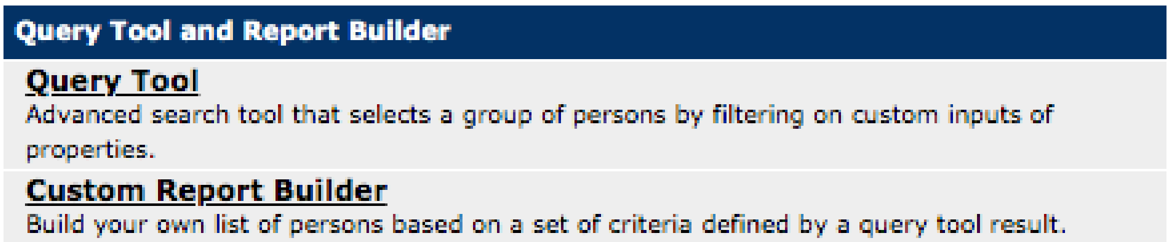
Cancel Generate

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



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	☑
* Last Name or Initial	☑
* Date of Birth (mm/dd/yyyy)	☐
Age	☐
Client ID	☑
Other required data	
*** Indicates Required Field**	
Street Address	☐
* Zip	☐
City	☐
State	☐
Home Phone	☐
Mobile Phone	☐
Email	☐
* Client Marked Yes on Consent Form	☐
Oakland Unite Client Consent Form	Print Doc
Sexual Orientation and Gender Identity	
* Gender	☑
If other, please specify	☐
Sex at Birth	☐
Sexual Orientation	☐
If other, please specify	☐

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

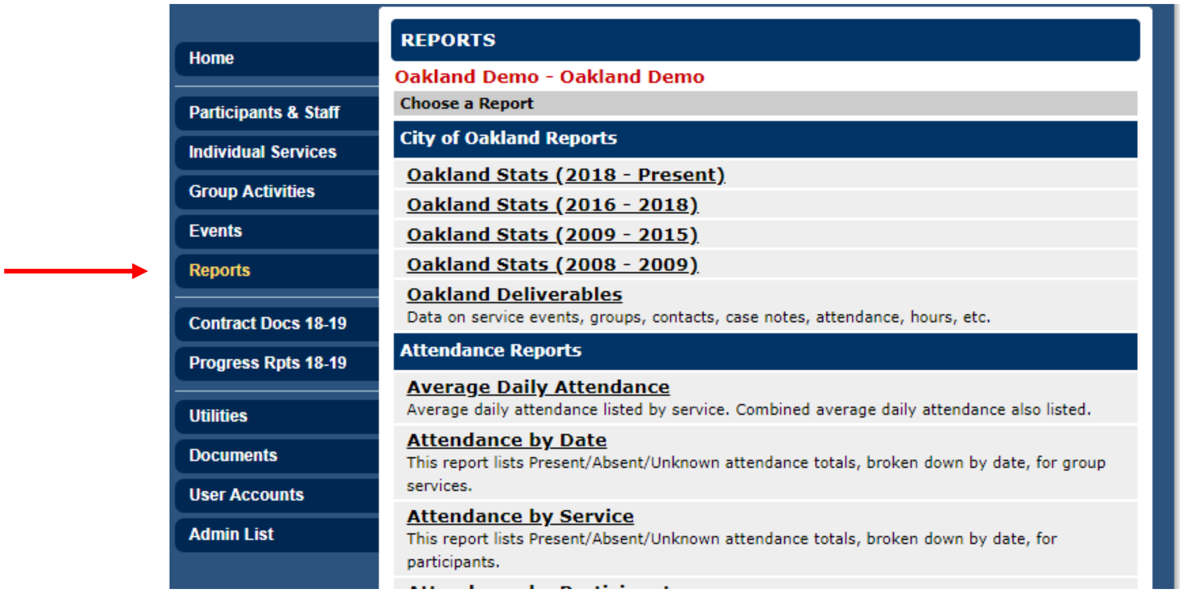
Query Tool Params	
Attendance Date Range (End):	7/31/2019
Intensive Adult Case Management:	1
Min Days of Attendance:	12/31/2019
Person Type:	Participants

	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

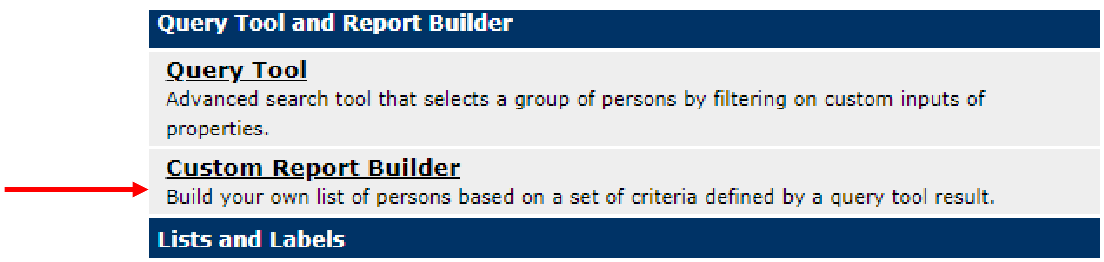
Reports to Use to Troubleshoot Data Entry Concerns

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

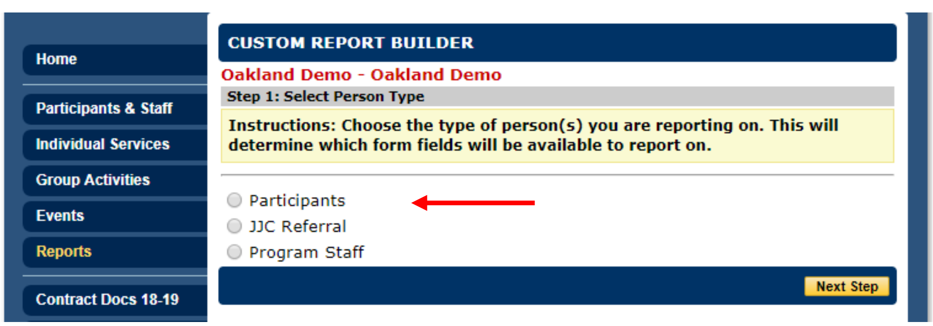
1. Select 'Reports' from blue menu on left-hand side of the screen



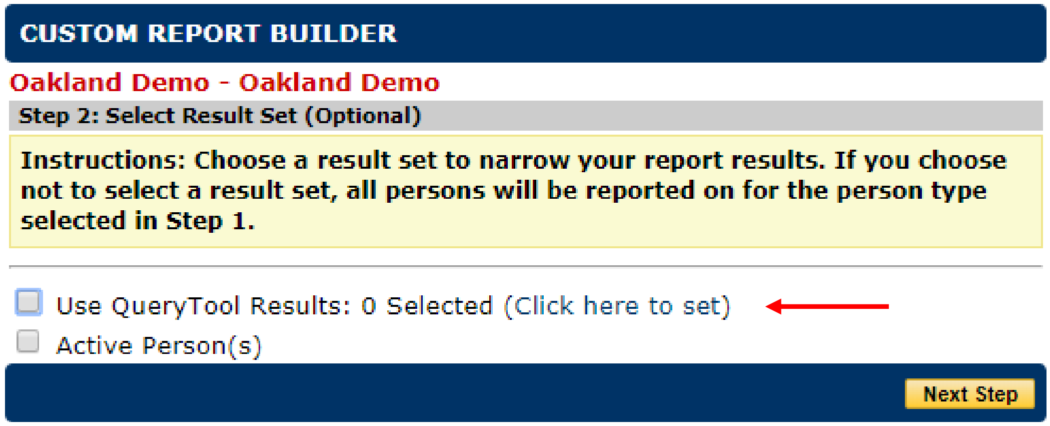
2. Select, Custom Report Builder:



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

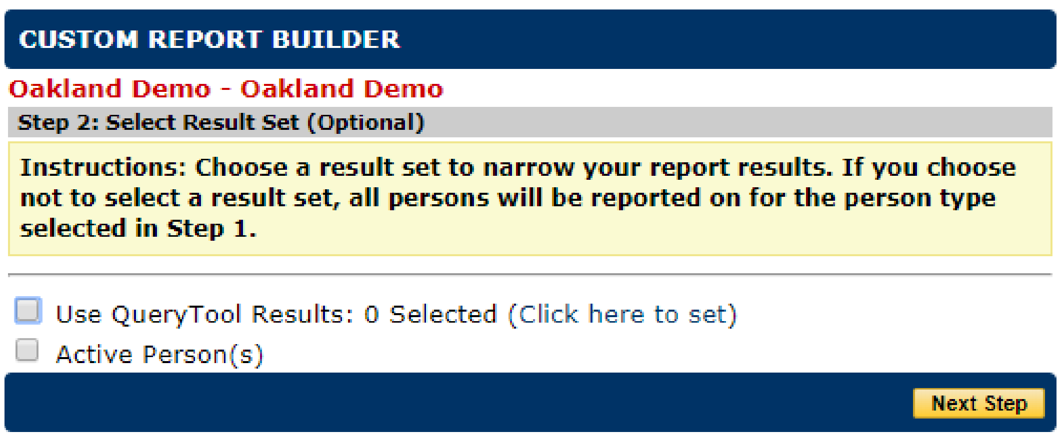


4. Select, "Click Here to Set" to select parameters that will allow you to create a filter to pull information for individuals who do not have the strategy selected (in this case Intensive Adult Case Management).

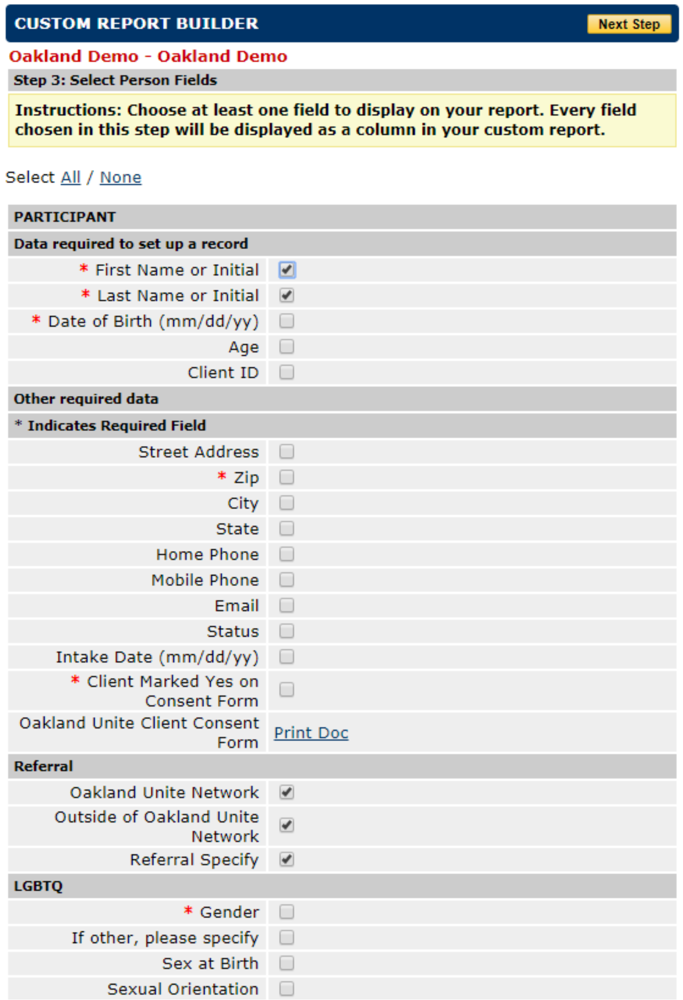


5. In the search window, select/enter the following for the parameters and select Return:
    - Person Type: Participants
    - Intensive Adult Case Management: Value Missing
    - Funded by Oakland Unite: Value Missing
    - Attendance Date Range (Begin): 07/01/2018
    - Attendance Date Range (End): 06/18/19

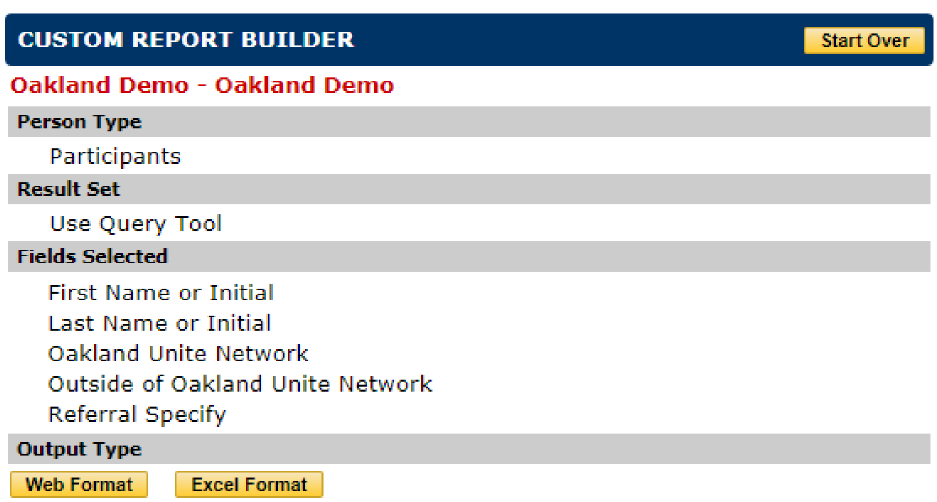
6. Once you are redirected to the Custom Report Builder page, select the checkmark next to Use QueryTool Results and select Next Step



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



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.



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)
    - o Power User here gives access to Service data entry **AND** User Accounts
    - o Regular User here gives access to Service data entry, but **NOT** User Accounts
    - o 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.