

ExCEL Management System (EMS)

User Guide

Rev. July 2023

San Francisco Unified School District[Logout](#)

[Home](#)[Participants & Staff](#)[Group Activities](#)[Wait List](#)[Snack](#)[Funding](#)[Lead Teacher](#)[Reports](#)[APR Reports](#)[Utilities](#)[Help Center](#)[User Accounts](#)[School List](#)

SERVICE SITE[Edit](#)

SFUSD - Demo

Site Coordinator Name	Phone	Email	
Site Coordinator	415-555-9999	scoordinator@leadagency.org	
Site Assistant Name	Phone	Email	
Assistant Site Coordinator	415-555-1122	asitecoordinator@leadagency.org	
Street Address	City	St.	ZIP
1234 Namea Street	San Francisco	CA	9415%
Site Phone 1	Site Phone 2	Site Fax	
415-555-1234		415-555-5678	
Description			
The SFUSD ExCEL demo site provides services to local youth ages 5 to 10 in the areas of academic tutoring, academic enrichment programs, and structured physical education workshops that supports every student participants ability to be successful academically, included in daily programs and projects, and to strive to be healthy and physically fit. Services are provided at San Francisco School, a local community school which resides in the SF Neighborhood distirict. In the current fiscal year, the program will serve 80-100 youth of diverse demographic backgrounds. Of this number, all youth will receive academic services, which will be provided by 4 program lead staff. Activities at the school site range from structured academic classes to outdoor activities and sports throughout the week.			



SFUSD SAN FRANCISCO
PUBLIC SCHOOLS

School Health Programs Department



Table of Contents

Service Site.....	4
Program Contacts.....	4
Adding a New User.....	5
User Accounts - Add or Delete.....	5
Group Activities.....	6
1. Add Activity.....	6
2. Naming Activities.....	7
3. General Info Page.....	8
4. Edit Schedule.....	9
Setting Up Activities.....	10
Utilities - Setting the Service Term.....	10
Summer Program.....	11
Participants & Staff.....	12
Staff Information.....	12
Assign Student (Summer Program ONLY).....	14
Enrollment.....	15
By Single Student.....	17
Edit Enrollment By Activity.....	19
Edit Enrollment By Student.....	20
Edit Enrollment Re-Enroll By Activity.....	22
Query Tool: General Search.....	23
Query Tool: Activity Name.....	24
Linking Activities.....	25
Groups.....	25
Changing Groups.....	28
Drop From Outgoing Group.....	28
Add to Incoming Group.....	30
Attendance Reports.....	32
Attendance Collection Tool.....	32
ExCEL Weekly Sign In Sheet.....	33
(Elementary School).....	34
(Middle School).....	35
(High School).....	36
Complete Participant Attendance Sheet (Duplicated).....	37
Generating the Complete Participant Attendance Sheet.....	38
Inputting Attendance.....	39
Weekly Attendance.....	39
Group Activities.....	40
By Group.....	41

View By Date.....	42
Funding.....	43
Matching Funds.....	43
ExCEL Program Fees.....	45
Inventory.....	47
Inventory Barcode Label Report.....	48
Attendance Reports.....	49
Process by Grant Type.....	49
Progress By Grant Type (Calendar Year).....	50
Complete Participant Attendance Sheet.....	51
Complete Participant Attendance Sheet.....	52
Wait List Tab.....	53
Contracts.....	54
Program Summary.....	54
Program Summary - Amendment.....	55
ELO-P.....	56
Step 1: EMS BO Reports.....	56
Step 2: "ELO Report".....	56
Step 3: Download in excel file or PDF.....	56
ELO-P Outreach documentation	57
21st CCLC Annual Performance Reporting.....	59
Demo Site.....	61

Service Site Program Contacts

San Francisco Unified School District [Logout](#)

SERVICE SITE [Edit](#)

SFUSD - Demo

Agency Director	Phone	Email
Agency Director	415-555-2345	director@leadagency.org
Program Manager	Phone	Email
Program Manager	415-555-8475	programmanager@leadagency.org
Site Coordinator Name	Phone	Email
Site Coordinator	415-555-9999	scoordinator@leadagency.org
Assistant Site Coordinator Name	Phone	Email
Assistant Site Coordinator	415-555-1122	asitecoordinator@leadagency.org
School Year CBO		

Site Phone 1	Site Phone 2	Site Fax
415-555-1234		415-555-5678

Description

The SFUSD ExCEL demo site provides services to local youth ages 5 to 10 in the areas of academic tutoring, academic enrichment programs, and structured physical education workshops that supports every student participants ability to be successful academically, included in daily programs and projects, and to strive to be healthy and physically fit. Services are provided at San Francisco School, a local community school which resides in the SF Neighborhood district. In the current fiscal year, the program will serve 80-100 youth of diverse demographic backgrounds. Of this number, all youth will receive academic services, which will be provided by 4 program lead staff. Activities at the school site range from structured academic classes to outdoor activities and sports throughout the week.

Select **EDIT** to update the contact information for your site and agency.

San Francisco Unified School District [Logout](#)

EDIT AGENCY [Delete](#) [Save](#) [Return](#)

REQUIRED 21ST CCLC FIELDS

Agency Name: SFUSD
Program Name: Demo

END OF REQUIRED FIELDS

Agency Contact Information

Phone 1	415-555-1234
Phone 2	
Fax	415-555-5678
Email	

Agency Director

First Name	Agency
Last Name	Director
Phone	415-555-2345
Email	director@leadagency.org

Program Manager

First Name	Program
Last Name	Manager
Phone	415-555-8475
Email	programmanager@leadagency.org

Site Coordinator

First Name	Site
Last Name	Coordinator
Phone	415-555-9999
Email	scoordinator@leadagency.org

Assistant Site Coordinator

First Name	Assistant
Last Name	Site Coordinator
Phone	415-555-1122
Email	asitecoordinator@leadagency.org

Adding a New User

User Accounts - Add or Delete

USER ACCOUNTS Add User

SFUSD - Demo

Current User

Name	Email
Hong, Lucy	hongl1@sfusd.edu

Power Users

Name	Email
Admin, Temp	
Cheung, Joyce	CheungJ1@sfusd.edu
Coordinator, Site	sitec@cbo.org
Doe, John	demo@aol.com
Tran, Raphael	
aef, aef (deactivated)	aefae@aefa

Regular Users

Name	Email
bunz, howdy	howdybunz@cityspan.com

Attendance User

Name	Email
Zeller, Jennifer	jennifer@cityspan.com

No Permission

Name	Email
bunz, howdy	howdybunz@cityspan.com

Under the tabs select "User Accounts." To add new users select "Add User"

To Delete a User, select the user and click **Delete**.

EDIT USER Delete Save & Return

*** Indicates Required Field**

Personal Information

* Username	howdybunz
* Email	howdybunz@cityspan.com
* First Name	howdy
* Last Name	bunz
Title	

When creating a user decide what access you want to give to the user.

For Site Coordinators and Program Managers please select **Power User**.

ADD USER Cancel Create

*** Indicates Required Field**

Personal Information

* Username	
* Password	
* Re-enter Password	
* Email	
* First Name	
* Last Name	
Title	
Phone	
Fax	

Service Management System

Power User	<input type="radio"/> Full Access to System, User Accounts
Regular User	<input type="radio"/> Full Access to System
Attendance User	<input type="radio"/> Access to Services and Help Center only
No Access	<input type="radio"/>

NOTE:

Users that need access to multiple school sites, please contact the ExCEL Office.

Group Activities

Setting Up Activities for School Year

1. Add Activity

The screenshot shows the 'Add Activity' form with the following sections and callouts:

- Service Details:**
 - Service Name:** A dropdown menu with 'Shining Stars' selected. Callout: 'From the Group Activities Section Select the Add Activity tab'.
 - Time Start:** 10:00 AM
 - Time End:** 11:00 AM
 - Activity Name:** A text input field. Callout: 'Insert the name of the activity using the Service Name wizard. For more information on how to input in the proper format refer to page 4.'
 - Days of the Week:** A list of days (M, Tu, W, Th, F, Sa, Su) with checkboxes.
 - Year:** A dropdown menu.
 - Type:** Radio buttons for 'Virtual' (selected) and 'In-Person'.
 - Activity Type:** A dropdown menu with 'Drop-In Activity' selected.
 - Does this activity contribute toward College and Career Readiness?:** Radio buttons for 'Yes' and 'No'.
- Activity Categories:**
 - A list of 20 categories with checkboxes, including 'Academic Enrichment Learning Programs', 'Activities Promoting Family Literacy', etc.
 - Specify Other Category(s) Here:** A text input field. Callout: 'Mark one category that best describes the activity. Most activities will fit within the first FIVE options.'
- Student Population(s) Targeted:**
 - Checkboxes for 'Students not performing at grade level...', 'Limited English proficient students', 'Students who have been truant...', 'Students with special needs or disabilities', and 'Other'.
 - Specify Other Student Population(s) Here:** A text input field. Callout: 'Only fill this out if the individual activity intentionally targets a given student population. Mark all that apply.'
- Subject Area(s):**
 - Checkboxes for 'Reading/Literacy', 'Mathematics', 'Science', 'Arts and Music', 'Entrepreneurial Education', 'Technology/Telecommunications', 'Cultural Activities/Social Studies', 'Health/Nutrition-Related Activities', and 'Other Subject Area'.
 - Specify Other Subject Area(s) Here:** A text input field. Callout: 'Mark all subject areas that apply.'

Group Activities

Service Name	
* Group	4th - 5th
* Time Start	4:30 PM
* Time End	6:00 PM
* Activity Name	Academics
* Days of the Week	<input checked="" type="checkbox"/> M <input checked="" type="checkbox"/> Tu <input checked="" type="checkbox"/> W <input checked="" type="checkbox"/> Th <input checked="" type="checkbox"/> F <input type="checkbox"/> Sa <input type="checkbox"/> Su
* Year	FY 12-13

Fig 4.1

2. Naming Activities

Group – A group can be defined by a student created Name (Happy Chickens), a staff person (Bill), grade level (1st, 2nd/3rd)

Activity Time – Identify the start and end time of the activity. (This will have them populate chronologically. See Fig 4.1)

Activity Name – Define the virtual activity by type (Skill Building/Enrichment, Child and Youth Care, Referrals/Connections to Services, Wellness Checks, Support Distance Learning) See Fig 4.2

Days of Week – Indicate which days of the week the activity meets so that “at a glance” it is obvious that the full schedule is entered into EMS.

Year (for example: “23 - 24” for school year; “Summer 2023” for summer)

Here is an example of how activities will be listed from the “Group Activities” tab within EMS.

Activities will be listed alphabetically by group and numerically by the time.

This allows your schedule to be visible “at a glance”.

Name	Begin	End
1st - 3rd 1:45PM-3:00PM Snack/Academics M-F 12-13	8/20/12	5/31/13
1st - 3rd 3:00PM-4:30PM Recreation M-Th 12-13	8/20/12	5/31/13
1st - 3rd 4:30PM-6:00PM Enrichment M-F 12-13	8/20/12	5/31/13
4th - 5th 1:45PM-3:00PM Snack/Recreation M-F 12-13	8/20/12	5/31/13
4th - 5th 3:00PM-4:30PM Enrichment M-F 12-13	8/20/12	5/31/13
4th - 5th 4:30PM-6:00PM Academics M-F 12-13	8/20/12	5/31/13
5th Grade 3:30PM-4:30PM Happy Rec M-Th 12-13	8/20/12	5/30/13
5th Grade 4:30PM-5:30PM Happy Academics M-Th 12-13	8/20/12	12/20/12
5th Grade 5:30PM-6:30PM Awesome Enrichment M-Th 12-13	8/20/12	5/30/13
Foggy Bottoms 1:45PM-3:00PM Snack/Avid Academics M-Th 12-13	8/20/12	5/23/13
Foggy Bottoms 1:45PM-5:30PM Snack/Friday Night Lights F 12-13	8/24/12	5/24/13
Foggy Bottoms 3:00-4:00 Raucous Recreation M-Th 12-13	8/20/12	5/23/13
Foggy Bottoms 3:00PM-4:00PM Gymnastics Th 12-13	9/20/12	9/20/12
Foggy Bottoms 4:00-5:30 Enthusiastic Enrichment M-Th 12-13	8/20/12	5/23/13
Foggy Bottoms 5:30-6:00 Community Time M-F 12-13	8/20/12	5/24/13

Fig 4.2

Group Activities

3. General Info Page

The screenshot shows the 'General Info' page for a group activity named 'Shining Stars 10:00AM-11:30AM Greek Mythology Tu,Th 20-21'. The page includes a sidebar with navigation links and a main content area with various fields for activity details.

GENERAL INFO		Delete
Shining Stars 10:00AM-11:30AM Greek Mythology Tu,Th 20-21		
Name	Edit	
Shining Stars 10:00AM-11:30AM Greek Mythology Tu,Th 20-21		
Type	Edit	
Virtual		
Activity Type	Edit	
Drop-In Activity No		
Does this activity contribute toward College and Career Readiness?	Edit	
Yes		
Activity Category	Edit	
Expanded Library Service Hours		
Student Population(s) Targeted	Edit	
Students not performing at grade level, are failing, or otherwise are performing below average		
Subject Area(s)	Edit	
Reading/Literacy		
Schedule	Edit	
Date Range	8/18/2020 - 6/1/2021	
Days of Week	Tu, Th	
Time	10:00 AM - 11:30 AM	
Status	Pending	
Staff	Edit	
Lead Staff	Samwise Gamgee -	
Support Staff	Tim Allen -	
Card Scanner		
Launch Card Scanner		
Activity ID		
Activity ID	3889151	

Fig 6.1

Ensure that you input under all editable fields.

1. For activity type please choose Virtual or In Person.
2. Population(s) Targeted: Only fill this out if the individual activity intentionally targets a given student population. Mark all that apply.
3. Mark all activities that apply. Define the activity by type (Skill Building/Enrichment, Child and Youth Care, Referrals/Connections to Services, Wellness Checks, Support Distance Learning)
4. Schedule: Every activity must have a schedule.

For guidance on how to edit the schedule please refer to page 6.

5. Staff: Assign at least one Lead Staff person. Assign a minimum of one staff for every 20 youth.

Adding Staff:

It is expected that ALL STAFF people are entered into the EMS including teachers and volunteers.

- Staff must be added prior to assigning them to an activity. To do so under the Participants & Staff section click on the "Add Person" tab in the top right corner.
- Assign a staff type. Most CBO Program Leaders are "Youth Development Staff".
- Employment Type. Identify if the staff person is paid or a volunteer.

The screenshot shows the 'CREATE NEW PERSON' form. It includes a sidebar with navigation links and a main content area with fields for person information.

CREATE NEW PERSON		Cancel	Add
The following fields are required for Program Staff:			
* Person Type	Program Staff		
* First Name	Count		
* Last Name	Von Count		
* Staff Type	Youth development workers		
* Employment Type	Paid		
* Funded directly by 21C?	<input type="radio"/> Y <input checked="" type="radio"/> N <input type="radio"/> Unspecified		
Add Person			

Fig 6.2

Once you have added staff refer to page 9 for inputting staff information like TB test and Criminal Background Check dates.

Group Activities

4. Edit Schedule

Fig 7.1

Select to add either Multiple dates or a Single Date. (Fig 7.1)

Fig 7.2

Fig 7.3

For "Single Date" Refer to figure 7.2

1. Set the date (Step 1).
2. Enter the Begin time (Step 2) and End time (Step 3) the activity. Activity times can be set on the quarter hour. Activities should be set to maximize the actual instruction time and leave no gaps.
3. When you have finished, click the yellow "Add Single Date" tab (Step 4).

Weekends and Intersession:

If you have a 21st Century Supplemental or ASSETS grant do not assign activities to the weekend (Saturday/Sunday) or intersession (Spring Break) without first getting approval from the ExCEL Office. Activities that are not approved will be deleted.

For "Multiple Dates" Refer to figure 7.3

1. Set the begin date (Step 1) and an end date (Step 2) of the activity. Activities can be year long, semester based, tied to the grade period or just a few weeks.
2. Select the Begin and End times for each day that the activity meets (Step 3). Activity times can be set on the quarter hour. Activities should be set to maximize the actual instruction time and leave no gaps. In the example above the program begins at 1:50pm, so all activities should start at 1:45pm.
3. When you have finished, click the yellow "Add Multiple Dates" tab (Step 4).

Setting Up Activities

Utilities - Setting the Service Term

San Francisco Unified School District

SET SERVICE TERM

To Set Service Term: 56817 Site I.D.

1. Enter a Begin Date: 6/4/2012 (mm/dd/yyyy)

2. Enter an End Date: 6/26/2012 (mm/dd/yyyy)

3. Click Set Term Now

Current Service Term

Begin Date: End Date:

Setting the service term will limit the view of services to those that are active during this time period. Services that are outside this date range are archived and NOT deleted.

Fig 8.1

Setting the service term will define the activities you see under Group Activities in both the "View Activities" (Fig 8.2) and "View By Date" (Fig 8.4) tabs. All other activities are archived.

1. To set the Service Term click on the Utilities Tab on the left hand side.
2. Click on "Set Service Term".
3. Enter the Begin Date (Step 1)
4. Enter the End Date (Step 2)
5. Click the yellow tab "Set Term" (Step 3)

ACTIVITIES

SFUSD - Demo 6/4/2012

View by Initial

Name	Begin	End
ExCEL - Franklin - Snack/Awesome Architects M.W 3:25-5:00	6/18/12	7/25/12
ExCEL - SF School - Snack/Art Enrichment 1:50-3:00 M.W.F	6/4/12	7/27/12

Fig 8.2

VIEW BY DATE

SFUSD - Demo 6/4/2012

View by Initial

Name	Begin	End
Art w/ Brian	1/24/12	5/15/12
Art w/ Brian 2	1/24/12	5/15/12
Dance	8/1/11	8/30/11
Drop-in Test Activity	2/1/12	2/28/12
ExCEL - Franklin - Snack/Awesome Architects M.W 3:25-5:00	None	None
ExCEL - SF School - Assemblies/Gymnastics 3:00-4:30	9/20/12	9/20/12
ExCEL - SF School - Snack/Art Enrichment 1:50-3:00	8/20/12	5/20/13
ExCEL - SF School - Snack/Art Enrichment 1:50-3:00 M.W.F	6/4/12	7/27/12
Gardening Club	2/3/12	5/18/12
Gardening Club 2	2/3/12	5/18/12
General After School Session	1/2/12	5/31/12
Girls Club	1/9/12	5/21/12
Imagine Bus project Art	1/26/12	5/17/12
Imagine Bus Project Art 2	1/26/12	5/17/12
J	1/7/19	4/8/19
Mandarin Program	1/3/12	5/22/12
Sports Camp	1/9/12	5/16/12

Fig 8.3

To see activities that are not in the current service term use the drop down box in the upper right hand corner in "View Activities" and "View By Date".

Click on "ALL" This will allow you to see all previous activities (Fig 8.3) under "View Activities" or see all past dates of service (Fig 8.5) under "View By Date".

DATES OF ATTENDANCE

SFUSD - Demo 6/4/2012

View by Initial

Name	Begin	End
ExCEL - Franklin - Snack/Awesome Architects M.W 3:25-5:00	6/18/12	7/25/12
ExCEL - SF School - Snack/Art Enrichment 1:50-3:00 M.W.F	6/4/12	7/27/12

Fig 8.4

DATES OF ATTENDANCE

SFUSD - Demo 6/4/2012

View by Initial

Name	Begin	End
ExCEL - Franklin - Snack/Awesome Architects M.W 3:25-5:00	6/18/12	7/25/12
ExCEL - SF School - Snack/Art Enrichment 1:50-3:00 M.W.F	6/4/12	7/27/12

Fig 8.5

Setting up Activity

Summer Program

In order for EMS to capture attendance for a six hour program, sites MUST create an activity that is six hours long and enroll all students in the program in that activity.

SERVICE DETAILS		Cancel	Save & Return
Service Name			
* Group	Demo		
* Time Start	8:00 AM		
* Time End	2:00 PM		
* Activity Name	Summer program		
* Days of the Week	<input checked="" type="checkbox"/> M <input checked="" type="checkbox"/> Tu <input checked="" type="checkbox"/> W <input checked="" type="checkbox"/> Th <input checked="" type="checkbox"/> F <input type="checkbox"/> Sa <input type="checkbox"/> Su		

Ensure your activity is 6 hours long, the activity can be longer than six hours but not shorter than six hours.

GENERAL INFO		Delete
Demo 8:00AM-2:00PM Summer program M-Su SUMMER 2016		
Name	Edit	
Demo 8:00AM-2:00PM Summer program M-Su SUMMER 2016		
Activity Type	Edit	
Drop-In Activity	No	
Does this activity contribute toward College and Career Readiness?	Edit	
No		
Activity Category	Edit	
Student Population(s) Targeted	Edit	
Subject Area(s)	Edit	
Schedule	Edit	

Schedule: Every activity must have a schedule.

ADD DATE(S) TO SCHEDULE		Cancel
Demo 8:00AM-2:00PM Summer program M-Su SUMMER 2016		
To add Multiple Dates to the schedule, click here		
To add a Single Date to the schedule, click here		

ADD DATE(S) TO SCHEDULE			Cancel
Demo 8:00AM-2:00PM Summer program M-Su SUMMER 2016			
To Add Multiple Dates to the Schedule			
Step 1:	Enter Begin Date (mm/dd/yy):	Begin Date:	6/1/2016
Step 2:	Enter End Date (mm/dd/yy):	End Date:	7/8/2016
Step 3:	Select the Begin and End Times for each class day.		
	Day	Begin Time	End Time
	Monday	8:00 AM	2:00 PM
	Tuesday	8:00 AM	2:00 PM
	Wednesday	8:00 AM	2:00 PM
	Thursday	8:00 AM	2:00 PM
	Friday	8:00 AM	2:00 PM
	Saturday		
	Sunday		
Step 4:	Click "Add Multiple Dates".		Add Multiple Dates

1. Set the begin date and an end date of the activity. Activities can be yearlong, semester based, tied to the grading period or just a few weeks.
2. Select the Begin and End times for each day that the activity meets. Activity times MUST be 6 hours long for summer activities.
3. When you have finished click the yellow "Add Multiple Dates" tab.

Participants & Staff

Staff Information

All staff must be entered into the EMS system. There are several required fields that must be input into their file.

The first fields are covered on page 6 under "Adding Staff" (see figure 6.2). For the other required fields see figure 9.1.

1. All staff must be fingerprinted and receive a negative result on a tuberculosis test. (Sites are not responsible for inputting this information for Youth volunteers and District staff)
2. When your staff have cleared fill in the check box for "Yes" next to "Finger Print Clearance" and "TB Clearance".
3. Then input the date of the clearance for both Fingerprinting and TB Testing.
4. All staff must have a Start and End date. Staff should not start prior to TB and FP clearance. The End Date should be the end of the current service term.
5. To enter dates, either type in the date OR click on the calendar graphic next to the field and click on the appropriate date.

REQUIRED FIELDS	
First Name	Count
Middle Initial	
Last Name	Von Count
* Staff Type	Youth development workers
* CBO	
* Employment Type	Field
* Funded directly by 21C?	<input checked="" type="radio"/> Y <input checked="" type="radio"/> N <input type="radio"/> Unspecified
Finger Print Clearance	<input checked="" type="radio"/> Yes <input type="radio"/> No
Finger Print Clearance Date	7/16/2012
TB Test Clearance	<input checked="" type="radio"/> Yes <input type="radio"/> No
TB Clearance Date	8/22/2012
TB Expiration	8/22/2016
Employ. Start Date	8/23/2012
Employ. End Date	

Fig 9.1

Finger Print Clearance	<input checked="" type="radio"/> Yes <input type="radio"/> No
Finger Print Clearance Date	7/16/2012
TB Test Clearance	<input checked="" type="radio"/> Yes <input type="radio"/> No
TB Clearance Date	8/22/2012
TB Expiration	
Employ. Start Date	August 2016
Employ. End Date	
ADDITIONAL REQUIRED FIELDS	
Status	31 1 2 3 4 5 6
Street Address	7 8 9 10 11 12 13
City	14 15 16 17 18 19 20
State	21 22 23 24 25 26 27
ZIP	28 29 30 31 1 2 3

Finger Print Clearance	<input checked="" type="radio"/> Yes <input type="radio"/> No
Finger Print Clearance Date	7/16/2012
TB Test Clearance	<input checked="" type="radio"/> Yes <input type="radio"/> No
TB Clearance Date	8/22/2012
TB Expiration	8/22/2016
Employ. Start Date	8/22/2012
Employ. End Date	6/1/2012

Expiration Dates:

TB test results are valid for 4 years.
Criminal Background Checks have no expiration.

Participants & Staff Staff Information - con't

6. Check off the box for **Food Handler Certified**.
7. Enter the expiration date of the certification. (Certification is valid for three years from the certification date.)
8. Note that for all certified food handlers **a copy of their certification must be kept on file on-site.**
9. Then input whether or not your staff is **Compliant with Instructional Aide Requirements** and how they are compliant.
10. Click **Save**; once completed.
11. Update your staff information as new hires on added, staff pass the IA exam and staff that leave the program.

Food Handler Certification: Please ensure a copy of certification is on file on-site.

Food Handler Certified ☐

Date of Expiration (Three Years After Certification Date)

Compliance Requirements

* Compliant with Instructional Aide Requirements ☐ Yes ☐ No ☐ N/A, does not directly supervise students

One of the following:

An AA degree or higher

or

Official transcripts reflecting 48 college units and a high school diploma/equivalent

or

Completion of CBEST and a high school diploma/equivalent

Completion of IA Exam/CODESP and a high school diploma/equivalent

An AA Degree or Higher ☐

Date of Degree

Institution, if applicable

Copy of Diploma or official transcripts on file ☐

Official transcripts reflecting 48 college units and a high school diploma/equivalent ☐

Copy of official transcripts on file ☐

Passing scores on CBEST and a high school diploma/equivalent ☐

Date of CBEST Test

Copy of high school diploma/equivalent or official transcripts on file ☐

Copy of CBEST scores on file ☐

Passing score on IA Exam/CODESP ☐

Date of IA Exam/CODESP Test

Copy of IA Exam/CODESP scores/certificate on file ☐

Taking the IA Exam:

If your staff needs to take the IA Exam, please contact the SFUSD HR department https://docs.google.com/document/d/1dY88bNxjshS16bFa8iFu-vK79QknCsm4AFYrvw7q_Q/edit for next available testing dates. Also available through SFUSD HR are practice test questions and materials.

Participants & Staff

Assign Student (Summer Program ONLY)

To accommodate **SB 429**, the law which allows Summer Supplemental programs to operate 6 hours AND allow K-8 youth from the entire district to participate in any K-8 ELO-P, ASES or 21st Century program. Cityspan has created the "Assign Student" tab.

Info needed to Assign Student: Recommended:

In order to find an SFUSD student that does not attend the host school site the following information would be helpful in searching for the student:

- The youth's Date of Birth (DOB) **OR** H0# (Student ID)
- The youth's legal First Name (nicknames will not work)
- The youth's Last Name

It is recommended that initials are used when searching for a student to assign. This widens the search.

Using the example below, when searching for Paul Scott, use "p" in the first name section and/or "s" in the last name section.

The screenshot shows a web interface with three tabs at the top: 'View Persons', 'Assign Student' (which is active), and 'Add Person'. Below the tabs is a section titled 'ASSIGN PERSON TO SITE'. This section contains a form with the following fields: 'Person Type:' (a dropdown menu set to 'Youth Participants'), 'H0# / Student ID' (an empty text box), 'DOB' (a date picker set to '1/2/2003'), 'First Name' (a text box with 'paul'), and 'Last Name' (a text box with 'scott'). Below these fields is a yellow 'Find Person' button. An arrow points from this button down to a table. The table has a dark blue header bar that says 'Page 1'. The table itself has six columns: 'Last Name', 'First Name', 'DOB', 'Home School', 'Grade (2011-12)', and 'Action'. The first row of data contains: 'Scott', 'Paul', '1/2/2003', 'GLEN PARK ELM', '4th grade', and 'Assign'. The 'Assign' button in the table is blue, underlined, and circled in red. A blue arrow points from this button down to the text below the screenshot.

Fig 10.1

Click on the "Find Person" tab. All youth that fit the description should appear below with a Home School, Grade and list an Action.

To Assign the youth click on the [BLUE underlined ASSIGN](#) button. This youth will now be available to enroll into the youth ExCEL Summer Program.

Enrollment



When enrolling youth,

1. Start by clicking on an activity.
2. From there click on the **Enrollment** yellow tab. If you have not enrolled any youth into this activity the screen will look like figure 11.1.
3. Click on "**click here to enroll new participants**". You will be directed to step 1: **Find Participants** (Figure 11.2).

From Figure 11.2 there are several options for searching for the student:

- a. You can type in the first or last name of a student.
- b. OR you can click on the letter of their last name.
- c. OR you can input a single letter or part of their first or last name (*for instance, you can input "r" in last name and if an "r" appears anywhere within a youth's last name, they will appear on your list.*)
- d. If you would like to see a list of ALL SFUSD students who attend your school, click on ALL and you will see an alphabetical list of all students with a check box next to their name.
- e. When viewing multiple students at once, check all names that you would like to enroll in and click on the yellow tab "Next Step".

The screenshot shows the 'ENROLL PARTICIPANT' page. At the top, there is a 'Return' button. Below it, the activity name 'ExCEL - SF School - Funkinomics T,Th 4:30-6:00' is displayed. The page is divided into two main sections: 'STEP 1: FIND PARTICIPANTS' and 'STEP 2: SELECT PARTICIPANTS'.
STEP 1: FIND PARTICIPANTS includes a 'Use Query' button and two search methods: 'View by Last Name Initial' (with an alphabetical grid A-Z and an 'ALL' button) and 'Find by Name' (with input fields for First Name, Last Name, and Person Type, and a 'Find Person' button).
STEP 2: SELECT PARTICIPANTS includes a 'Next Step' button and a message: 'Choose participants to enroll then click "Next Step". Select All / None'. Below this is a table of participants with checkboxes for enrollment and their dates of birth.

Enroll	Participant Name	Date of Birth
<input type="checkbox"/>	Barker, Ben	
<input type="checkbox"/>	Belden, Jim	
<input checked="" type="checkbox"/>	Blair, Bonnie	
<input type="checkbox"/>	Claremont, Erica	8/19/2001
<input type="checkbox"/>	Collado, Skye	
<input checked="" type="checkbox"/>	Doe, Jane	
<input type="checkbox"/>	Dubourt, Alex	2/15/1980
<input type="checkbox"/>	Dumigas, Jessie	4/16/1989
<input checked="" type="checkbox"/>	Dwight, Bryan	
<input type="checkbox"/>	Eshlemen, Jim	
<input type="checkbox"/>	Flores, Luis	
<input checked="" type="checkbox"/>	Ford, John	
<input type="checkbox"/>	Garcia, Brenda	
<input type="checkbox"/>	Goat, Kels	

The caption 'Fig 11.2' is located at the bottom right of the screenshot.

Continue to the next page...

Enrollment - con't

ENROLL PARTICIPANT Cancel

ExCEL - SF School - Funkinomics T,Th 4:30-6:00

STEP 3: SELECT ENROLL DATE(S) Next Step

Participant(s) will be enrolled according to the dates indicated. You may enter alternate dates, set all dates to [today's date](#) or set all dates to the [beginning of the service](#).

Participant Name	Enroll Date
Blair, Bonnie	6/19/2012
Doe, Jane	6/19/2012
Dwight, Bryan	6/19/2012
Ford, John	6/19/2012
Haverhill, Brett	6/19/2012
Jeter, Derek	6/19/2012
Lane, Candy	6/19/2012
Monu, Alice	6/19/2012
Ruiz, Carmen	6/19/2012
Smith, Raymond	6/19/2012
Squarepants, Spongebob	6/19/2012

Next

June 2012

Su	Mo	Tu	We	Th	Fr	Sa
27	28	29	30	31	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

Fig 12.1

In Step 3 (Figure 12.1)

1. You will be asked to identify the start date within this activity for each youth. It will automatically assign the first day of the activity (in this example, Tuesday, June 19th).
2. If you need to adjust the start date, enter it into the box next to the youth's name in OR click on the calendar icon.
3. Once you have completed entering start dates (if different from the first day of program) click on the yellow "Next Step" tab.

In Step 4 (Figure 12.2)

1. You will be asked to rectify any schedule conflicts.
2. If you would like to disregard the conflict check the box next to a youth's name.
3. Otherwise, the system will NOT allow youth to be enrolled in two or more activities at the same time.
4. When you are finished, click on the yellow "Next Step" tab and your activity will have enrollment.

ENROLL PARTICIPANT Cancel

ExCEL - SF School - Funkinomics T,Th 4:30-6:00

STEP 4: SCHEDULE CONFLICTS Next Step

Below is a list of participants where **scheduling conflicts were found**. Click on the checkbox next to a participant's name if you wish to disregard the conflict and continue with their enrollment.

[All / None](#)

<input checked="" type="checkbox"/> Blair, Bonnie	6/19/2012
ExCEL - SF School - Homework Pover Hour M-Th 4:00-5:00	
<input type="checkbox"/> Doe, Jane	6/19/2012
ExCEL - SF School - Homework Pover Hour M-Th 4:00-5:00	
<input type="checkbox"/> Dwight, Bryan	6/19/2012
ExCEL - SF School - Homework Pover Hour M-Th 4:00-5:00	
<input checked="" type="checkbox"/> Ford, John	6/19/2012
ExCEL - SF School - Homework Pover Hour M-Th 4:00-5:00	
<input type="checkbox"/> Haverhill, Brett	6/19/2012
ExCEL - SF School - Homework Pover Hour M-Th 4:00-5:00	
<input type="checkbox"/> Lane, Candy	6/19/2012
ExCEL - SF School - Homework Pover Hour M-Th 4:00-5:00	
<input checked="" type="checkbox"/> Monu, Alice	6/19/2012
ExCEL - SF School - Homework Pover Hour M-Th 4:00-5:00	
<input type="checkbox"/> Ruiz, Carmen	6/19/2012
ExCEL - SF School - Homework Pover Hour M-Th 4:00-5:00	
<input type="checkbox"/> Smith, Raymond	6/19/2012
ExCEL - SF School - Homework Pover Hour M-Th 4:00-5:00	

[All / None](#)

Next Step

Fig 12.2

Enrollment By Single Student

PARTICIPANTS & STAFF
SFUSD - Demo

View by Type
View SFUSD Students
View Program Staff

View by Last Name 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

Search:
First Name: Peter
Last Name: Parker
Nickname:
DOB:

Find Person

Fig 13.1

EMS allows you to enroll an SFUSD student into one or more programs at once. This can be very useful when you have a new student enroll in your program or when you need to change an individual student's schedule.

Participants & Staff

SFUSD - 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

Name	Age	Grade	Status
Bourne, Jason	24	TK	Active
Doe, Jane		TK	Active
Dubourt, Alex	44	1	Active
Hill, Carol		3	Active
Smith, Smith		TK	Active

Page 1

Fig 13.2

1. From the "Participants & Staff" tab, this will bring you to the view in figure 13.1.
2. Enter the name of the new student OR
3. Select "View SFUSD Students" for all the students you wish to enroll into one or more programs. (Fig 13.2)
4. You will be directed to the Student's file when you select the student's name. (Fig 13.3).
5. Click on the yellow "Enrollment" tab.
6. You will be directed to Figure 13.4. If the student is already enrolled in activities a list will appear below the Activities bar.
7. To enroll the student in new activities click on the yellow "Add Activity" button. (Fig 13.4)

1. REGISTRATION

Peter Parker

First Name: Peter
Last Name: Parker
Nickname: Erica
Middle Name: Parker
Last Name: Claremont

The following ER codes and Attendance Notes will display on the EXCEL Daily Sign-In Sheet

Parallel Program ☐
Family Emergency ☐
Personal Family Circumstance ☐
Medical Appointment ☐
Transportation ☐
Community Safety ☐
Child accident ☐
Other Conditions ☐

Attendance Notes

Fig 13.3

PARTICIPANT ENROLLMENT

Peter Parker

Current Term

ACTIVITIES

Add Activity Bulk Drop

Activities	Begin	End	Status
(A) Fletcher Price 6:45AM-9:45AM Germaine Norman M,Th SUMMER 2014	7/3/23	7/3/23	Dropped

Fig 13.4

Continue to the next page...

Enrollment By Single Student - con't

ENROLL INDIVIDUAL Return

Below is a list of services that Erica Claremont is **not** enrolled in. Select the services you wish to enroll this participant in and click "Enroll".

Service Name	Begin	End
<input type="checkbox"/> Foggy Bottoms 1:45-3:00 Snack/Avid Academics M-Th 12-13	8/20/2012	5/23/2013
<input type="checkbox"/> Foggy Bottoms 1:45-5:30 Snack/Friday Night Lights F 12-13	8/24/2012	5/24/2013
<input type="checkbox"/> Foggy Bottoms 3:00-4:00 Raucous Recreation M-Th 12-13	8/20/2012	5/23/2013
<input type="checkbox"/> Foggy Bottoms 4:00-5:30 Enthusiastic Enrichment M-Th 12-13	8/20/2012	5/23/2013
<input type="checkbox"/> Foggy Bottoms 5:30-6:00 Community Time M-F 12-13	8/20/2012	5/24/2013
<input type="checkbox"/> Jumping Jacks 1:45-3:00 Snack/Enrichment M-Th 12-13	8/20/2012	5/23/2013
<input checked="" type="checkbox"/> Jumping Jacks 1:45-6:00 Freestyle Friday F 12-13	8/24/2012	5/24/2013
<input type="checkbox"/> Jumping Jacks 3:00-4:00 Academics M-Th 12-13	8/20/2012	5/23/2013
<input type="checkbox"/> Jumping Jacks 4:00-5:00 Recreation M-Th 12-13	8/20/2012	5/23/2013
<input type="checkbox"/> Jumping Jacks 5:00-6:00 Homework Review M-Th 12-13	8/20/2012	5/23/2013
<input type="checkbox"/> Test Activity		

Enroll Fig 14.1

8. Select the name of the activity or activities that you wish to enroll the student into by checking the box next to the activity name. (Fig 14.1)
9. Click the yellow "Enroll" button. (Fig 14.1)
10. You will be prompted to set the start date. (Fig 14.2)
11. Once you have determined the start date click on the yellow "Enroll" button. (Fig 14.2)
12. You will be brought back to the Participant Enrollment Screen where the activity or activities you added should be visible.
13. To repeat this process for another student please refer back to the previous page and repeat steps 1-13.

SET START DATES Cancel

Erica Claremont will be enrolled in the following services according to the dates indicated.
 You may enter alternate dates, [set all dates to today's date](#) or [set all dates to the beginning of the service](#).

Service Name	Enroll Date
Jumping Jacks 1:45-6:00 Freestyle Friday F 12-13	8/24/2012

Enroll Fig 14.2

PARTICIPANT ENROLLMENT

Erica Claremont Current Term

ACTIVITIES Add Activity Bulk Drop

Activities	Begin	End	Status
(A) Foggy Bottoms 3:00-4:00 Gymnastics Th 12-13	9/20/12	9/20/12	Enrolled
(A) Jumping Jacks 1:45-6:00 Freestyle Friday F 12-13	8/24/12	5/24/13	Enrolled

Fig 14.3

Enrollment

Edit Enrollment By Activity

To edit a student's enrollment in an individual activity

ENROLLMENT LIST (4 Enrolled)

Test 2:00PM-5:00PM Test M,Tu,Th,F SY 23-24

Name	Age	Status	Start Date	Drop Date	Edit
adams, test	5	Enrolled	12/1/23	n/a	Edit
Barker, Ben		Enrolled	12/1/23	n/a	Edit
Belden, Jim		Enrolled	12/1/23	n/a	Edit
Blair, Bonnie		Enrolled	12/1/23	n/a	Edit

Fig 15.1

1. Start by going to that activity under the **Group Activities** tab.

2. Click on Enrollment and select the **Edit** button near the student who needs a change.

3. You will be brought to **Enrollment History** (figure 15.2) for the student. Read the directions to understand how best to proceed.

ENROLLMENT HISTORY

ExCEL - SF School - Funkinomics T,Th 4:30-6:00 - Bonnie Blair

Start Date	Drop Date	Action
6/19/12	n/a	Edit / Un-enroll

Reason for alt. start date Reason for drop

- To drop this participant from this activity, select the "Edit" link and enter a drop date. This action will remove attendance records that belong to this participant for this activity that are dated after the drop date.
- To change the enrollment start date, select the "Edit" link and enter an alternate date. This action will remove attendance records that belong to this participant for this activity prior to the start date.
- To undo the drop of this participant, select the "Edit" link and remove the drop date. This will only work on the latest enrollment period.
- To completely remove a participant from this activity and delete all attendance records associated with this participant, select the "Un-enroll" link. Note: You should only un-enroll participants if the participant was mistakenly enrolled in this activity. When an participant is rightfully enrolled and only attends a portion of this activity, it is strongly recommended that you use the "Drop" function to maintain their attendance data.

Fig 15.2

a. If you click on "Edit" you will be brought to figure 15.3. Detailed directions on this page will guide you on how to proceed. Editing allows you to DROP A YOUTH FROM ONE OR MORE ACTIVITIES WITHOUT LOSING DATA.

b. To see how to re-enter a student into an activity go to page 18.

c. If you click on "Un-enroll" you will be brought to Fig 15.4, Delete Enrollment History. This will inform you of any potential data loss prior to the deletion of enrollment. Un-enrolling will DELETE A YOUTH'S RECORDS.

ENROLLMENT HISTORY

ExCEL - SF School - Funkinomics T,Th 4:30-6:00 - Bonnie Blair

Start Date	Drop Date	Action
6/21/12	n/a	Edit / Un-enroll

Reason for alt. start date Reason for drop

Bonnie lay over the ocean until Wednesday, June 20th.

Save

- To drop this participant from this activity, select the "Edit" link and enter a drop date. This action will remove attendance records that belong to this participant for this activity that are dated after the drop date.
- To change the enrollment start date, select the "Edit" link and enter an alternate date. This action will remove attendance records that belong to this participant for this activity prior to the start date.
- To undo the drop of this participant, select the "Edit" link and remove the drop date. This will only work on the latest enrollment period.
- To completely remove a participant from this activity and delete all attendance records associated with this participant, select the "Un-enroll" link. Note: You should only un-enroll participants if the participant was mistakenly enrolled in this activity. When an participant is rightfully enrolled and only attends a portion of this activity, it is strongly recommended that you use the "Drop" function to maintain their attendance data.

Fig 15.3

DELETE ENROLLMENT PERIOD

You are attempting to delete one of this participant's enrollment periods. Below is a summary of Present and Absent attendance records that will be deleted. Only the dates highlighted in yellow are unlocked and can be removed. (Warning! Data will not be recoverable.)

To permanently destroy these records, please select "CONFIRM DELETE".

To cancel this transaction, please select "Cancel".

Service Name: ExCEL - SF School - Funkinomics T,Th 4:30-6:00

Participant Name: Blair, Bonnie

Start Date: 6/21/2012

Drop Date: N/A

Date of Service	Attendance Status
(No Present or Absent attendance records will be deleted.)	

Cancel CONFIRM DELETE

Fig 15.4

Enrollment

Edit Enrollment By Student

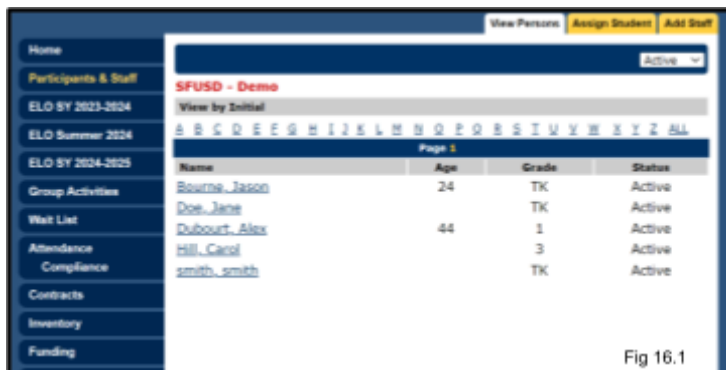


Fig 16.1

If you need to adjust the enrollment of a single student follow the steps below.

1. Under "Participants and Staff" and click "View SFUSD Students".
2. Find the student whose enrollment you wish to adjust. (Fig 16.1)
3. From the individual student's click on the yellow "Enrollment" tab. (Fig 16.2)
4. You will see a list of all the activities that student is enrolled in. (Fig 16.3)
5. Click on the yellow "Bulk Drop" button. (Fig 16.3)

Fig 16.2

Dropping and Data Loss:

When a student is dropped from an activity, data may or may not be lost depending on the scenario.

For example, Erica Claremont is enrolled in "Foggy Bottoms 3:00-4:00 Gymnastics Th 23-24", but she never attended the activity. Dropping her from "Foggy Bottoms 3:00-4:00 Gymnastics Th 23-24" will take her out of that activity and no data will be lost.

In another example, if Erica is enrolled in "Jumping Jacks 1:45-6:00 Freestyle Friday F 23-24" and participated until October, she can be dropped after her last day attended and no data will be lost.

Data WILL be LOST if Erica Claremont is enrolled in "Miracle Workers 1:45-3:00 Snack/ Recreation M-Th 23-24" and she attended from 8/20/23 through 5/24/24, attendance was entered for her on those days AND she is dropped on from 1/8/23. All data from 1/8/23 on will be LOST.

Activities	Begin	End	Status
(A) Jumping Jacks 1:45-6:00 Freestyle Friday F 12-13	8/24/12	5/24/13	Enrolled
(A) Miracle Workers 1:45-3:00 Snack/Recreation M-Th 12-13	8/20/12	5/23/13	Enrolled
(A) Miracle Workers 1:45-6:00 Snack/Freestyle Friday F 12-13	8/24/12	5/24/13	Enrolled
(A) Miracle Workers 3:00-4:30 Drama M-Th 12-13	8/20/12	5/23/13	Enrolled
(A) Miracle Workers 4:30-5:30 Academic Allstars M-Th 12-13	8/20/12	5/23/13	Enrolled
(A) Miracle Workers 5:30-6:00 Community Time M-Th 12-13	8/20/12	5/23/13	Enrolled
(A) Foggy Bottoms 3:00-4:00 Gymnastics Th 12-13	9/20/12	9/20/12	Dropped

Fig 16.3

Enrollment Edit Enrollment By Student - con't

BULK DROP Cancel

Erica Claremont

STEP 1: ENTER DROP DATE Next Step

Specify a drop date. This participant will be dropped from services as of the given date. **WARNING:** Entering a drop date that precedes dates with valid attendance data will result in the deletion of that data.

Enter drop date

Drop Date: (mm/dd/yyyy)

Fig 17.1

6. From the Bulk Drop menu (Fig 17.1) indicate the first day in which the student will no longer be counted, and therefore dropped, from one or more activities.

7. Click the yellow "Next Step" button. (Fig 17.1)

8. A list of all the activities will be listed. Only Current Term activities will be available to drop. This is to prevent you from dropping a youth from a previous semester or summer activity. (Fig 17.2)

9. Check off all activities that you wish to drop the student from. (Fig 17.2)

10. Click the yellow "Drop Selected" button. (Fig 17.2)

11. You will then be prompted to confirm the drop in figure 17.3. A highlighted section will show you of any potential data loss.

12. Click the yellow "Confirm Drop" button. (Fig 17.3)

BULK DROP Cancel

Erica Claremont

STEP 2: SELECT SERVICES Drop Selected

Choose services to drop, then click "Drop Selected". Services listed in grey cannot be dropped because the given drop date falls outside of the service's date range.

Select	Service Name	Service End Date
<input type="checkbox"/>	Drop-in Test Activity	2/28/2012
<input checked="" type="checkbox"/>	Jumping Jacks 1:45-6:00 Freestyle Friday F 12-13	5/24/2013
<input type="checkbox"/>	Miracle Workers 1:45-3:00 Snack/Recreation M-Th 12-13	5/23/2013
<input type="checkbox"/>	Miracle Workers 1:45-6:00 Snack/Freestyle Friday F 12-13	5/24/2013
<input type="checkbox"/>	Miracle Workers 3:00-4:30 Drama M-Th 12-13	5/23/2013
<input type="checkbox"/>	Miracle Workers 4:30-5:30 Academic Allstars M-Th 12-13	5/23/2013
<input type="checkbox"/>	Miracle Workers 5:30-6:00 Community Time M-Th 12-13	5/23/2013
<input type="checkbox"/>	SF School - 12-13 - Snack/Art Enrichment M,W,F 1:50-3:00	7/27/2012
<input type="checkbox"/>	Sports Camp	5/16/2012

Fig 17.2

BULK DROP Cancel

Erica Claremont

STEP 3: CONFIRM DROP

You have chosen to drop the participant from the services listed below. Listed next to each service is the number of postdated attendance records that will be permanently destroyed. (**Warning! Data will not be recoverable.**)

Services marked in red signify that the participant cannot be dropped due to conflicts with enrollment periods. Please edit their enrollment period(s) manually.

Grayed out participants cannot be dropped because they have locked attendance data. Only the participants highlighted in yellow can be dropped.

Participant	Postdated Attendance Records
Jumping Jacks 1:45-6:00 Freestyle Friday F 12-13	0

CONFIRM DROP CANCEL

Fig 17.3

Activities from different terms will be faded and no changes may be made to them.

Activities are listed in yellow highlight with any potential data records listed. In this case "0". If you attempt to delete locked data they will appear in gray and you will not be allowed to make changes.

If you need to change, edit or delete locked data contact your District Coordinator to unlock the necessary month's data.

Enrollment

Edit Enrollment Re-Enroll By Activity

ENROLLMENT LIST (20 Enrolled)

Jumping Jacks 1:45-6:00 Freestyle Friday F 12-13

Name	Age	Status	Start Date	Drop Date	Edit
Barker, Ben		Enrolled	8/24/12	n/a	Edit
Belden, Jim		Enrolled	8/24/12	n/a	Edit
Blair, Bonnie		Enrolled	8/24/12	n/a	Edit
Dumigas, Jessie	23	Enrolled	8/24/12	n/a	Edit
Dwight, Bryan		Enrolled	8/24/12	n/a	Edit
Ford, John		Enrolled	8/24/12	n/a	Edit
Goat, Kels		Enrolled	8/24/12	n/a	Edit
Horowitz, John	23	Enrolled	8/24/12	n/a	Edit
Jones, John		Enrolled	8/24/12	n/a	Edit
Lane, Candy	20	Enrolled	8/24/12	n/a	Edit
Monu, Alice		Enrolled	8/24/12	n/a	Edit
Rankin, James		Enrolled	8/24/12	n/a	Edit
ronald, myers		Enrolled	8/24/12	n/a	Edit
Sampson, Salvador		Enrolled	8/24/12	n/a	Edit
Sanders, Barbara		Enrolled	8/24/12	n/a	Edit
Smith, Jane		Enrolled	8/24/12	n/a	Edit
Smith, Lawrence		Enrolled	8/24/12	n/a	Edit
Smith, Raymond		Enrolled	8/24/12	n/a	Edit
smith, smith		Enrolled	8/24/12	n/a	Edit
Stevenson, Catherine	52	Enrolled	8/24/12	n/a	Edit
Claremont, Erica	10	Dropped	8/24/12	10/12/12	Edit

Fig 18.1

If you find that you need to re-enroll a youth into a particular activity, then follow these steps to add them back to an activity.

(For Example, you dropped them during track season and now they are ready to come back.)

This can only be done by activity.

- From the Group Activities tab, click on an activity and then click on the yellow "Enrollment" activity (Fig 18.1)
- A list of all youth will be visible. Dropped youth will appear at the bottom in gray. Click the blue "edit" button next to the name of the youth you wish to re-enroll. (Fig 18.1)
- You will be brought to the Enrollment History of that activity for the selected student. In the "Re-enroll Date" box enter the date you wish the youth to restart the activity. (Fig 18.2)
- Click the blue "Re-enroll" button. (Fig 18.2)
- The "Enrollment History" will be updated to reflect the new "start date" (Fig 18.3)

ENROLLMENT HISTORY

Jumping Jacks 1:45-6:00 Freestyle Friday F 12-13 - Erica Claremont

Start Date	Drop Date	Action
8/24/12	10/12/12	Edit / Un-enroll

Reason for alt. start date Reason for drop

Re-enroll Date: [Re-enroll](#)

- To re-enroll the participant, enter a new start date in the space below. The date must be at least one date later than the drop date above.
- To drop this participant from this activity, select the "Edit" link and enter a drop date. This action will remove attendance records that belong to this participant for this activity that are dated after the drop date.
- To change the enrollment start date, select the "Edit" link and enter an alternate date. This action will remove attendance records that belong to this participant for this activity prior to the start date.
- To undo the drop of this participant, select the "Edit" link and remove the drop date. This will only work on the latest enrollment period.
- To completely remove a participant from this activity and delete all attendance records associated with this participant, select the "Un-enroll" link. Note: You should only un-enroll participants if the participant was mistakenly enrolled in this activity. When an participant is rightfully enrolled and only attends a portion of this activity, it is strongly recommended that you use the "Drop" function to maintain their attendance data.

Fig 18.2

ENROLLMENT HISTORY

Jumping Jacks 1:45-6:00 Freestyle Friday F 12-13 - Erica Claremont

Start Date	Drop Date	Action
1/8/13	n/a	Edit / Un-enroll
8/24/12	10/12/12	Edit / Un-enroll

Reason for alt. start date Reason for drop

Fig 18.3

Enrollment

Query Tool: General Search

ENROLL PARTICIPANT Return

ExCEL - SF School - Snack/Recreation T, Th 1:50-3:00

STEP 1: FIND PARTICIPANTS Use Query

View by Last Name 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

Find by Name:

First Name:

Last Name:

Person Type:

Find Person

No persons matched your criteria

Fig 19.1

If you wish to narrow your search, you can specify which fields you wish to use in your search by grade level, gender, age, or any number of fields.

1. Click on the yellow "Use Query" button.
2. Select your criteria and click on the yellow "Find Person" tab. A list of youth will show up with a total number in the top right corner (Figure 19.3).
3. Hit the yellow "Return" tab.

ADV. SEARCH Clear Find Person Return

SFUSD - Demo Selected Persons:0

Parameters

Person Type:

Active Status:

Min Age:

Max Age:

Grade:

☐ Infant ☐ 7th grade

☐ Pre-K ☐ 8th grade

☐ Kindergarten ☐ 9th grade

☐ 1st grade ☐ 10th grade

☐ 2nd grade ☐ 11th grade

☐ 3rd grade ☐ 12th grade

☐ 4th grade Education

☐ 5th grade Students 18 to 22 years old

☐ 6th grade

☐ Ungraded

☐ Value Missing

Gender:

Ethnicity:

Special Education:

Special Needs:

IEP:

Limited English:

Free/Reduced Lunch:

School Attending:

Zip Code:

Service Parameters

Staff:

Service Formats:

Partner:

Service Category:

Activity Name:

Attendance Date Range (Begin):

Attendance Date Range (End):

Min Days of Attendance:

Max Days of Attendance:

Other Parameters

Walk Home Alone:

Ride 21C bus:

Permission to use Photos:

Behavior Plan:

Allergies:

Medicine:

QUERY TOOL RESULTS Return

SFUSD - Demo 22 people found

Name	DOB
Barker, Ben	
Belden, Jim	
Claremont, Erica	8/19/2001
Dubour, Alex	2/15/1980
Dumigas, Jessie	4/16/1989
Dwight, Bryan	
Estleman, Jim	
Flores, Luis	
Grimaldi, Robert	
Haverhill, Brett	
Hill, Pat	
Jeter, Derek	12/12/1989
Jones, John	
Lane, Candy	12/1/1991
Mull, Dee	
Ronald, Myers	
Santos, John	
Sanders, Barbara	
Scott, Paul	1/2/2003
Smith, Raymond	
Squarepants, Spongebob	
Wilburn, Wilbur	1/1/1989

Fig 19.3

You will be brought back to the main page of the query tool, but the blue in the top right corner will now say "Selected Persons:" and the number from your original search.

4. If you are happy with the selection click "Return" again. If not, revise your search repeating steps 1 & 2.

ADV. SEARCH Clear Find Person Return

SFUSD - Demo Selected Persons:22

Parameters

Person Type:

Active Status:

Min Age:

Max Age:

Fig 19.4

Once the query tool is set to a group of youth, it will not change until you reset it or until you log out.

The query search can be used both in enrollment and in many reports.

Enrollment Query Tool: Activity Name

Service Parameters

Staff:

Service Formats:

Partner:

Service Category:

Activity Name: Click to edit field

Attendance Date Range (Begin):

Attendance Date Range (End):

Min Days of Attendance:

Max Days of Attendance:

Fig 20.1

ADV. SEARCH Return

Activity Name

[All / Clear](#)

☐ Art w/ Brian

☐ Art w/ Brian 2

☐ Dance

☐ Drop-in Test Activity

☐ ExCEL - Franklin - Snack/Awesome Architects M,W 3:25-5:00

☐ ExCEL - SF School - Aerobics/Gymnastics 3:00-4:30

☐ ExCEL - SF School - Funkinomics T,Th 4:30-6:00

☐ ExCEL - SF School - Homework Power Hour M-Th 4:00-5:00

☐ ExCEL - SF School - Snack/Art Enrichment 1:50-3:00

☒ ExCEL - SF School - Snack/Art Enrichment M,W,F 1:50-3:00

☐ ExCEL - SF School - Snack/Recreation T, Th 1:50-3:00

Fig 20.2

You can also use the Query Tool to copy the enrollment of one or more activities. To do this:

1. Click on the "Click to edit field" (Fig 20.1) button next to Activity Name.
2. Check off the box next to the activity whose enrollment data you wish to duplicate (Fig 20.2).
3. Click the yellow "Return" tab (Fig 20.2).

This will take you back to the main query screen. (Fig 19.2 on page 23)

4. Click the yellow "Find Person" tab.
5. A list of youth will appear on your screen with the number of youth selected (Fig 20.3).
6. Click the yellow "Return" tab (Fig 20.3).
7. You will return to the main Query Tool page (magnified in Fig 20.4).
8. If you are happy with your selection, click the yellow tab "Return" (Fig 20.4).
9. If you are unhappy with your selection, revise your search by repeating steps 1 through 7.

QUERY TOOL RESULTS Return

SFUSD - Demo 22 people found

Name	DOB
Barker, Ben	
Belden, Jim	
Claremont, Erica	8/19/2001
Dubourt, Alex	2/15/1980
Dumgas, Jessie	4/16/1989
Dwight, Bryan	
Eshlemen, Jim	
Flores, Luis	
Grimaldi, Robert	
Haverhill, Brett	
Hill, Pat	
Keter, Derek	12/12/1989
Jones, John	
Lane, Candy	12/1/1991
Mull, Dee	
Ronald, myers	
Samos, John	
Sanders, Barbara	
Scott, Paul	1/2/2003
Smith, Raymond	
Squarepants, Spongebob	
Wilburn, Wilbur	1/1/1989

Fig 20.3

ADV. SEARCH Clear Find Person Return

SFUSD - Demo Selected Persons: 22

Parameters

Person Type:

Active Status:

Min Age:

Max Age:

Fig 20.4

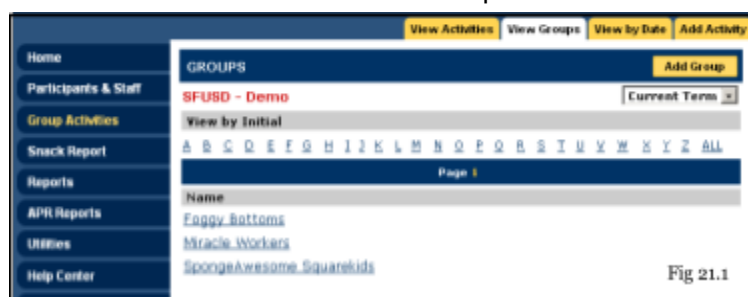
Linking Activities

Groups

Many programs organize the programs so that all 1st graders stick together all day while they meet the 3 ExCEL required areas of Academics, Enrichment and Recreation. EMS allows you to create the individual activities and then link them so that you can:

1. Enroll youth ONCE into a group. All linked activities will automatically be enrolled with these youth.
2. Take attendance ONCE daily by group.

To utilize this feature follow the steps below.



To create a new Group in order to link multiple activities:

1. In the group activities section click on the yellow "View Groups" tab.
2. Click on the yellow "Add Group" tab.

You will be brought to the "Create Group" window.

1. Name the group
2. Provide a description of the group
3. Click the yellow "Create" button



From here, you can add youth OR activities to the group. Once youth are enrolled in the group they will be enrolled in any activity that is added to the group.

1. Click on "Click Here to Link Participants."
2. To Link Activities first go to fig 23.

You will be brought to the "Link Participants" screen. You may enroll youth in several ways:

1. Input one youth at a time by using the First Name or Last Name search.
2. Click on the letter of the last name of the youth.
3. Click on "ALL" to view all youth in your school site.

Linking Activities Groups - con't

In this example a search was made by an individual's last name (Barker). All youth with the name "Barker" will appear below. Select the individual(s) by checking the box next to their name and click "Link Selected Participants".

LINK PARTICIPANTS Return

SpongeAwesome Squarekids

Search By Last Name 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

Search: First Name: Last Name: **barker** Find Person

Check the participants you wish to link with this group and click "Link Selected Participants" to continue.

Select	Last Name	First Name
<input checked="" type="checkbox"/>	Barker	Ben

Link Selected Participants

Fig 22.1

In this example a search was made by searching by the Last Name Initial "R". Clicking on the "R" will show all youth with an R last name below. Select individual(s) using the check box next to their name and click "Link Selected Participants".

LINK PARTICIPANTS Return

SpongeAwesome Squarekids

Search By Last Name 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

Search: First Name: Last Name: **R** Find Person

Check the participants you wish to link with this group and click "Link Selected Participants" to continue.

Link Selected Participants

Select	Last Name	First Name
<input checked="" type="checkbox"/>	Rankin	James
<input type="checkbox"/>	Roberts	Brian
<input type="checkbox"/>	ronald	myers
<input type="checkbox"/>	Ruiz	Carmen

Link Selected Participants

Fig 22.2

You will be brought to the **Confirm Link** screen below.

CONFIRM LINK Return

SpongeAwesome Squarekids

New participants you are linking to this group will automatically be enrolled into the linked activities according to the dates indicated below. You may enter alternate dates, set all dates to today's date or set all dates to the beginning of each activity.

Service Name: Enroll Date:

Link New Participants

Fig 22.3

Note:

You can link participants first OR activities first. It is up you. To see how to link activities, skip to page 23.

Linking Activities Groups - con't

General Info Participants **Activities** Attendance Group List

LINKED ACTIVITIES

SpongeAwesome Squarekids

Add

Fig 23.1

From within your new group, click on the "Activities" tab and click the yellow "Add" button.

1. You will see a list of all the activities that you have already created.
2. At this point if you have not yet created activities, go back to the main "Group Activities" tab on the left of the screen. Follow the directions on pages 3 through 7 of this User Guide.
3. If you have already created all of your activities, check off the names of the activities that you wish to link to your group and click "Link Selected Activities".

LINK ACTIVITIES Return

SpongeAwesome Squarekids

Check the activities you wish to link with this group and click "Link Selected Activities" to continue.

Link Selected Activities

Select	Activity Name
<input type="checkbox"/>	Franklin - 12-13 - Snack/Awesome Architects M,W 3:25-5:00
<input checked="" type="checkbox"/>	SF School - 12-13 - Funkinomics T,Th 4:30-6:00
<input checked="" type="checkbox"/>	SF School - 12-13 - Snack/Art Enrichment M,W,F 1:50-3:00
<input checked="" type="checkbox"/>	SF School - 12-13 - Snack/Recreation T, Th 1:50-3:00
<input type="checkbox"/>	SF School - 12-13 Community Time M-F 5:30-6:00
<input type="checkbox"/>	SF School - 12-13 Enthusiastic Enrichment M-Th 4:00-5:30
<input type="checkbox"/>	SF School - 12-13 Raucous Recreation M-Th 3:00-4:00
<input type="checkbox"/>	SF School - 12-13 Snack Friday Night Lights 1:45-5:30
<input type="checkbox"/>	SF School - 12-13 Snack/Avid Academics M-Th 1:45-3:00

Link Selected Activities

Fig 23.2

CONFIRM LINK Return

SpongeAwesome Squarekids

Participants currently linked to this group will automatically be enrolled into these activities according to the dates indicated below. You may enter alternate dates, set all dates to today's date or set all dates to the beginning of each activity.

Service Name	Enroll Date
SF School - 12-13 - Funkinomics T,Th 4:30-6:00	6/19/2012
SF School - 12-13 - Snack/Art Enrichment M,W,F 1:50-3:00	6/4/2012
SF School - 12-13 - Snack/Recreation T, Th 1:50-3:00	6/5/2012

Link New Activities

Fig 23.3

The final step to link activities in your new group is to confirm the start date for each activity. You will have three choices:

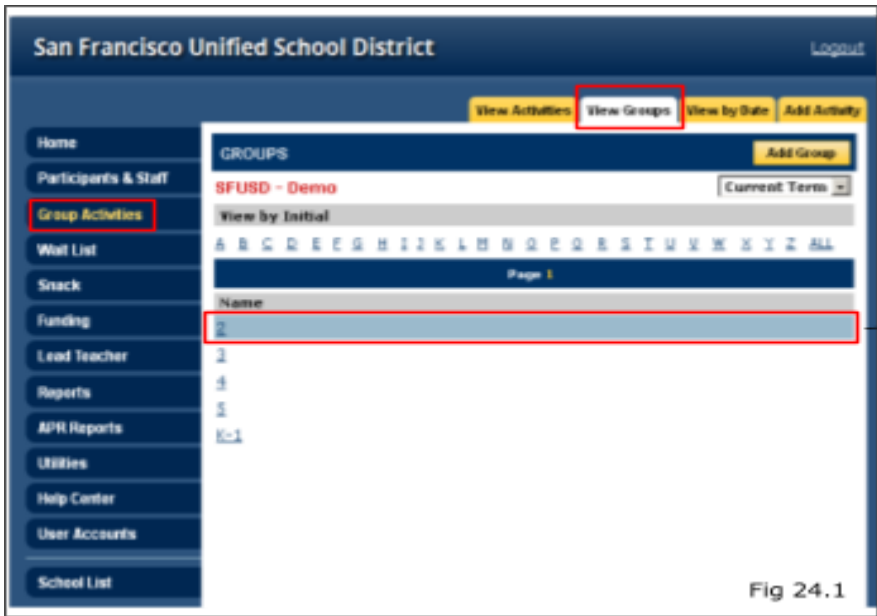
1. Choose "today's date"
2. Set the dates to the first date of each activity (beginning of each activity)
3. Manually enter a date in the box to the right of the activity

Linking Activities

Changing Groups

Drop From Outgoing Group

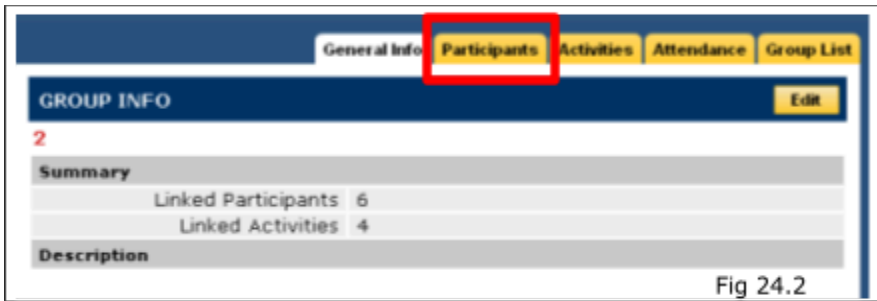
Often, youth move from one group to the next. This is achievable within EMS, but to prevent confusion and ensure accuracy, it is important to DROP the youth from the OUTGOING group and then ENROLL the youth into the INCOMING group. To do this, follow the steps on the next 4 pages.



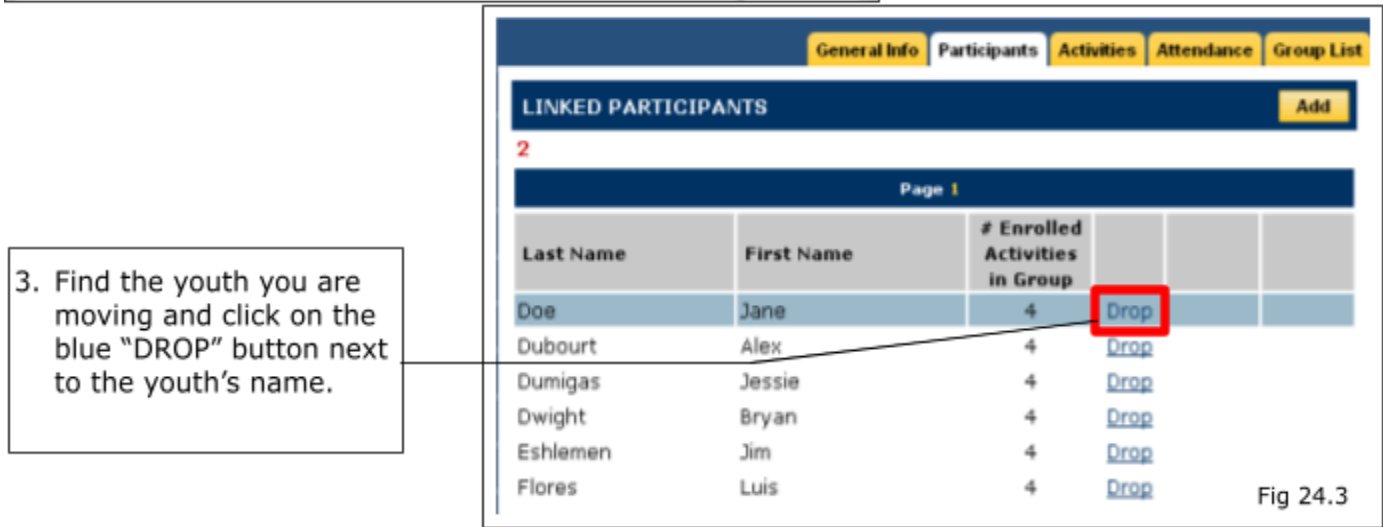
From the "View Group" tab under Group Activities.

1. select the youth's OUTGOING Group.

In this example, the OUTGOING group is 2 and the INCOMING group is 3.



2. Click on "Participants"



3. Find the youth you are moving and click on the blue "DROP" button next to the youth's name.

Linking Activities Changing Groups

DROP FROM OUTGOING GROUP - con't

BULK DROP Cancel

Jane Doe (2)

STEP 1: ENTER DROP DATE Next Step

Specify a drop date. This participant will be dropped from services as of the given date. **WARNING:** Entering a drop date that precedes dates with valid attendance data will result in the deletion of that data.

Enter drop date

Drop Date: (mm/dd/yyyy) Fig 25.1

The system will then ask you what date is the DROP DATE. The drop date is the youth's last day in that group. They will still have attendance within that group on the drop date.

4. Enter the youth's last day in the OUTGOING group.

5. Click "NEXT STEP"

BULK DROP Cancel

Jane Doe (2) Fig 25.2

STEP 2: SELECT SERVICES Drop Selected

Choose services to drop, then click "Drop Selected".

Select	Service Name	Service End Date
<input checked="" type="checkbox"/>	ALL 11:00AM-2:00PM Lunch and Academics M-F SUMMER 2013	8/16/2013
<input checked="" type="checkbox"/>	ALL 2:00PM-5:00PM Enrichment and Snack M-F SUMMER 2013	8/16/2013
<input checked="" type="checkbox"/>	ALL 9:00AM-11:00AM Rec M-F SUMMER 2013	8/16/2013
<input checked="" type="checkbox"/>	ALL 9:00AM-5:00PM Sign In and Out M-F SUMMER 2013	8/16/2013

IMPORTANT NOTE:

DO NOT ENTER THE SAME DROP AND ENROLL DATES. THIS WILL HAVE THE YOUTH ENROLLED IN BOTH GROUPS.

6. Check off all the activities that the youth is linked to.

7. Click "Drop Selected"

BULK DROP Cancel

Jane Doe (2)

STEP 3: CONFIRM DROP

You have chosen to drop the participant from the services listed below. Listed next to each service is the number of postdated attendance records that will be permanently destroyed. (**Warning! Data will not be recoverable.**)

Grayed out participants cannot be dropped because they have locked attendance data. Only the participants highlighted in yellow can be dropped.

Service	Postdated Attendance Records
ALL 11:00AM-2:00PM Lunch and Academics M-F SUMMER 2013	<input type="radio"/>
ALL 2:00PM-5:00PM Enrichment and Snack M-F SUMMER 2013	<input type="radio"/>
ALL 9:00AM-11:00AM Rec M-F SUMMER 2013	<input type="radio"/>
ALL 9:00AM-5:00PM Sign In and Out M-F SUMMER 2013	<input type="radio"/>

CONFIRM DROP CANCEL Fig 25.3

You will be directed to "Confirm Drop" from all the selected activities. Any present records will appear adjacent to the activity name.

8. Click "Confirm Drop"

If there are any present records, this data will be deleted when you click "Confirm Drop".

If you do not wish to delete attendance records, click "CANCEL".

General Info **Participants** **Activities** **Attendance** **Group List**

LINKED PARTICIPANTS Add

2

Page 1

Last Name	First Name	# Enrolled Activities in Group	
Dubourt	Alex	4	Drop
Dumigas	Jessie	4	Drop
Dwight	Bryan	4	Drop
Eshleman	Jim	4	Drop
Flores	Luis	4	Drop

Fig 25.4

9. Jane Doe has been successfully dropped from Group 2.

To add Jane Doe to a new Group, continue onto the next page.

Linking Activities Changing Groups

Add to Incoming Group

Now that you have DROPPED the youth from the OUTGOING group it is time to ADD them to the INCOMING group.

View Activities View Groups View by Date Add Activity

GROUPS Add Group

SFUSD - Demo Current Term

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

Name

2

3

4

5

K-1

Fig 26.1

From the View Groups tab under Group Activities:

1. Select the youth's INCOMING Group.

General Info Participants Activities Attendance Group List

GROUP INFO Edit

3

Summary

Linked Participants 4

Linked Activities 4

Description

Fig 26.2

2. Click on "Participants"

3. Click on the yellow "ADD" button.

General Info Participants Activities Attendance Group List

LINKED PARTICIPANTS Add

3

Page 1

Last Name	First Name	# Enrolled Activities in Group			
Ford	John	4	Drop		
Garcia	Brenda	4	Drop		
Goat	Kels	4	Drop		
Grimaldi	Mickaela	4	Drop		

Fig 26.3

Linking Activities Changing Groups

Add to Incoming Group - con't

LINK PARTICIPANTS Return

3

Search By Last Name 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	

Search

First Name:

Last Name:

Check the participants you wish to link with this group and click "Link Selected Participants" to continue.

Selected	Last Name	First Name
<input checked="" type="checkbox"/>	Doe	Jane

Fig 27.1

You will need to find the youth just like you would when originally enrolling them.

4. Enter the first and/or last name OR click on the first initial of their last name.

5. Check the box next to the youth's name and click "Link Selected Participants".

CONFIRM LINK Return

3

New participants you are linking to this group will automatically be enrolled into the linked activities according to the dates indicated below. You may enter alternate dates, set all dates to today's date or set all dates to the beginning of each activity.

Service Name	Enroll Date
ALL 11:00AM-2:00PM Lunch and Academics M-F SUMMER 2013	7/1/2013
ALL 2:00PM-5:00PM Enrichment and Snack M-F SUMMER 2013	7/1/2013
ALL 9:00AM-11:00AM Rec M-F SUMMER 2013	7/1/2013
ALL 9:00AM-5:00PM Sign In and Out M-F SUMMER 2013	7/1/2013

Fig 27.2

6. Enter the Enroll date for the INCOMING activity. Click "Link New Participants".

IMPORTANT NOTE:

DO NOT ENTER THE SAME DROP AND ENROLL DATES. THIS WILL HAVE THE YOUTH ENROLLED IN BOTH GROUPS.

Jane Doe has now been successfully DROPPED from the OUTGOING Group 2 and ENROLLED into the INCOMING Group 3.

LINKED PARTICIPANTS Add

3

Page 1

Last Name	First Name	# Enrolled Activities in Group	
Doe	Jane	4	Drop
Ford	John	4	Drop
Garcia	Brenda	4	Drop
Goat	Kels	4	Drop
Grimaldi	Mickaela	4	Drop

Fig 27.3

Attendance Reports

Attendance Collection Tool

Elementary and K-8 Sites:

- ExCEL Weekly Sign-In Sheet (Fig 28.1)

Middle School:

- SFUSD ExCEL Middle School Sign-In Sheet OR
- BLANK SFUSD ExCEL Middle School Sign-In Sheet

High School:

- SFUSD ExCEL High School Sign-In Sheet (Fig 28.2) OR
- BLANK SFUSD ExCEL High School Sign-In Sheet (Fig 28.3)

Elementary & K-8

Fig 28.1

High School

Fig 28.2

Middle School

Fig 28.3

Attendance Reports: Attendance Collection

ExCEL Weekly Sign In Sheet

Please select "Reports" and click on "ExCEL Weekly Sign In Sheet" to start.

The screenshot shows a web application interface. On the left is a vertical navigation menu with items: Home, Participants & Staff, Group Activities, Wait List, Snack, Funding, Lead Teacher, Reports (highlighted with a red box), APR Reports, Utilities, Help Center, User Accounts, and School List. A red arrow points from the 'Reports' menu item to the 'ExCEL Weekly Sign In Sheet' option in the main content area. The main content area is titled 'REPORTS' and 'SFUSD - Demo'. It has a 'Choose a Report' section with 'California Reports' listed below. The reports include: 'Progress by Grant Type' (with a description), 'Progress by Grant Type (Calendar Year)' (with a description), '21st CCLC/ASES Statewide Evaluation Data' (for elementary and middle schools), 'ASSETS Statewide Evaluation Data' (for high schools), 'ExCEL Weekly Sign In Sheet' (highlighted with a red box), 'SFUSD ExCEL Daily Sign-In Sheet' (with a description), 'SFUSD ExCEL High School Sign-In Sheet', 'Blank SFUSD ExCEL High School Sign-In Sheet', and 'Supplemental 6 Hour Program Single Day Attendance Sheet'. A 'Fig 29.1' label is at the bottom right of the main content area.

The screenshot shows a form titled 'EXCEL WEEKLY SIGN IN SHEET' and 'SFUSD - Demo'. It has a section 'Enter Report Parameters' with the following fields: 'Begin Date (mm/dd/yy)' with the value '8/19/13', 'End Date (mm/dd/yy)' with the value '8/23/13', 'Sort Pages By' with radio button options for 'Alphabetical', 'Activity', 'Current Grade', and 'Group' (where 'Group' is selected), and 'Add blank lines to sheet for non-enrolled students. (Enter 0-20)' with the value '5'. At the bottom are two buttons: 'Cancel' and 'Generate' (highlighted with a red box). A 'Fig 29.2' label is at the bottom left of the form.

From this portal:

1. Define the Begin and End dates (one week at a time)
2. Select how to sort the pages
 - a. Alphabetical—creates a master list of the entire program A- Z.
 - b. Activity—creates a separate sign in sheet for each activity.
 - c. Current Grade—creates a separate sign in sheet for each grade level.
 - d. Group—creates a separate sign in sheet for each group.
3. Blanks will appear on each separate sign in sheet.
4. Click on the "Generate" button.

Attendance Reports: Attendance Collection

SFUSD - ExCEL Weekly Sign In Sheet (Elementary School)

ExCEL DAILY SIGN IN SHEET

Week Of: Monday, April 20, 2015 - Friday, April 24, 2015

Program Name/Site: SFUSD - Demo

Group/Activity Name: Master List

Session Time (Start/End):

EARLY RELEASE / LATE ARRIVAL CODES:

1 - Parallel Program	5 - Transportation
2 - Family Emergency	6 - Community Safety
3 - Personal Family Circumstance	7 - Child Accident
4 - Medical Appointment	8 - Other Conditions

Student Name	Monday				Tuesday				Wednesday				Thursday				Friday			
	4/20/15	Time In	Time Out	ER Code	4/21/15	Time In	Time Out	ER Code	4/22/15	Time In	Time Out	ER Code	4/23/15	Time In	Time Out	ER Code	4/24/15	Time In	Time Out	ER Code
Barker, Ben	<input type="checkbox"/>				<input type="checkbox"/>				<input type="checkbox"/>				<input type="checkbox"/>				<input type="checkbox"/>			
Belden, Jim	<input type="checkbox"/>				<input type="checkbox"/>				<input type="checkbox"/>				<input type="checkbox"/>				<input type="checkbox"/>			
Blair, Bonnie	<input type="checkbox"/>				<input type="checkbox"/>				<input type="checkbox"/>				<input type="checkbox"/>				<input type="checkbox"/>			
Cineros, Aurelio	<input type="checkbox"/>				<input type="checkbox"/>				<input type="checkbox"/>				<input type="checkbox"/>				<input type="checkbox"/>			
Ford, John	<input type="checkbox"/>				<input type="checkbox"/>				<input type="checkbox"/>				<input type="checkbox"/>				<input type="checkbox"/>			
Garcia, Brenda	<input type="checkbox"/>				<input type="checkbox"/>				<input type="checkbox"/>				<input type="checkbox"/>				<input type="checkbox"/>			
Hong, Lucy	<input type="checkbox"/>				<input type="checkbox"/>				<input type="checkbox"/>				<input type="checkbox"/>				<input type="checkbox"/>			
Kalis, Natasha	<input type="checkbox"/>				<input type="checkbox"/>				<input type="checkbox"/>				<input type="checkbox"/>				<input type="checkbox"/>			
Pemberton, Matt	<input type="checkbox"/>				<input type="checkbox"/>				<input type="checkbox"/>				<input type="checkbox"/>				<input type="checkbox"/>			
Sanders, Barbara	<input type="checkbox"/>				<input type="checkbox"/>				<input type="checkbox"/>				<input type="checkbox"/>				<input type="checkbox"/>			
smith, smith (smithy)	<input type="checkbox"/>				<input type="checkbox"/>				<input type="checkbox"/>				<input type="checkbox"/>				<input type="checkbox"/>			
Slaverson, Catherine	<input type="checkbox"/>				<input type="checkbox"/>				<input type="checkbox"/>				<input type="checkbox"/>				<input type="checkbox"/>			

Fig 30.1

In the **ExCEL Weekly Sign In Sheet** above, please note the following:

1. The date range, school site and Group/Activity Name will appear in the upper left hand corner.
2. An Early Release/Late Arrival Legend will appear in the upper right hand corner.
3. Staff signature line with Date is to be signed off at the end of a week.
4. Daily totals should be input in the bottom right hand area: M Total for Monday, Tu Total for Tuesday and so on.

Signing In and Out

Staff need to check or X the students who are present then enter the time in and time out.

Early Release

Early Release Codes should be entered on the Early Release column for students who leave early.

Attendance Reports: Attendance Collection

SFUSD - ExCEL Weekly Sign In Sheet

(Middle School)

ExCEL DAILY SIGN IN SHEET

Week Of: Monday, April 20, 2015 - Friday, April 24, 2015
 Program Name/Site: SFUSD - Demo
 Group/Activity Name: Master List
 Session Time (Start/End):

EARLY RELEASE / LATE ARRIVAL CODES:	
1 - Parallel Program	5 - Transportation
2 - Family Emergency	6 - Community Safety
3 - Personal Family Circumstance	7 - Child Accident
4 - Medical Appointment	8 - Other Conditions

Student Name	Monday				Tuesday				Wednesday				Thursday				Friday			
	4/20/15	Time In	Time Out	ER Code	4/21/15	Time In	Time Out	ER Code	4/22/15	Time In	Time Out	ER Code	4/23/15	Time In	Time Out	ER Code	4/24/15	Time In	Time Out	ER Code
Barker, Ben	<input type="checkbox"/>				<input type="checkbox"/>				<input type="checkbox"/>				<input type="checkbox"/>				<input type="checkbox"/>			
Belden, Jim	<input type="checkbox"/>				<input type="checkbox"/>				<input type="checkbox"/>				<input type="checkbox"/>				<input type="checkbox"/>			
Blair, Bonnie	<input type="checkbox"/>				<input type="checkbox"/>				<input type="checkbox"/>				<input type="checkbox"/>				<input type="checkbox"/>			
Cisneros, Aurelio	<input type="checkbox"/>				<input type="checkbox"/>				<input type="checkbox"/>				<input type="checkbox"/>				<input type="checkbox"/>			
Ford, John	<input type="checkbox"/>				<input type="checkbox"/>				<input type="checkbox"/>				<input type="checkbox"/>				<input type="checkbox"/>			
Garcia, Brenda	<input type="checkbox"/>				<input type="checkbox"/>				<input type="checkbox"/>				<input type="checkbox"/>				<input type="checkbox"/>			
Hong, Lucy	<input type="checkbox"/>				<input type="checkbox"/>				<input type="checkbox"/>				<input type="checkbox"/>				<input type="checkbox"/>			
Kalia, Natasha	<input type="checkbox"/>				<input type="checkbox"/>				<input type="checkbox"/>				<input type="checkbox"/>				<input type="checkbox"/>			
Pemberton, Matt	<input type="checkbox"/>				<input type="checkbox"/>				<input type="checkbox"/>				<input type="checkbox"/>				<input type="checkbox"/>			
Sanders, Barbara	<input type="checkbox"/>				<input type="checkbox"/>				<input type="checkbox"/>				<input type="checkbox"/>				<input type="checkbox"/>			
Smith, Smith (Smithy)	<input type="checkbox"/>				<input type="checkbox"/>				<input type="checkbox"/>				<input type="checkbox"/>				<input type="checkbox"/>			
Stevenson, Catherine	<input type="checkbox"/>				<input type="checkbox"/>				<input type="checkbox"/>				<input type="checkbox"/>				<input type="checkbox"/>			

Important Note:

Middle schools can also print out BLANK sign in sheets.

From the Attendance Collection Tools click on BLANK SFUSD ExCEL MS Sign In Sheet.

In the example above, clicking on **"SFUSD ExCEL Middle School Sign-In Sheet"** will bring you to where you can customize the sign in sheet.

1. Input the day and then choose how to sort the pages.
2. In this example by choosing "Alphabetical" the weekly Sign-In sheet will display all youth enrolled in any activity that week in alphabetical order.
3. In "Add Blank" it says "5", so at the last page of the sign-in sheet there are 5 blank slots for new students to write in their name.

To have youth sign in by an individual activity Sign In sheet:

1. Be sure to choose Activity under Sort Pages By.
2. This will list all daily activities arranged alphabetically AND by the time of the activity sessions.

Sites can also choose to have youth sign in/out by grade level. To do this, check the Grade box in the Sort Pages By section.

Attendance Reports: Attendance Collection

SFUSD - ExCEL Weekly Sign In Sheet (High School)

Attendance Collection Tools

SFUSD Middle School Sign In Sheet

SFUSD HS Attendance Sheet
This report allows users to print attendance sheets spanning up to 5 days for each service that meets within the specified time period.

SFUSD HS Attendance Sheet (Blank)
This report allows users to print a blank attendance sheet spanning 5 days.

ExCEL Weekly Sign In Sheet

ExCEL SB 429 6-Hour Weekly Sign In Sheet

Blank ExCEL Weekly Sign In Sheet

Fig 31.1

SFUSD HS ATTENDANCE SHEET

SFUSD - Demo

Enter Report Parameters

Begin Date (mm/dd/yy)

Number of Days ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5

Exclude Time In ☐ Exclude Time In

Exclude Time Out ☐ Exclude Time Out

Extra Attendance Rows (Enter 1-20)

Services (Select All/None) ☐ 1st - 3rd 1:45PM-3:00PM
☐ Snack/Academics M-F 12-13
☐ 3rd Grade 8:30AM-11:30AM Summer Arts M-F SUMMER 2015

Fig 31.2

ExCEL DAILY SIGN IN SHEET

Week of: 2/17/15 - 2/23/15

Program Name/Title: SFUSD - Demo

Group/Activity Name: Library 3:00PM-6:00PM Library M-F 14-15

Session Time (start/end): 3:00 PM - 6:00 PM

Student Name	Tuesday 2/17/15	Wednesday 2/18/15	Thursday 2/19/15	Friday 2/20/15	Monday 2/23/15
Barker, Dan	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

By signing, I attest that the above information is true to the best of my knowledge.

Staff Name: Staff Signature: Date: M Total: Tu Total: W Total: Th Total: F Total:

Fig 31.3

ExCEL DAILY SIGN IN SHEET

Week of: 2/17/15 - 2/23/15

Program Name/Title: SFUSD - Demo

Group/Activity Name: Library 3:00PM-6:00PM Library M-F 14-15

Session Time (start/end): 3:00 PM - 6:00 PM

Student Name	Tuesday 2/17/15	Wednesday 2/18/15	Thursday 2/19/15	Friday 2/20/15	Monday 2/23/15
Barker, Dan	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

By signing, I attest that the above information is true to the best of my knowledge.

Staff Name: Staff Signature: Date: M Total: Tu Total: W Total: Th Total: F Total:

Fig 31.4

This process is almost identical to that on page 30 (**ADD TO INCOMING GROUP**).

In the example above, clicking on SFUSD ExCEL High School Sign-In Sheet (Fig 31.1) will bring you to Figure 31.2 where you can customize the sign in sheet.

1. Input the day and then choose the number of days.
2. If Times are not desired, check off the "Hide Time In & Time Out Columns".
3. In "Add Blank" it says "10", so at the last page of the Master list (Fig 31.4) there are 10 blank slots for new students to write in their name.
4. Choose the activity/ activities you want to print the attendance sheets for.

IMPORTANT NOTE

High schools can also print out BLANK sign in sheets. From the Attendance Collection Tools, click on BLANK SFUSD ExCEL HS Sign In Sheet. This can be printed with or without "Time In " and "Time Out".

Attendance Reports: Attendance Collection BO Report Complete Participant Attendance Sheet (Duplicated)

San Francisco Unified School District

BUSINESS OBJECTS REPORTS

General (3)

Complete Participant Attendance Sheet (Duplicated)
(no description)

Program Summary
(no description)

Program Summary Amendment
(no description)

San Francisco Unified School District

COMPLETE PARTICIPANT ATTENDANCE SHEET (DUPLICATED)

Enter Report Parameters

Enter Full Date(Start) 3/10/2015

Enter Full Date(End) 3/17/2015

Enter Site Name ☒ A.R. Giannini Middle (Beacon)

Select All / None

Generate

Complete Participant Attendance Sheet (Duplicated)

Participant Name	Student ID	03/10/2015	03/11/2015	03/12/2015	03/13/2015
Alarova, Catherine	2001102	4	4	4	4
Alarova, Alexander	2001101	4	4	4	4
Amis, Eric	20030732			1	
Anzini, Andrea	8625386	4	4	4	4
Anzini, Carlos	2003087	4	4	4	4
Ault, Royal	2001899	4	4	4	0
Ayuning, Victoria	2001586	4	4	4	4
Bertoni, Giovanni	20048525	4	4	4	4
Bertoni, Giuseppe	20048526	4	4	4	4
Bethel, Emma	20041029			1	
Bhongsua, Rutaporn	20036274	4	4	0	0
Bloom, Kai	20050436	4	4	4	4
Burns, Kaleb	20050286	4	4	4	4
Bryce, Owen	20041126	4	4	4	4
Cam, Crystal	20047182	4	4	4	4
Can, Chunsheng	2005437	4	4	4	0
Castro, Erika	20042885	4	4	4	4
Can, Michael	2001308	4	4	4	4
Chan, Curtis	20036321	4	4	4	4

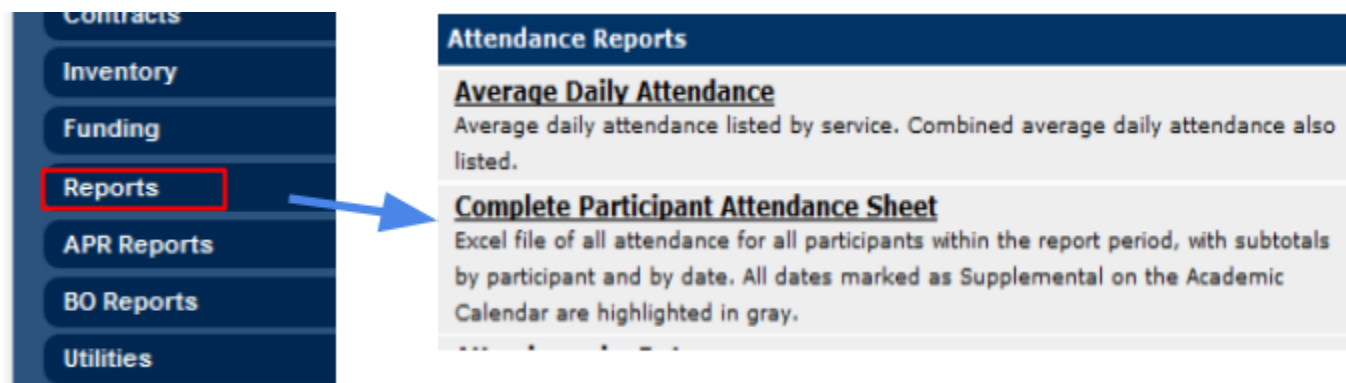
Participant Name	Student ID	03/16/2015	03/17/2015	Total per student
Wuttsan, Shasupol	20048671	4	4	24
Kovner, Lauren	20048422	4	4	24
Kuo, Shirley	20048018	4	4	16
Yan, Carmen	20071177	4	0	20
Yang, Julie	20062647	4	0	12
Yang, Xinlong	20073231	4	4	24
Yan, Leo	20047209	4	0	12
Yes, Cameron	20048401	4	4	20
Young, Nicholas	20031851	0	0	16
Yu, Bonnie	20048371	4	4	24
Yu, Gavin	20048182	4	4	24
Yu, Jasmine	86253501	4	4	24
Yu, Qilin	20052918	4	4	24
Yu, Zhenyu	20048841	4	4	24
Zhang, Alan	20051328	4	4	24
Zhang, Chunlin	20072159	4	4	24
Zhang, Luyan	20072030	4	4	25
Zhen, Franklin	20048059	4	4	20
Zheng, Zhey	20048670	4	4	20
Zhou, Jamei	20044847	4	4	24
Total per day:		788	760	4,776

In the example above, clicking on BO Reports will bring you to figure where you can generate the **Complete Participant Attendance Sheet (Duplicated)**. This report will allow sites to track which students attended multiple activities in a day.

1. Input the dates and then choose your site.
2. Click last to see how many times students participated in the program on any given day. This report allows sites to input attendance as is without having to manually sort out the attendance themselves.
3. The "total per day" should match the hard count on the sign-in sheets.

Attendance Reports

Generating the Complete Participant Attendance Sheet



COMPLETE PARTICIPANT ATTENDANCE SHEET

SFUSD - Alvarado Elementary

Enter Report Parameters

Begin Date (mm/dd/yyyy)	8/18/2014	
End Date (mm/dd/yyyy)	10/31/2014	
Query Tool (Optional)	<input type="checkbox"/> Filter using results from Query Tool	

Cancel

Generate

Attendance Detail By Date
From 8/18/2014 to 10/31/2014
Date of Report: 8/26/2015

1 = present
0 = absent or not applicable
na = attendance not complete

Participant Name	Client ID	8/18/2014	8/19/2014	8/20/2014	8/21/2014	8/22/2014	Total
All Services							
name	ID	1	1	1	1	1	52
name	ID						0
name	ID	1	1	1	1	1	52
name	ID	1	1	1	1	1	50
name	ID	1	1	1	1	1	52
name	ID	0	1	1	1	0	47
name	ID	1	1	1	1	1	52
name	ID	1	1	1	1	1	52
name	ID	1	1	1	1	1	52
name	ID	0	1	1	1	1	48
name	ID	1	1	1	1	0	28
name	ID	1	1	0	1	1	44
name	ID	1	1	1	1	1	49
name	ID	0	0	0	0	0	0
name	ID	0	0	1	0	1	31
name	ID	0	0	0	0	0	0
name	ID	0	1	1	1	1	49
		253	264	283	272	263	14496

How to generate the report:

1. Click on reports
2. Select Complete Participant Attendance sheet
3. Enter Begin date and end date for report
4. Click Generate

This report shows sites their attendance information broken down by student and by day.

Important note:

This report is best for Elementary sites that do not have a before school grant (see next page for sites that have a before school grant).

How to read the report:

As a site coordinator compare the total number for each day with the hard copy count. The numbers should match.

Inputting Attendance Weekly Attendance

Sites can now submit attendance in a weekly format.

San Francisco Unified School District

Logout

General Info Enrollment Attendance Reports Activity List

Home

Participants & Staff

Group Activities

Wait List

Snack

Quality Action Plan

Academic Liaison

Funding

Contracts

Inventory

Funding

Reports

APR Reports

BO Reports

Utilities

Help Center

User Accounts

School List

WEEKS OF ATTENDANCE

Group 1 3:00PM-6:00PM Circle Games M-F 16-17

Click on Week to Enter Attendance

Week	Status
2016	
7/31/2016-8/6/2016	Complete
8/14/2016-8/20/2016	Complete
8/21/2016-8/27/2016	Complete
8/28/2016-9/3/2016	Complete
9/4/2016-9/10/2016	Incomplete
9/11/2016-9/17/2016	Incomplete
9/18/2016-9/24/2016	Incomplete
9/25/2016-10/1/2016	Incomplete
10/2/2016-10/8/2016	Incomplete
10/9/2016-10/15/2016	Incomplete
10/16/2016-10/22/2016	Incomplete
10/23/2016-10/29/2016	Incomplete
10/30/2016-11/5/2016	Incomplete
11/6/2016-11/12/2016	Incomplete
11/13/2016-11/19/2016	Incomplete
11/20/2016-11/26/2016	Incomplete
11/27/2016-12/3/2016	Incomplete
12/4/2016-12/10/2016	Incomplete
12/11/2016-12/17/2016	Incomplete
2017	

Select the week that you want to enter attendance.

Status:

Complete - when you complete all of the attendance.

Incomplete - weeks that you still need to enter attendance.

San Francisco Unified School District

Logout

General Info Enrollment Attendance Reports Activity List

Home

Participants & Staff

Group Activities

Wait List

Snack

Quality Action Plan

Academic Liaison

Funding

Contracts

Inventory

Funding

Reports

APR Reports

WEEKLY ATTENDANCE

Group 1 3:00PM-6:00PM Circle Games M-F 16-17

Completed ☐

< Save & Prior Week Mar 5, 17 - Mar 11, 17 Save & Next Week >

All Present Clear

Click on "All Present" to indicate that all participants were present throughout the week. If a specific participant was absent on one or more of the days, simply click in the box next to his or her name to remove the check mark. If you would like to do attendance for less than a week or for only a few participants, do not select "All Present." Instead, simply click in the appropriate boxes to mark the participant as present.

Participant Name (3)	Su 3/5	M 3/6	T 3/7	W 3/8	Th 3/9	F 3/10	Sa 3/11
Doe, Jane	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Hong, Lucy	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
smith, smith	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

All Present - will mark all students present.

Clear - Pressing this will clear all attendance for that week. (Be careful when selecting this function.)

Inputting Attendance Group Activities

Attendance is due AND the system will lock on the **5th of every month**, unless otherwise noted by the ExCEL office.

Best Practice:

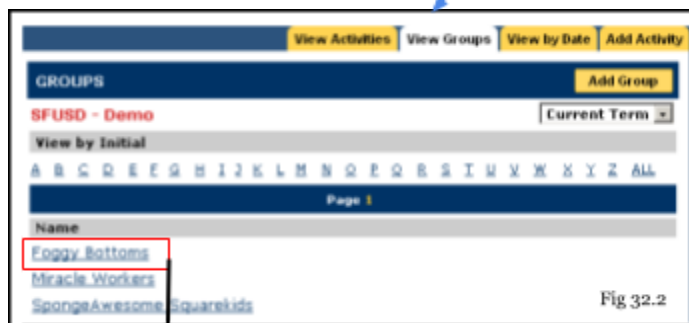
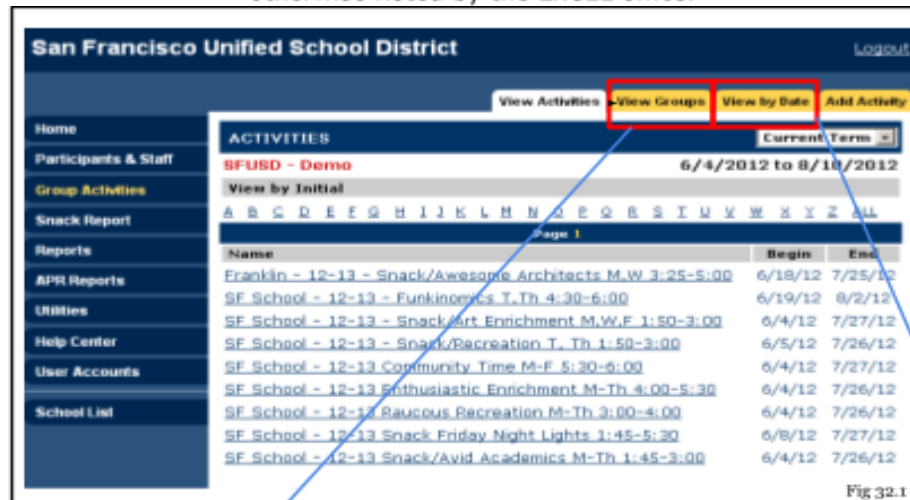
It is recommended that sites input attendance within EMS daily. This will help catch possible errors and ensure that the site is maintaining the proper Average Daily Attendance.

Inputting Daily will also help prevent spending hours inputting attendance at the last minute.

There are two ways to take attendance for the entire program so that you only input once for each child.

Both require you to be in the Group Activities tab.

1. Click on "View Groups"
2. Click on "View by Date"



For "Groups"

1. Click on the name of the **group** for which you wish to take attendance (Fig 32.2).
2. Click on the day for which you wish to take attendance (Fig 32.3).
3. Continue on page 33.

For "View By Date"

1. Click on the date for which you wish to take attendance (Fig 32.4).
2. Continue on page 34.

Inputting Attendance By Group

ATTENDANCE All Present Clear Save Return

Foggy Bottoms

< Save & Prev Day Tue, Jun 12, 12 Save & Next Day >

Click to mark all present for the service Click to mark all absent for the service

Click to mark all present for the participant Click to mark all absent for the participant

Participant	SF School - 12-13 Community Time M-F 5:30-6:00	SF School - 12-13 Enthusiastic Enrichment M-Th 4:00-5:30	SF School - 12-13 Raucous Recreation M-Th 3:00-4:00	SF School - 12-13 Snack/Avid Academics M-Th 1:45-3:00
Barker, Ben				
Belden, Jim				
Dumigas, Jesse				
Dwight, Bryan				
Eshlemen, Jim				
Grimaldi, Robert				
Horowitz, John				
Jones, Susie				
Malibu, Kevin				
Mull, Dee				
Rankin, James				
Ruiz, Carmen				
Sampson, Salvador				
Smeith, Jane				
Smith, Lawrence				
Squarepants, Spongebob				
Wilburn, Wilbur				

Fig 33.1

When taking attendance under Group activities you will have four options for marking students present:

1. The yellow "All Present Tab".
2. The downward facing, green "Mark all present for the service" arrow.
3. The right facing, green "Mark all present for the participant" arrow.
4. Check the box in the left column for the activity that a youth is present.

You will have three options for marking youth absent:

1. The downward facing, red "Mark all absent for service" arrow.
2. The right facing, red "Mark all absent for the participant" arrow.
3. Check the box in the right column for the activity that a youth is absent.

When you have completed taking attendance for an individual group click on the yellow "SAVE" button.

 to mark all present for the service', 'Click to mark all absent for the service', 'Click to mark all present for the participant', and 'Click to mark all absent for the participant'."/>

Click to mark all present for the service Click to mark all absent for the service

Click to mark all present for the participant Click to mark all absent for the participant

Fig 33.2

Inputting Attendance View By Date

When a youth is marked present or absent from this View By Date screen, they will be present or absent for the whole day.

To aide in attendance taking, staff can use the yellow "All Present" button and then only mark those youth that were absent OR conversely staff can use the yellow "All Absent" buttons and then only mark those youth that were present.

Be sure to SAVE when you are done.

ATTENDANCE **Save** **Return**

[<< Prev Date](#) Wednesday, June 13, 2012 [Next Date >>](#)

(Page 1 of 2)
1 2

Save & Next 25 >

All Present **All Absent** **Clear**

Sort By: Participant Name / [Activity](#) / [Grade Level](#)

Present in All Activities	Absent in All Activities	Mixed Attend.	Participant Name (36)
<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	Barker, Ben
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Belden, Jim
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Claremont, Erica
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Collado, Skye
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Doe, Jane
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Dubourt, Alex
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Dumigas, Jessie
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Dwight, Bryan
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Eshlemen, Jim
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Flores, Luis
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Ford, John
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Goat, Kels
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Grimaldi, Robert
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Haverhill, Brett
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Hill, Pat
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Horowitz, John
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Jeter, Derek
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Jones, John
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Jones, Susie
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Lane, Candy
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Malibu, Kevin
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Mull, Dee
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Rankin, James
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	ronald, myers
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Ruiz, Carmen

(Page 1 of 2)
1 2

Save & Next 25 >

You can choose to sort by Participant Name, Activity Name or Grade Level.

In all three sort options students will be listed alphabetically by last name.

For Activity Name and Grade level sorting, there will be no visible separation in the list. Rather, breaks will be denoted by changes in alphabetization (ie, suddenly Watson is followed by Abad.) This is not always obvious as sometimes the first youth in an activity or grade has a last name with a B or C.

Fig 34.1

Funding Matching Funds

All programs are expected to provide a match of 33% of the agencies' total contract amount. Use this module to account for these funds.

San Francisco Unified School District [Logout](#)

Home
Participants & Staff
Group Activities
Wait List
Snack
Funding
Lead Teacher
Reports
APR Reports
Utilities
Help Center
User Accounts
School List

SERVICE SITE [Edit](#)

SFUSD - Demo

Site Coordinator Name	Phone	Email
Site Coordinator	415-555-9999	scoordinator@leadagency.org

Site Assistant Name	Phone	Email
Assistant Site Coordinator	415-555-1122	asitecoordinator@leadagency.org

Street Address	City	St.	ZIP
1234 Namea Street	San Francisco	CA	941\$%

Site Phone 1	Site Phone 2	Site Fax
415-555-1234		415-555-5678

Description

The SFUSD ExCEL demo site provides services to local youth ages 5 to 10 in the areas of academic tutoring, academic enrichment programs, and structured physical education workshops that supports every student participants ability to be successful academically, included in daily programs and projects, and to strive to be healthy and physically fit. Services are provided at San Francisco School, a local community school which resides in the SF Neighborhood distirict. In the current fiscal year, the program will serve 80-100 youth of diverse demographic backgrounds. Of this number, all youth will receive academic services, which will be provided by 4 program lead staff. Activities at the school site range from structured academic classes to outdoor activities and sports throughout the week.

Fig 35.1

From the main screen:

1. Click on the Funding tab. (Fig 35.1)
This will take you to the screen below.

2. Click on "Matching Funds FY xxxx-xxxx"

FUNDING

SFUSD - Demo

Matching Funds

[Matching Funds FY 2013-2014](#)

ExCEL Program Fees

[ExCEL Program Fees FY 2013-2014](#)

Fig 35.2

Funding Matching Funds - con't

MATCHING REQUIREMENTS Save Return

SFUSD - Demo

21st Century Base

Contract Amount

Matching requirement is met via ☒ DCYF ☐ Cash ☐ In-Kind

DCYF Amount

Cash Amount

In-Kind Value

In-Kind Source

Brief description of how funds are used in program

21st Century Supplemental

Contract Amount

Matching requirement is met via ☐ DCYF ☐ Cash ☒ In-Kind

In-Kind Value

In-Kind Source

Brief description of how funds are used in program

ASES Base

Contract Amount

Matching requirement is met via ☒ DCYF ☐ Cash ☐ In-Kind

DCYF Amount

Brief description of how funds are used in program

Fig 36.1

From the "Matching Funds" page you will see a list of every grant type:

- 21st Century Base
- 21st Century Supplemental
- ASES Base
- ASES Supplemental

Enter the Contract Amount for each grant type for which your agency has a contract.

Check the box for every applicable match source.

A new box will appear to add the value of the match, per funding source.

Enter a brief description explaining how the match funds are used at the site.

MATCHING REQUIREMENTS Save Return

SFUSD - Demo

21st Century Base

Contract Amount

Matching requirement is met via ☒ DCYF ☒ Cash ☒ In-Kind

DCYF Amount

Cash Amount

In-Kind Value

Fig 36.2

Once completed click the SAVE button.

Funding ExCEL Program Fees

Some programs charge fees to families in the course of business. Please use this section to document which fees, if any, are charged to ExCEL families.

San Francisco Unified School District [Logout](#)

Home
Participants & Staff
Group Activities
Wait List
Snack
Funding
Lead Teacher
Reports
APR Reports
Utilities
Help Center
User Accounts
School List

SERVICE SITE [Edit](#)

SFUSD - Demo

Site Coordinator Name	Phone	Email	
Site Coordinator	415-555-9999	scoordinator@leadagency.org	
Site Assistant Name	Phone	Email	
Assistant Site Coordinator	415-555-1122	asitecoordinator@leadagency.org	
Street Address	City	St.	ZIP
1234 Namea Street	San Francisco	CA	9415%
Site Phone 1	Site Phone 2	Site Fax	
415-555-1234		415-555-5678	

Description

The SFUSD ExCEL demo site provides services to local youth ages 5 to 10 in the areas of academic tutoring, academic enrichment programs, and structured physical education workshops that supports every student participants ability to be successful academically, included in daily programs and projects, and to strive to be healthy and physically fit. Services are provided at San Francisco School, a local community school which resides in the SF Neighborhood district. In the current fiscal year, the program will serve 80-100 youth of diverse demographic backgrounds. Of this number, all youth will receive academic services, which will be provided by 4 program lead staff. Activities at the school site range from structured academic classes to outdoor activities and sports throughout the week.

Fig 37.1

From the main screen:

1. Click on the Funding tab. (Fig 37.1)
This will take you to the screen below.

FUNDING

SFUSD - Demo

Matching Funds

[Matching Funds FY 2013-2014](#)

ExCEL Program Fees

[ExCEL Program Fees FY 2013-2014](#)

Fig 37.2

2. Click on "ExCEL Program Fees FY xxxx-xxxx"

Funding ExCEL Program Fees - con't

ExCEL PROGRAM FEES Save Return

SFUSD - Demo

After School Program Fees include any fees charged to families. This includes, but is not limited to: tuition, enrollment fees, application fees, snack fee, supplies fees etc.

The SFUSD - Demo ExCEL After School Program

Section 1: The ExCEL after school program:

☒ Does NOT charge any fees to families

☐ Does charge fees to families (if program charges fees proceed to sections 2 & 3)

If other, please specify

Fig 38.1

From the "ExCEL Program Fees" page you will be asked to specify whether your program DOES or DOES NOT charge fees to families.

Check the appropriate box.

ExCEL PROGRAM FEES Save Return

SFUSD - Demo

After School Program Fees include any fees charged to families. This includes, but is not limited to: tuition, enrollment fees, application fees, snack fee, supplies fees etc.

The SFUSD - Demo ExCEL After School Program

Section 1: The ExCEL after school program:

☐ Does NOT charge any fees to families

☒ Does charge fees to families (if program charges fees proceed to sections 2 & 3)

Section 2: If fees are charged, the following CDE requirements have been met

☒ All program materials related to outreach and enrollment clearly state that no child will be denied services due to inability to pay

☒ A sliding scale of fees and scholarships is provided for those who cannot afford to pay

☒ All income collected from fees is used to fund program activities specified in the contract. Fees generated from fees are subject to audit and program monitoring so programs must maintain documentation for a period of five (5) years.

Section 3: Program fees charged: (check all that apply)

☐ Tuition

☒ Registration/Enrollment fee

☐ Application fee

☒ Snack fee

☐ Supplies fee

☐ Other

If other, please specify

Fig 38.2

Once completed click the yellow "Save" button.

Check all CDE requirements that are met by the program.

Use this space to identify any fees that are charged that do not fit into the options already presented.

IMPORTANT NOTE:

If you have completed Sections 2 & 3, rechecking "Does NOT charge any fees to families" will wipe all information input into sections 2 & 3.

Inventory

Items purchased through ExCEL After School Programs funds (ASES, 21st CCLC and ASSETS including Base and Supplemental) which value \$100 or over (per item) must be inventoried on the EMS inventory feature upon receipt. All items must be tagged using the EMS generated tags.

San Francisco Unified School District

Logout

Home

Participants & Staff

Group Activities

Wait List

Snack

Quality Action Plan

Lead Teacher

Contracts

Inventory

Funding

Reports

SERVICE SITE Edit

SFUSD - Demo

Site Coordinator Name	Phone	Email	
Site Coordinator	415-555-9999	scoordinator@leadagency.org	
Site Assistant Name	Phone	Email	
Assistant Site Coordinator	415-555-1122	asitecoordinator@leadagency.org	
Street Address	City	SL	ZIP
1234 Napa Street	San Francisco	CA	94118
Site Phone 1	Site Phone 2	Site Fax	
415-555-1234		415-555-5678	

Description:
The SFUSD ExCEL demo site provides services to local youth ages 5 to 10 in the areas of academic tutoring, academic enrichment programs, and structured physical education workshops that supports every student participants ability to be successful academically, included in daily programs and projects, and to strive to be healthy and physically fit. Services are provided at San Francisco School, a local community school which resides in the SF Neighborhood district.

San Francisco Unified School District

Logout

Home

Participants & Staff

Group Activities

Wait List

Snack

Quality Action Plan

Lead Teacher

Contracts

Inventory

Funding

Reports

INVENTORY Add Item

Search

- 1 Desktop Computers
- 1 Laptop Computers
- 2 Tablets
- 1 Software
- 2 Printers

INVENTORY ITEM Cancel Save Save & Return

Form locks 15 minutes after first submission.

Category: Laptop Computers

Description: HP Note Book Laptop

Model: HP 820 Notebook PC

Serial Number: Scg4310dxw

SFUSD Tag Number: 88361

Cost: 1000.00

Funding Source: ASES Base

STATUS

Acquisition Date: 10/01/2014

Condition: Excellent

Location: 20 Cook street Rm 1

Complete for each item, and then click "Save & Return"

For the cost, please only enter the numeric value -- commas and \$ will cause a validation message and not allow the form to be saved.

Inventory Barcode Label Report

Sites can print their labels from EMS for their equipment.

San Francisco Unified School District [Logout](#)

Home
Participants & Staff
Group Activities
Wait List
Snack
Quality Action Plan
Lead Teacher
Contracts
Inventory
Funding
Reports

SERVICE SITE [Edit](#)

SFUSD - Demo

Site Coordinator Name	Phone	Email	
Site Coordinator	415-555-9999	scoordinator@leadagency.org	
Site Assistant Name	Phone	Email	
Assistant Site Coordinator	415-555-1122	asitecoordinator@leadagency.org	
Street Address	City	St.	ZIP
1234 Namea Street	San Francisco	CA	9415%
Site Phone 1	Site Phone 2	Site Fax	
415-555-1234		415-555-5678	
Description			
The SFUSD ExCEL demo site provides services to local youth ages 5 to 10 in the areas of academic tutoring, academic enrichment programs, and structured physical education workshops that supports every student participants ability to be successful academically, included in daily programs and projects, and to strive to be healthy and physically fit. Services are provided at San Francisco School, a local community school which resides in the SF Neighborhood district.			

Lists and Labels

- [Participant Mail Labels](#)
- [Participant File Folder Labels](#)
- [Staff Mail Labels](#)
- [Agency Mail Labels](#)
- [Barcode Labels](#)
Prints labels with barcode for each active participant.
- [Inventory Barcode Label Report](#)**
Prints labels with barcode for each inventory item.

Click on "Inventory Barcode Label Report"

INVENTORY BARCODE LABEL REPORT

SFUSD - Demo

Your report has been generated (at 12:09:08 PM)
[Click here](#) if the report did not open in a new window

Enter Report Parameters

Note: Use Avery 5160 File Folder Labels.

If the printed text is not aligned with the label stickers, make sure that the "Page Scaling" print option in Adobe Acrobat Reader is set to "None."

[Cancel](#) [Generate](#)

Click on "Generate"

Student PC(Dell-123-5123)
1234

Office PC(HP1000)
404040

asdf(asd)
asdf

HP Printer(HP-120)
ExCEL-1314-000-1

IPad(Air 32gb)
ExCEL-1314-000-2

Desk(Wood)
ExCEL-1314-000-3

XXXX(32-12-232)
ExCEL-1314-000-4

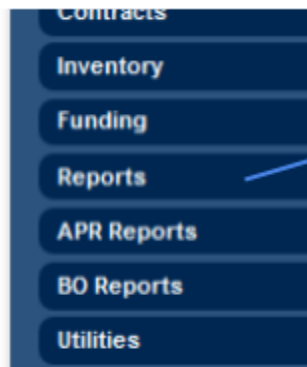
sdff(sdf)sdf
ExCEL-1314-000-5

test(1)
ExCEL-1314-000-6

EMS is able to generate labels for equipment entered into EMS.

Attendance Reports

Process by Grant Type



Generating the Process by Grant Type Report

California Reports

Progress by Grant Type
 For each grant type, shows progress towards grant award limits. Also breaks down actual performance data by month.

Progress by Grant Type (Calendar Year)
 This report shows progress toward grant award limits per calendar year. These figures may be used by CDE when determining grant reductions. The grant info used will be the first fiscal year (e.g. if for calendar year 2012, the grant info for FY 2011-12 will be used).

Enter Report Parameters

Begin Date (mm/dd/yyyy)

End Date (mm/dd/yyyy)

Cancel

Generate

How to generate the report:

1. Click on reports
2. Select Progress by Grant Type
3. Enter Begin date and end date for report (**Begin date:** recommend starting from the beginning of the school year to get an accurate report, for High school, start July 1. **End date:** recommend the last day with complete attendance)
4. Click Generate

This report shows sites their progress per grant.

	ASES			21C		
	Service Days ²	Present Records ³	ADA ⁴	Service Days ²	Present Records ³	ADA ⁴
Grant Award Goal	180	18751	104.17	180	7560	42.00
Actual Performance	83	7630	91.93	83	2977	35.87
Remaining Goal	97	11121	114.65	97	4583	47.25
Over/(Under) Grant Award ADA Goal ¹	--	--	(22.72)	--	--	(11.38)
Percentage of Goal Attained	46.11%	40.69%	88.25%	46.11%	39.38%	85.40%

How to read the report:

This report breaks down how a site is doing based on attendance in different sections; the first section is base, then before school and supplemental grants.

The top row names the grant type: ASES, 21st CCLC or ASSETS

- **Grant award goal** (target): These are the goals for each grant broken down by Services day: 180 days unless otherwise noted, Present records: number of student days needed for the grant and ADA: Average Daily Attendance.
- **Actual Performance** (current): This is what your site has achieved as given the dates you entered.
- **Remaining Goal**: These numbers will tell you what you need to achieve to meet your goal(target)
- **Over/Under Grant Award ADA Goal**: Tell you how many students you are over or under your goal.
- **Percentage of Goal Attained**: will show you the progress for each grant. The number sites should focus on is under the ADA column per grant.

Attendance Reports

Progress By Grant Type (Calendar Year)

The progress by grant type (calendar year) report takes into consideration the attendance achieved across two fiscal years. Since the California Department of Education calculates attendance numbers based on calendar year, this report gives sites a clear picture of your attendance percent achieved for the calendar year.

Progress by Grant Type

For each grant type, shows progress towards grant award limits. Also breaks down actual performance data by month.

Progress by Grant Type (Calendar Year)

This report shows progress toward grant award limits per calendar year. These figures may be used by CDE when determining grant reductions. The grant info used will be the first fiscal year (e.g. if for calendar year 2012, the grant info for FY 2011-12 will be used).

PROGRESS BY GRANT TYPE (CALENDAR YEAR)

SFUSD - Demo

Enter Report Parameters

Begin Date (mm/dd/yyyy)

📅

End Date (mm/dd/yyyy)

📅

Cancel

Generate

Begin Date - the first of the year

End Date - The last day of the Month that attendance has been completed to fully capture all the attendance

Click **Generate**

Progress by Grant Type (Calendar Year)
Creation Date: 2/16/2017, 1:25:39 PM (PT)

District: SFUSD
School: Demo
Report Period: 1/1/2016 to 12/31/2016

Elementary After School Base - Summary

	21C		
	Service Days ²	Present Records ³	ADA ⁴
Grant Award Goal	180	7200	40.00
Actual Performance	179	19	0.11
Remaining Goal	1	7181	7,181.00
Over/(Under) Grant Award ADA Goal ¹	--	--	(7180.89)
Percentage of Goal Attained	99.44%	0.26%	0.27%

Grant year used for 21CCLC goals: 2015-16

How to read the report:

This report breaks down how a site is doing based on attendance in different sections; the first section is base, then before school and supplemental grants.

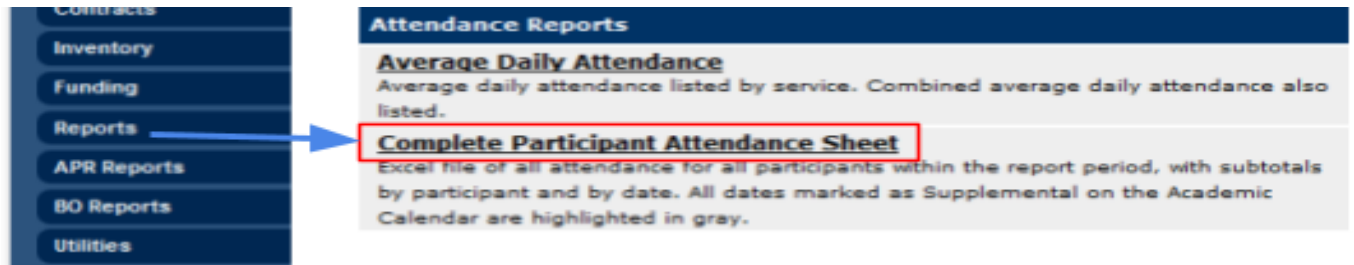
The top row names the grant type: ASES, 21st CCLC or ASSETS

- **Grant award goal** (target): These are the goals for each grant broken down by Services day: 180 days unless otherwise noted, Present records: number of student days needed for the grant and ADA: Average Daily Attendance.
- **Actual Performance** (current): This is what your site has achieved as given the dates you entered.
- **Remaining Goal**: These numbers will tell you what you need to achieve to meet your goal (target).
- **Over/Under Grant Award ADA Goal**: Tell you how many students you are over or under your goal.
- **Percentage of Goal Attained**: will show you the progress for each grant. The number sites should focus on is under the ADA column per grant.

Page 50 of 62

Attendance Reports

Complete Participant Attendance Sheet



COMPLETE PARTICIPANT ATTENDANCE SHEET

SFUSD - Alvarado Elementary

Enter Report Parameters

Begin Date (mm/dd/yyyy)	8/18/2014	
End Date (mm/dd/yyyy)	10/31/2014	
Query Tool (Optional)	<input type="checkbox"/> Filter using results from Query Tool	

Cancel

Generate

How to generate the report:

1. Click on reports
2. Select **Complete Participant Attendance sheet**
3. Enter **Begin Date** and **End Date** for report
4. Click **Generate**

This report shows sites their attendance information broken down by student and by day.

Attendance Detail By Date
From 8/18/2014 to 10/31/2014
Date of Report: 8/26/2015

1 = present
0 = absent or not applicable
na = attendance not complete

Participant Name	Client ID	8/18/2014	8/19/2014	8/20/2014	8/21/2014	8/22/2014	Total
All Services							
name	ID	1	1	1	1	1	52
name	ID						0
name	ID	1	1	1	1	1	52
name	ID	1	1	1	1	1	50
name	ID	1	1	1	1	1	52
name	ID	0	1	1	1	0	47
name	ID	1	1	1	1	1	52
name	ID	1	1	1	1	1	52
name	ID	1	1	1	1	1	52
name	ID	0	1	1	1	1	48
name	ID	1	1	1	1	0	28
name	ID	1	1	0	1	1	44
name	ID	1	1	1	1	1	49
name	ID	0	0	0	0	0	0
name	ID	0	0	1	0	1	31
name	ID	0	0	0	0	0	0
name	ID	0	1	1	1	1	49
		253	264	283	272	263	14496

Important note:

This report is best for sites that do not have a before school grant and want to see how many students are attending program (see next page for sites that have a before school grant).

How to read the report:

As a site coordinator compare the total number for each day with the hard copy count. The numbers should match.

Attendance Reports

Complete Participant Attendance Sheet

[Contracts](#)
[Inventory](#)
[Funding](#)
[Reports](#)
[APR Reports](#)
[BO Reports](#)
[Utilities](#)

Generating the Complete Participant attendance sheet (before school)

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.

Participant Summaries

ADV. SEARCH

Clear Find Person Return

SFUSD - Cleveland Elementary

Selected Persons:0

Parameters

Person Type

Active Status

Min Age

Max Age

Grade 15-16

Grade 14-15

Grade 13-14

Youth Participants

Active

TK

7

Infant

8

PK

9

K

10

1

11

2

12

3

5th YR Senior

4

Unknown

5

Value Missing

6

TK

7

Infant

8

PK

9

☒ K

10

☒ 1

11

☒ 2

12

☒ 3

5th YR Senior

☒ 4

Unknown

☒ 5

Value Missing

☒ 6

Infant

7

Service Parameters

Staff

Service Formats

Partner

Service Category

Activity Name

Attendance Date Range (Begin)

Attendance Date Range (End)

Click to edit field

Click to edit field

How to generate the report:

1. Click on **Reports**
2. Select **Query Tool**
3. Select **Youth participants** and the grade level in the year you want to generate the information from
4. Scroll down and click on **Activity name**
5. Select the activity you would like to generate attendance for (this can be more than one.)
6. Click return
7. Follow the steps on page 56 for generating the complete participant attendance sheet; however select the filter tool before

ADV. SEARCH

Return

Activity Name

All / Clear

☐ Academic Block / EPGY
☐ All Students 8:00AM-4:00PM Cleveland/Longfellow Summer Program M-F SUMMER 2014
☐ All University of Cleveland Students 4:00PM-5:00PM Homework Assistance/ Literacy Support M-F 14-15
☐ All University of Cleveland Students 5:00PM-6:00PM University Enrichment M-F 14-15
☐ All University of Cleveland Students 6:00PM-6:30PM Recreation/Closing Circle M-Th 14-15
☐ All University of Cleveland Students Snack/Homework/Recreation/Closing Circle 3:30PM-6:30PM Snack/Homework/Recreation/Closing Circle M-F 14-15
☒ BeforeSchoolProgram 8:00AM-9:00AM Homework Help/Activity Time M-F 12-13

Enter Report Parameters

Begin Date (mm/dd/yyyy)

7/1/2015

End Date (mm/dd/yyyy)

12/31/2015

Query Tool (Optional)

☒ Filter using results from Query Tool

Cancel

Generate

Wait List Tab

The waitlist tab can help you keep track of students that still need a space in your after school program.

WAIT LIST

Choose participants to add to list

Add to Wait List

1. chavez, monica	Remove	(added 8/14/2014)
2. Dubourt, Alex	Remove	(added 8/14/2014)
3. Bender, Alan	Remove	(added 8/14/2014)
4. Belden, Jim	Remove	(added 9/11/2014)
5. Campos, Ana	Remove	(added 11/10/2015)
6. Collado, Skye	Remove	(added 12/1/2015)
7. Blair, Bonnie	Remove	(added 4/21/2016)
8. Bourne, Jason	Remove	(added 4/29/2016)
9. Eshlemen, Jim	Remove	(added 8/5/2016)
10. Flores, Luis	Remove	(added 8/5/2016)
11. Goat, Kels	Remove	(added 8/5/2016)

Contracts Program Summary

CONTRACTS		
Lucy Hong Current Term ▼		
PROGRAM SUMMARY Add Program Summary		
Fiscal Year	Grant Type	Date
2015 - 2016	Afterschool Base Program	2/5/2015
2014 - 2015	Afterschool Base Program	4/30/2014
2014 - 2015	Department of Youth, Children, & Families (DCYF)	11/4/2013
2014 - 2015	Afterschool Base Program	10/30/2013
2015 - 2016	Afterschool Base Program	
AMENDMENT Add Amendment		
Fiscal Year	Community Agency	Date
2014 - 2015	YMCA	12/10/2013

Under the Contracts Tab:

Select **Add Program Summary** to create a new program summary for your contract.

Only select Add Program Summary for a new contract.

If you are working on a contract amendment click the **Add Amendment** button.

ADD PROGRAM SUMMARY Cancel Save & Return Save	
Fiscal Year	<input type="text"/>
ExCEL Program Summary for:	<input type="text"/>
SECTION 1: School Site Information	
Date	<input type="text"/>
School Site	Demo
School Site Principal Name	<input type="text"/>
Name of Contractor (Community Agency)	<input type="text"/>
Contractor (Community Agency) Director Name	<input type="text"/>
ExCEL Coordinator Name	<input type="text"/>

Fiscal Year: Select the "Fiscal Year"

"ExCEL Program Summary for:" base contract, supplemental contract, DCYF and before school will come up.

Enter the rest of the information for the program summary then press save.

Once you press save, you can actually print the document out for signatures.

EDIT PROGRAM SUMMARY Print Delete Save & Return Save	
Fiscal Year	2014 - 2015
ExCEL Program Summary for:	Afterschool Base Program

Contracts

Program Summary - Amendment

CONTRACTS

Lucy Hong Current Term ▼

PROGRAM SUMMARY Add Program Summary

Fiscal Year	Grant Type	Date
2015 - 2016	Afterschool Base Program	2/5/2015
2014 - 2015	Afterschool Base Program	4/30/2014
2014 - 2015	Department of Youth, Children, & Families (DCYF)	11/4/2013
2014 - 2015	Afterschool Base Program	10/30/2013
2015 - 2016	Afterschool Base Program	

AMENDMENT Add Amendment

Fiscal Year	Community Agency	Date
2014 - 2015	YMCA	12/10/2013

Select **Add Amendment** for Base, Supplemental, school contract amendments.

Complete the Program summary amendment and press save.

After pressing save print the amendment out for signatures.

ADD AMENDMENT

Cancel
Save & Return
Save

School Site Information

School Site	Demo	
Date	<input type="text"/>	
Fiscal Year	<input type="text"/>	
Name of Community Agency	<input type="text"/>	
After School Coordinator Name	<input type="text"/>	

In addition to the services to be provided by the Community Agency ("Contractor") at the designated SFUSD school site pursuant to Attachment 1 ("School Site Program Summary"), the following services will also be provided pursuant to this Agreement:

ADDITIONAL SERVICES TO BE PROVIDED:

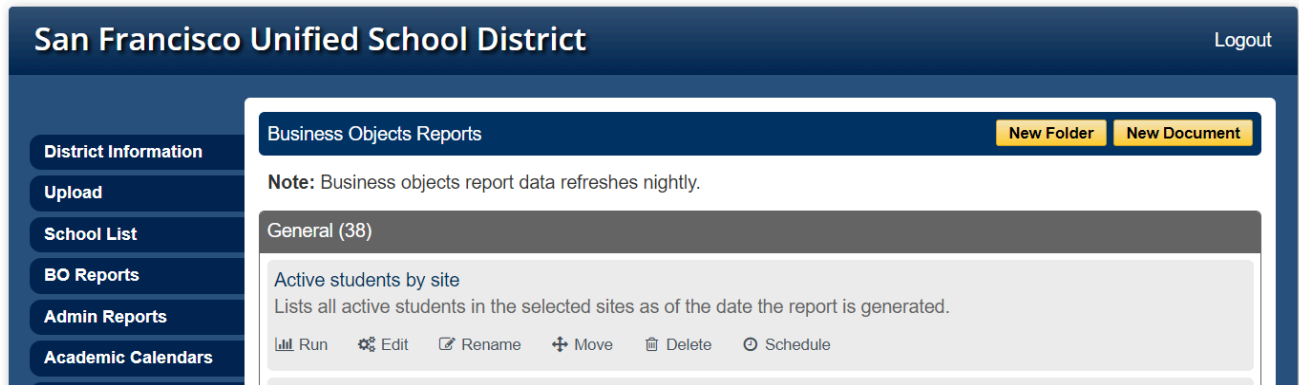
Services (1)	Delete
Activity	
Description	
Staffing/Provider Partners	

Click here to add 'Services'

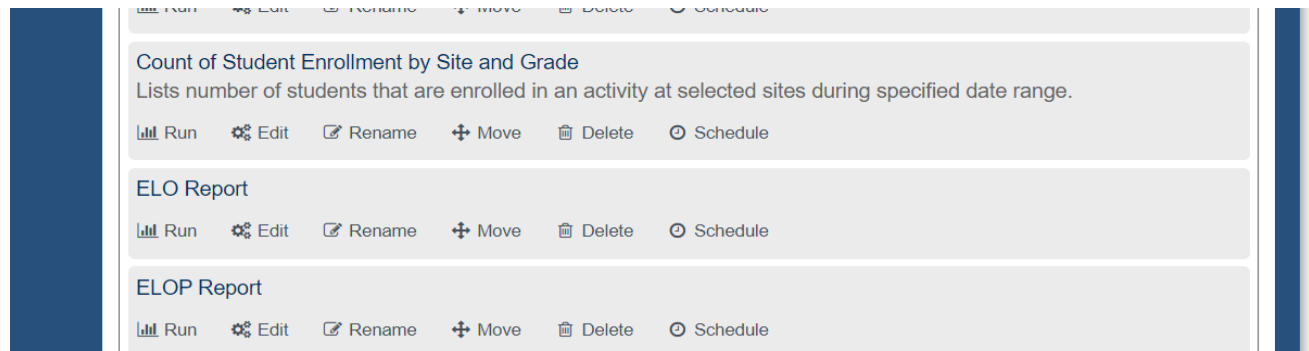
ELO-P

How do I use the data in EMS to ensure ELO-P priority enrollment and outreach occurs?

Step 1: EMS BO Reports



Step 2: “ELO Report”



Step 3: Download in excel file or PDF

ELO opt-out status: After ELO-P has been offered to all families, report the family response on the ELO-P tab

School List →

Attendance —>

ELO SY 25-26 -

- List either “opted out”, “No parent response” or “On priority waitlist”
- Once the student is enrolled in an activity, the next morning their green bar will show us as “enrolled” on the ELO-P tab

San Francisco Unified School District

Logout

Home

Participants & Staff

ELO SY 2023-2024

Group Activities

Wait List

Attendance

Compliance

Contracts

Inventory

Funding

Reports

APR Reports

BO Reports

Utilities

Site Settings

Help Center

User Accounts

School List

SFUSD STUDENTS (206)

Save

SFUSD - Bryant Elementary

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

< Prev Page 1 2 3 4 5 Next >

Name	ELO Status
Student names	Opted out
	Enrolled
	Enrolled
	Enrolled
	Enrolled
	Enrolled
	Opted out
	Enrolled
	Enrolled
	Opted out
	Enrolled
	Enrolled
	Opted out
	Enrolled
	Enrolled
Enrolled	
mantha	No parent response
rahi	No parent response
nso	Opted out
bel	Opted out
	Enrolled
ne	Enrolled
	Enrolled

San Francisco Unified School District

Logout

Home

Participants & Staff

ELO SY 2023-2024

ELO Summer 2024

ELO SY 2024-2025

Group Activities

Wait List

Attendance Compliance

Save

SFUSD - 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

Name	ELO Status
Bourne, Jason	No parent response
Doe, Jane	On Priority Waitlist
Dubourt, Alex	

San Francisco Unified School District

Logout

Home

Participants & Staff

ELO SY 2023-2024

ELO Summer 2024

ELO SY 2024-2025

Group Activities

Wait List

Attendance

Compliance

Contracts

Inventory

Funding

Reports

APP Reports

BO Reports

Utilities

Site Settings

Help Center

User Accounts

School List

Business Objects Reports

Note: Business objects report data refreshes nightly.

General (4)

Complete Participant Attendance Sheet (Duplicated)

ELO Report

Lists all students with ELO-P priority status, outreach and enrollment for SY 23-24 / Summer 24 / SY 24-25

Program Summary

Program Summary Amendment
(no description)

San Francisco Unified School District
Logout

Home
Participants & Staff
ELO SY 2023-2024
ELO Summer 2024
ELO SY 2024-2025
Group Activities
Wait List
Attendance
Compliance
Contracts
Inventory
Funding
Reports
APR Reports
BO Reports
Utilities
Site Settings
Help Center
User Accounts
School List

ELO ReportBack

1. Select Year
Summer 2024

Enter value(s) for Site Name (Optional)
1 selected
Select All / None

Output Format
☐ PDF
☒ Excel 2007+
☐ Excel 2003

Generate

Drop down will provide the following options

21st CCLC Annual Performance Reporting

Only required for sites with 21st CCLC funding including ASSETs, 21st CCLC Base and 21st CCLC supplemental.

Click on **Group Activities**, select one activity to update

Home

Participants & Staff

ELO SY 2023-2024

ELO Summer 2024

ELO SY 2024-2025

Group Activities

Wait List

Attendance

Compliance

ACTIVITIES

Current Term ▼

SFUSD - Demo

7/1/2023 to 6/30/2024

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

Name	Begin	End
Fletcher Price 6:45AM-9:45AM Germaine Norman M,Th SUMMER 2014	7/3/23	6/24/24
Test 2:00PM-5:00PM Test M,Tu,Th,F SY 23-24	12/1/23	1/31/24

Activities copied from CMS denoted with *

Click on **Activity Category** and Edit

Activity Category	Edit

Select the Activity Categories for the Activity (The number of activity categories will be divided equally by the number of hours of the activity)

SERVICE DETAILS		Cancel	Save & Return
Fletcher Price 6:45AM-9:45AM Germaine Norman M,Th SUMMER 2014			
Activity Type			
Drop-In Activity		<input type="checkbox"/>	
ACTIVITY CATEGORIES			
Activity Category			
<input type="checkbox"/> Academic Enrichment			
<input type="checkbox"/> Activities for English Learners			
<input type="checkbox"/> Assistance to Students who have been Truant, Suspended, or Expelled			
<input type="checkbox"/> Career Competencies and Career Readiness			
<input type="checkbox"/> Cultural Programs			
<input type="checkbox"/> Drug and Violence Prevention and Counseling			
<input type="checkbox"/> Expanded Library Service Hours			
<input type="checkbox"/> Healthy and Active Lifestyle			
<input type="checkbox"/> Literacy Education			
<input type="checkbox"/> Parenting Skills and Family Literacy			
<input type="checkbox"/> Science, Technology, Engineering, and Mathematics			
<input type="checkbox"/> Services for Individuals with Disabilities			
<input type="checkbox"/> Telecommunications and Technology Education			
<input type="checkbox"/> Well-rounded Education Activities			

Under the APR Reports Tab, we can run reports on Activities and Participation

REPORTS

SFUSD - Demo

Choose a Report

21st Century CLC APR

Activities

Total number of participants attending each activity along with how many total hours each activity was offered.

Participation

Total number of participants by grade level who attended based on the number of hours they attended.

21st Century CLC APR - Data Completion Reports

APR Checklist

Lists students, staff, and activities and key 21C data. This report will help you examine what data is being included in your APR.

Exclusion Report

Identifies reasons that services, participants, and staff are excluded from APR reports

The activities report

Activity Category	How many participants attended this activity category during the term (school year or summer)?	How many total hours of this activity category did you offer during the term (school year or summer)?
Academic Enrichment	0	0
Activities for English Learners	0	0
Assistance to Students who have been Truant, Suspended, or Expelled	0	0
Career Competencies and Career Readiness	0	0
Cultural Programs	0	0
Drug and Violence Prevention and Counseling	0	0
Expanded Library Service Hours	0	0
Healthy and Active Lifestyle	0	0
Literacy Education	0	0
No Category	224	5799
Parenting Skills and Family Literacy	0	0
Science, Technology, Engineering, and Mathematics	0	0
Services for Individuals with Disabilities	0	0
Telecommunications and Technology Education	0	0
Well-rounded Education Activities	0	0

The participation report

Grade Level	Less than 15 hours	15-44 hours	45-89 hours	90-179 hours	180-269 hours	270 hours or more	Total
TK	0	0	1	2	1	7	11
Infant	0	0	0	0	0	0	0
PK	0	0	0	0	0	0	0
K	0	0	1	6	0	21	28
1	1	0	1	2	2	24	30
2	0	0	0	0	2	38	40
3	0	0	0	2	2	37	41
4	0	0	0	2	4	30	36
5	0	0	2	1	3	32	38
6	0	0	0	0	0	0	0
7	0	0	0	0	0	0	0
8	0	0	0	0	0	0	0
9	0	0	0	0	0	0	0
10	0	0	0	0	0	0	0
11	0	0	0	0	0	0	0
12	0	0	0	0	0	0	0
5th YR Senior	0	0	0	0	0	0	0
Unknown	0	0	0	0	0	0	0
Total	1	0	5	15	14	189	224

Demo Site

The SFUSD demo site is available for all sites to practice any function of the EMS. To access the demo site go to:
<https://www.youthservices.net/sfusd/index.asp>

Username: sfusd
 Password: demosite