



# Cityspan Guide

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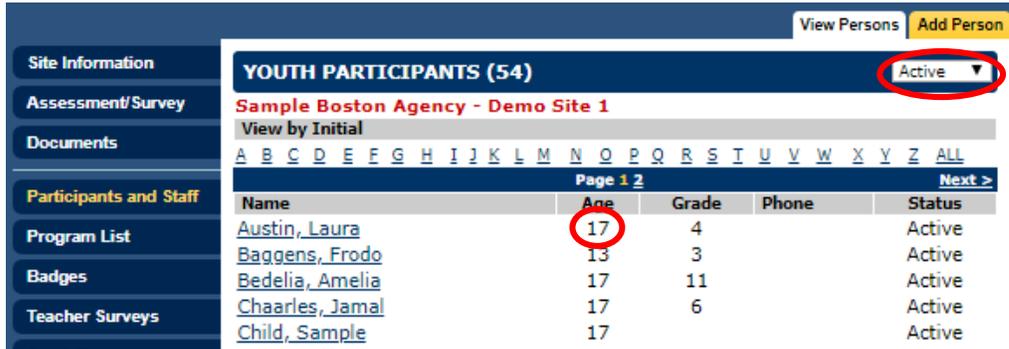
**I. Adding Participant Data to Cityspan**

**Part 1: Review and Update Existing Participants' Information to Avoid Creating Duplicates**

- Before enrolling new participants, you need to review and update existing participants' information. To do so, click on "Participants and Staff" and then click "View Youth Participants."



- You may need to click the "Active" drop-down menu and select "All" to see all participants. Students' ages appear if dates of births have been entered.



- Click on the participant's name, mark them as "Active" if they aren't already, and add all known information. The critical piece of information to add is **date of birth** so that no duplicate records are created if you later upload the student. Check the first and last name spelling and case. Ensure consent form status is up-to-date. Add **BPS ID** if known (this should be on the consent form).

**REGISTRATION** Print Delete Save

\* Status  Inactive  Active

\* First Name

\* Last Name

Middle Name (optional)

\* Birthdate

\* Race

Race Other (optional)

\* Gender  Male  Female  Other

**BOSTON BEYOND ADDITIONAL FIELDS - NOT REQUIRED**

Data Consent Form  [View Definition](#)

Photo/Video Release

Permission to Contact

Person ID

BPS Student ID

123456



**Part 2: Upload New Participants**

There are two options for uploading students:

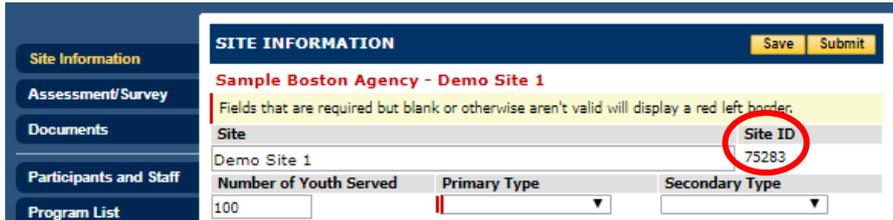
- 1) In bulk using the Participant Upload Template (suggested method).
- 2) One-by-one manually in Cityspan.

Option 1: Uploading in Bulk Using the Participant Upload Template

- Next, upload participants (including returning students, if desired) using the Participant Upload Template. Please note that the Participate Upload Template has been updated for SY 2018-2019 and you must use this version, which is available in the [Cityspan section](#) of the Insight Center. Fill in the required fields (highlighted in yellow) and the BPS ID field and zip code, if known. **Do not add, delete, or edit any columns.**

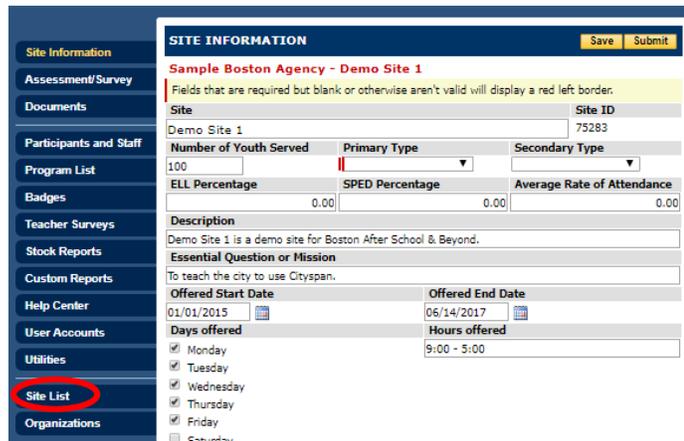
A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
SiteID	PersonID	BPSStudentID	StateStudentID	FirstName	LastName	MiddleName	DateOfBirth	Race	Gender	SchoolName	SchoolID	Language	Grade	Zip	Consent
75283		123456		Harry	Potter		1/1/2001	Asian	Male						0
75283		234567		Hermione	Granger		2/2/2002	Black or Afric	Female						0
75283		345678		Severus	Snape		3/3/2003	American Ind	Other						0
75283		456789		Albus	Dumbledore		4/4/2004	White	Male						0
75283		567890		Rubeus	Hagrid		5/5/2005	Hispanic	Male						1

- SiteID = Cityspan SiteID, available on the Site Information page:



- BPS ID: Enter if known (this should be on the consent form).
- Race, Gender, and Consent all have drop down menus. **You must choose one of the available responses for the sheet to upload successfully. Please note that the race options have been updated for SY 2018-2019.**
- For “Consent,” “0” = don’t have signed consent form; “1” = do have signed consent form. **Please update consent form status in the student’s individual record as you receive additional consent forms.** (You can access a student’s record by going to: Participants and Staff → ALL → Finding the student.)
- Save the template.

- Go to the dark blue “Site List” tab on the left side.

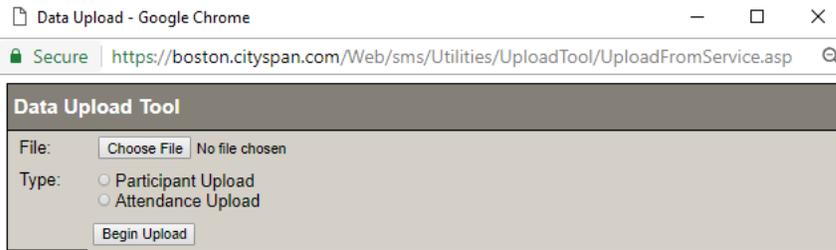




- Then, click on the dark blue “Upload” tab on the left side.



- This will prompt a window to open. Click “Choose File” and attach your Participant Enrollment Template. Select “Participant Upload” as the type and click “Begin Upload.”



- If the upload works, you’ll see the following message with the number of participants you enrolled:

**Results**

**Total records uploaded: 5**  
**Total records returned with validation errors: 0**  
**Total records in upload file: 5**

- If the upload doesn’t work, you’ll see an error message. Common issues include not entering all required information, altering columns (either adding or deleting), editing column names, or not choosing a response from the drop-down menu for race, gender, or consent.

Option 2: Uploading One-by-One Manually in Cityspan

- Click on the “Participants and Staff” tab on the left side and then click “Add Person.”





- Next to “Person Type,” click “Youth Participants.” Then, enter the participant’s First Name, Last Name, and Date of Birth:

CREATE NEW PERSON		Cancel	Add
Person Type	<input checked="" type="radio"/> Youth Participants <input type="radio"/> Program Staff		
* First Name	Sample Student		
* Last Name	A		
* Birthdate	1/1/2001		
<a href="#">Add Person</a>			

- Next, you’ll need to add all other known info to the student’s record by clicking on “View Record.”

**REGISTRATION SUCCESSFUL**

**Sample Student A** has been successfully registered.

To view this record, click [View Record](#)

- Enter the student’s race, gender, and BPS ID (if known). Check the “Data Consent Form” box if you have a completed consent form for the student. **Please update consent form status throughout the school year as you receive additional consent forms.**

REGISTRATION		Print	Delete	Save
* Status	<input type="radio"/> Inactive <input checked="" type="radio"/> Active			
* First Name	Sample Student			
* Last Name	A			
Middle Name (optional)				
* Birthdate	1/1/2001			
* Race	Black or African American ▼			
Race Other (optional)				
* Gender	<input type="radio"/> Male <input checked="" type="radio"/> Female <input type="radio"/> Other			
<b>BOSTON BEYOND ADDITIONAL FIELDS - NOT REQUIRED</b>				
Data Consent Form	<input checked="" type="checkbox"/> <a href="#">View Definition</a>			
Photo/Video Release	<input type="checkbox"/>			
Permission to Contact	<input type="checkbox"/>			
Person ID	<a href="#">View Definition</a>			
	<input type="text"/>			
BPS Student ID	<a href="#">View Definition</a>			
	<input type="text" value="123456"/>			



## II. Creating a Program

Please note: A “Program” is the specific dates of your program this school year. You must create a new program each year.

- Click the dark blue “Program List” tab on the left.
- Click the yellow “Add Program” tab in the top right corner.

Name	Begin	End
15-16 test	None	None
15-16 test	None	None

- Enter the program details, if applicable. Click “Save and Proceed.”

Program Name: Demo Site for YMCA Training

Program Type & Subject:

- Primary Program Type: Academic
- Secondary Program Type: Arts & Culture
- Primary Program Subject: Math/English
- Secondary Program Subject: Health

- Click the “Edit” button to the right of “Schedule.”

Program ID: 3292656

Program Type & Subject: Academic, Arts & Culture, Math/English, Health

Drop-In: No

Badges: [Edit]

Schedule: [Edit]

- Click on the “Multiple Dates” link.

ADD DATE(S) TO SCHEDULE

Cancel

Demo Site for YMCA Training

To add **Multiple Dates** to the schedule, [click here](#)

To add a **Single Date** to the schedule, [click here](#)



- Add the begin date, end date, and daily hours, then click “Add Multiple Dates.”

- Click the yellow “Select All” button. Uncheck any dates that you do not have programming (e.g., school vacations). Then, click the yellow “Add Dates” button.

Select	Date	Begin	End	Time
<input checked="" type="checkbox"/>	Monday, June 25, 2018	9:00 AM	4:00 PM	(Time)
<input checked="" type="checkbox"/>	Tuesday, June 26, 2018	9:00 AM	4:00 PM	(Time)
<input checked="" type="checkbox"/>	Wednesday, June 27, 2018	9:00 AM	4:00 PM	(Time)
<input checked="" type="checkbox"/>	Thursday, June 28, 2018	9:00 AM	4:00 PM	(Time)
<input checked="" type="checkbox"/>	Friday, June 29, 2018	9:00 AM	4:00 PM	(Time)
<input checked="" type="checkbox"/>	Monday, July 2, 2018	9:00 AM	4:00 PM	(Time)
<input checked="" type="checkbox"/>	Tuesday, July 3, 2018	9:00 AM	4:00 PM	(Time)
<input type="checkbox"/>	Wednesday, July 4, 2018	9:00 AM	4:00 PM	(Time)

- Go back to the “Program List” tab. You may need to click the arrow next to “Current Term” and change this to “All.” Then, click on the newly-created program. Check that the information is correct.

Name	Begin	End
15-16 test	None	None
15-16 test	None	None



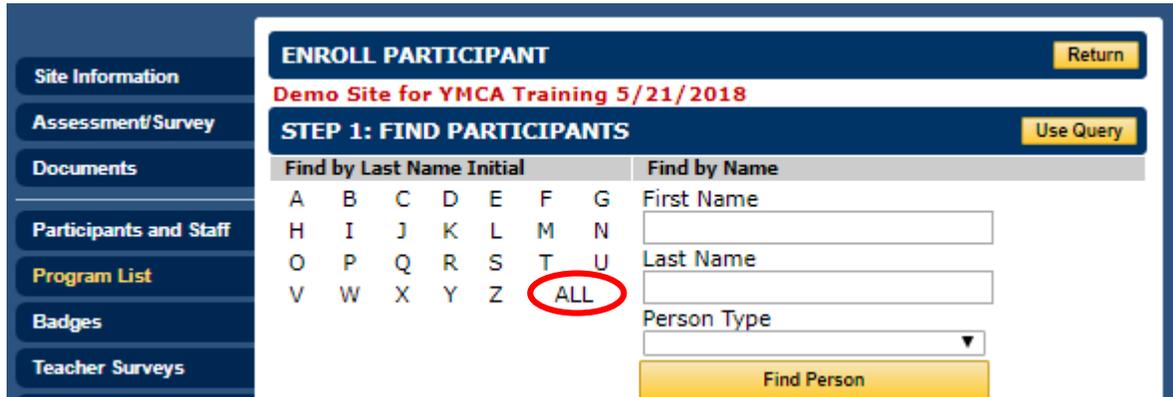
### III. Enrolling Participants in the Program

Please note that you've *uploaded* the students, but you now need to complete the separate step of *enrolling* them in your newly-created program.

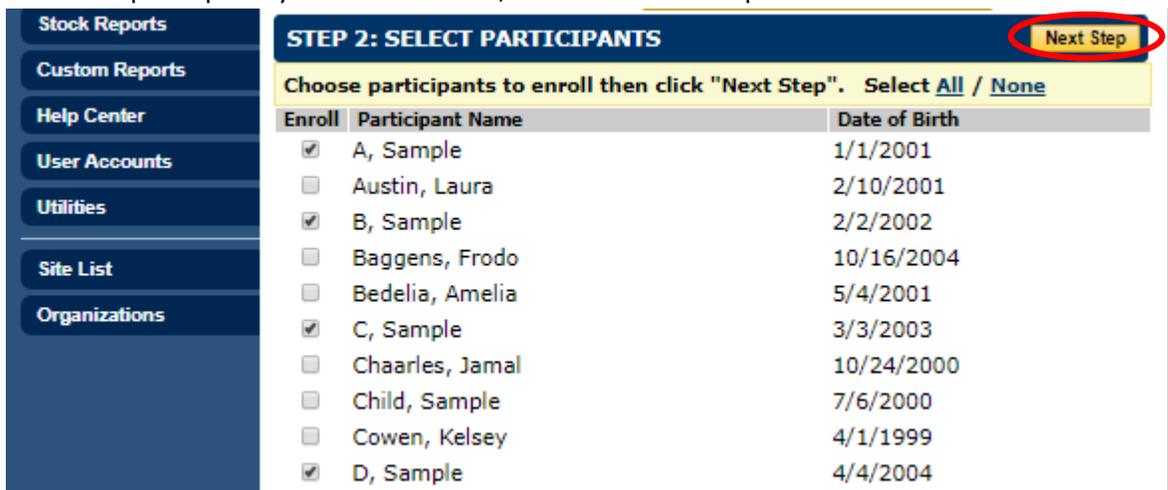
- Go to the Program. Then, click on the yellow "Enrollment" tab, and click on "Click here to enroll new participants."



- Click on "ALL." This will show the list of all active participants. Please note: if you did not mark returning students as active, they will not show up on this list. You will need to go back to the student's record and mark them as active.



- Select the participants you'd like to enroll, then click "Next Step."





- Check that the enrollment date is correct, then click “Next Step.” You’ve now enrolled those participants. Click “done.”

**ENROLL PARTICIPANT** Cancel

Demo Site for YMCA Training 5/21/2018

**STEP 3: SELECT ENROLL DATE(S)** Next Step

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

Participant Name	Enroll Date
A, Sample	6/25/2018
B, Sample	6/25/2018
C, Sample	6/25/2018
D, Sample	6/25/2018
E, Sample	6/25/2018

Next Step



#### IV. Tracking Daily Attendance

- From the Program page, click the yellow “Attendance” tab.

Program Type & Subject		Edit
Primary Program Type	Academic	
Secondary Program Type	Health	
Primary Program Subject	Math/English	
Secondary Program Subject	Science	

- Attendance can be entered by date. Click on a date:

Date	Begin	End	Present / Total
<a href="#">Monday, June 25, 2018</a>	9:00 AM	4:00 PM	0 / 5
<a href="#">Tuesday, June 26, 2018</a>	9:00 AM	4:00 PM	0 / 5
<a href="#">Wednesday, June 27, 2018</a>	9:00 AM	4:00 PM	0 / 5
<a href="#">Thursday, June 28, 2018</a>	9:00 AM	4:00 PM	0 / 5

- Mark the appropriate box:
  - Present = Attended program that day.
  - Absent = Did not attend program that day (and scheduled to attend).
  - Unscheduled = Did not attend program that day (and not scheduled to attend).
    - Example: you unexpectedly did not run programming that day because inclement weather.
- If most participants attended that day, you can save time by clicking “All Present” and then changing non-present participants to “Absent” or “Unscheduled,” as appropriate.
- Click “Save & Next Day” and repeat the process as necessary.
- Click “Save” and then “Return” to see each day of attendance.

Participant Name	Present	Absent	Unscheduled	Begin	End
A, Sample	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	9:00 AM	4:00 PM
B, Sample	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	9:00 AM	4:00 PM
C, Sample	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	9:00 AM	4:00 PM
D, Sample	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	9:00 AM	4:00 PM
E, Sample	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	9:00 AM	4:00 PM
<b>TOTAL (5)</b>	<b>0</b>	<b>0</b>	<b>0</b>		



## V. Administering the SAYO-T

Please note:

- You must complete steps 1-4 (uploading participants, creating a program, enrolling participants, and tracking attendance) before you can administer the SAYO-T.
- The SAYO-T involves a pre and a post survey. You'll therefore need to follow the steps below at the beginning and end of program.
- Click on the dark blue "Teacher Surveys" tab. Then, click on the appropriate survey.

Survey Round	Status	Attendees	Refresh Attendee List	Survey Requests Sent*	Survey Responses Submitted*
<a href="#">Post SAYO T: SY 17-18</a>	Need to Send Requests	7	<a href="#">Refresh</a>	2	0
<a href="#">Pre SAYO T: SY 17-18</a>	Need to Send Requests	7	<a href="#">Refresh</a>	2	1
<a href="#">Summer 2017 SAYO-T Post</a>	Need to Send Requests	39	<a href="#">Refresh</a>	2	2

- You may have zero attendees. If so, click "Refresh List." If this doesn't work, check that you have marked each student as present at least once. **Please note: If a student hasn't been marked as present at least once, they will not appear here. You will need to go mark the student as present, return to this page, and click "Refresh."** Initially, all of your participants will be "Attendees Without Teacher." You'll need to first add the staff members who will complete surveys by clicking on the yellow "Teachers" tab.

Teacher	Status	Attendees	Survey Requests Sent*	Survey Responses Submitted*	Last Request Sent*	Last Response Submitted*
<a href="#">Attendees Without Teacher</a>	--	21	0	0	--	--
<input type="checkbox"/> <a href="#">Kerwin, Jack</a>	Need to Send Requests	8	0	0	--	--

- Click "Add Teacher."

- Add the teacher's information. Then, assign participant(s) to that teacher and click "Save."



- Go to “Teacher Surveys,” then re-click on the appropriate survey. Click the box to the left of each staff member and then click “Send Request to Selected Teachers.”

**Survey Round: Pre SAYO T: SY 17-18**

**School:** Sample Boston Agency (Demo Site 1)  
**Status:** Need to Send Requests  
**Attendees:** 7 [Refresh List](#)  
**Surveys:** 1 responses submitted out of 2 requested \*  
**First Requests Sent:** 10/13/2017

Teacher	Status	Attendees	Survey Requests Sent*	Survey Responses Submitted*	Last Request Sent*	Last Response Submitted*
<input checked="" type="checkbox"/> Dodge, Emily	Need to Send Requests	5	0	0	--	--
<input type="checkbox"/> Zhang, Han	Waiting for Responses	2	2	1	10/16/2017	10/13/2017

\* Does not include surveys on students who are not Attendees

[Send Request to Selected Teachers ...](#)

- You’ll now see the email each staff member will receive. Click “Send Survey Requests” at the bottom of the page. **Please Note: If you do not click this button, the staff member will not receive the email.**
- The staff member will then receive an email with a link to and instructions for completing the survey(s). When they click on the link, they’ll see:

**SURVEY REQUESTS**

**Teacher** Dodge, Emily  
**School** Sample Boston Agency (Demo Site 1)

Survey Round	Student	Response Status	Date Submitted
Pre SAYO T: SY 17-18	<a href="#">A, Sample</a>	Blank	
Pre SAYO T: SY 17-18	<a href="#">B, Sample</a>	Blank	
Pre SAYO T: SY 17-18	<a href="#">C, Sample</a>	Blank	
Pre SAYO T: SY 17-18	<a href="#">D, Sample</a>	Blank	
Pre SAYO T: SY 17-18	<a href="#">E, Sample</a>	Blank	

- The staff member will complete their survey(s) and submit them. You can track their progress on their surveys by examining the “Survey Responses Submitted” and “Last Response Submitted” columns:

**TEACHER SURVEYS > Pre SAYO T: SY 17-18**

**Survey Round: Pre SAYO T: SY 17-18**

**School:** Sample Boston Agency (Demo Site 1)  
**Status:** Waiting for Responses  
**Attendees:** 7 [Refresh List](#)  
**Surveys:** 1 responses submitted out of 7 requested \*  
**First Requests Sent:** 10/13/2017

Teacher	Status	Attendee	Survey Requests Sent*	Survey Responses Submitted*	Last Request Sent*	Last Response Submitted*
<input type="checkbox"/> Dodge, Emily	Waiting for Responses	5	5	0	5/20/2018	--