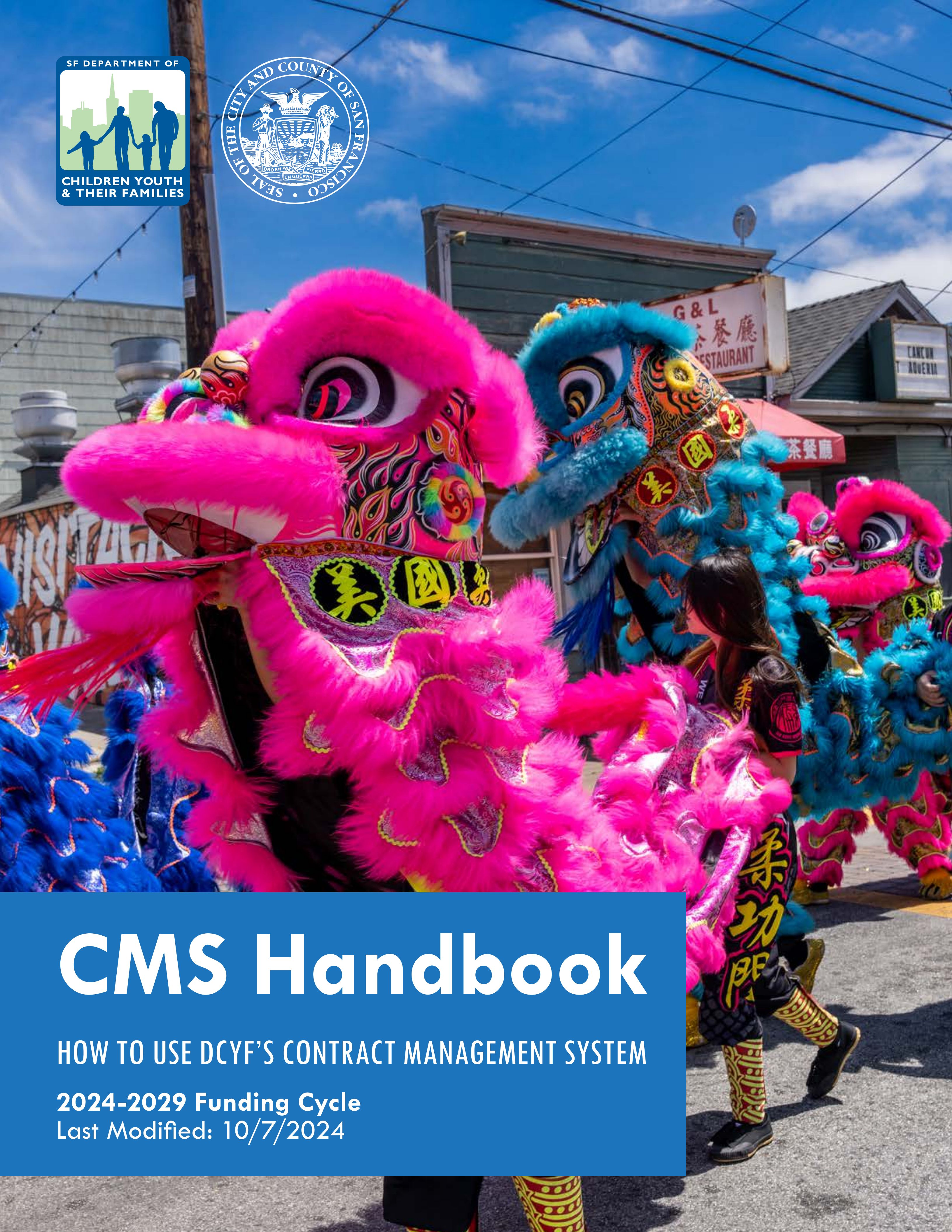


SF DEPARTMENT OF CHILDREN YOUTH & THEIR FAMILIES

SEAL OF THE CITY AND COUNTY OF SAN FRANCISCO

# CMS Handbook

HOW TO USE DCYF'S CONTRACT MANAGEMENT SYSTEM

**2024-2029 Funding Cycle**
Last Modified: 10/7/2024

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# RELEASE NOTES

## September 2024

**New Sections**

- *Program Quality Assessment (PQA)*

## August 2024

**New Sections**

- *Invoices*
- *Data Upload Tool*

**Changes to Existing Sections**

- Described the new *Notes* module in the list of Forms and Modules in *Navigating the CMS*
- Added additional access details related to the *Notes* module in the *User Accounts* section
- Added Appendix D: Participant Outcomes Data Entry & Reporting Instructions
- Added Appendix E: CMS to EMS Transfer Guide

## June 2024

**New Sections**

- *Participants & Staff*
- *Activities*
- *Outcomes*

**Changes to Existing Sections**

- Described the new *Outcomes* section in the list of Forms and Modules in *Navigating the CMS*
- Added additional access details related to the *Outcomes* and *Resources* modules in the *User Accounts* section

## April 2024

Initial release of the CMS Handbook for the FY2024-2029 funding cycle

# OVERVIEW

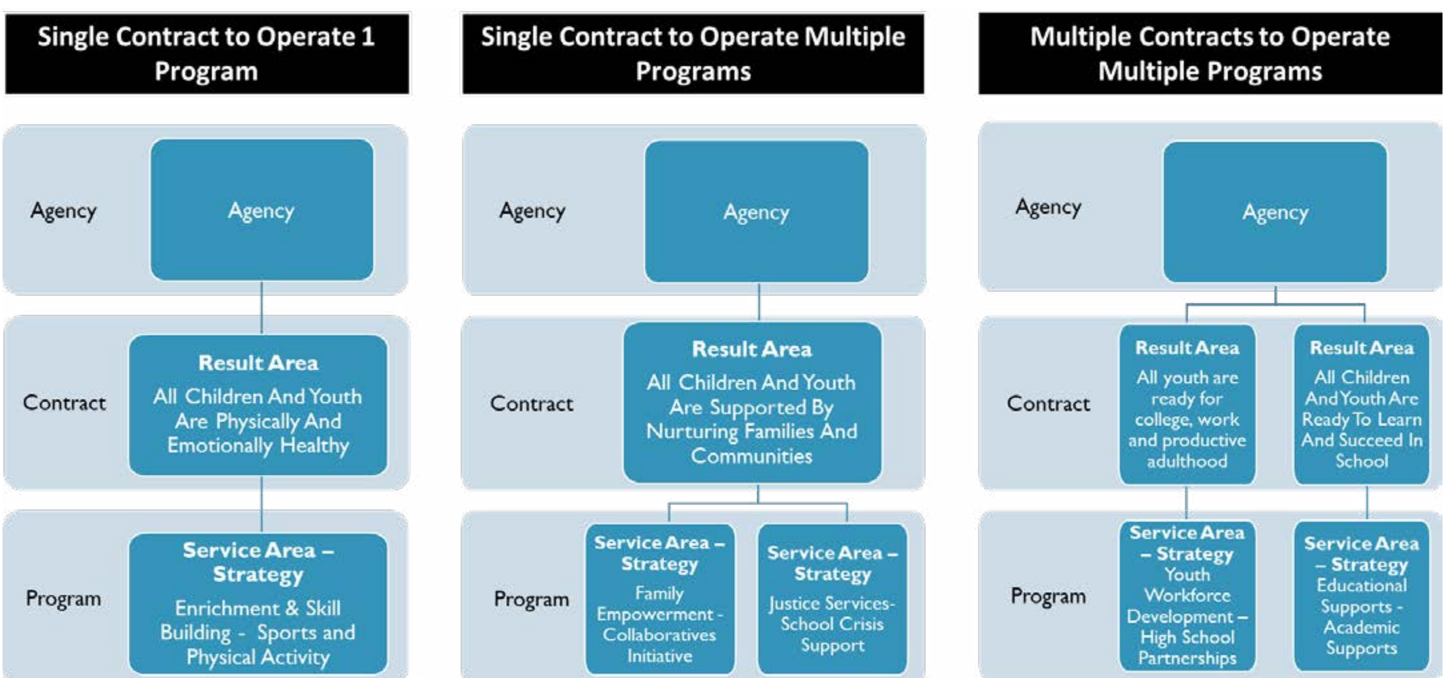
The Contract Management System (CMS) is an online system used by DCYF staff and grantees for grants management, reporting, and invoicing. DCYF contracts with Cityspan, a cloud-based provider of data management systems for social services programs, to manage and administer the CMS. DCYF grantees are provided with accounts to the CMS and are expected to use the system to complete administrative functions, such as submitting workplans, invoices, and reports. The CMS helps DCYF monitor grants and provide regular updates to department stakeholders.

> The CMS is updated periodically as needs and circumstances change. DCYF communicates system changes and upcoming deadlines through grantee newsletters and updates on the CMS login page.

## Organization of the CMS

The CMS is organized by fiscal year and program. Grantees may receive a single contract (also referred to as a Grant Agreement) to operate one program, a single contract to operate multiple programs, or multiple contracts to operate multiple programs. Upon logging into the system, grantee users see a list of programs funded for the selected fiscal year. Navigating to a specific program gives users access to CMS functions related to the program, such as submitting invoices and entering activity data.

Grantees complete and submit workplans for each funded program on an annual basis. For example, a grantee that receives a single grant to operate two programs will complete and submit two workplans each year. The grantee will submit invoices and report on participants and activities separately for each program. Additionally, each program is assigned a DCYF Program Specialist. Program Specialists are grantees' primary points of contact at the department.



## Navigating the CMS

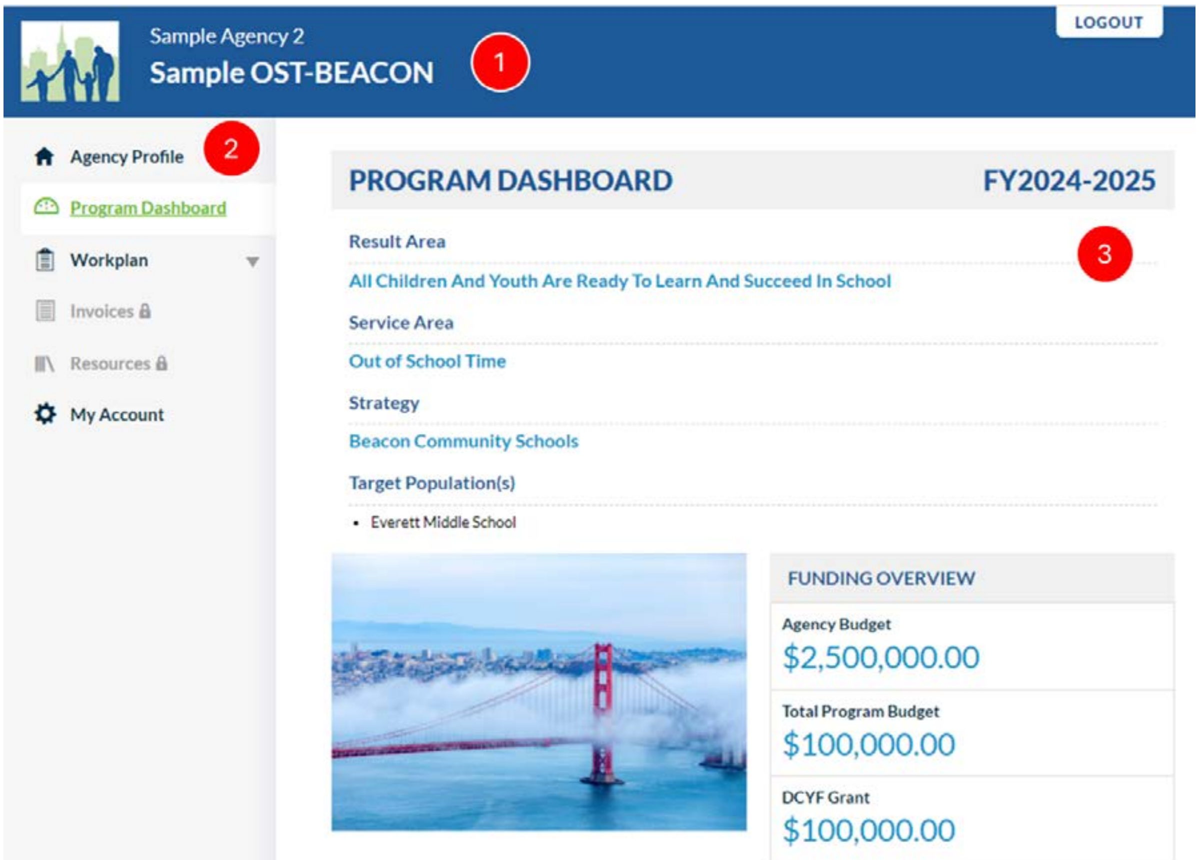
This section provides an overview of the CMS user interface and describes how to navigate the system. The system is best viewed on a device with a large screen, such as a desktop or laptop computer, but it may also be accessed on a mobile device in landscape mode.

### Logging into the CMS

Access the CMS at https://contracts.dcyf.org. You must have a CMS user account to access the system. Contact your agency's primary Agency Account holder for access. For more information, see the *User Accounts* section.

### CMS Interface

The CMS user interface is made up of three sections: (1) a top header, (2) a lefthand navigation menu, and (3) a main section with page content.




The *top header* provides information on the page context. There are two primary page contexts in the CMS: (1) an agency context for pages relevant to multiple programs (e.g., *Agency Profile*) and (2) a program context for pages specific to a single program (e.g., *Program Dashboard*, *Workplan*). The agency context shows the name of the grantee agency in the top header, while the program context shows the name of the currently selected program in addition to the name of the grantee agency in the top header.

The *lefthand navigation menu* presents links to different pages and modules depending on the current page context. The next section provides an overview of the various forms and modules in CMS. Access to certain pages and modules may be limited based on the role of the user.

The *main section* shows page content and may contain additional navigation elements at the top, such as links or dropdown filters.

### Forms and Modules

The CMS is made up of various forms, modules, and reports. The list below provides a brief description of the main pages and functions of the system. These are described in more detail throughout the handbook. Some CMS modules are still in development and are planned for release in June 2024.

**Agency Programs**. The *Agency Programs* page is the first page users see after logging into the CMS. This page presents a list of programs accessible to the user for the fiscal year that is currently selected.

Use the Fiscal Year dropdown filter at the top of the *Agency Programs* page to change the fiscal year and view programs funded under a different fiscal year.

**Agency Profile.** The *Agency Profile* is a form that captures agency-level details. It is part of the workplan and shared across all programs each fiscal year.

**Agency Accounts.** The *Agency Accounts* page allows Agency Account users to view and manage CMS user accounts. For more information, see the *User Accounts* section.

**Program Dashboard**. The *Program Dashboard* is the first page users see after selecting a program from the *Agency Programs* page. The dashboard presents program-level summary data and indicators.

**Workplan.** The *Workplan* module is a series of forms used to complete annual workplans. An Agency Account is required to edit Workplan forms. For more information, see the *Workplan* section.

**Invoices.** The *Invoices* module is used to complete and submit monthly invoices. The module is only accessible when the program workplan is in an Approved state.

**Participants & Staff.** The *Participants & Staff* module is used to register program participants and staff and record their demographic information. Participants must have complete registrations in the Participants & Staff module prior to being enrolled into activities.

**Activities.** The *Activities* module is used to report grant-funded activities, enroll participants, and submit participation and attendance information.

**Outcomes.** The *Outcomes* module is used to view an unduplicated list of active program participants and report outcomes.

**PQA.** The *PQA* module is used to view and edit Program Quality Assessments. An Agency Account is required to view program self-assessments.

**Notes.** The *Notes* module is used by DCYF CMS users to document relevant program notes.

**Upload Tool.** The *Upload Tool* provides an interface for uploading participant, activity, and attendance information in bulk using spreadsheet templates populated by the user. The tool can be used to assist in importing data into CMS from other administrative systems.

**Resources.** The *Resources* module is a repository where DCYF staff and grantees may upload grant-related documents and resources. Files uploaded by grantees are specific to a program and fiscal year.

### Buttons and Icons

Buttons and icons are found throughout the CMS where data is entered or submitted. The following list provides a brief description of their functionality.

**PDF**
Downloads a PDF copy of the current page or selected item.

**Back/Return**
Returns to the previous page in CMS.

**Save**
Saves your work or progress on the current form.

**Submit**
Validates data entered on the current form and submits the form.

**Unlock**
Unlocks the current form for edits. Submitted forms may require special permissions for unlocking. For example, submitted workplan forms may only be unlocked by the Program Specialist.

**Top**
Scrolls your browser window back to the top of the current page.

**Collapse**
Collapses bounded sections within CMS forms.

**Expand**
Expands bounded sections within CMS forms.

**Add**
Creates additional instances of data items, such as activities, program quality assessments, and budget line items.

**Delete**
Deletes instances of data items, such as activities, program quality assessments and budget line items.

**Info**
Presents a short description or additional information about the current field or section.

# USER ACCOUNTS

Access to the CMS is limited to individuals with CMS user accounts. Two types of accounts are available to DCYF grantees: (1) Agency Accounts and (2) Program Staff Accounts. Each grantee is also provided with one primary Agency Account that can create and manage all accounts. Agency Accounts have full access to view and submit information in CMS for all programs. Program Staff Accounts have access to view and submit information for a limited set of programs specified in the Agency Accounts module. The table below describes how permissions differ between Agency Accounts and Program Staff Accounts in more detail.

| Module | Agency Accounts | Program Staff Accounts |
|---|---|---|
| **Programs** | All Programs | Limited to Specified Programs |
| **Workplan** | Full Access | Limited Access – read-only permissions and no access to the Budget form |
| **Activities** | Full Access | Full Access |
| **Participants & Staff** | Full Access | Full Access |
| **Outcomes** | Full Access | Full Access |
| **Invoices** | Full Access | Limited Access – can edit narratives and view progress reports; no access to invoice expenses |
| **PQA** | Full Access | Limited Access – can only create/view own assessments |
| **Notes** | Limited Access – can only view DCYF program notes visible to Agency Accounts | Limited Access – can only view DCYF program notes visible to Program Staff Accounts |
| **Extracts/Reports** | Full Access | Full Access |
| **User Accounts** | Primary Agency Account can create and manage all accounts; Other Agency Accounts can create and manage Program Staff Accounts | No Access |
| **Resources** | Full Access | Full Access |

## Creating New Accounts

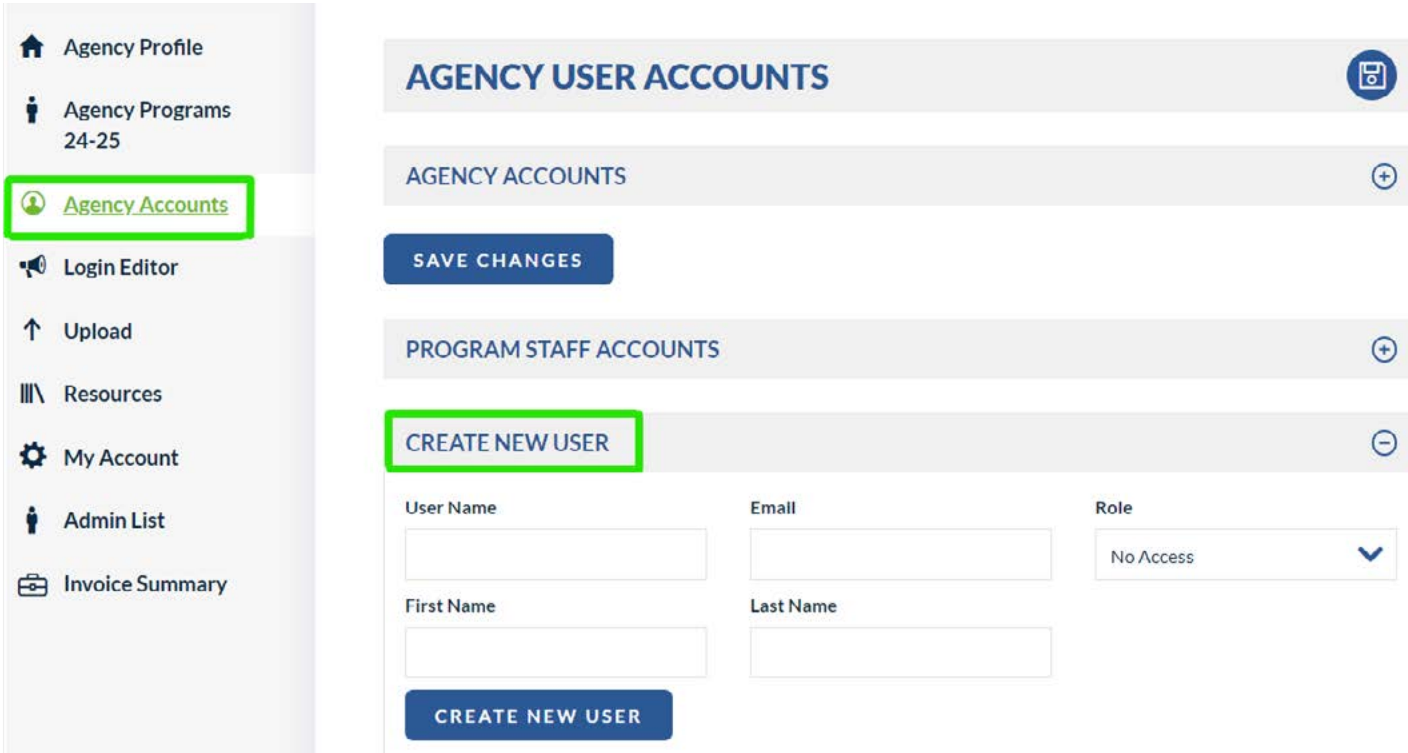
Grantees are expected to create and manage CMS accounts as needed. Each grantee is provided with one primary Agency Account, which is generally assigned to the grantee's Executive Director. This account can create both Agency Accounts and Program Staff Accounts. Other Agency Accounts can create Program Staff Accounts but not other Agency Accounts.

To change the Executive Director Agency Account, contact your DCYF Program Specialist.

**What You'll Need**

- **Creating Agency Accounts**
    - Primary Agency Account
    - New Account Details: First Name, Last Name, Email Address, unique username (can be the user's email address)

- **Creating Program Staff Accounts**
  - Agency Account
  - New Account Details: First Name, Last Name, Email Address, unique username (can be the user's email address)




**Step 1:** Log into CMS using an Agency Account.

**Step 2:** Click on the *Agency Accounts* link in the lefthand navigation menu.

**Step 3:** Scroll to the *Create New User* section at the bottom of the *Agency Accounts* page.

**Step 4:** Enter account details: first name, last name, email address, and a unique username.

**Step 5:** Select a *Role* for the account. When creating new Agency Accounts, select "No Access" if you are unsure. You may update the role at a later point in time.

**Step 6:** Click on the *Create a New User* button to create the account. An email with instructions for accessing the account will be sent to the email address provided. Advise the new user to check their spam/junk folder for this message if they do not see it in their inbox.

**Step 7:** *(Applicable only to Program Staff Accounts)* Navigate back to the *Agency Accounts* page and grant Program Staff Accounts access to one or more programs in CMS by clicking on the edit icon under *Add/Remove Access.*

## Removing Accounts


The *Agency Accounts* module may also be used to remove or deactivate CMS accounts. To deactivate an Agency Account, select *No Access* as the role type for the account and then click on the save icon at the top of the page. To deactivate/remove a Program Staff Account, click on the edit icon under *Add/Remove Access* and remove access to all programs.

## Retrieving Account Credentials

The CMS login page includes a function for retrieving lost or forgotten account credentials. Click on the *Forgot your username or password?* link in the login box. On the next page, enter the email address associated with the user account and click on the *Lookup* button. Identify your username and click on the *Reset* button. Follow the steps in the email sent to the email address associated with your account. Check your spam or junk mail for this message if you do not see it in your inbox.

# WORKPLAN

Grantees complete workplans for each of their programs on an annual basis. The workplan consists of the *Contact & Program Info* form, the *Services & Projections* form, the *Performance Measures* form, the *Budget* form, and the *Agency Profile* form. Information from the workplan is integrated directly into Grant Agreements. Additionally, the information is used by DCYF to help administer and monitor grants. For example, DCYF staff refer to contact information entered in the *Contact & Program Info* form when sending out grant communications.

Workplan forms may be pre-populated with information from the original proposal submitted for the program or from the prior year's workplan (in the case of a multi-year grant). After a workplan has been completed and submitted by a grantee, it is reviewed and approved by the Program Specialist. A workplan may undergo several rounds of changes before it is approved. Workplans must be approved by DCYF before access to invoices and activity setup is granted.

## Completing a Workplan

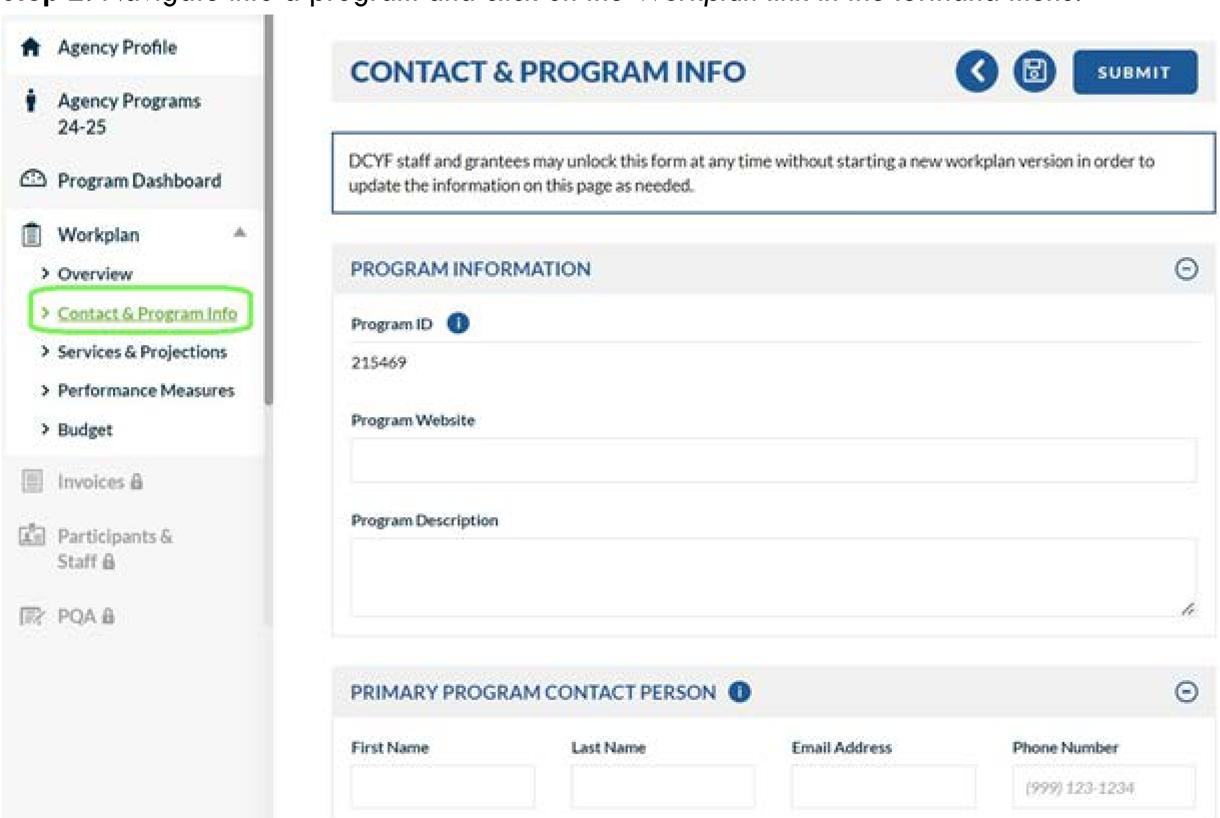
Completing your workplan by specified deadlines is the first step to ensuring timely processing of your Grant Agreement and access to monthly invoices and data reporting. This section describes how to complete and submit your workplan.

**What You'll Need**

- Agency Account
- DCYF 2024-2029 Request for Proposals or DCYF Result Area Guides
- Your Proposal
- Doing Business with DCYF

**Step 1:** Log into CMS using an Agency Account.

**Step 2:** Navigate into a program and click on the *Workplan* link in the lefthand menu.



**Step 3:** Complete and submit the *Contact & Program Info* form. This form consists of general program information such as the program website, description, and contacts.

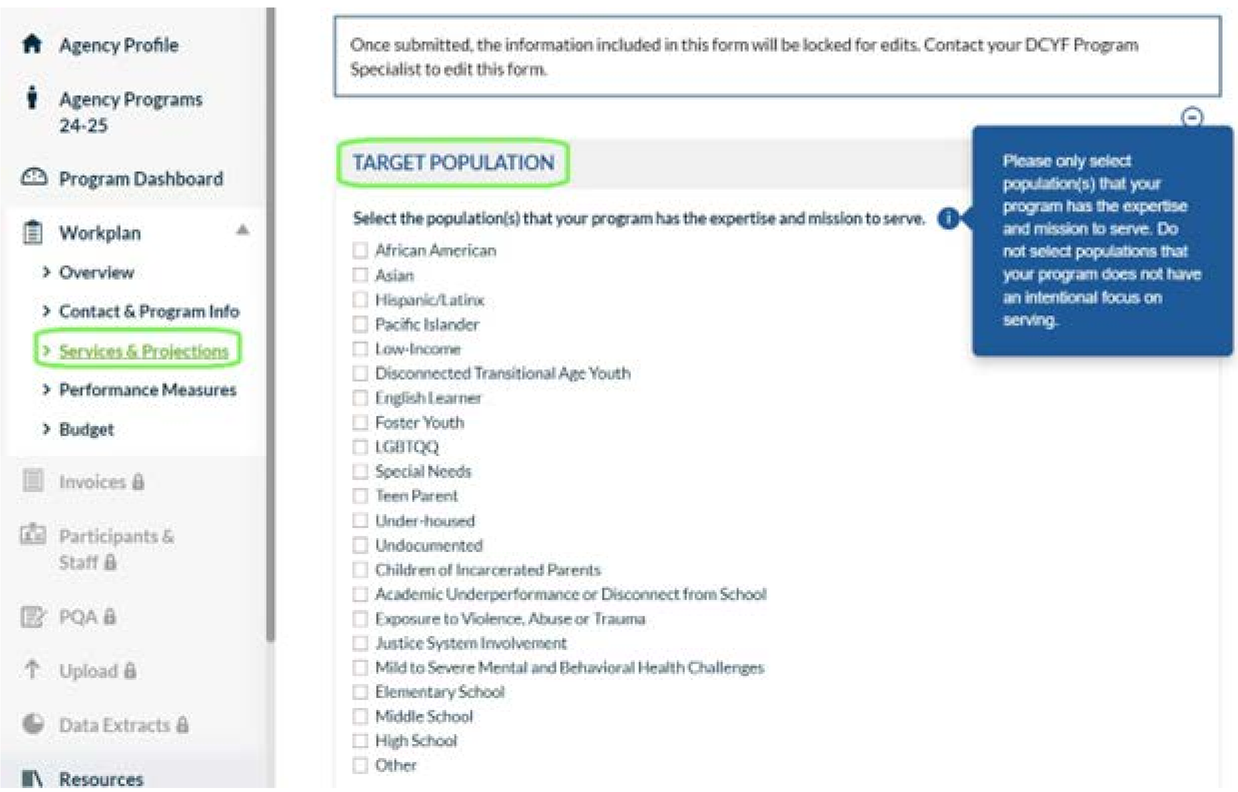
**Contact & Program Info - Additional Guidance**

**Program Description.** Your program description should describe your program services, service-delivery methods (e.g., virtual/remote services, in-person, hybrid), and any relevant information that would be useful for someone unfamiliar with your program. DCYF includes grantee program descriptions in public-facing documents and other materials for department stakeholders.

**Primary Program Contact.** Grantee communications, including workplan and invoicing updates, will be sent to the Primary Program Contact listed on the *Contact & Program Info* form. Keep this information up to date to ensure you receive communications from DCYF.

**Step 4:** Complete and submit the *Services and Projections* form. This form consists of program operation dates, participant projections, target population(s), service site locations, and projected services. Refer to the DCYF 2024-2029 Request for Proposals when completing this form to ensure that your program's services and projections align with the guidance and requirements described for the Strategy under which your program is funded. Review your program's proposal or the *Program Dashboard* to identify your program's DCYF Result Area, Service Area, and Strategy.

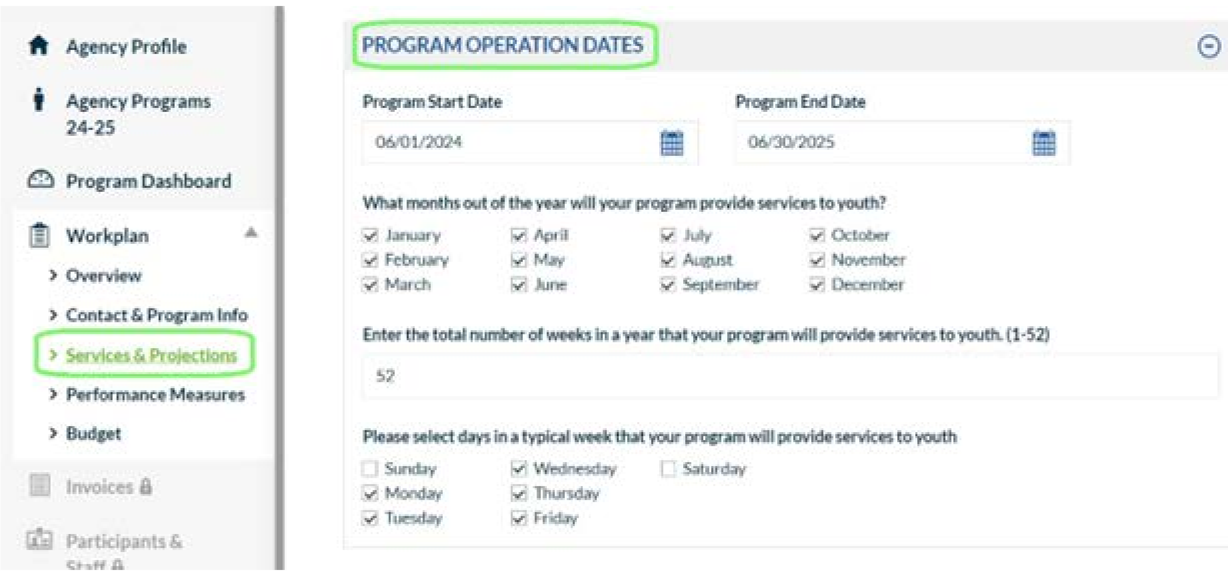
**Services & Projections - Additional Guidance**



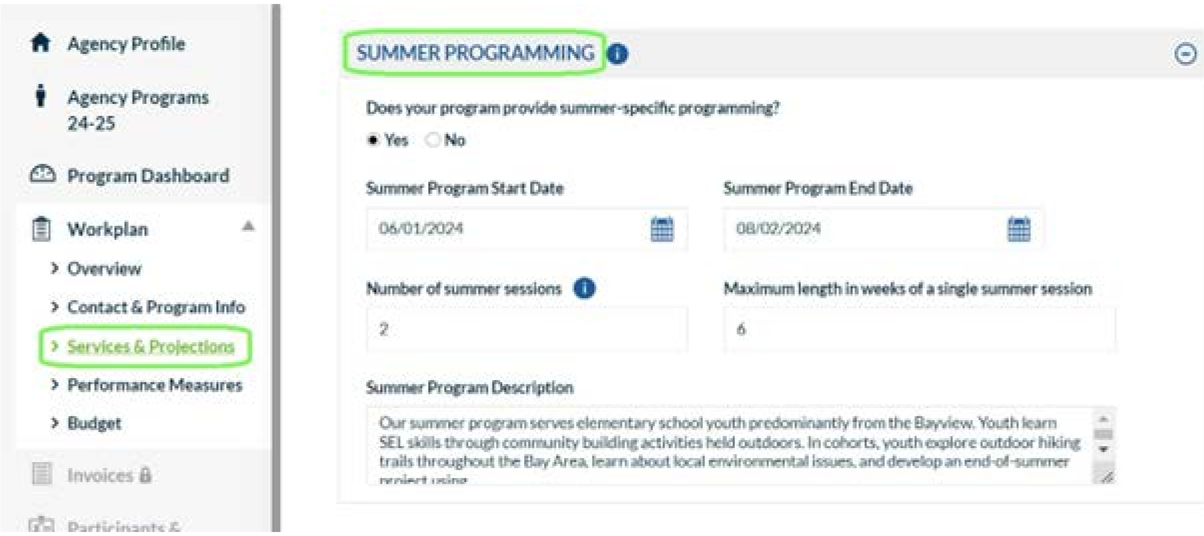

**Target Population.** Select the population(s) that your program has the expertise and mission to serve. Take the time to reflect on the population(s) that your program has an intentional focus on serving. DCYF refers to responses when responding to requests for information from department stakeholders. For example, responses have been used to respond to requests for information on programs with expertise in serving disconnected transitional age youth and youth with disabilities. Refer to the guiding questions below to support your selection.

- Location: Is your program strategically located in a specific neighborhood in San Francisco that would make your services more accessible to your target population?
- Supports: What intentional supports are provided by your program to better serve your target population(s)? Examples include, but are not limited to: language supports, specific legal services, skillsets required by your program staff to fulfill service delivery, wellness resources tailored to specific population(s).
- Outreach: Consider your programs' outreach methods. Are your outreach methods designed to target a specific population(s)?
- Participation: Would your program be able to speak to best practices for serving specific population(s)?

Target Population selections represent your program's expertise and population(s) of focus rather than population(s) served by your program coincidentally.




**Program Operation Dates.** The City's fiscal year begins on July 1 and ends on June 30 the following year. Although CMS is organized by fiscal year, to simplify activity reporting for summer programming, which typically falls in two fiscal years (e.g., the activities begin in June and end in August), DCYF requires grantees that offer summer programming to report on the activities in one fiscal year in CMS—the fiscal year in which the summer ends. For example, Summer 2024 activities should be reported into FY2024-2025 in CMS, and Summer 2025 activities should be reported into FY2025-2026. The *Program Start Date* must be on or after June 1 of the calendar year in which the fiscal year begins (e.g., June 1, 2024 for FY2024-2025), and the *Program End Date* must be on or before June 30 in which the fiscal year ends (e.g., June 30, 2025 for FY2024-2025). If your program offers summer services that are funded by your DCYF grant, your Program Start Date should be the first date of summer programming, and your Program End Date should be the last date of school year programming.




**Summer Programming.** If your program offers summer specific programming, please enter a description of your summer program, a start date, an end date, the number of summer sessions, and the length of a typical session.

Summer-specific programming takes place during the summer and is different, or separate, from programming offered throughout the rest of the year. For example, summer-specific programming may have a different enrollment process, extended hours, a different curriculum, or may be offered to a cohort that starts and ends during the summer months. Programs that operate year-round and do not make any significant changes during the summer months are not considered to have summer-specific programming.

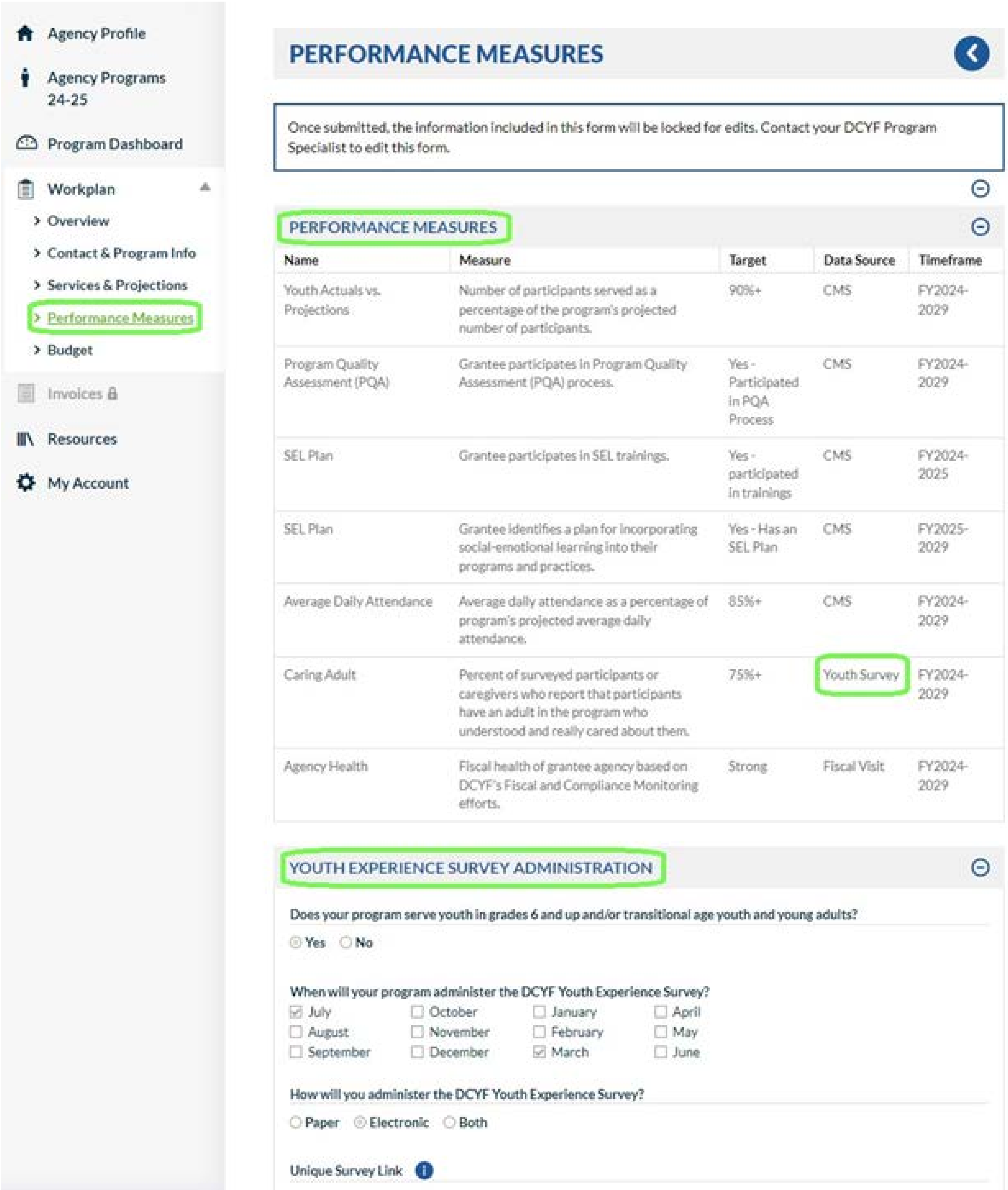
**Services Sites.** Closely review the program Service Site Locations and Projected Services. The *Services and Projections* form should only include site locations and services planned during the *Program Start* and *Program End Dates* listed in the *Program Operation Dates* section.

**Projected Services.** For each Projected Service, indicate a *Service Name, Service Type, Description,* and other service implementation details. Review the *Service Sites and Projected Services* section below for information on Service Types.

**Step 5:** Complete and submit the *Performance Measures* form. This form presents the performance measures applicable to your program based on the Strategy under which it is funded.

**Performance Measures - Additional Guidance**

**Youth Experience Survey Administration** - If your program is required to administer the DCYF Youth Experience Survey, please indicate your proposed survey administration method (paper, electronic, or both) and timeframe for administering the survey. Youth Experience Surveys must be administered each year to participants in grades 6+ towards the end of their program experience that year. Contact your Program Specialist if you have questions about the Youth Experience Survey.



Agency Profile
Agency Programs 24-25
Program Dashboard
Workplan
› Overview
› Contact & Program Info
› Services & Projections
› Performance Measures
› Budget
Invoices
Resources
My Account

PERFORMANCE MEASURES

Once submitted, the information included in this form will be locked for edits. Contact your DCYF Program Specialist to edit this form.

PERFORMANCE MEASURES

| Name | Measure | Target | Data Source | Timeframe |
|---|---|---|---|---|
| Youth Actuals vs. Projections | Number of participants served as a percentage of the program's projected number of participants. | 90%+ | CMS | FY2024-2029 |
| Program Quality Assessment (PQA) | Grantee participates in Program Quality Assessment (PQA) process. | Yes - Participated in PQA Process | CMS | FY2024-2029 |
| SEL Plan | Grantee participates in SEL trainings. | Yes - participated in trainings | CMS | FY2024-2025 |
| SEL Plan | Grantee identifies a plan for incorporating social-emotional learning into their programs and practices. | Yes - Has an SEL Plan | CMS | FY2025-2029 |
| Average Daily Attendance | Average daily attendance as a percentage of program's projected average daily attendance. | 85%+ | CMS | FY2024-2029 |
| Caring Adult | Percent of surveyed participants or caregivers who report that participants have an adult in the program who understood and really cared about them. | 75%+ | Youth Survey | FY2024-2029 |
| Agency Health | Fiscal health of grantee agency based on DCYF's Fiscal and Compliance Monitoring efforts. | Strong | Fiscal Visit | FY2024-2029 |

YOUTH EXPERIENCE SURVEY ADMINISTRATION

Does your program serve youth in grades 6 and up and/or transitional age youth and young adults?
Yes No

When will your program administer the DCYF Youth Experience Survey?
July October January April
August November February May
September December March June

How will you administer the DCYF Youth Experience Survey?
Paper Electronic Both

Unique Survey Link

**Step 6:** Complete and submit the *Budget* form. Refer to the *Doing Business with DCYF* guide for information about the budget categories and line items included on this form.

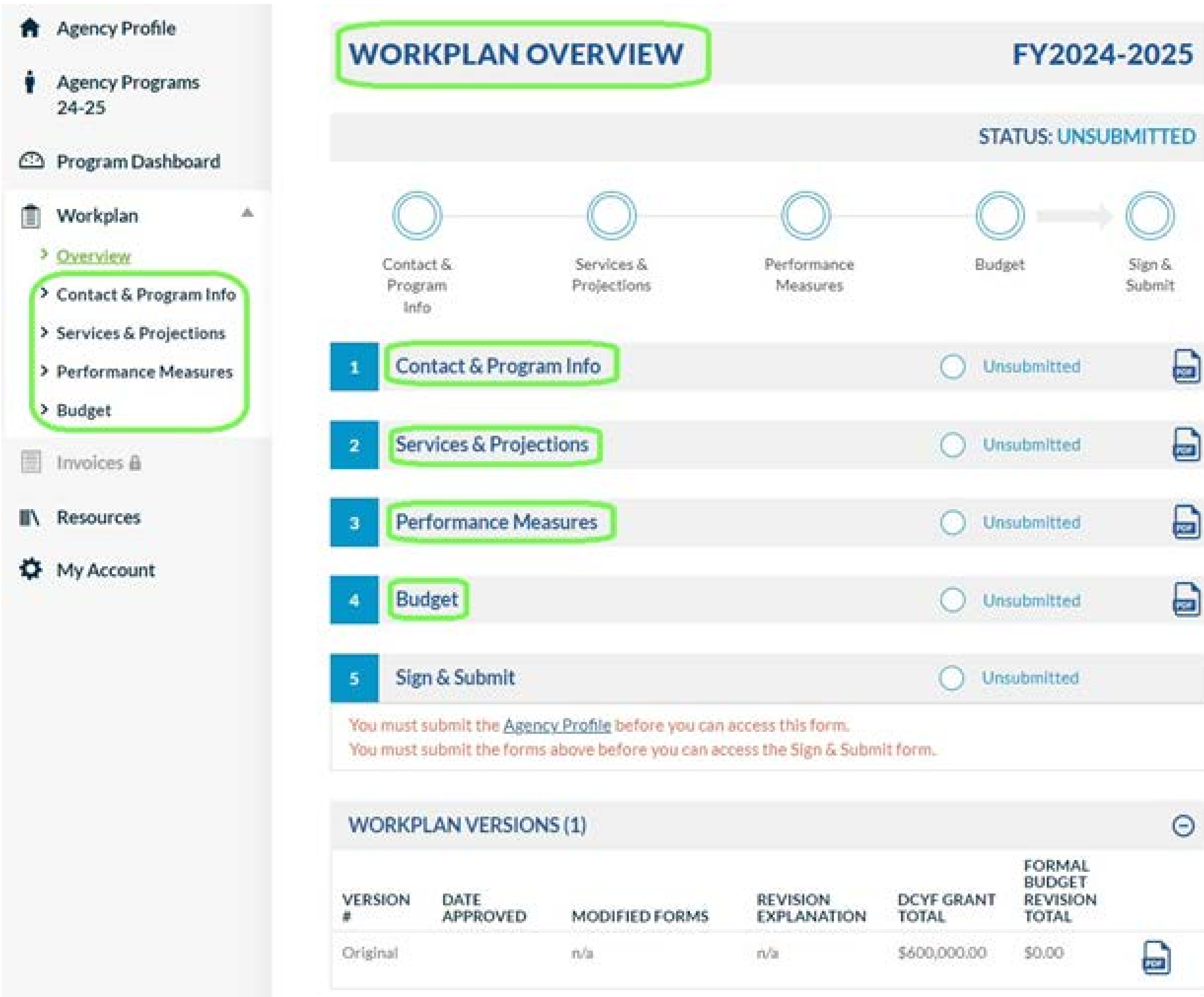
**Step 7:** Complete and submit the *Agency Profile* form. If the Agency Profile has already been submitted, review the responses for accuracy. The Agency Profile form is shared across all programs listed on the *Agency Programs* page.

**Step 8:** Submit your workplan for approval by completing and submitting the *Sign & Submit* form. The *Agency Profile* and all workplan forms must be submitted before accessing the *Sign & Submit* form. CMS will send an email to the Primary Program Contact listed in the *Contact & Program Info* form confirming your submission.

**Next Steps:** Your DCYF Program Specialist will review your submitted Workplan. CMS will send an email to the Primary Program Contact when your DCYF Program Specialist has approved or denied the workplan submission. If your submission is not approved, review the explanation submitted by your Program Specialist by navigating to the Workplan *Overview* form. Make necessary changes and resubmit the workplan for review and approval.

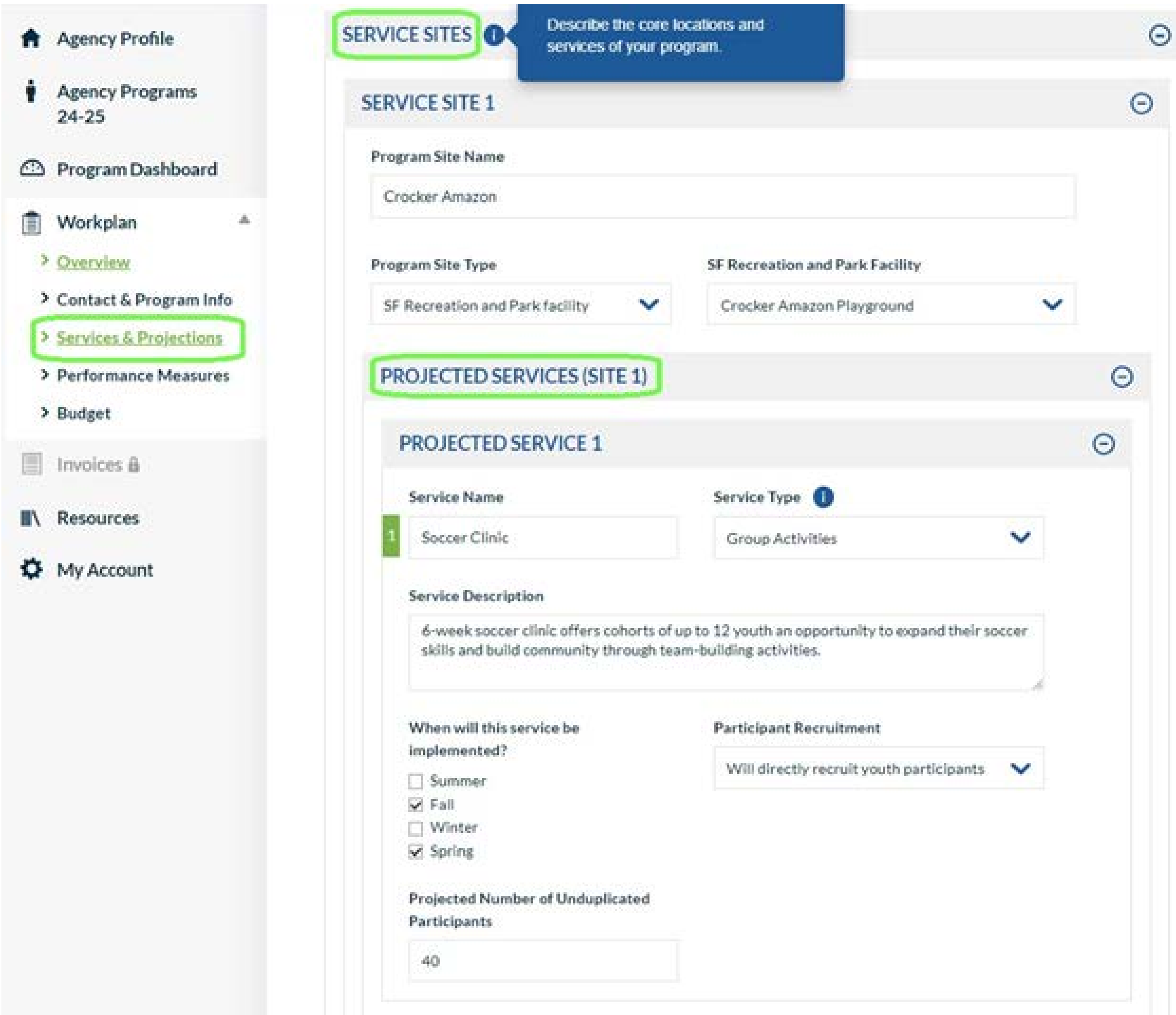
**Tips**

- Access workplan forms from one of two places in the CMS: the *Workplan* link in the lefthand navigation menu or the Workplan *Overview* page.




- CMS will log you out after 90 minutes of inactivity and you may lose any unsaved work! Save your progress regularly and continue later by clicking on the Save button, located at the top and righthand side of each form.
- Workplan forms that have been submitted may only be unlocked by the Program Specialist. Contact your Program Specialist if you need assistance unlocking a workplan form that has been submitted.
- Don't risk missing important DCYF communications! Keep your Primary Program Contact up to date in the *Contact & Program Info* form. The Program Primary Contact will receive an email notification when a Workplan is submitted, approved, or unlocked for edits.
- CMS email notifications sent by Cityspan. Check your spam or junk mail for CMS notifications sent from the email domain, *@cityspan.com*

# Service Sites and Projected Services




This section provides additional guidance on completing the Service Sites and Projected Services sections of the *Services & Projections* form. Describing funded programming and services with the appropriate level of detail on this form is key as this section of the workplan provides a template for activity reporting throughout the year. Describing dozens of detailed services at each site location on the workplan will require very detailed activity reporting throughout the year. At the same time, services must not be described ambiguously or omitted from the workplan altogether. Program Specialists will review your submissions to this section to ensure that projected services are described appropriately for the Strategy under which the program is funded.

### Service Types

Each Projected Service must be categorized as one of the following Service Types: Group Activities, Individual Activities, Job Placements, or Activities without Personal Information. These types are described in more detail below.

**Group Activities.** Activities that serve enrolled participants in group settings on a set schedule. Programs are required to track individual attendance records for all participants in Group Activities. Examples include group-based afterschool activities, job skills trainings, parent/caregiver courses, and youth discussion groups.

**Individual Activities.** Activities that serve enrolled participants in individual or one-on-one settings. Programs are required to track and record individual meeting dates and duration for all participants in Individual Activities. Examples include case management, mentorship, individual tutoring, and one-on-one follow-up support services.

**Activities without Personal Information.** Activities for which individual-level attendance records cannot be tracked, such as outreach activities to children, youth, and/or families not registered in the program. Programs are instead required to track and record the dates and total number of attendees. Examples include outreach activities for disconnected transitional age youth and special events such as "Lights on Afterschool" and "Summer Learning Day". DCYF expects programs to only project Events that are (1) key to meeting DCYF requirements and/or (2) essential to the delivery of DCYF-funded services.

**Job Placements.** Placements of youth into internships, job shadows, or work experiences. Programs are expected to track and record placement start and end dates, as well as specific details related to the individual placement, such as the type of organization into which the youth was placed. Reference the Job Placement activity type category definitions below when completing Workplan Job Placement Projected Activities:

| Job Placement Type | Definition |
|---|---|
| **Internship** | A paid, or unpaid, career preparation activity in which youth are placed in a business for a defined period of time to participate in and observe work firsthand within a given industry. Internships should include a formal learning contract between the youth, program, and the employer. Internships are intended to be highly structured, time-limited experiences that occur at a workplace. |
| **Job Shadow** | A career exploration activity in which youth observe the workday of a professional, interact with clients or customers, and attend meetings and other appointments. Job shadows are designed to help youth explore a field of interest while developing research skills and building occupational knowledge through a facilitated, active learning process. |
| **Work Experience** | A paid career preparation activity in which participants execute real work and are held to the same expectations as all employees at the workplace. Evaluations based on workplace expectations and performance should be provided by the worksite supervisor. Could be regular, paid employment, subsidized employment and/or learning-rich work experience. |

**Activity Reporting**

Throughout the year, grantees are expected to report data related to each service site and projected service described on the workplan. Once your program's workplan has been approved, you may begin to set up activities for recording participation and attendance. Each activity is associated with a Projected Service described on the workplan. Multiple activities can be connected to a single Projected Service.

The examples presented below demonstrate the relationship between Projected Services, Service Types, and Activities. Reference the examples below when describing Projected Services in the *Services & Projections* form.

**Example – Workplan Projected Service Types and Activity Attendance**

| Projected Service | Service Type | Activities* | Attendance Details |
|---|---|---|---|
| **Soccer Clinic** | Group Activity | Fall Soccer | Schedule, Participant Enrollment, Present/Absent attendance for each scheduled date |
| | | Spring Soccer | Schedule, Participant Enrollment, Present/Absent attendance for each scheduled date |
| **Case Management** | Individual Activity | 1-1 Support Sessions | Participant enrollment, Date of Attendance, # of minutes, notes, referral details |
| **Internships** | Job Placement Activity – *Internship* | Internships at local CBOs | Participant enrollment, Placement Dates, type (virtual/in-person), compensation, subsidies, job type, reason for ending |
| **Events** | Activity without Personal Information | Book Fair | Date of Service, # of minutes, counts of participants, notes |
| | | Lights on Afterschool | Date of Service, # of minutes, counts of participants, notes |

*Set up in the CMS *Activities* form after Workplan Approval

## Workplan Revisions

After a workplan has been approved, edits to the workplan in most cases require a formal workplan revision. To request a workplan revision, contact your DCYF Program Specialist and provide justification. If your Program Specialist agrees, they will start a new version of the workplan and unlock forms that require edits.

In some cases, revisions to the workplan may be limited by system rules and validations. For example, during the revision process, CMS will not allow budget category totals to be reduced below the amount invoiced for that category year-to-date. Additionally, it is important to note that CMS will lock access to the *Invoices* module if the *Budget* form has been unlocked or changed during the revision process.

Workplan revisions are reviewed and approved by the Program Specialist. Prior versions of the workplan are accessible in PDF form at the bottom of the Workplan *Overview* page after a new workplan version has been initiated.

> Edits to the *Agency Profile* and *Contact & Program Info* forms are the exception. These forms may be unlocked and edited by grantees at any time without going through the workplan revision process. The CMS notes this at the top of these forms.

# PARTICIPANTS & STAFF

Grantees report information about program participants in the CMS using the *Participants & Staff* module. The data required to be reported into the system includes personally identifiable information such as names, dates of birth, and home addresses. Grantees are responsible for collecting this information and maintaining participant records in the CMS. DCYF uses the information to understand the populations served by grantees and to ensure that San Francisco's most vulnerable children, youth, and families have access to services. Additionally, collection of demographic information is required to comply with legislative mandates. For example, DCYF grantees are required to collect sexual orientation and gender identity data to comply with the City's Sexual Orientation and Gender Identity Ordinance, which directs DCYF and other City departments to collect and report this data on an annual basis.

## Confidentiality and Consent

DCYF is committed to protecting the confidentiality of personally identifiable information in the CMS. The department restricts access to the data and is careful to prepare only aggregate-level, anonymous reports, charts, and tables that exclude any information that may be used to identify individual participants. Additional information on DCYF's policies and practices related to the collection, use, and management of personally identifiable information can be found in the *Doing Business with DCYF* guide.

DCYF maintains a data sharing agreement with Cityspan and the San Francisco Unified School District (SFUSD) to facilitate CMS reporting for services provided to SFUSD students. The agreement helps DCYF and SFUSD track student participation in DCYF-funded programs and understand program impacts on educational outcomes. Additionally, the partnership helps to streamline CMS reporting by providing grantees access to student names, dates of birth, addresses, and education information from SFUSD systems.

The data sharing agreement requires DCYF grantees to execute a Memorandum of Understanding (MOU) with SFUSD or collect consent forms that authorize access to student data before accessing personally identifiable information related to SFUSD students through the CMS. Grantees required to execute an MOU with SFUSD are those that (1) offer in-person services to students at SFUSD school sites or (2) offer virtual services to SFUSD students through the student's school. Grantees that do not have an existing contract or MOU with SFUSD must collect consent forms that authorize data sharing prior to registering and enrolling SFUSD students in CMS.

Appendix A provides the consent form for grantees to administer to parents/guardians and students over the age of 18 during program registration. Grantees may create and administer electronic versions of the form if desired. DCYF expects grantees to maintain signed consent forms on file, either in electronic or paper format, for periodic review and inspection. Grantees that have an existing contract or MOU with SFUSD are not required to collect consent forms from participants in services covered by the contract or MOU. Grantees are not required to collect consent forms from non-SFUSD participants.

- If your program has a contract or MOU with SFUSD, you are not required to collect consent forms from participants in services covered under the MOU.
- If your program serves SFUSD students and does not have a contract or MOU with SFUSD, you are required to obtain consent forms that authorize data sharing prior to registering SFUSD students in CMS.

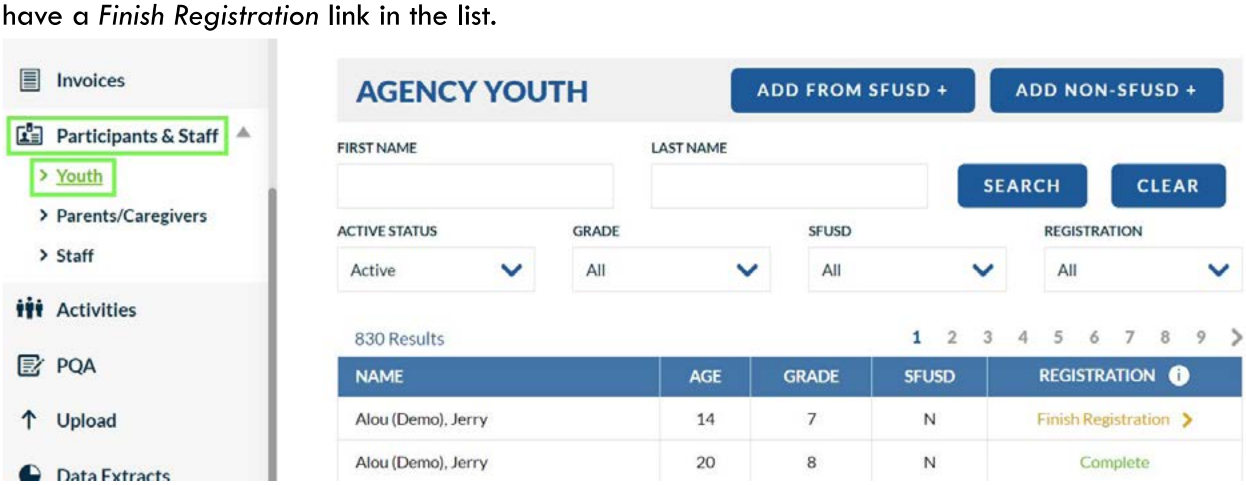
- Consent forms are not required for non-SFUSD participants.
- If your participants are already registered in CMS due to prior participation in your program(s), obtain signed consent forms at your earliest opportunity.
- If a participant participates in multiple DCYF-funded programs run by your agency, a single signed consent form is sufficient for all programs.
- Refusal to provide consent to share data with DCYF and SFUSD should not be a basis for denying services. Programs are encouraged to serve youth for whom consent cannot be obtained.
- If your program does not have direct contact with parents/guardians because you work with youth at the site of a different program, coordinate with the host program to have the consent forms administered with your agency's name listed on the consent form.
- If your program anticipates issues collecting consent forms for a significant number of participants, inform your DCYF Program Specialist.

## Registering Participants in CMS

Grantees must create complete records or profiles of participants in the CMS before information on their participation in group, individual, or job placement activities can be reported. The process of creating participant records is also referred to as registering participants in the system. Participant records include personal information (name, date of birth, home address), demographic information (race/ethnicity, gender identity, sexual orientation), and education information (level of schooling completed, school, grade level). Appendix B provides a sample participant intake form with the system's required demographic fields and response options. Grantees may administer their own intake forms but may need to recode or adapt data when entering information into the CMS.

### Agency Youth

To register new participants or manage existing registrations, access the *Agency Youth* page by clicking on the *Participants & Staff* link in the lefthand navigation menu and selecting *Youth*. The *Agency Youth* page displays a list of participants across all programs and includes search criteria and dropdown menus that can be used to filter the list. To view a profile, click on the name or registration status of a participant in the list. To register new participants, click on the *Add from SFUSD* or *Add Non-SFUSD* button at the top of the page. Before participants can be enrolled in activities, they must have a *Complete* registration status. Participant profiles with an incomplete registration will have a *Finish Registration* link in the list.



Participant records in CMS are shared by all programs at an agency. Youth who are registered by one program are available to enroll in other programs at the same agency. To prevent creating duplicate records, review your agency's existing registrations before adding new participants.

Participant registrations from prior fiscal years remain accessible in the FY2024-2029 funding cycle and do not need to be recreated.

**Participant Record Types**

Two types of participant records exist in the CMS: (1) *SFUSD* and (2) *Non-SFUSD*. SFUSD participant records are for SFUSD students and are preloaded with select information from SFUSD systems, including name, date of birth, home address, school, and grade level. These records automatically update when this information changes in SFUSD systems. As described in the *Confidentiality and Consent* section above, grantees must have an active contract or MOU with SFUSD or collect consent forms that authorize data sharing prior to accessing SFUSD student data through the CMS.

Non-SFUSD participants (e.g., private school students, youth participants not in school, etc.) should be registered using the Non-SFUSD record type. All data for these records must be entered by the grantee. Non-SFUSD profiles must be updated each year to reflect the most recent educational attainment information for each participant.

During the summer and early in the school year when many students change schools and enter or leave SFUSD, grantees may run into challenges finding SFUSD students in the CMS and adding new SFUSD participant records. Although the CMS is updated each day with new information from SFUSD systems, it may take some time for changes to officially be reflected in SFUSD's electronic systems. Please be patient and try registering participants again after a few days have passed. After several unsuccessful registration attempts and as a last resort, SFUSD participants may be registered in the CMS using the Non-SFUSD record type. Please select "SFUSD Student Record not in Enrollment Directory" as the school and write-in the name of the SFUSD school in the *Specify School Attending* field.

**Step-by-Step Registration Process**

**Step 1:** Log into CMS at [https://contracts.dcyf.org](https://contracts.dcyf.org).

**Step 2:** Navigate into a program and click on the *Participants & Staff* link in the lefthand menu.

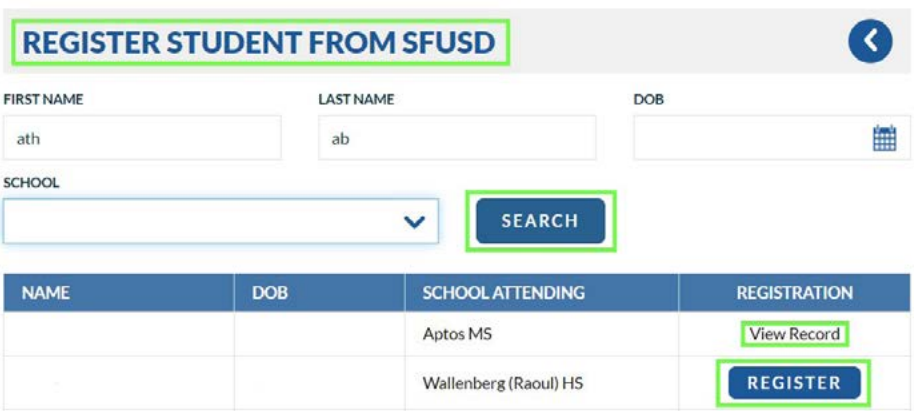
**Step 3:** Select *Youth* to access the *Agency Youth* list.

Search for a participant using the filter criteria and dropdown menus above the Agency Youth list. Click on the name or registration status of a participant to view a record.

**Step 4**: Search for the participant on the *Agency Youth* page to avoid creating duplicate records. If the participant has an existing profile, ensure the registration status is *Complete*. If your participant has an incomplete registration status, click on *Finish Registration* to submit missing information. If your participant cannot be found, proceed to Step 5 to create a new record.

**Step 5:** Register the participant by clicking on the *Add from SFUSD* or *Add Non-SFUSD* button.

**SFUSD Participants:** After selecting *Add from SFUSD*, search for the student by name, date of birth, and school. If your initial search is unsuccessful, try varying your search criteria, e.g., remove a few characters from the student's name or remove the school and date of birth. Once you have found the student, select *Register* to add the student to your *Agency Youth* list. If the student has already been registered, a *View Record* link will appear.




**Non-SFUSD Participants:** After selecting Add Non-SFUSD, enter the participant's name and date of birth. If an existing participant with the same name is found, you will be asked to confirm that you are not creating a duplicate record before completing the participant profile.

Profiles of Non-SFUSD participants ages 18 years and older have expanded Sexual Orientation and Gender Identity prompts and response options. Review Appendix B for a sample intake form.

**Step 6:** Save the participant profile by clicking on the Save button.

Once the registration status of the participant is Complete, the participant may be enrolled in activities in CMS.

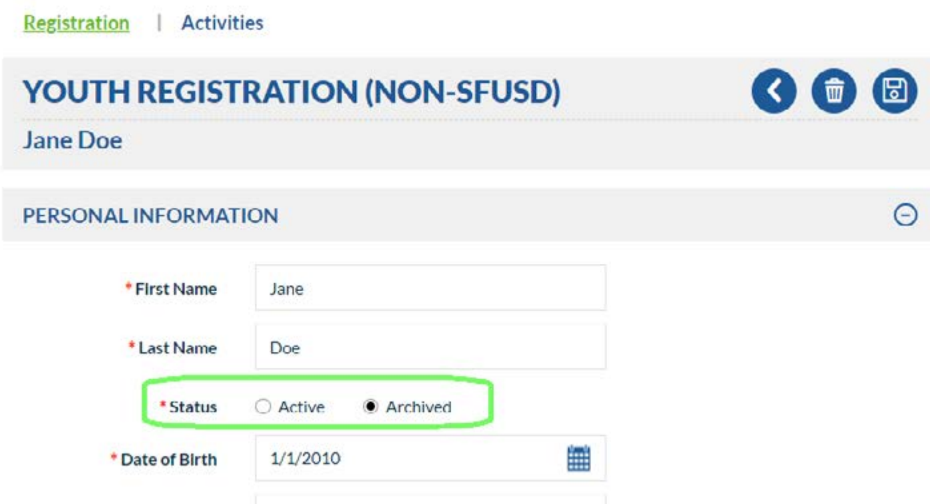
**Unique Identifiers**

Each registered participant is assigned a unique identifier in the CMS known as the *Person ID*. The *Person ID* can be used to distinguish participants with similar names and is displayed in the Personal Information section of the participant profile. Additionally, the *Person ID* is used when uploading participant demographics and attendance using the *Upload Tool*.

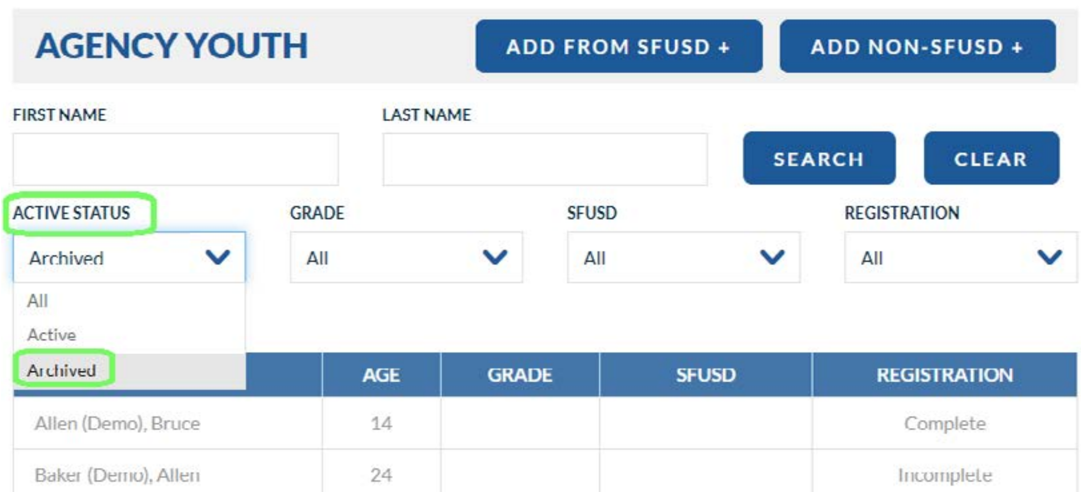
To download a complete list of registered participants and profile data, including Person IDs, navigate to the *Data Extracts* module and select the *Participant, Parent and Staff* Extract. Before generating the extract, select one or more Person Types and Registration statuses. This will generate a spreadsheet with the profiles that meet your search parameters.


## Archiving Participants

Participant profiles are shared by all programs at an agency and persist across years. Given these circumstances, the *Agency Youth* page may show an extensive list of registered participants. To maintain a manageable list of participants, grantees are encouraged to archive participants who are no longer active in services. Archiving participants does not impact past attendance records. To archive participants, access a participant profile and change the value of the Status field to *Archived*.




Archived participants may be accessed via the *Agency Youth* list by selecting *Archived* in the status dropdown filter.



# ACTIVITIES

Grantees use the *Activities* module to report on the services described in their workplans. As described in the *Workplan* section above, the *Services & Projections* form provides a template for activity reporting throughout the year. Grantees are expected to report data for each of their Projected Services. This means that there should be at least one activity associated with each Projected Service by the end of each fiscal year. Refer to the *Workplan* section above for information on how to complete the *Services & Projections* form of the workplan. This section describes how to create activities and record participation and attendance data in the CMS.

## Creating Activities

Activities are containers for grantees to record grant-funded services throughout the year. DCYF expects there to be at least one activity for each Projected Service described on the workplan. Grantees may create multiple activities per Projected Service if desired. For example, you may choose to create separate activities for a Projected Service to split CMS data entry across different staff or to help you track different groups of youth.

To add new activities to CMS, your workplan must be in an *Approved* state.

**Step 1:** Log in to the CMS and navigate into your program.

**Step 2:** Click on the *Activities* module in the lefthand navigation menu.

**Step 3:** Click on the *Add* button to create a new activity.

> If you do not see the *Add* button, your workplan is not in an *Approved* state, e.g., it is *Unsubmitted* or it is *Submitted* but still pending approval. Your Program Specialist must first approve your workplan before activities can be created.

**Step 4:** Select the Service Type from the dropdown menu.

**Step 5:**

**Group, Individual, or Activities without Personal Information:** Select a Service Site and Projected Service.

**Job Placements:** Select a Job Placement Projected Service.

**Step 6:** Enter activity details. These details may be edited after the activity has been created.

- **Activity Categories:** Select the categories applicable to the activity. Definitions for each category are provided in Appendix C. When making your selection(s), reflect on the intention of the activity. Although you may select more than one category, please select the categories that *best* capture the activity's objective. Job Placement categories are from the workplan and cannot be edited in the *Activities* module.
- **Activity Label:** Enter a label for the activity that will help with identifying the activity among a list of other activities.
- **Specify Staff *(optional)*:** Specify a Staff person who leads or implements the activity. To register a new staff member, access the *Participants & Staff* module and select the *Staff* form.
- **Notes *(optional)*:** Add additional descriptive information about the activity.

**Step 7.** Click *Create Activity.*

The process to create Group Activities continues below with setting up an activity schedule in Step 8. All other activities are ready for recording participation and service dates.

**Group Activities Setup**

**Step 8:** Create a schedule by selecting Single Date or Multiple Dates for number of occurrences. Then enter begin/end dates, days, and times. Note that you must enter dates that fall within the program operation dates specified in the workplan. When you are finished, click Next. This will redirect you to the Details page.

**Step 9:** Enroll participants by clicking on the Enrollment tab.

**Step 10:** Check off the names of the participants you would like to enroll in the activity. These are the participants for whom you will take attendance each day.

A quick way to enroll many participants is to check the *ALL* button in the upper lefthand corner and then deselect youth not enrolled in the activity.

**Step 11:** Review the enrollment begin dates for each participant. CMS prepopulates begin dates with the first scheduled activity date. You may change the date as necessary to reflect the date each participant started in the activity. When you are finished, click Next.

Check for scheduling conflicts. CMS generates a list of participants who are enrolled in activities that are scheduled at the same date(s) and time as your activity. If you want CMS to ignore these scheduling conflicts, check the *Enroll* box in the upper lefthand corner. When you are finished, click Next.

## Submitting Participation and Attendance Data

The service and participation data reported into CMS helps to quantify your program's reach and impact. Recording dates of service and participation in the system is also a grant requirement; activity data must be entered into the CMS no later than 45 days following the close of the month. For example, July 2024 activity data must be entered into CMS no later than September 15, 2024. Activity data is summarized and reflected in progress reports included in monthly invoices.

To add data related to an activity, you will first need to create the activity. See the previous *Creating Activities* section for more information. To add individual-level participation and attendance data (group, individual, and job placement activities) to an activity, you will need register your participants in CMS; see the *Registering Participants in* CMS section for more information.

**Step 1:** Log in to the CMS and navigate into your program.

**Step 2:** Click on the *Activities* module in the lefthand navigation menu.

**Step 3:** Select the activity for which you are recording participation.

**Group Activities**

**Step 4:** Select a week to record attendance on the *Attendance* page.

**Step 5:** Enter attendance for each scheduled day by selecting “P” (present) or “A” (absent) for each participant. You may also use the *Mark All Present* or *Mark All Absent* buttons to enter attendance for all participants enrolled in the activity for the week’s scheduled days.

**Step 6:** Save your attendance by clicking on the Save button.

**Individual Activities**

**Step 4:** Click on the *Add* button to create a new participation record for a participant.

**Step 5:** Complete the required fields as indicated by a red asterisk (Participant, Date, and # of Minutes). Add optional referral details.

**Step 6:** Click on *Create* button to save the record or the *Create and Add Another* button to save the record and start a new individual participation record.

**Job Placements**

**Step 4:** Click on the *Add* button to create a new job placement record.

**Step 5:** Complete the required fields as indicated by a red asterisk (e.g., start date, virtual/remote, compensation, etc.).

**Step 6:** Click on *Create* button to save the record or the *Create and Add Another* button to save the record and start a new job placement record.

**Activities without Personal Information**

**Step 4:** Click on the *Add* button to create a new instance of the activity.

**Step 5:** Complete the required fields as indicated by a red asterisk (service date, minutes, number of participants, etc.).

**Step 6:** Click on *Create* button to save the record or the *Create and Add Another* button to save the record and start a new instance of the activity.

## Editing Activity Details

To edit activity details such as the activity label, categories, or assigned staff, access the *Activities* module and navigate into an activity. Select the *Details* link at the top of the page and click on the edit icon. Some activity details, such as the *Activity Description*, are populated from the workplan and may only be edited through a workplan revision. See the *Workplan* section for more information.

# OUTCOMES

The *Outcomes* module is used to view an unduplicated list of program participants and to record participant-level outcomes related to program performance measures. The list includes participants that have participated in a group, individual, or job placement activity during the year according to data submitted via the *Activities* module. Summary information, such as first participation date and total unique service dates, is displayed for each participant.

Additionally, programs funded under the following strategies are required to use the *Outcomes* module to report performance measure results for each participant.

- Educational Supports
    - Academic Supports
    - Alternative Education
    - Literacy Supports
    - Summer Transitions
- Youth Workforce Development
    - High School Partnerships
    - Mayor's Youth Employment and Education Program (MYEEP) Initiative
    - Youth Workforce Development - General
    - Youth Workforce Development - TAY/A
- Justice Services
    - Young Adult Court Case Management (YACCM)

Programs required to submit participant outcomes must indicate results for each participant by the end of each year using the data entry and outcome reporting instructions located in Appendix D.

# PROGRAM QUALITY ASSESSMENT

The Youth & School Aged Program Quality Assessment (PQA) Tool is a validated instrument developed by the David P. Weikart Center to evaluate the quality of youth programs and identify staff training needs. The tool measures a young person's access to key developmental experiences through a set of scored items that can be used to assess progress over time. Grantees required to participate in DCYF's Program Quality Intervention process use the PQA module in CMS to record information related to assessments conducted using the PQA tool.

## Submitting PQA Scores

**What You'll Need**

- Agency or Program Staff User Account
- PQA observation details, scores, and supporting evidence
- Approved Workplan

**Step 1:** Log into CMS at https://contracts.dcyf.org.

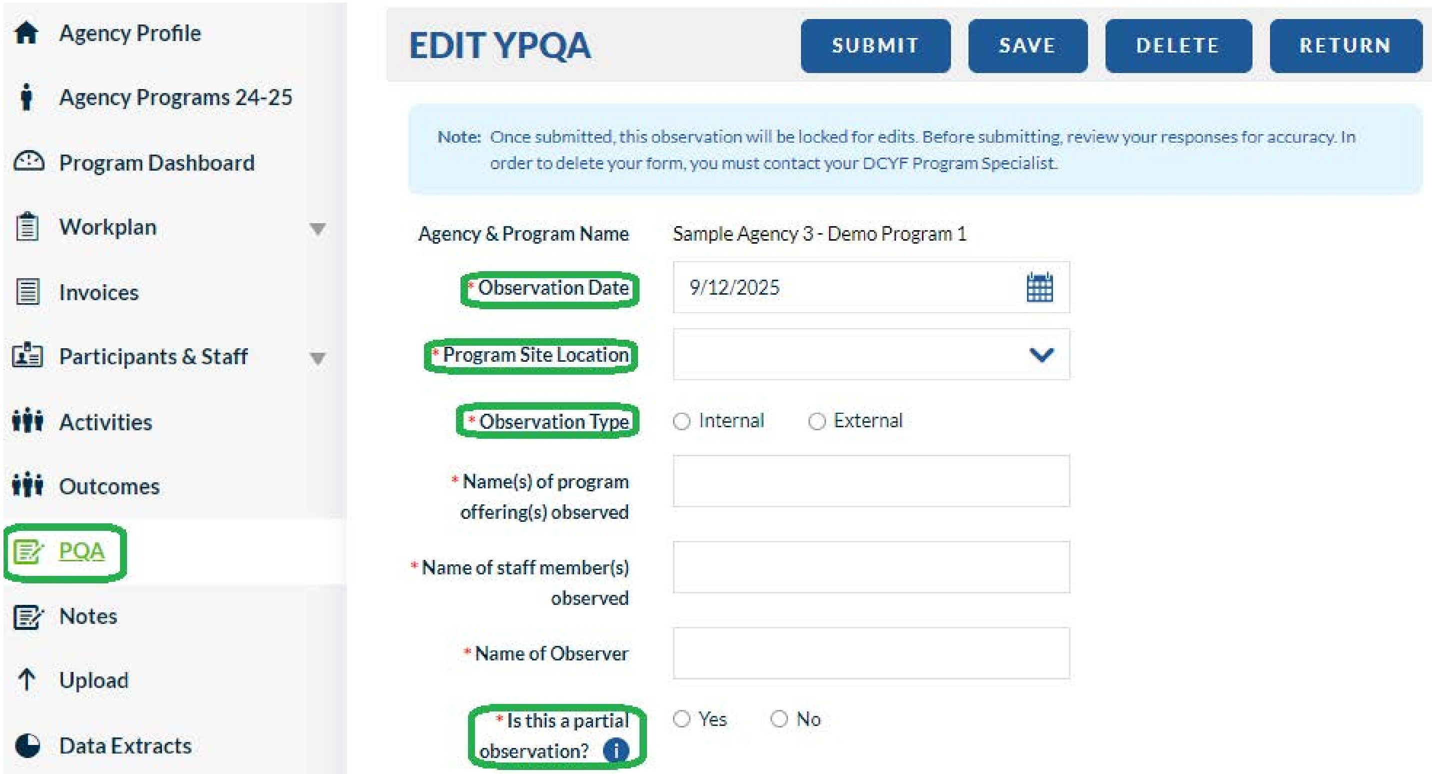
**Step 2:** Select a program and click on the *PQA* link in the lefthand menu.

**Step 3:** Identify the PQA tool used to assess program services and select the appropriate *Add+* button.

PQA Observations can only be created for programs with approved workplans. Check the status of your workplan in the *Workplan Overview* form or on the *Agency Programs* page.

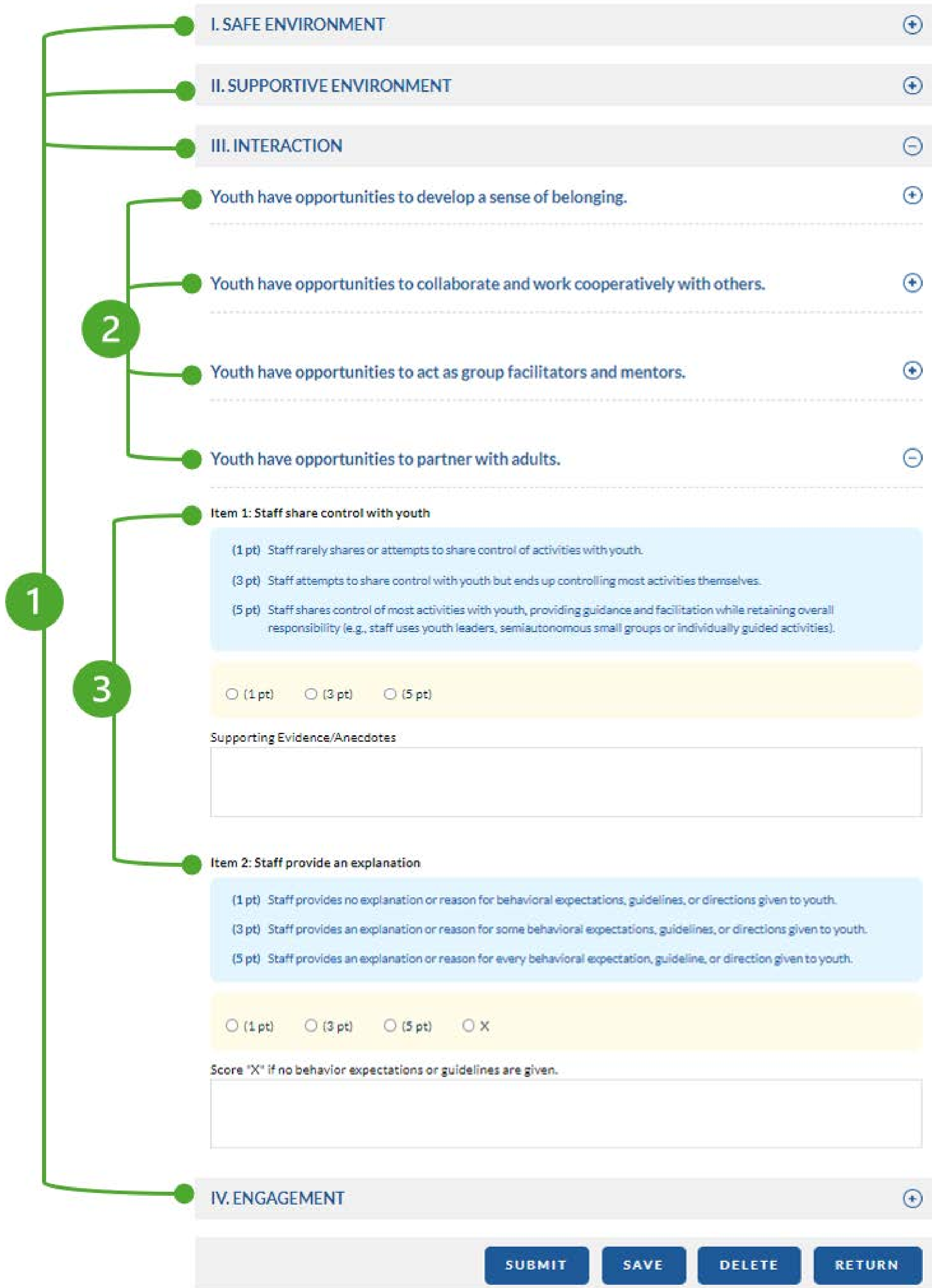
Prior to observing your Program, ensure you are utilizing the correct PQA tool. Contact your Program Specialist to confirm.

**Step 4:** Complete the Observation Details.




- **Observation Date.** The date the observation took place. This date must fall between the Program Operation Start and End Dates entered in the *Workplan Services & Projections* form.
- **Program Site Location.** The site where the observation took place. The Program Site Location dropdown menu is populated with the approved list of sites in the Workplan Services & Projections form. Contact your Program Specialist if you do not see an option for the location where the observation took place.
- **Observation Type.** Internal assessments, also known as self-assessments, are conducted by grantee staff. External assessments are conducted by DCYF staff. Grantees should select the "Internal" option.
- **Partial Observations.** Partial Observations do not require the form to be completed in its entirety. Contact your Program Specialist prior to conducting a partial observation.

**Step 5:** Complete the observation form by submitting a score and supporting evidence for each item. Use the collapse and expand icons to navigate the different domains and scales included in the form.




1. **Domains:** Domains are listed above relevant Scales and items.
2. **Scales:** Scales are listed below relevant Domains and include one, or more, items.
3. **Items:** Items are listed below relevant Scales. Reference the scoring guidelines and available scoring instructions presented with each item.

**Step 6:** Review the observation form for accuracy and submit the form.

Once an observation form has been submitted, it cannot be edited. To edit or delete a submitted observation form, contact your Program Specialist.

Save your work often! Select the save icons as you submit your PQA scores and supporting evidence. CMS will time out after 90 minutes of inactivity. Any progress that has not been saved will be lost when you are logged out of the system.

To save an observation form, first complete the observation details listed at the top of each form.

# INVOICES

DCYF grant funds are provided on a cost reimbursement basis. This means that grantees must first incur and then invoice for eligible program expenses rather than receiving their full grant awards at the start of their term. The invoice submission and review process is carried out in the *Invoices* module in CMS. On a monthly basis, grantees submit expenses along with a *Narrative* and *Progress Report* for review and approval by DCYF Program Specialists.

Grantees identify their anticipated invoicing months on their annual workplans. To access the *Invoices* module, a grantee's workplan must be in an approved state and the DCYF Grant Agreement approval process must be complete. CMS will send an email to the program primary and fiscal contacts once the Grant Agreement approval process is complete, indicating that invoicing can begin.

> Important invoicing details, including expense eligibility and deadlines, are published in the Doing Business with DCYF guide.

## Submitting Monthly Invoices

**What You'll Need**

- Agency Account
- Doing Business with DCYF

**Step 1:** Log-in to CMS using an Agency account. Program Staff accounts may view and edit invoice *Narrative* responses but do not have access to edit the *Expenses* form nor submit invoices for DCYF review.

**Step 2:** Navigate to the appropriate fiscal year using the Fiscal Year filter, located in the Agency Programs page.

**Step 3:** Select the program you wish to invoice for.

**Step 4:** Click on the *Invoices* module located in the left menu.

**Step 5:** Select the current month's invoice.

**Step 6:** Complete and submit the *Narrative* form.

Your responses should describe challenges, successes, and programming experiences. Additionally, responses should reflect the activity and participation data submitted in CMS. If your program offered services for which you were unable to collect and report individual participation data, document the services in your responses in the *Narrative* form.

> DCYF Program Specialists may request specific details and/or ask that additional questions be addressed in your narrative responses.

**Step 7:** Review and submit the *Progress Report*.

The Progress Report summarizes monthly and year-to-date participation data entered in the CMS prior to submission of the Progress Report form. Activity and participation data entered after submission of the form will be reflected in future Progress Report totals. Prior to submitting the Progress Report form, ensure all activity and attendance data has been entered in CMS and reflects the program activities for the month.

**Step 8:** Complete and Submit the *Expenses* form.

The *Expenses* form presents the following three sections


1. **Approved Expenses Summary** (excluding the current month's expenses): This table lists the budget allocated to different categories described in your approved workplan. Approved expenses, adjustments, and payments from prior months are reflected in the *Account Balance* column, which indicates the total funds remaining for each budget category.
2. **Monthly Expenses Summary** (current month's expenses): This table lists the total expenses included in the current month's invoice for each budget category described in your approved workplan. The totals will update after you submit expenses for each category in the following section.

> Grantees that received an advance payment will see an advance repayment amount deducted from the total expenses to be reimbursed by DCYF in the *Monthly Expenses Summary* table. Monthly advance repayment amounts are based on the schedule agreed to at the time the initial payment was finalized. Contact your DCYF Program Specialist if your total monthly expenses are less than the month's advance repayment amount.

3. **Expenses by Category** (current month's expenses): Submit expenses for each budget category using the appropriate table. The expense categories that appear on your invoice are drawn from your approved workplan. If you do not see an expense category that you need, please contact your DCYF Program Specialist.

**Expenses Form – Additional Guidance**

**Adult Staff:** Enter the *Role/Title*, *Employee Name*, and wage information for eligible adult staff. You may add or delete staff by clicking on the *Add* button or trashcan icon.

> You may copy over Adult Staff information from the prior invoice month for the current fiscal year by clicking on the *Copy Over* button.

> You must list the name, title, and wage information for each employee. Multiple employees cannot be described under a single adult staff line. Review all wages to make sure your invoices reflect your agency's payroll records.

**Youth Staff:** Enter the *Title/Position, Number of Positions*, and wage information for youth staff. CMS will generate an error message if the total monthly expense for Youth Staff is greater than the amount remaining in your Youth Staff budget.

**Subcontractors:** Enter the name, expense amount, and explanation for each subcontractor. Only subcontractors named in the approved DCYF Grant Agreement may be listed in this section.

**Expenses by Category:** Enter the expense amount and explanation for each budget category.

> CMS will generate an error message if the total monthly expense for any budget category is greater than the amount remaining in that category. Please contact your Program Specialist if you need to revise your budget.

**Step 9:** Complete the Sign & Submit step to submit the invoice for DCYF review and approval. Invoices must be submitted in monthly order.

Access a PDF copy of individual invoice forms or the full invoice by selecting the PDF icons located to the right of each form name.

> Submitting **only** the *Expenses* form (Step 8, above) is insufficient and will not send your invoice for DCYF review upon submission. **You must submit all components of your Invoice (*Narrative, Progress Report, Expenses,* and Sign & *Submit)* for DCYF to receive your full invoice and begin the review process.**

## Editing Invoicing Months

Invoicing months are defined in the first version of your workplan and cannot be changed through a revision process once the workplan has been approved.


If your program has zero expenses on a given invoicing month, submit the invoice with zero expenses. This ensures access to subsequent invoicing months. To add invoicing months that were not initially selected in your workplan, contact your Program Specialist.

## Editing Submitted Invoices

There are different ways to edit submitted invoices depending on where they are in the approval process.

**1. If your invoice is unapproved and under review by DCYF**

Contact your DCYF Program Specialist and request that they disapprove the invoice submission. Disapproving the invoice will allow you to make the necessary edits and resubmit.

**2. If your DCYF Program Specialist has approved your invoice**

Contact your DCYF Program Specialist. Depending on the circumstances, your Program Specialist may recommend an *Adjustment* on the following invoice. Adjustments are entered by DCYF staff before an invoice is submitted by grantees for review. Adjustments are applied at the budget category-level (e.g., Adult Staff, Youth Staff, Other Program Expenses) and can be positive or negative dollar amounts depending on the issue to be addressed. Positive adjustments are typically applied when grantees under-bill, and negative adjustments are typically applied when grantees over-bill.

# UPLOAD TOOL

The *Upload Tool* provides an option for grantees to add participant and activity data to the CMS in bulk by populating and uploading spreadsheet templates. Because the tool does not replace all data entry interfaces in the CMS, we encourage grantees to consider the benefits and costs of using this tool. Grantees who meet all of the following conditions may find the *Upload Tool* efficient and effective for entering participant and activity data into the CMS: 1) grantee houses the majority of their participant and activity data in another database that is capable of generating reports/extracts in a tabular format; 2) fields and values in the other database are mapped to CMS data or if they are not currently mapped, grantee has the staff capacity to conduct this mapping; 3) all required fields in the CMS are represented in the other database; and 4) grantee works with large numbers of SFUSD and/or non-SFUSD youth.

If your program decides to upload participant and attendance data, we encourage you to stick to this method year-round. A combination of uploads and manual data entry may lead to data being unintentionally deleted or overwritten. For data quality assurance purposes, if you are planning on uploading data please stick to this method as much as possible. You may change methods year to year, but it is best practice to stick to just one method year-round.

## Step-by-Step Instructions for Uploading Data

**What You'll Need**

- Agency or Program Staff User Account
- Appropriate Upload Tool Template: Accessible in the CMS Resources page
- For uploading attendance: Participant records entered in CMS and activities created
- For uploading participant registrations: DCYF-required demographic information

**Register SFUSD Participants (Part 1)**

Programs have the option to register SFUSD participants using the CMS Upload Tool. All DCYF-required demographic information must be uploaded for a complete participant registration which requires a 2-step upload process. As with manual SFUSD participant registration, the SFUSD participant registration data upload tool first requires you to search for an SFUSD participant that matches to an existing student in SFUSD's directory. Step 2 (described below) requires the submission of participant demographic information once a participant has been registered in CMS and has an existing Person ID.

**Step 1:** Navigate to the CMS *Resources* tab and download the 'DCYF SFUSD Student Registration Upload Template'.

**Step 2:** Complete the required cells.

Your program's *Site ID* is located in the CMS *Upload* window. Provide the participant's SFUSD H0# and/or their First Name, Last Name, AND Date of Birth. CMS will use SFUSD H0# (if entered in the Upload Template) to find a matching SFUSD student. If SFUSD H0# is missing, CMS will use a combination of First Name, Last Name, AND Date of Birth to find a matching student. Enter participant names identical to SFUSD records.

**Step 3:** Save the file on your local computer.

**Step 4:** Click on the *Upload* tab in the left-hand menu in CMS.

**Step 5.** Click on the *Choose File button* in the Data Upload Tool.

**Step 6.** Select the upload template file you would like to upload. This will upload the file to the Data Upload Tool.

**Step 7:** Select 'DCYF SFUSD Student Registration Upload' for *Type* in the Data Upload Tool.

**Step 8:** Click on the *Begin Upload* button in the Data Upload Tool.

**Step 9:** (If applicable) Review any error messages, make appropriate changes and repeat steps 5-8.

**Step 10:** When all participants have been registered successfully, click on the 'AssignedPersons' file.

**Step 11:** Use the 'Assigned Persons' file to locate the registered participant Person IDs. The Person ID is a unique CMS identifier and will be required to complete Step 2 below.

**Step 12:** Participants are now registered to the CMS but have an Incomplete Registration Status due to missing demographic responses.

**Register SFUSD Participants (Part 2)**

Follow these steps to upload or update participant demographic information in CMS. If your program does not already track participant identifiers in an external database, retrieve Person ID for each participant requiring demographic uploads or updates through the 'Assigned Persons' file (as described above). Use the 'Participant, Parent & Staff' Data Extract to access Person ID and all other participant information submitted in your agency's CMS.

**Step 1:** Identify participant Person ID by referencing the 'AssignedPersons' file as described in the section above (How to Register SFUSD Participants Step 1).

**Step 2:** Download the 'DCYF SFUSD Student Demographic Upload Template' from the CMS *Resources* tab – *Upload* section.

**Step 3:** Populate Person ID in the upload template.

**Step 4:** Populate the rest of the columns for each participant by selecting values in the drop-down menus.

**Step 5:** Save the upload template to your computer.

**Step 6:** Click on the *Upload* tab in the left-hand menu in CMS.

**Step 7:** Click on the *Choose File* button in the Data Upload Tool.

**Step 8:** Select the upload template file you would like to upload. This will upload the file to the Data Upload Tool.

**Step 9:** Select the 'DCYF SFUSD Student Demographic Upload' for *Type*.

**Step 10:** Click on the *Begin Upload* button in the Data Upload Tool.

**Step 11:** (If applicable) Review any error messages, make appropriate changes and repeat steps 7-11.

**Update Demographic Information for SFUSD Participants**

Sometimes you may need to make updates or changes to participant records you have uploaded or manually created in CMS. Below are steps for making changes or updates through the Data Upload Tool.

**Step 1:** Ensure that each participant you wish to upload into CMS has a participant record. Obtain participant Person IDs.

**Step 2:** Run the 'Participant, Parent & Staff Extract' from the CMS Data Extracts tab.

**Step 3:** Select Youth for 'Participant Type' and Incomplete under 'Registration'.

**Step 4:** Select Generate. Open the downloaded file and identify Person ID located in Column B.

**Step 5:** Complete steps 2-11 listed above.

**Register Non-SFUSD Participants in CMS**

Follow these steps to register non-SFUSD participants using the 'DCYF Non-SFUSD Student Registration+Demographic Upload Template'. The upload template may also be used for updating non-SFUSD participant demographic using existing CMS Person IDs.

**Step 1:** Navigate to the CMS Resources tab via the left-hand side menu and download the 'DCYF Non-SFUSD Student Registration+Demographic Upload Template' - within the Uploads section.

**Step 2:** Populate all required columns for each participant by selecting values in the drop-down menus. Note, CMS will register and update demographic information during the same upload session. All required columns must have a value for a successful participant registration.

**Step 3:** Save the upload template to your computer.

**Step 4:** Click on the Upload tab in the left-hand menu in CMS.

**Step 5:** Click on the Choose File button in the Data Upload Tool.

**Step 6:** Select the upload template file you would like to upload. This will upload the file to the Data Upload Tool.

**Step 7:** Select the 'DCYF Non-SFUSD Participant Registration Upload' for Type.

**Step 8:** Click on the Begin Upload button in the Data Upload Tool.

**Step 9:** (If applicable) Review any error messages, make appropriate changes and repeat steps 3-9.

**Step 10:** Repeat steps 5-9 to obtain the CMS participant Person IDs by downloading the file, 'ExistingRecord FNLNDOB'. Column AA defines participant Person IDs.

**Update Demographic Information for Non-SFUSD Participants**

Sometimes you may need to make updates or changes to participant demographic information. Below are steps for making changes or updates through the Data Upload Tool.

**Step 1:** Ensure that each youth participant you wish to update demographics for has been registered in your agency's CMS. Obtain the participant Person IDs.

**Step 2:** Run the 'Participant, Parent & Staff Extract' from the CMS Data Extracts tab.

**Step 3:** Select Youth for 'Participant Type' and Incomplete (for participants missing required demographics) or Complete (for participants with complete demographic information) under 'Registration Type'.

**Step 4:** Select Generate. Open the download and identify Person ID located in Column B.

**Step 5:** Complete steps 1-10 listed above.

**Update Non-SFUSD Participant SOGI Demographics**

When uploading non-SFUSD youth, it is important to pick the appropriate option based on the youth's age since it may lead to an incomplete registration. The Data Upload Tool validates the Gender/Gender Identity and Sexual Orientation fields, so it is important to pay close attention to the entries in these fields. For instance, selecting "Transgender" under the Gender & Gender Identity field for a 20-year-old will cause an error for that participant entry and the record will not be created nor updated in CMS. Follow the these steps to upload or update participant demographic information in CMS. If your program does not already track participant identifiers in an external database, retrieve Person ID for each participant requiring demographics uploads or updates through the 'Assigned Persons' file (as described above) or through the 'Participant, Parent & Staff' Data Extract.

**Gender & Gender Identity**: This field has different options for youth participants who are under 18 years old versus over 18 years old. Reference the sample participant profile in Appendix B.

**Sexual Orientation:** This field has different options for youth participants who are under 18 years old versus 18 or older. Reference the sample participant profile in Appendix B.

**Upload Attendance for Group Activities**

**Step 1:** Ensure that Group Activities have been created in CMS, including their schedules.

**Step 2:** Run the 'Participant, Parent & Staff Extract' from the CMS Reports tab.

**Step 3:** Run the 'Activity Extract' from the CMS *Data Extracts* tab.

**Step 4:** Filter for "Group" in the Activity Extract under the Activity Type column (Column F).

**Step 5:** Download the 'Group Attendance Upload Template' from the *Resources* tab – *Upload* section.

**Step 6:** Enter Person IDs, Activity Instance IDs and Attendance Dates for the attendance you wish you upload.

Populate the Attendance Date column by entering each date each participant attended each activity. To populate the Person ID and Activity Instance ID columns in the template, pull Person IDs from the Participant, Parent & Staff Extract 'and Activity Instance IDs from the Activity Extract.

**Step 7:** Save the file to your computer.

**Step 8:** Click on the *Upload* tab in the left-hand menu in CMS.

**Step 9:** Click on the *Choose File* button in the Data Upload Tool.

**Step 10:** Select the upload template file you would like to upload. This will upload the file to the Data Upload Tool.

**Step 11:** Check the 'Group Attendance Upload' for *Type* in the Data Upload Tool.

**Step 12:** Click on the *Begin Upload* button in the Data Upload Tool.

**Step 13:** (If applicable) Review any error messages, make the appropriate changes and repeat steps 8-12.

**Update attendance records in Group Activities:**

Your program may need to update or change attendance records you have uploaded. Below are steps for updating attendance records to make these changes.

**Step 1:** Repeat steps 1-5 above for Group Activities.

**Step 2:** To upload dates of attendance for participants that were originally left out of the initial upload, simply repeat steps 6-12 above (for Group Activities).

**Step 3:** To change a participant's attendance from "present" to "absent", simply log into CMS, locate the attendance record and select "A" for absent.

**Upload Attendance for Individual Activities**

**Step 1:** Ensure that Individual Activities have been created in CMS.

**Step 2:** Run the 'Participant, Parent & Staff Extract' from the CMS *Data Extracts* tab.

**Step 3:** Run the 'Activity Extract' from the CMS *Data Extracts* tab.

**Step 4:** Filter for "Individual" in the Activity Extract under the Activity Type column (Column F).

**Step 5:** Download the 'Individual Attendance Upload template' from the *Resources* tab – *Upload* section.

**Step 6:** Enter Person IDs, Activity Instance IDs and Attendance Dates for the attendance you wish you upload.

Populate the Attendance Date column by entering each date each participant attended each activity. Populate the Attendance Date column by entering each date each participant attended each activity. To populate the Person ID and Activity Instance ID columns in the template, pull Person IDs from the Participant, Parent & Staff Extract and Activity Instance IDs from the Activity Extract. Column A, Attendance ID, is populated only when you are making updates to attendance records.

**Step 7:** Populate the Minutes Attended column (column F).

**Step 8:** (Optional) Populate the Staff ID column by pulling Person IDs for staff from the 'Participant, Parent & Staff Extract'.

**Step 9:** (Optional) Populate Columns G through K.

**Step 10:** Save the file to your computer.

**Step 11:** Click on the *Upload* tab in the left-hand menu in CMS.

**Step 12:** Click on the *Choose File* button in the Data Upload Tool.

**Step 13:** Select the upload template file you would like to upload. This will upload the file to the Data Upload Tool.

**Step 14:** Select the 'Individual Attendance Upload (Site-level)' for *Type*.

**Step 15:** Click on the *Begin Upload* button in the Data Upload Tool.

**Step 16:** (If applicable) Review any error messages, make the appropriate changes and repeat steps 11-15.

**Update attendance records in Individual Activities:**

You may need to update or change attendance records you have uploaded. For example, you may have accidentally left out referral information or uploaded the incorrect number of minutes. Instead of making these changes manually (i.e. going into the attendance record in CMS), you will need to use the Data Upload Tool.

**Step 1:** Run the 'Participant Attendance Extract' from the *Data Extracts* tab in CMS.

**Step 2:** Download the 'Individual Attendance Upload template' from the *Resources* tab – *Upload* section.

**Step 3:** Pull Attendance IDs for the attendance record you would like to update from the 'Participant Attendance Extract'.

**Step 4:** Enter the Attendance IDs for the attendance record you would like to update into the upload template.

**Step 5:** Enter the information you would like to upload into the appropriate columns.

**Step 6:** Save the file to your computer.

**Step 7:** Repeat steps 11-16 above for Individual Activities.

**Upload Attendance for Job Placements**

**Step 1:** Ensure that Job Placements have been created in CMS.

**Step 2:** Run the 'Participant, Parent & Staff Extract' from the CMS *Data Extracts* tab.

**Step 3:** Run the 'Activity Extract' from the CMS *Data Extracts* tab.

**Step 4:** Filter for "Job Placements" in the Activity Extract under the Activity Type column (Column F).

**Step 5:** Download the 'Job Placements Upload template' from the *Resources* tab – *Upload* section.

**Step 6:** Enter the following required information:

Person IDs of the participants with job placements, Activity Instance IDs of the job placement activities, Start Dates, Expected End Dates, virtual/remote placement, Compensation, Subsidized/Unsubsidized, Work Hours, and Job Type. You can pull Person IDs from the 'Participant, Parent & Staff Extract' and Activity Instance IDs from the 'Activity Extract'. Column C, Placement ID, is populated only when you are making updates to attendance records. Please see below.

**Step 7:** (Optional) Populate column N.

**Step 8:** Save the file to your computer.

**Step 9:** Click on the *Upload* tab in the left-hand menu in CMS.

**Step 10:** Click on the *Choose File* button in the Data Upload Tool.

**Step 11:** Select the upload template file you would like to upload. This will upload the file to the Data Upload Tool.

**Step 12:** Select the Job Placement Attendance Upload' for *Type* in the Data Upload Tool.

**Step 13:** Click on the *Begin Upload* button in the Data Upload Tool.

**Step 14:** (If applicable) Review any error messages, make the appropriate changes and repeat steps 9-13.

**Update attendance records in Job Placements**

You may need to update or change job placements you have uploaded. For example, you may need to enter Actual End Dates or other information about the placement that was left out of the original upload. Instead of making these changes manually (i.e. going into the job placement record in CMS and manually entering this information), you may use the Data Upload Tool.

**Step 1:** Run the 'Placement Extract' from the *Data Extracts* tab in CMS.

**Step 2:** Download the 'Job Placement Attendance Upload template' from the *Resources* tab – *Upload* section.

**Step 3:** Pull Placement ID for the job placement record(s) you would like to update from the 'Placement Extract'.

**Step 4:** Enter the Placement ID for the job placement record(s) you would like to update into the upload template.

**Step 5:** Enter the information you would like to upload into the appropriate columns.

**Step 6:** Save the file to your computer.

**Step 7:** Repeat steps 9-14 above for Job Placements.

**Upload Attendance for Activities without Personal Information (w/out PI)**

**Step 1:** Ensure that Activities without Personal Information have been created via the CMS *Activities* tab.

**Step 2:** Run the 'Participant, Parent & Staff Extract' from the CMS *Data Extracts* tab.

**Step 3:** Run the 'Activity Extract' using the CMS *Data Extracts* tab.

**Step 4:** Filter for "Activities w/o Personal Information" in the Activity Extract under the Activity Type column (Column F).

**Step 5:** Download the 'Activities woPI' Upload Template from the *Resources* tab – *Upload* section.

**Step 6:** Enter the Activity Instance ID.

This is the identifier for the Activity you are uploading attendance for. Refer to the 'Activity Extract'.

**Step 7:** Enter the Attendance Date(s).

This is the date the activity occurred. *PLEASE NOTE: Dates of attendance must be entered in the following date format - MONTH/DAY/YEAR (e.g. 3/14/2023).

**Step 8:** Enter the Number of Minutes (i.e., the activities duration)

**Step 9:** Enter (optional) Notes.

**Step 10:** Enter the total number of Youth that received the service/activity on the date specified.

NOTE: if no youth received the service/activity, simply enter "0".

**Step 11:** Enter the total number of Adults/Parents that received the service/activity on the date specified.

NOTE: if no adults/parents received the service/activity, enter "0".

**Step 12:** Enter the total number of Service Providers (other than program staff) that attended the service/activity on the date specified.

NOTE: if no service providers attended, enter "0".

**Step 13:** Enter (optional) a Program Staff PersonID for the Staff who administered or attended the service/activity.

NOTE: Reference the Person ID under Staff Records in the CMS *Participants & Staff* tab or in the 'Participants, Staff, Parents Data Extract'.

**Step 14:** Enter a ServiceDate ID only when editing an existing attendance record.

Please see below. Access Service Date ID by downloading the 'Activity w/o Personal Information Extract' using the *Data Extracts* tab in CMS.

**Step 15:** Save the file to your computer.

**Step 16:** Click on the *Upload* tab in the left-hand menu in CMS.

**Step 17:** Click on the *Choose File* button in the Data Upload Tool.

**Step 18:** Select the upload template file you would like to upload.

This will upload the file to the Data Upload Tool.

**Step 19:** Select 'Activities without PI' for *Type* in the Data Upload Tool.

**Step 20:** Click on the *Begin Upload* button in the Data Upload Tool.

**Step 21:** (If applicable) Review any error messages, make the appropriate changes and repeat steps 16-20.

**Use the Upload Tool to Make Changes to Existing Attendance Records**

**Step 1:** Enter the ServiceDate ID of the attendance records you would like to update under the ServiceDate ID column of the template.

Download the 'Activity w/o Personal Information Extract' from the *Data Extracts* tab in CMS to identify existing ServiceDate IDs. NOTE: rows that are missing this Service Date ID will create a separate attendance record for the date specified. Rows that contain ServiceDate IDs will overwrite the existing attendance record with the values contained in the template.

**Step 2:** Complete all the required fields making sure to enter the original values you want to keep and define new values or data as necessary.

Please refer to steps 6-13 above to identify required fields

**Step 3:** Repeat steps 15-21 above.

# APPENDIX A: DCYF/SFUSD CONSENT FORM (MULTIPLE LANGUAGES)

## AUTHORIZATION FOR RELEASE OF CONFIDENTIAL STUDENT INFORMATION

**Agency Name:** ______________________________________________

**Participant Name:** ________________________________ **Date of Birth:** ____________________

The San Francisco Department of Children, Youth, and Their Families (DCYF) funds our agency and the services we provide. To fulfill the requirements of this funding, we share information about the participants in our services with DCYF. DCYF and the San Francisco Unified School District (SFUSD) maintain a shared, secure database to record information about services provided to San Francisco youth by DCYF's grantees in order to facilitate outreach and enrollment and track program use and impact. As a DCYF grantee, our agency has access to the shared database to both see and report data about the youth we serve. The data that we report to DCYF is also shared with SFUSD.

By signing this form, you authorize

1. Our agency to share information about your child's participation in our program (or your participation, if you are 18 years of age or older) with authorized staff at DCYF and SFUSD for the purposes described above. The information that our agency reports to DCYF includes:
    - Person information, such as name, date of birth, and address:
    - Demographic information, such as race/ethnicity and gender identity;
    - Education information, such as school name and grade level;
    - Participation in activities and services, such as dates of attendance dates and hours attended; and
    - Anonymous and voluntary youth experience surveys.
2. SFUSD to share certain information about your child (or you, if you are 18 years of age or older) with authorized staff from our program as a DCYF grantee. The information that SFUSD reports to DCYF includes:
    - Personal information, such as name, date of birth, and address;
    - Education information, such as school name and grade level; and
    - Dates of attendance in SFUSD or an SFUSD school.

DCYF, SFUSD, or our agency will not publicly report any information that we provide in a way that may be used to identify your child (or you, if you are 18 years of age or older).

**Restrictions:** All information that we provide or access that is related to an SFUSD student is protected by federal and state laws that govern the use, disclosure and re-disclosure of student education records. Parties other than DCYF, SFUSD and our agency will not have access to any personally identifiable information that is reported into the database, except to the extent that the parties have obtained prior written authorization from you or have followed SFUSD policies and procedures to obtain access to such information.

**Expiration:** This authorization expires on June 30, 2029.

**Your Rights:** You may refuse to sign this form. You may cancel it at any time by information our agency in writing. If you cancel your permission allowing us to release information to DCYF and SFUSD, and SFUSD to our agency, it will go into effect immediately, unless the information has already been released. You have a right to receive a copy of this form.

**Your Name:** ______________________________________________

**Relationship to Participant:** ☐ Parent ☐ Legal Guardian ☐ Participant 18 Years of Age or Older

**Signature:** ________________________________ **Date:** ____________________

# تصريح بخصوص الاطلاع على بعض المعلومات الخاصة للطلاب

## اسم الوكالة/ الجهة: ______________________________

## اسم المشارك: ____________ تاريخ الميلاد: ____________

إن تمويل مؤسستنا والخدمات التي نقدمها هو من إدارة الأطفال واليافعين والشباب وعائلاتهم في سان فرانسيسكو (DCYF). وكجزء من متطلبات هذا التمويل، فإننا نشارك معلومات عن المشاركين في خدماتنا وبرامجنا مع إدارة الأطفال واليافعين والشباب وعائلاتهم في سان فرانسيسكو. إن الإدارة ومنطقة المدارس الموحدة في سان فرانسيسكو، تحتفظان بقاعدة بيانات مشتركة وآمنة لتوثيق المعلومات عن الخدمات المقدمة لليافعين والشباب في سان فرانسيسكو من خلال الجهات المتلقية لمنح الإدارة، بهدف تسهيل القدرة على الوصول وعملية التسجيل، وتتبع مدى استخدام البرامج والخدمات، ورصد أثرها. وإننا بصفتنا من الجهات المتلقية لمنح الإدارة، نساهم في قاعدة البيانات المشتركة كمزودين للبيانات وكمطلعين عليها، فيما يتعلق باليافعين والشباب الذين نخدمهم. إن البيانات التي نزودها للإدارة، تتم مشاركتها أيضاً مع منطقة المدارس الموحدة في سان فرانسيسكو.

بالتوقيع على هذا النموذج، فإنكم تصرحون بالموافقة على التالي:

١. أن تشارك مؤسستنا المعلومات عن مشاركة ولدكم أو ابنتكم في برنامجنا (أو مشاركتكم أنتم في حال كان عمركم ١٨ عاماً او أكثر) مع أفراد فريق العمل المخولين بالاطلاع على هذه المعلومات في إدارة الأطفال واليافعين والشباب وعائلاتهم في سان فرانسيسكو وفي إدارة منطقة المدارس الموحدة في سان فرانسيسكو، للأغراض المبينة أعلاه. إن المعلومات التي تشاركها مؤسستنا مع إدارة الأطفال واليافعين والشباب وعائلاتهم في سان فرانسيسكو تتضمن:
   - المعلومات الشخصية، مثل الاسم وتاريخ الميلاد والعنوان
   - البيانات الديمغرافية مثل العرق/الأصل والجنس (النوع الاجتماعي)
   - المعلومات التعليمية مثل اسم المدرسة والصف الدراسي
   - معلومات عن المشاركة في الأنشطة والبرامج والخدمات، مثل تواريخ وساعات الحضور
   - الاستبيانات الاختيارية والمجهلة (غير التعريفية) عن تجارب الشباب واليافعين

٢. تشارك منطقة المدارس الموحدة في سان فرانسيسكو معلومات محددة عن طفلكم أو طفلتكم (أو عنكم، إذا كان عمركم ١٨ عاماً أو أكثر) مع أفراد فريق العمل المخولين من برنامجنا بصفته ممولاً من إدارة الأطفال واليافعين والشباب وعائلاتهم في سان فرانسيسكو. هذه المعلومات تتضمن:
   - المعلومات الشخصية، مثل الاسم وتاريخ الميلاد والعنوان
   - المعلومات التعليمية مثل اسم المدرسة والصف الدراسي
   - معلومات عن المشاركة والحضور في المدرسة أو الإدارة

إن أياً من إدارة الأطفال واليافعين والشباب وعائلاتهم في سان فرانسيسكو، ومنطقة المدارس الموحدة في سان فرانسيسكو، ومؤسستنا، لن تشارك أي معلومات نقدمها بشكل عام أو علني يتيح التعرف على طفلكم أو طفلتكم (أو عليكم إذا كان عمركم ١٨ عاماً أو أكثر).

**المحددات:** إن كافة المعلومات التي نقدمها أو إمكانية الاطلاع على البيانات المتعلقة بأحد الطلاب في منطقة المدارس الموحدة في سان فرانسيسكو هي معلومات محمية وفق القوانين الفيدرالية وقانون الولاية الذي يحكم استخدام البيانات والتصريح عنها وإعادة التصريح عنها أو مشاركتها. كما أن إمكانية الوصول أو الاطلاع على أي بيانات مربوطة بمعرّفات شخصية ستكون محدودة حصراً بإدارة الأطفال واليافعين والشباب وعائلاتهم وبمنطقة المدارس الموحدة وبمؤسستنا، باستثناء في حال حصول أي جهة على موافقة خطية مسبقة منكم أو اتباعها لسياسات وإجراءات منطقة المدارس الموحدة في سان فرانسيسكو للحصول على إمكانية الاطلاع على مثل هذه المعلومات.

**تاريخ الانتهاء:** تنتهي صلاحية هذا التصريح في ٠٣ حزيران/يونيو ٢٠٢٩.

**حقوقكم:** يمكنكم رفض التوقيع على هذا التصريح/النموذج. يمكنكم الغاء صلاحية هذا التصريح في أي وقت لاحق تشاؤون عبر التواصل الخطي/الكتابي مع مؤسستنا. في حالة إلغاء تصريح مشاركة المعلومات الممنوح لإدارة اليافعين والشباب وعائلاتهم ولمنطقة المدارس الموحدة، ولمنطقة المدارس الموحدة ومؤسستنا، فإن هذا الإلغاء يصبح سارياً مباشرة، إلا فيما يتعلق بأي معلومات سبق وجرت مشاركتها. لديكم الحق في استلام نسخة من هذا النموذج.

**اسمكم:** ______________________________

**علاقتكم بالمشارك(ة):** ☐ أب أو أم ☐ وصي قانوني ☐ المشارك نفسه (عمر ١٨ عاماً أو أكثر)

**التوقيع:** ____________ **التاريخ:** ____________

# AUTORIZACIÓN PARA LA DIVULGACIÓN DE INFORMACIÓN CONFIDENCIAL DEL ESTUDIANTE

## Nombre de la agencia: ______________________________________________

**Nombre del participante:** ______________________________ **Fecha de nacimiento:** ________________

El Departamento de Niños, Jóvenes y sus Familias de San Francisco (DCYF, por sus siglas en inglés) financia nuestra agencia y los servicios que ofrecemos. Para cumplir con los requisitos de este financiamiento, compartimos información sobre los participantes de nuestros servicios con DCYF. DCYF y el Distrito Escolar Unificado de San Francisco (SFUSD, por sus siglas en inglés) mantienen y comparten una base de datos segura para registrar información acerca de los servicios que las entidades subvencionadas por DCYF ofrecen a los jóvenes de San Francisco con el fin de facilitar la difusión del programa, la inscripción y hacer un seguimiento del uso y el impacto del programa. Como entidad subvencionada por DCYF, nuestra agencia tiene acceso a esta base de datos compartida con el fin de reportar datos sobre los jóvenes a los que servimos. Los datos que reportamos a DCYF también se comparten con el SFUSD.

Al firmar este formulario, usted autoriza que:

1. Nuestra agencia comparta información sobre la participación de su niño en nuestro programa (o su participación, si usted tiene 18 años o más) con personal autorizado en DCYF y SFUSD para los propósitos descritos anteriormente. La información que nuestra agencia reporta a DCYF incluye:
   - Información sobre la persona, como el nombre, la fecha de nacimiento y la dirección;
   - Información demográfica, como raza/etnia e identidad de género;
   - Información educativa, como el nombre de la escuela y el grado;
   - Participación en actividades y servicios, como fechas de asistencia y horas de asistencia;
   - Encuestas anónimas y voluntarias sobre la experiencia de los jóvenes.
2. SFUSD comparta cierta información sobre su niño (o usted, si tiene 18 años o más) con personal autorizado de nuestro programa como entidad subvencionada por DCYF. La información que SFUSD reporta a DCYF incluye:
   - Información personal, como el nombre, la fecha de nacimiento y la dirección;
   - Información educativa, como el nombre de la escuela y el grado;
   - Fechas de asistencia en el SFUSD o en una escuela del SFUSD.

DCYF, SFUSD o nuestra agencia no reportarán públicamente ninguna información que nosotros compartamos de manera que pueda utilizarse para identificar a su niño (o a usted, si usted tiene 18 años o más).

**Restricciones:** Toda la información que proporcionamos o a la que tenemos acceso que está relacionada con un estudiante del SFUSD está protegida por las leyes federales y estatales que rigen el uso, la divulgación y la repetición de la divulgación de los registros de educación estudiantil. Las entidades que no sean DCYF, SFUSD o nuestra agencia no tendrán acceso a ninguna información personal identificable que se reporte en la base de datos, excepto en la medida en que las partes hayan obtenido autorización previa por escrito de usted o hayan seguido las pautas y procedimientos del SFUSD para obtener acceso a dicha información.

**Fecha de vencimiento:** Esta autorización vence el 30 de junio de 2029.

**Sus derechos:** Usted puede negarse a firmar este formulario y puede cancelar esta autorización en cualquier momento haciéndoselo saber a nuestra agencia por escrito. Si usted cancela la autorización que nos permite divulgar información a DCYF y SFUSD, y de SFUSD a nuestra agencia, la cancelación entrara en vigor inmediatamente, a menos que la información ya haya sido compartida. Usted tiene derecho a recibir una copia de este formulario.

**Su nombre:** ______________________________________________

**Relación con el participante:** ☐ Padre/Madre ☐ Tutor legal ☐ Participante de 18 años o más

**Firma:** ______________________________________ **Fecha:** ________________

# 公開學生機密資訊授權書

## 機構名稱: ______________________________

**參與者姓名:** ______________________________ **出生日期:** ________________

三藩市兒童青年和家庭服務局 (DCYF) 資助我方機構和我們提供的服務。為了滿足這項資助的規定, 我們與 DCYF 分享我們服務參與者的資訊。DCYF 和三藩市聯合學區 (SFUSD) 保持一個共用的安全資料庫以記錄 DCYF 的受贈人向三藩市青少年提供的服務相關資訊, 以便促進對外推廣和招生工作, 並且追蹤計畫的使用情況和影響。我方機構作為 DCYF 受贈人可以存取共用資料庫, 查看與報告關於我們所服務的青少年的資料。我們向 DCYF 報告的資料也會與 SFUSD 共用。

簽署此授權書即表示您授權

1. 我方機構與 DCYF 和 SFUSD 的授權人員分享您孩子 (或您的參與, 如果您年滿 18 歲或以上) 參與我們計畫的資訊。我方機構向 DCYF 報告的資訊包括:
   - 個人資訊, 如姓名、出生日期和地址;
   - 人口資訊, 如種族/族裔和性別認同;
   - 教育資訊, 如學校名稱和年級;
   - 參加活動和服務, 如出席日期、出席日期和時間; 以及
   - 匿名和自願的青少年體驗調查。
2. SFUSD 將與我們作為 DCYF 受贈人的計畫授權人員分享您孩子 (或您, 如果您年滿 18 歲以上) 的某些資訊。SFUSD 向 DCYF 報告的資訊包括:
   - 個人資訊, 如姓名、出生日期和地址;
   - 教育資訊, 如學校名稱和年級; 以及
   - 在 SFUSD 或 SFUSD 學校的在讀日期。

DCYF、SFUSD 或我方機構不會公開報告我們提供的任何可能用於識別您的孩子 (或您, 如果您年滿 18 歲以上) 身分的資訊。

**限制條件:** 我們所提供或存取的與 SFUSD 學生有關的所有資訊都受聯邦和州法律保護, 這些法律治理學生教育記錄的使用、披露和再披露。除了 DCYF、SFUSD 和我方機構之外的其他方將無權存取任何報告到資料庫中的個人識別資訊, 除非其他方事先獲得您的書面授權或遵循 SFUSD 政策和程序獲取此類資訊。

**到期日:** 此授權書將於 2029 年 6 月 30 日到期。

**您的權利:** 您可以拒絕簽署此授權書。您可以隨時以書面形式通知我方機構取消授權。如果您取消允許我們向 DCYF 和 SFUSD 公開資訊以及 SFUSD 向我方機構公開資訊的許可, 除非資訊已經公開, 否則取消將立即生效。您有權收到此授權書的副本。

**您的姓名:** ______________________________

**與參與者的關係:** ☐ 家長 ☐ 法定監護人 ☐ 年滿 18 歲以上的參與者

**簽名:** ______________________________ **日期:** ________________

# AWTORISASYON PARA ILABAS ANG KUMPIDENSYAL NA IMPORMASYON TUNGKOL SA ESTUDYANTE

**Pangalan ng Ahensya:** ______________________________

**Pangalan ng Kalahok:** ______________________ **Petsa ng Kapanganakan:** ______________

Pinopondohan ng San Francisco Department of Children, Youth and Their Families (DCYF, Kagawaran ng San Francisco para sa mga Bata, Kabataan at Kanilang mga Pamilya) ang aming ahensya at mga serbisyong aming ipinagkakaloob. Upang matugunan ang mga iniaatas ng pagpopondong ito, nagbabahagi kami ng impormasyon tungkol sa mga kalahok sa aming mga serbisyo sa DCYF. Ang DCYF at ang San Francisco Unified School District (SFUSD, Nagkakaisang Distrito ng Paaralan ng San Francisco) ay nagpapanatili ng magkasamang ginagamit at ligtas na database para irekord ang impormasyon tungkol sa mga serbisyong ipinagkakaloob sa mga kabataan ng San Francisco sa pamamagitan ng mga ginawaran ng DCYF upang mapabilis ang pakikipag-ugnayan at pag-enrol at subaybayan ang paggamit at epekto ng programa. Bilang ginawaran ng DCYF, ang aming ahensya ay may access sa magkasamang ginagamit na database upang kapwa makita at iulat ang data tungkol sa kabataang aming pinaglilingkuran. Ang data na aming iniuulat sa DCYF ay ibinabahagi rin sa SFUSD.

Sa pamamagitan ng pagpirma sa form na ito, inaawtorisahan ninyo

1. Ang aming ahensyang ibahagi ang impormasyon tungkol sa pakikibahagi ng inyong anak sa aming programa (o sa inyong pakikibahagi kung kayo ay nasa edad na 18 taong gulang o mas matanda pa) sa awtorisadong tauhan sa DCYF at SFUSD para sa mga layuning inilalarawan sa itaas. Kabilang sa impormasyong iniuulat ng aming ahensya sa DCYF ang:
   - Personal na impormasyon, gaya ng pangalan, petsa ng kapanganakan, at address;
   - Impormasyong pandemograpiya, gaya ng lahi/etnisidad at pagkakakilanlan ng kasarian;
   - Impormasyon sa Edukasyon, gaya ng pangalan ng paaralan at baitang;
   - Pakikibahagi sa mga aktibidad at serbisyo, gaya ng mga petsa ng pagpasok at mga oras na pinasukan; at
   - Mga survey sa karanasan ng kabataan na hindi isinisiwalat ang pagkakakilanlan at kusang-loob na sinasagutan.
2. Ang SFUSD na ibahagi ang ilang impormasyon tungkol sa inyong anak (o sa inyo, kung kayo ay nasa edad na 18 taong gulang o mas matanda pa) sa awtorisadong tauhan mula sa aming programa bilang ginawaran ng DCYF. Kabilang sa impormasyong iniuulat ng SFUSD sa DCYF ang:
   - Personal na impormasyon, gaya ng pangalan, petsa ng kapanganakan, at address;
   - Impormasyon sa Edukasyon, gaya ng pangalan ng paaralan at baitang; at
   - Mga petsa ng pagpasok sa SFUSD o sa paaralan ng SFUSD.

Hindi iuulat sa publiko ng DCYF, SFUSD, o ng aming ahensya ang anumang impormasyong aming ipinagkakaloob sa paraang magagamit para matukoy ang inyong anak (o kayo, kung kayo ay nasa edad na 18 taong gulang o mas matanda pa).

**Mga Restriksyon:** Ang lahat ng impormasyong aming ipinagkakaloob o ina-access na nauugnay sa isang estudyante ng SFUSD ay pinoprotektahan ng mga pederal na batas at batas ng estado na namamahala sa paggamit, pagsisiwalat at muling pagsisiwalat ng mga rekord sa pag-aaral ng estudyante. Ang mga partidong bukod sa DCYF, SFUSD at ang aming ahensya ay hindi magkakaroon ng access sa anumang impormasyong matutukoy ang pagkakakilanlan na iniuulat sa database, maliban kung sa abot na nakakuha ang mga partido ng paunang nakasulat na awtorisasyon mula sa inyo o sumunod sa mga patakaran at pamamaraan ng SFUSD para makakuha ng access sa naturang impormasyon.

**Pagkawala ng bisa:** Ang awtorisasyong ito ay mawawalan ng bisa sa Hunyo 30, 2029.

**Ang Inyong mga Karapatan:** Maaari ninyong tanggihan ang pagpirma sa form na ito: Maaari ninyo itong kanselahin sa anumang oras sa pamamagitan ng pagpapaalam sa aming ahensya sa paraang nakasulat. Kung kakanselahin ninyo ang inyong permisong nagpapahintulot sa aming ilabas ang impormasyon sa DCYF at SFUSD, at SFUSD sa aming ahensya, agad itong magkakabisa, maliban kung nailabas na ang impormasyon. May karapatan kayong tumanggap ng kopya ng form na ito.

**Ang Inyong Pangalan:** ______________________________

**Kaugnayan sa Kalahok:** ☐ Magulang ☐ Legal na Tagapag-alaga ☐ Kalahok na 18 taong gulang o mas matanda pa

**Pirma:** ______________________________ **Petsa:** ______________

# APPENDIX B: SAMPLE PARTICIPANT PROFILE

The sample intake form below shows the prompts and response options used in participant profiles in the CMS. Replicating these fields and values in your own intake forms will facilitate CMS data entry and support the collection of high-quality participant data.

## Personal Information (if participant is a SFUSD student, enter information according to SFUSD records)

| First Name | Last Name(s) | Date of Birth |
|---|---|---|
| | | |

## Housing Status *(select one)*

- ❑ Permanent/Stable Housing
- ❑ Homeless - Motel/Hotel
- ❑ Homeless - Transitional/Supportive Housing
- ❑ Unknown
- ❑ Homeless - Shelter/Emergency Housing
- ❑ Homeless - Staying with Friends/ Family/ Doubled-up
- ❑ Homeless - Unsheltered

## Home Address

| Street Address | Apt./Unit | |
|---|---|---|
| | | |
| **City** | **State** | **Zip** |
| | | |

## Home Language *(select one)*

| | | | | |
|---|---|---|---|---|
| ❑ English | ❑ Spanish | ❑ Cantonese | ❑ Japanese | ❑ Arabic |
| ❑ Khmer/Cambodian | ❑ Korean | ❑ Laotian | ❑ Mandarin | ❑ American Sign Language |
| ❑ Samoan | ❑ Tagalog | ❑ Toishanese | ❑ Vietnamese | ❑ Russian |

❑ Unspecified

❑ Other, specify language: ______________________________

## Race/Ethnicity *(select one)*

- ❑ African American
- ❑ Other Black **(specify below)**

  ______________________________

- ❑ Asian - Chinese
- ❑ Asian - Filipino
- ❑ Asian - Indian
- ❑ Asian -Japanese
- ❑ Asian – Khmer/Cambodian
- ❑ Asian - Korean
- ❑ Asian - Laotian
- ❑ Asian - Thai
- ❑ Asian - Vietnamese
- ❑ Asian - Other **(specify below)**

  ______________________________

- ❑ Hispanic/Latino - Mexican/Mexican American
- ❑ Hispanic/Latino - Central American
- ❑ Hispanic/ Latino - South American
- ❑ Hispanic/Latino - Caribbean
- ❑ Hispanic/Latino - Other **(specify below)**

  ______________________________

- ❑ Middle Eastern - Arab
- ❑ Middle Eastern - Iranian
- ❑ Middle Eastern - Other **(specify below)**

  ______________________________

- ❑ Native American
- ❑ Native Alaskan

- ❑ Pacific Islander - Guamanian
- ❑ Pacific Islander - Hawaiian
- ❑ Pacific Islander - Tongan
- ❑ Pacific Islander - Samoan
- ❑ Pacific Islander - Other **(specify below)**

  ______________________________

- ❑ White
- ❑ Multiracial/ Multiethnic
- ❑ Other **(specify below)**

  ______________________________

- ❑ Declined to state

## Gender/Gender Identity *(select one)*

| Participants *Under* 18 Years Old *(select one)* | Participants 18 Years Old or *Over* *(select one)* | |
|---|---|---|
| **What is your gender?** | **What is your gender?** | |
| ❑ Female | ❑ Female | ❑ Male |
| ❑ Male | ❑ Trans Male | ❑ Trans Female |
| ❑ Transgender | ❑ Genderqueer/Gender Non-Binary | ❑ Not listed (specify below) |
| ❑ Declined/Not Stated | ❑ Declined/Not Stated | ______________________ |

## Sexual Orientation/Sexual Identity *(select one)*

| Participants *Under* 18 Years Old | Participants 18 Years Old or *Over* | |
|---|---|---|
| **Do you identify as gay, lesbian, or bisexual? *(select one)*** | **Sexual Orientation/Sexual Identity *(select one)*** | |
| ❑ Y | ❑ Bisexual | ❑ Straight/Heterosexual |
| ❑ N | ❑ Gay/Lesbian/Same-Gender Loving | ❑ Declined/Not Stated |
| ❑ Unspecified | ❑ Questioning/Unsure | ❑ Not listed (specify below) |
| | | ______________________ |

## Educational Attainment *(select one)*

- ❑ Not yet attending K-12
- ❑ Completed high school diploma or GED
- ❑ Dropped out of K-12 before diploma
- ❑ GED Program
- ❑ Post Secondary
- ❑ Currently attending K-12 (if selected, complete the section below)

  K-12 Grade Level: ______________________________________________
- ❑ Does not attend school
- ❑ Declined/Not Stated

### If participant currently attends K-12, select one of the options below

- ❑ Enrolled in San Francisco Unified School District (SFUSD)

  Specify School Attending: ______________________________________________

- ❑ Attends School Outside SF
- ❑ Homeschooled
- ❑ Parochial/Private
- ❑ City Arts and Tech HS Charter
- ❑ Creative Arts K-8 Charter
- ❑ Early Morning Study Program HS (County)
- ❑ Edison K-8 Charter Academy
- ❑ Five Keys Adult HS Charter American Sign Language
- ❑ Log Cabin Ranch HS Court School (County)
- ❑ Gateway HS Charter
- ❑ Gateway MS Charter
- ❑ Hilltop HS (County)
- ❑ KIPP San Francisco Bay MS Academy Charter
- ❑ KIPP Bayview Academy MS Charter
- ❑ KIPP SF College Preparatory Charter
- ❑ Life Learning HS Academy Charter
- ❑ Leadership HS Charter
- ❑ Metropolitan Arts & Technology HS Charter
- ❑ Mission Preparatory K-8 School Charter
- ❑ SF Civic Center Secondary HS (County)
- ❑ SF Civic Center Secondary MS (County)
- ❑ SF Court Woodside Learning Ctr (County)

# APPENDIX C: ACTIVITY CATEGORY DEFINITIONS

The following table provides definitions of DCYF's Activity Categories. If necessary, select multiple activity categories for each activity but please only select those that *best* capture the activity's objective.

| Activity Category Definition | CMS Activity Type: Group | Individual | Job Placement | Activities w/out PI |
|---|---|---|---|---|
| **Barrier Removal:** Time spent supporting young people and their families with court dates and appearances, traffic and parking tickets, probation obligations, legal services, immigration services, applying for public benefits, translation services, transportation services, obtaining a driver's license/California ID, etc. | x | x | | x |
| **Family Supports:** Activities intended to support parents and caregivers in accessing resources that meet their family's basic needs including childcare, food, shelter and wellness resources aimed to strengthen the social emotional relationship between parent and child. | x | x | | x |
| **Food and Other Basic Needs Distribution:** Providing children, youth and families access to a range of resources that meet essential needs. Examples include but are not limited to: food, increasing access to technology, shelter/housing support, clothing and transportation. | x | x | | x |
| **Learning Supports:** Activities that help children, youth and their families address disparities in academic outcomes. Examples include but are not limited to; support for children, youth and their adult guardians/parents for distance learning, individual or small-group tutoring, successful transitions during key periods (entering kindergarten, middle and high school), and/or completion of high school or equivalent. | x | x | | x |
| **Referrals/ Connections to Services:** Connecting young people to an outside agency for the purpose of accessing services that meet their needs and/or help them achieve their goals. Referrals should promote positive social and emotional learning and support access to a broad range of supports. | x | x | | x |
| **Wellness and Mental Health Supports:** Activities that help children, youth and their families learn and sustain practices and habits that help maintain and improve mental health; activities that help address the impacts of COVID-19 related stressors and other stressors that may affect overall wellness, like family and community violence. Examples of activities within this service category include but are not limited to wellness check-ins, mental health and wellness education, therapeutic sessions with mental health provider. | x | x | | x |

| Activity Category Definition | CMS Activity Type<br>Group | <br>Individual | <br>Job Placement | <br>Activities w/out PI |
|---|---|---|---|---|
| **Comprehensive Afterschool:** Activities implemented afterschool during the school year that include the following components: enrichment, skill-building, physical activity and grade-specific academic and transition supports. | x | x | | x |
| **School Day:** Activities implemented during the school day when school is in session (not before or after school) during the school year. | x | x | | x |
| **Comprehensive Summer:** Activities implemented during the summer that include the following components: enrichment, skill-building, physical activity and grade-specific academic and transition supports. | x | x | | x |
| **Mentorship:** Activities that connect youth with caring adults who work with them over an extended period of time to provide motivation, guidance, connection and support with the ultimate aim of achieving positive goals, exploring new possibilities and increasing the youth's self-esteem and confidence. | x | x | | x |
| **Enrichment/Skill Building:** Enrichment/ skill building activities that are implemented at a site operated by your agency and with participants that your agency recruits and enrolls. Select "Enrichment/Skill Building - Partner Agency" if you partner with another agency to provide services at their location and/or serve the participants that their agency recruits and enrolls. | x | x | | x |
| **Enrichment/Skill Building - Partner Agency:** Enrichment/skill building activities that are implemented in partnership with another agency. Your agency provides services at their location and/or you serve participants that the other agency recruits and enrolls. For example, an afterschool program contracts with your agency to provide an arts workshop to the youth enrolled in the afterschool program. | x | x | | x |
| **ExCEL - Transfer Activity to EMS:** Activities that require attendance transfers from CMS to the ExCEL Contract Management (EMS) system. | x | x | | x |
| **Other:** Activities that address emerging needs that fall outside of the other categories. Include brief rationale for selecting 'Other' activity category in your Activity Description. | x | x | | x |
| **Internship:** A paid, or unpaid, career preparation activity in which youth are placed in a business for a defined period of time to participate in and observe work firsthand within a given industry. Internships should include a formal learning contract between the youth, program, and the employer. Internships are intended to be highly structured, time-limited experiences that occur at a workplace. | | | x | |

| Activity Category Definition | CMS Activity Type: Group | Individual | Job Placement | Activities w/out PI |
|---|---|---|---|---|
| **Job Shadow:** A career exploration activity in which youth observe the workday of a professional, interact with clients or customers, and attend meetings and other appointments. Job shadows are designed to help youth explore a field of interest while developing research skills and building occupational knowledge through a facilitated, active learning process. | | | x | |
| **Work Experience:** A paid career preparation activity in which participants execute real work and are held to the same expectations as all employees at the workplace. Evaluations based on workplace expectations and performance should be provided by the worksite supervisor. Could be regular, paid employment, subsidized employment and/or learning-rich work experience. | | | x | |
| **Events:** Events including, but not limited to, Townhalls, Lights On Afterschool, Summer Learning Week. | x | x | | x |
| **Staff Professional Development:** Pre-approved by DCYF - Trainings, Conferences, Retreats | | | | x |

# APPENDIX D: PARTICIPANT OUTCOMES DATA ENTRY & REPORTING INSTRUCTIONS

| Result Area | Service Area | Applicable Strategies | Annual Performance Measure | Measure Description | DCYF Target | Annual Participant Outcomes - CMS Data Entry Instructions |
|---|---|---|---|---|---|---|
| All children & youth are ready to learn & succeed in school | Educational Supports | Literacy Supports | Completed Literacy Assessments | Percent of participants with completed literacy assessments before and after program participation. | 90%+ | Participants who have a complete and current literacy assessment. Reference the *Literacy Assessments* instructions below. |
| | | Summer Transitions Initiative | Grade level C or Better | Percent of participants maintaining grades of C or better in core subjects. | 75%+ | Participants who have achieved a C or better in their Summer School class(es) |
| | | Literacy Supports | Increased Reading Proficiency | Percent of participants whose reading proficiency improved based on literacy assessments before and after program participation. | 75%+ | Participants who have raised their reading assessment scores by one grade level. |
| | | Academic Supports, Literacy Supports | Individual Learning Plan | Percent of participants with completed individual learning plans. | 85%+ | Participants who have a complete and current Individual Learning Plan (ILP). Reference the *ILP* instructions below. |
| All youth are ready for college, work and productive adulthood | Educational Supports | Academic Supports | Grade level C or Better | Percent of participants maintaining grades of C or better in core subjects. | 75%+ | Participants who have raised all grades in their core subjects (English, Math, Science) to C or better. |
| | | Academic Supports, Alternative Education | Individual Learning Plan | Percent of participants with completed individual learning plans. | 85%+ | Participants who have a complete and current Individual Learning Plan (ILP). Reference the *ILP* instructions below. |
| | | Academic Supports | Passing Courses | Percent of participants passing their courses. (Disconnected TAY/A Only) | 75%+ | Participants who are passing all of their courses in core subjects. |
| | | Alternative Education | High School Credential | Percent of participants who are in 12th grade or TAY/A that receive a high school credential. | 85%+ | Participants who possess or have obtained a high school credential. |
| | Justice Services | Young Adult Court Case Management (YACCM) | Program Graduation | Percent of participants graduating from the program. | 75%+ | Participants graduating from the YACCM program. |
| | Youth Workforce Development | YWD - TAY/A | Stable Employment | Percent of participants employed at the end of program participation. | 75%+ | Participants who are employed and have completed the program. |
| | | All YWD strategies | Transition Plan | Percent of participants with completed transition plans. | 90%+ | Participants who have a complete and current Transition Plan. Reference the *Transition Plan* instructions below. |

**Literacy Assessments**

Literacy Supports programs must administer literacy assessments to program participants. In addition to indicating program participants with a complete Literacy Assessment using the CMS Outcomes module, programs must submit annual pre and post assessment scores.

Literacy Supports programs must submit an annual assessment scores spreadsheet to their assigned DCYF Program Specialist by July 31. Populate the assessment scores spreadsheet with the following data:

- CMS Person ID: Registered participants are assigned a unique Person ID. Access a participant's Person ID by selecting the participant's name in the CMS Participants & Staff youth list.
- Assessment Type: Name of the tool used for assessment
- Assessment date at the beginning of services within a fiscal year
- Assessment score at the beginning of services within a fiscal year
- Assessment date after services or at the end of the fiscal year
- Assessment score after services or at the end of the fiscal year

**Individual Learning Plans**

Programs required to complete Individual Learning Plans (ILP) may use existing templates. Participant ILPs must include, at a minimum, the following information:

1. Results from relevant assessments. For example:
    a. Your own assessment
    b. A school assessment
    c. Grades
2. Identified strengths of participant.
3. Identified areas for growth of participant.
4. Goals and steps that you and the participant identified to support their educational plans.
5. Amount of time you will work with the participant (e.g., hours, days, weeks).
6. Engagement plan with youth, families, schools, or other educational partners.

Participant Individual Learning Plans (ILPs) must be stored in a secure place. DCYF Program Specialists may request to view ILPs during site visits. DCYF may also request completed ILPs to inform evaluations at any point during the funding cycle.

Programs must indicate participants that have a complete and current ILP using the CMS Outcomes module. Prior to accessing the Outcomes module for data-entry, participants must be registered in CMS and enrolled in a CMS activity.

**Transition Plans**

Programs required to complete Transition Plans may use existing templates. Participant Transition Plans must include, at a minimum, the following information:

1. Identified strengths of participant.
2. Identified areas for growth of participant.
3. Goals and steps that you and the participant identified to support their educational plans.
4. Amount of time you will work with the participant (hours, days, weeks).
5. Engagement plan with youth, families, schools, or other educational partners.
6. Future steps associated with education, employment, and career.

Participant Transition Plans must be stored in a secure place. DCYF Program Specialists may request to view Transition Plans during site visits. DCYF may also request completed Transition Plans to inform evaluations at any point during the funding cycle.

Programs must indicate program participants that have a complete and current Transition Plan using the CMS Outcomes module. Prior to accessing the Outcomes module for data-entry, participants must be registered in CMS and enrolled in a CMS activity.

# APPENDIX E: CMS TO EMS TRANSFER GUIDE

## Overview

Beacon Initiative programs along with Elementary, Middle, and K-8 programs that receive DCYF funding are required to report participant attendance in both the Contract Management (CMS) System and the ExCEL Contract Management (EMS) System. Programs reporting the same participant attendance in both systems may select to transfer activities entered in CMS through the *CMS to EMS Transfer*. The CMS to EMS Transfer duplicates eligible CMS activities in EMS and transfers SFUSD participant attendance. High School programs interested in transferring attendance from CMS to EMS must contact SFUSD ExCEL.

## CMS to EMS Transfer Requirements

Activities and participant attendance transferring from CMS to EMS must fulfill the requirements described below. The transfer requirements are informed by allowable programming eligible for reimbursement as defined by the California Department of Education (CDE) and alternative funding sources (e.g., ASES, 21st Century, ESSER).

1. **Public School (In-Person) Service Location:** The CMS activity *Service Site* is a public school and corresponds with the school in EMS. View or edit an activity's *Service Site* in the Activity *Details* page. Approved service sites and services are listed in CMS Workplans within the Services & Projections form.
2. **ExCEL – Transfer Activity to EMS Activity Category:** Activities created in CMS must have the *ExCEL – Transfer Activity to EMS* Activity Category selected in addition to at least one other Activity Category. Select one or more of the following *Activity Categories* as applicable:

   **DCYF CMS Activity Categories**

   - ❑ Barrier Removal
   - ❑ Family Supports
   - ❑ Learning Supports
   - ❑ Referrals/Connections to Services
   - ❑ Mentorship
   - ❑ Enrichment/Skill Building
   - ❑ Enrichment/Skill Building - Partner Agency
   - ❑ Wellness and Mental Health Supports
   - ❑ Comprehensive Afterschool
   - ❑ School Day
   - ❑ Comprehensive Summer
   - ❑ Events
   - ❑ Other*
   - ❑ Food & Other Basic Needs Distribution*
   - ❑ ExCEL – Transfer Activity to EMS**

   **Food & Other Basic Needs Distribution* and *Other* only activities will not transfer from CMS to EMS.

   **Selection required for CMS to EMS Transfer

3. **Participant Type & School Enrollment:** The student is registered in CMS as a SFUSD participant-type and the participant's CMS *School Attending* field corresponds with the EMS school. Participants registered as Non-SFUSD in CMS are ineligible for CMS to EMS transfers.
4. **Attendance submitted in CMS by the EMS lock dates:** The EMS refreshes nightly to reflect eligible CMS activities and attendance submitted by posted EMS deadlines. EMS will lock attendance transfers biannually on December 30 and at the end of each school year on July 7. If you missed a deadline, added or edited attendance after a deadline, complete an EMS Request Form.

# CMS to EMS Transfer Troubleshooting

Programs participating in the CMS to EMS Transfer must regularly review the activities and attendance transferred to EMS. Attendance transfers from CMS to EMS nightly for dates of attendance unlocked in EMS. Refer to the following checklist to troubleshoot CMS or attendance discrepancies between data entered in CMS and attendance transferred to EMS.

1. **Activity Creation in CMS Requires an Approved DCYF Workplan:** To create activities in CMS, your program's DCYF Workplan must be submitted and approved. Refer to the Workplan status located in the CMS Workplan Overview form or on the Agency Programs page.
2. **Activity Instances must be connected to an in-person Public School location, corresponding with the EMS school:** Virtual/remote activities are ineligible for CMS to EMS transfers. DCYF-approved service site locations and projected services are located in the Services & Projections Workplan form. Contact your DCYF Program Specialist if you need to edit the sites or services listed in the approved Workplan.
    a. **Check Activity Instance(s) & their Site Locations**
        i. Select the CMS *Activities* module from the left-hand menu.
        ii. Select the activity transferring to EMS.
        iii. Navigate to the activity *Details* page.
        iv. Review the activity *Service Site*.
        v. If your *Service Site* indicates the correct public-school location, review the additional troubleshooting checklist items.
        vi. Repeat the steps above for all activities transferring to EMS.

    Attendance will transfer for all unlocked dates of attendance in EMS. To request attendance transfers for locked dates, submit EMS Request Form. Once SFUSD ExCEL confirms that the requested dates have been unlocked, wait for the nightly CMS-EMS transfer and review your EMS activities the following day.

    b. **Edit Activity Instance(s) & their Site Locations**
        i. If the *Service Site* is incorrect, edit the activity details by selecting the blue edit icon on the top, right-hand corner of the activity *Details* page.
        ii. Select the correct *Service Site* in the drop-down menu and save the activity *Details* page.
        iii. Attendance will transfer for all unlocked dates of attendance in EMS.

    Note, site locations and services are approved by DCYF in the Workplan Services & Projections form. Contact your DCYF Program Specialist for questions or edits to your program's Workplan.

3. **Selected *Activity Categories* fulfill the CMS to EMS Transfer Requirements:** Review the CMS *to EMS Transfer Requirements* section above for a list of acceptable categories.
    a. **Check & Edit Activity Categories**
        i. Select the CMS *Activities* module from the left-hand menu.
        ii. Select the activity transferring to EMS.
        iii. Navigate to the activity *Details* page.
        iv. Review your activity's selected *Activity Categories*.
        v. If the activity does not have the *ExCEL – Transfer Activity to EMS* category selected, or if the only selected categories as *Other* and/or *Food and Other Basic Needs Distribution,* update the Activity Category selections to

align with the CMS to EMS transfer requirements.

vi. Repeat the steps above for all activities that need to transfer to EMS.

Attendance will transfer for all unlocked dates of attendance in EMS. To request attendance transfers for locked dates, submit EMS Request Form. Once SFUSD ExCEL confirms that the requested dates have been unlocked, wait for the nightly CMS-EMS transfer and review your EMS activities the following day.

4. **Transferring attendance from 1 program in CMS to multiple schools in EMS.** A subset of CMS programs offer services to multiple public schools and therefore require a multi-school attendance transfer. Refer to the following guidelines when setting up and reporting attendance in CMS.
   - Create distinct activities for each public school.
   - Enroll participants in CMS activities that coincide with the school they attend. For example, if your program serves both Wallenberg High School and Washington High School students, you must create 2 activities in CMS – one where you will report attendance for Washington HS students and another for Wallenberg HS students.
   - A single activity in CMS cannot be connected to multiple service site locations.
   - Review your program's projected site locations and services by accessing the Services & Projections form of the approved DCYF Workplan.

## Resources & Additional Considerations

- **CMS to EMS transfer rules are subject to change** per requirements communicated by California Department of Education and other funding sources.
- **Attendance must be submitted in CMS by the posted EMS Deadlines**. EMS will lock attendance transfers biannually on December 30 and at the end of each school year on July 7. If you need to change participant attendance in CMS after an EMS deadline has passed, please complete an EMS Request Form.
- **Access participant registration and activity reporting instructions in the FY2024-2029 CMS Handbook, located in the CMS *Resources* page.**

## Have Questions or Need Additional Support?

For CMS troubleshooting and transfer issues, check out the *CMS to EMS Troubleshooting* section above or contact:

- wongk10@sfusd.edu (SFUSD ExCEL - EMS)
- dataevalsupport@dcyf.org (DCYF - CMS). For other questions about your DCYF-funded program, please contact your DCYF Program Specialist.