



Cityspan Database Instructions

To all Measure Z Grantees: Official training video is available online. You can find the link by going to the Oakland Unite website [www.oaklandunite.org] and looking under the tab 'Grantee Corner' → 'Tools for Grantees'. Additional support can be accessed by reaching out to the Cityspan Help Desk toll-free at 1-866-469-6884.

Inside the guide:

- Create Participant Records (pg. 2 – 4)
- Create Staff Records (pg. 4)
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- Enter Individual Services (pg. 8 – 10)
- Enter Milestones Achieved (pg. 11)
- Enter Group Activities + Attendance (pg. 12 – 14)
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- Run Reports (pg. 15)
- Submitting Quarterly Reports (pg. 16)
- Maintaining User Accounts (pg. 17)



Logging onto Cityspan

Go to: <http://www.youthservices.net/oakland>. For access to the log-in page for the Measure Z Cityspan database.

Once you enter Cityspan – the blue navigation menu will appear on the left. This guide will provide directions for utilizing this navigation menu.

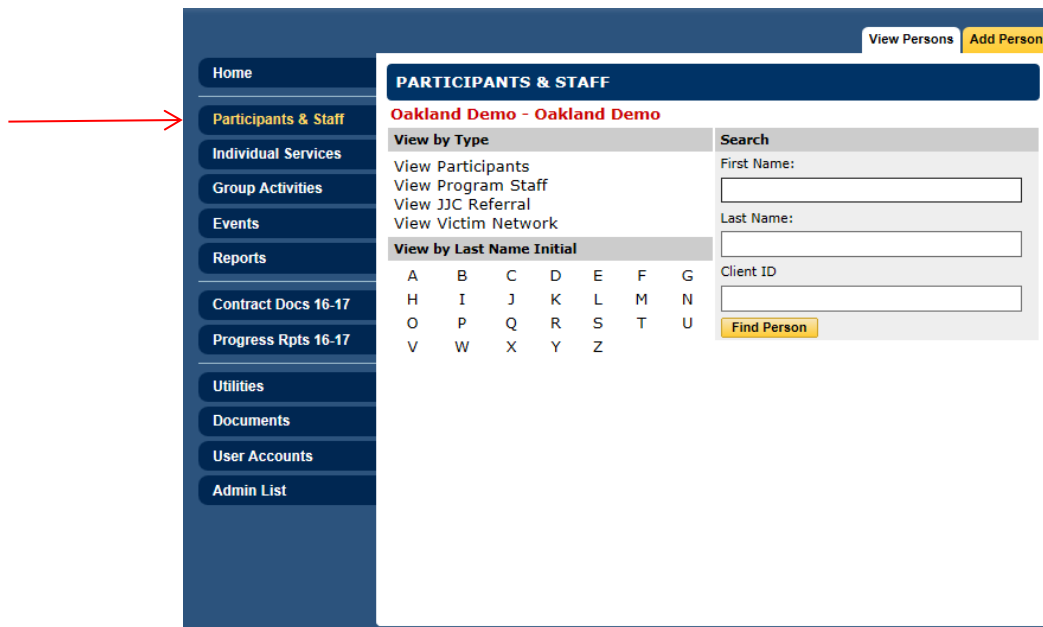
*****If you do not have a username and password – please review the ‘Maintaining User Accounts’ for directions.*****

Note: Notices from Oakland Unite are posted on the right hand side of the page.

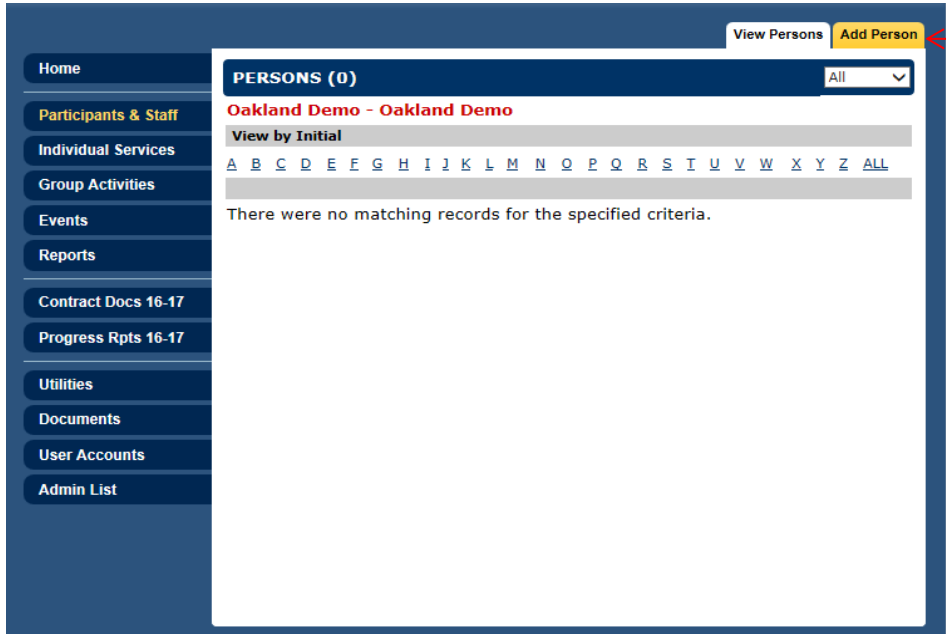
Creating a Participant Record

Can be viewed on YouTube from 9:30 - 11:32

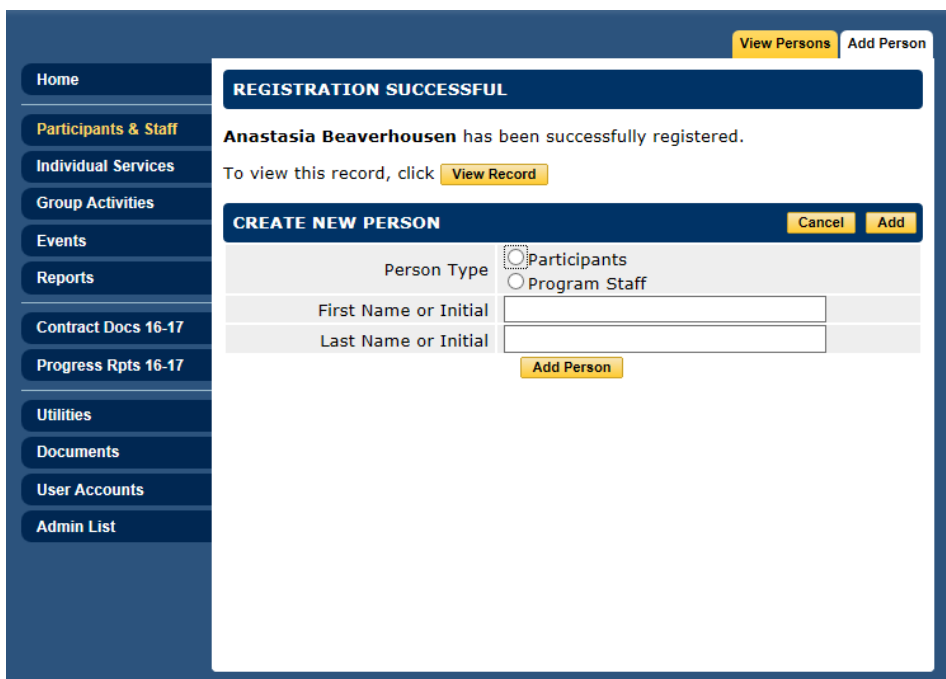
1. Select ‘Participants & Staff’ in blue menu on the left-hand side of the screen



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



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





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

Notes for Creating a Participant Record:

- Once recorded, Participant can be found by selecting 'Participants & Staff' on blue menu and selecting the first letter of their last name in the alphabet section or by typing part/all of their name into the designated cells
- **HIGHLY** recommended using 'Return' vs. browser back button

Creating a Staff Record

Note: Mirrors the creation of a Participant record

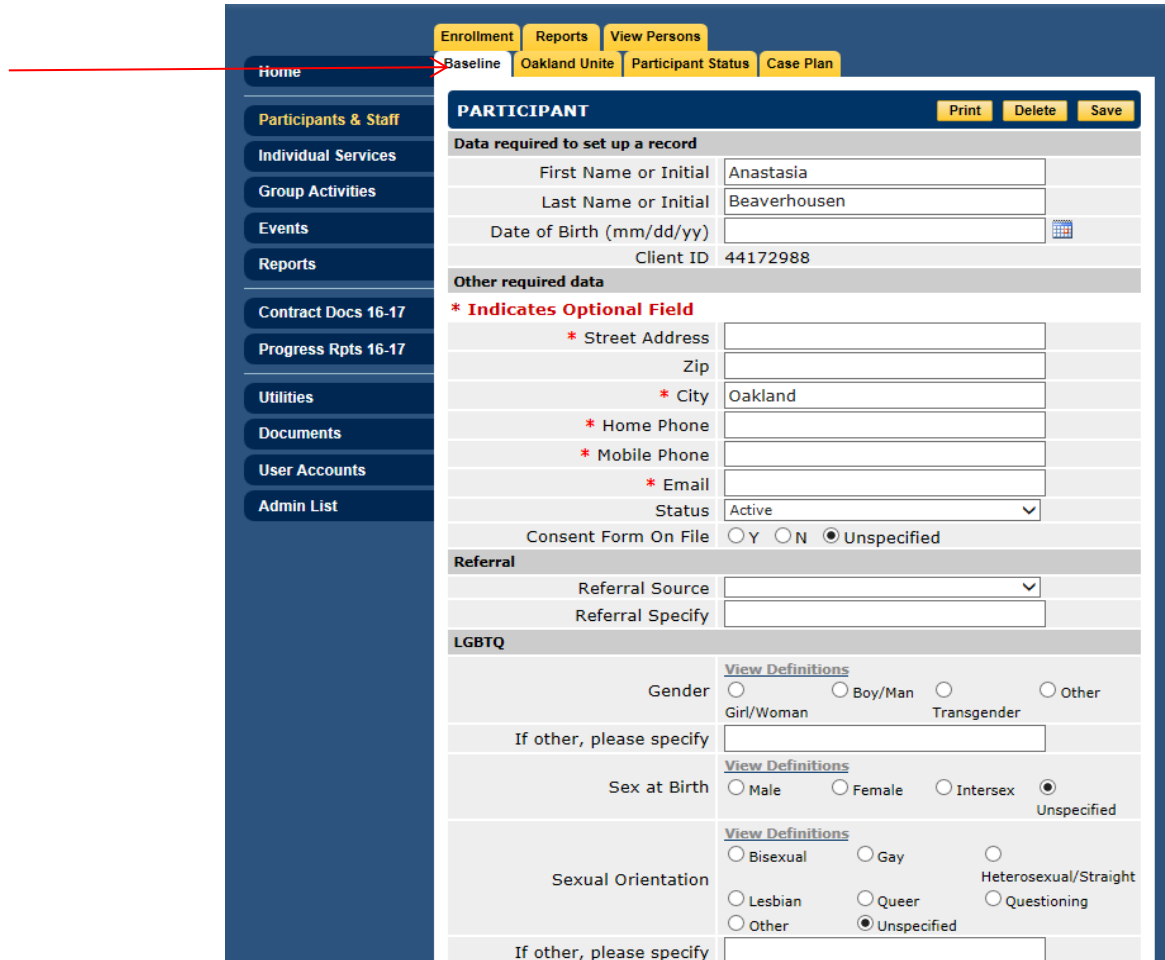
1. Select 'Participants & Staff' in blue menu on the left-hand side of the screen
2. Search for the name of the individual **first** to avoid duplicate records
3. Select 'Find Person'
4. If no match, select 'Add Person'
5. Select 'Program Staff'
6. Then, select 'Add Person'
Note: If recorded correctly,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

Baseline Tab

Can be viewed on YouTube from 11:35 – 16:40

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

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



The screenshot shows the 'PARTICIPANT' form in the Cityspan database. The 'Baseline' tab is selected in the top navigation bar. The form is divided into several sections:

- Data required to set up a record:**
 - First Name or Initial: Anastasia
 - Last Name or Initial: Beaverhausen
 - Date of Birth (mm/dd/yy): [Empty]
 - Client ID: 44172988
- Other required data:**
 - * Indicates Optional Field
 - * Street Address: [Empty]
 - Zip: [Empty]
 - * City: Oakland
 - * Home Phone: [Empty]
 - * Mobile Phone: [Empty]
 - * Email: [Empty]
 - Status: Active (dropdown)
 - Consent Form on File: Y N Unspecified
- Referral:**
 - Referral Source: [Empty]
 - Referral Specify: [Empty]
- LGBTQ:**
 - Gender: Girl/Woman Boy/Man Transgender Other
 - If other, please specify: [Empty]
 - Sex at Birth: Male Female Intersex Unspecified
 - Sexual Orientation: Bisexual Gay Heterosexual/Straight Lesbian Queer Questioning Other Unspecified
 - If other, please specify: [Empty]

2. The following information is **required** Oakland Unite:

- DOB
- Consent Form on File
- Zipcode
- Referral Source
- Referral Specify
- LGBTQ information
- Education
- Ethnicity

Note: User will be unable to move forward without completing the following: DOB, Zip, and Consent Form on File; **however**, it is in the program's **best** interest to input as much data as possible within the first meeting. Please refer to your Program Supervisor for other requirements regarding data input to avoid being penalized

Note: Full names are required by Oakland Unite to match Participants by future Evaluators

Note: All participants being funded through Oakland Unite strategies **must** be entered in database.

REMEMBER: Always update the Participant's information as it changes. Providing the most up-to-date information is crucial, especially if communications and/or incentives are being provided to the Participant's address on file.

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3. Information to ensure is completed:

- Consent Form on File
- Referral Source
- Referral Specify

Consent Form On File	<input checked="" type="radio"/> Y <input type="radio"/> N <input type="radio"/> Unspecified
Referral	
Referral Source	<input type="text" value="Ceasefire"/>
Referral Specify	<input type="text"/>

IMPORTANT: Completing the 'Referral Source' is how Cityspan (and Oakland Unite) is able to track how Participants are referred to programs.

Oakland Unite Tab

Can be viewed on YouTube from 16:41 – 20:24

1. After completing 'Baseline' tab, select 'Oakland Unite' tab
 - Under 'Enrollment': Select 'Oakland Unite'
 - Under 'Oakland Unite Strategies 2016-2017': Select the strategy relevant to the participant and/or strategy named in Agency's Scope of Work
 - If there is ever any uncertainty about strategy, reach out to your Program Supervisor



The screenshot shows the 'OAKLAND UNITE - RISK FACTORS' form for participant Anastasia Beaverhausen. The form is divided into two main sections:

- Enrollment:** A 'Program?' field with a dropdown menu. The 'Oakland Unite' option is selected (checked).
- Oakland Unite Strategies 2016-2017:** A grid of checkboxes for various strategies. The 'Shooting/Homicide Response and Support Network' checkbox is selected.

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

2. When a strategy is selected, a set of 'Risk Factors' **specific** to the strategy will appear. The completion of 'Risk Factors' is required to save and continue to another tab.
3. Enter the date you first began meeting with the Participant and answer the Baseline Status questions. Answers should be based on their status **BEFORE** you began working with the Participant.
 - Note: If these questions cannot be answered at intake, you **should** return to this tab to complete as soon as possible

Creating a Contact for a Participant

Can be viewed on YouTube from 46:48 – 48:10

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



CONTACTS & MILESTONES - PARTICIPANT LIST Active ▾

Oakland Demo - Oakland Demo

View by Initial

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

Page 1 2 3 4 5 6 7 Next 25 >

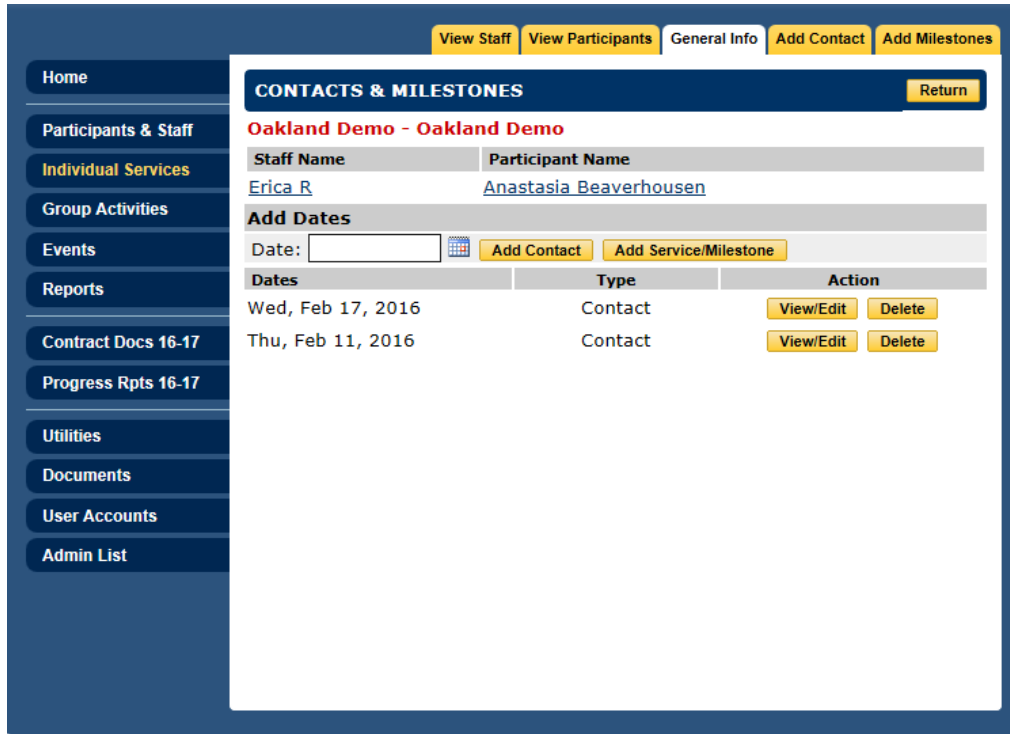
Participant Name	Age	Phone
Qiao Acosta	10	969-0936
Tavon Adams	36	793-0591
Tory Amous		
Deandre Ashton	27	588-9957
Andy Avis	18	519-7789
Shandra Bagley ii	17	964-8896
Kevin Bailey	15	399-8867
nele baker	16	556-9984
Kiayel Barfield	19	678-8865
Talarrie Barr	14	561-8538
Shanyna Bassett	14	863-1333
Donald Baylor		9-610-8139
Jacqui Bean	21	459-8896
Anastasia Beaverhousen	26	
Stacey Bee		
Anastasia Blissett	18	610-0689

***If Participant does not appear in the list, but you know you have successfully registered the Participant:

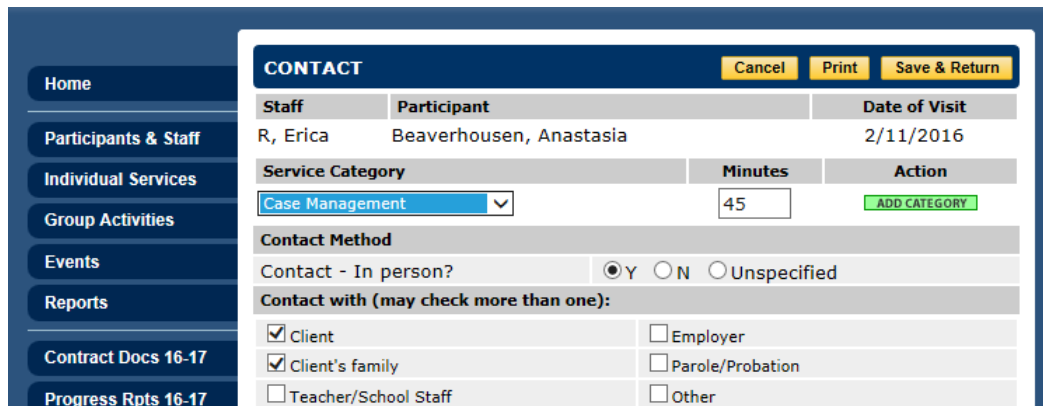
Note: Typically happens if Participant has no contacts entered yet.

- Select 'Add Contact' at the top of the screen
- Select a Staff Person from the dropdown
- Select a date
- Type in the name of the individual (under Step 2)
- Select 'Find Person'
- Choose the Participant & select 'Create New Record'

3. Select the appropriate Staff person,
4. Input date and select 'Add Contact'



5. Select the appropriate form of contact from the 'Service Category' dropdown menu
6. Reply to: amount of time, contact method, individuals in meeting, and provide notes [Note: Ensure the notes written are adequate to justify the amount of time spent with a Participant; examples provided on the next page].
7. Select 'Save & Return'





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

The screenshot shows a web-based form for entering a contact record. The form is titled "CONTACT" and includes buttons for "Cancel", "Print", and "Save & Return". It contains the following fields and sections:

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

Service Category	Minutes	Action
Case Management	45	ADD CATEGORY

Contact Method
Contact - In person? Y N Unspecified

Contact with (may check more than one):

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

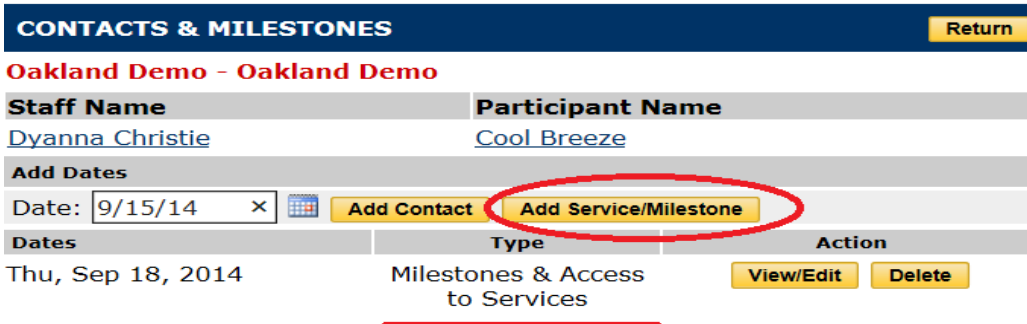
Case Note:
Case Manager met with the Participant at his home. Case Manager and Participant discussed safety concerns. Case Manager drafted a safety plan for Participant to follow for the month of February. Participant agreed to follow the plan. Participant signed off on the safety plan with Case Manager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

Creating a Milestone

Can be viewed on YouTube from 48:12 – 50:30

1. Select 'Individual Services' from the blue menu on the left side of the screen
2. Find Participant
3. Select Participant
4. Select the name of the appropriate Staff associated with the Participant; then...

On a bi-weekly basis, select each Milestone or Access to Service that the Participant has achieved within that time period. Think of it as a bi-weekly update.



CONTACTS & MILESTONES Return

Oakland Demo - Oakland Demo

Staff Name	Participant Name
Dyanna Christie	Cool Breeze

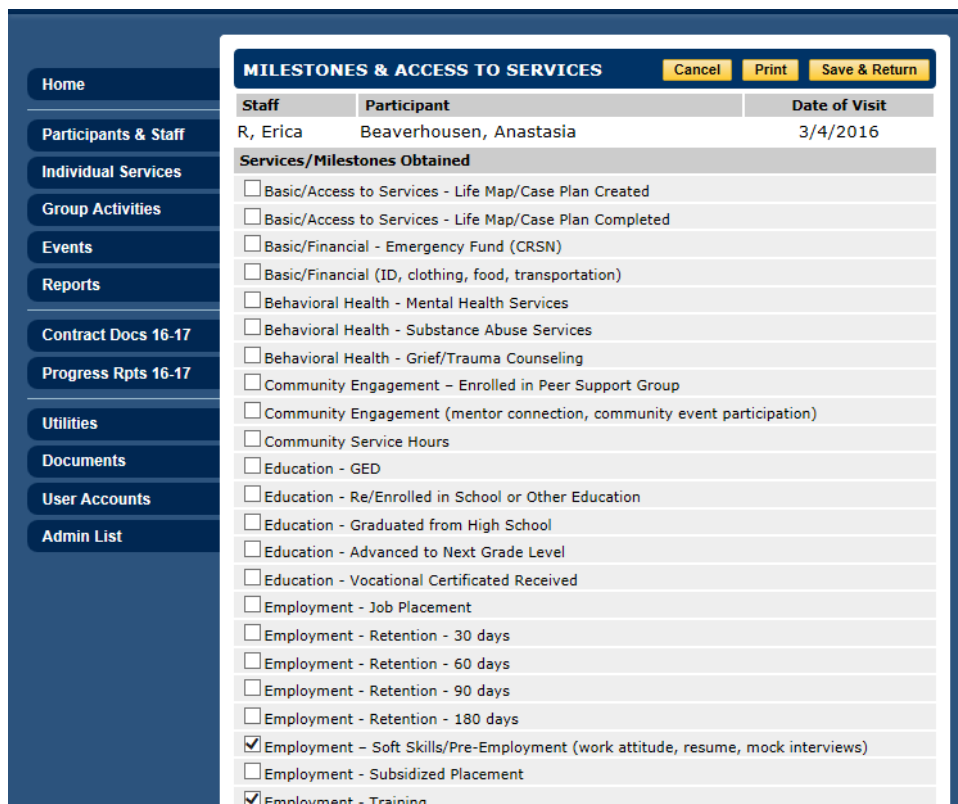
Add Dates

Date:

Dates	Type	Action
Thu, Sep 18, 2014	Milestones & Access to Services	<input type="button" value="View/Edit"/> <input type="button" value="Delete"/>

For each active participant on your caseload:

- Select a date
- Go to Individual Services and select: 'Add Service/Milestones'
- Select each Milestone or Access to Service that the participant **has achieved** since the previous data update.
 - **Note:** When creating a Milestone, ensure you have **supporting documentation** for the Participant's file. Document(s) will be reviewed during the course of an audit if the Participant's file is selected. [Example: Certificate of completion for training program].
- Select 'Save & Return' to add another Milestone for another date



MILESTONES & ACCESS TO SERVICES

Staff	Participant	Date of Visit
R, Erica	Beaverhousen, Anastasia	3/4/2016

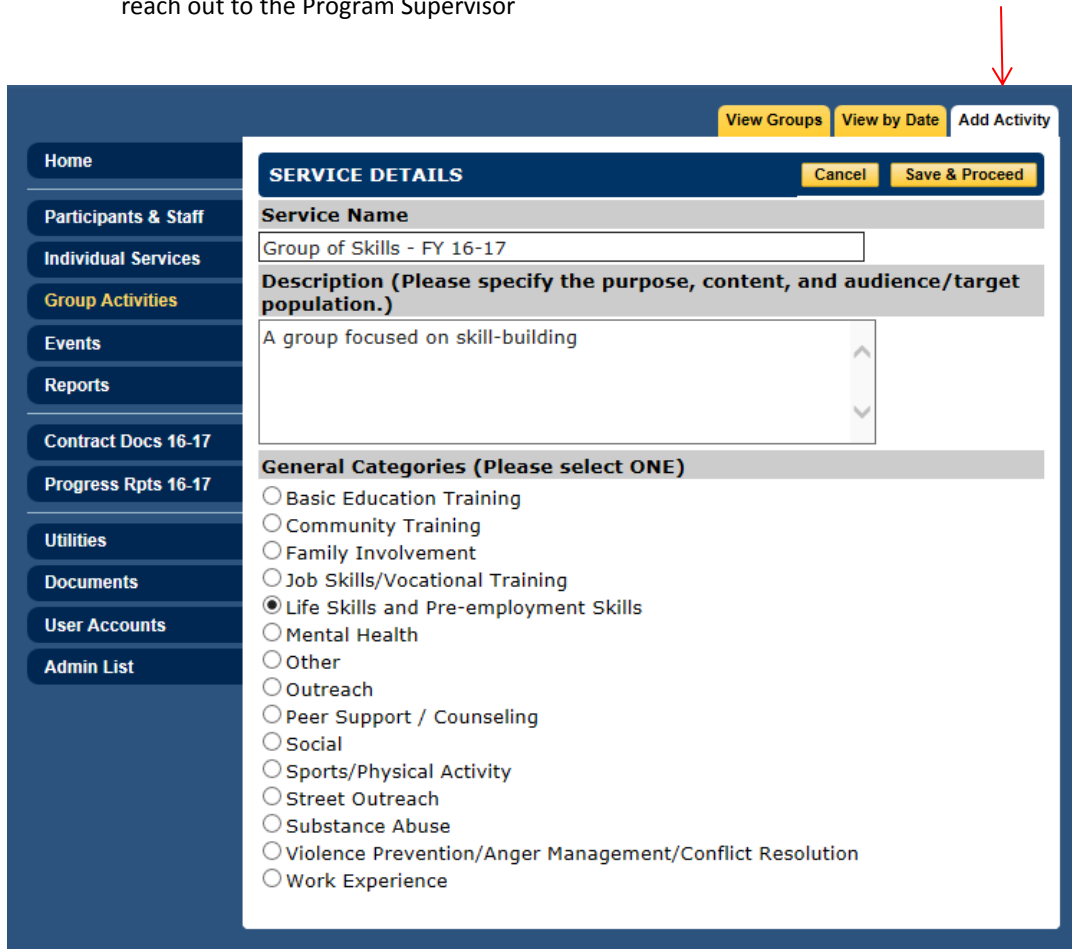
Services/Milestones Obtained

- Basic/Access to Services - Life Map/Case Plan Created
- Basic/Access to Services - Life Map/Case Plan Completed
- Basic/Financial - Emergency Fund (CRSN)
- Basic/Financial (ID, clothing, food, transportation)
- Behavioral Health - Mental Health Services
- Behavioral Health - Substance Abuse Services
- Behavioral Health - Grief/Trauma Counseling
- Community Engagement - Enrolled in Peer Support Group
- Community Engagement (mentor connection, community event participation)
- Community Service Hours
- Education - GED
- Education - Re/Enrolled in School or Other Education
- Education - Graduated from High School
- Education - Advanced to Next Grade Level
- Education - Vocational Certificated Received
- Employment - Job Placement
- Employment - Retention - 30 days
- Employment - Retention - 60 days
- Employment - Retention - 90 days
- Employment - Retention - 180 days
- Employment - Soft Skills/Pre-Employment (work attitude, resume, mock interviews)
- Employment - Subsidized Placement
- Employment - Training

Creating a Group Activity

Can be viewed on YouTube from 29:42 – 34:43

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



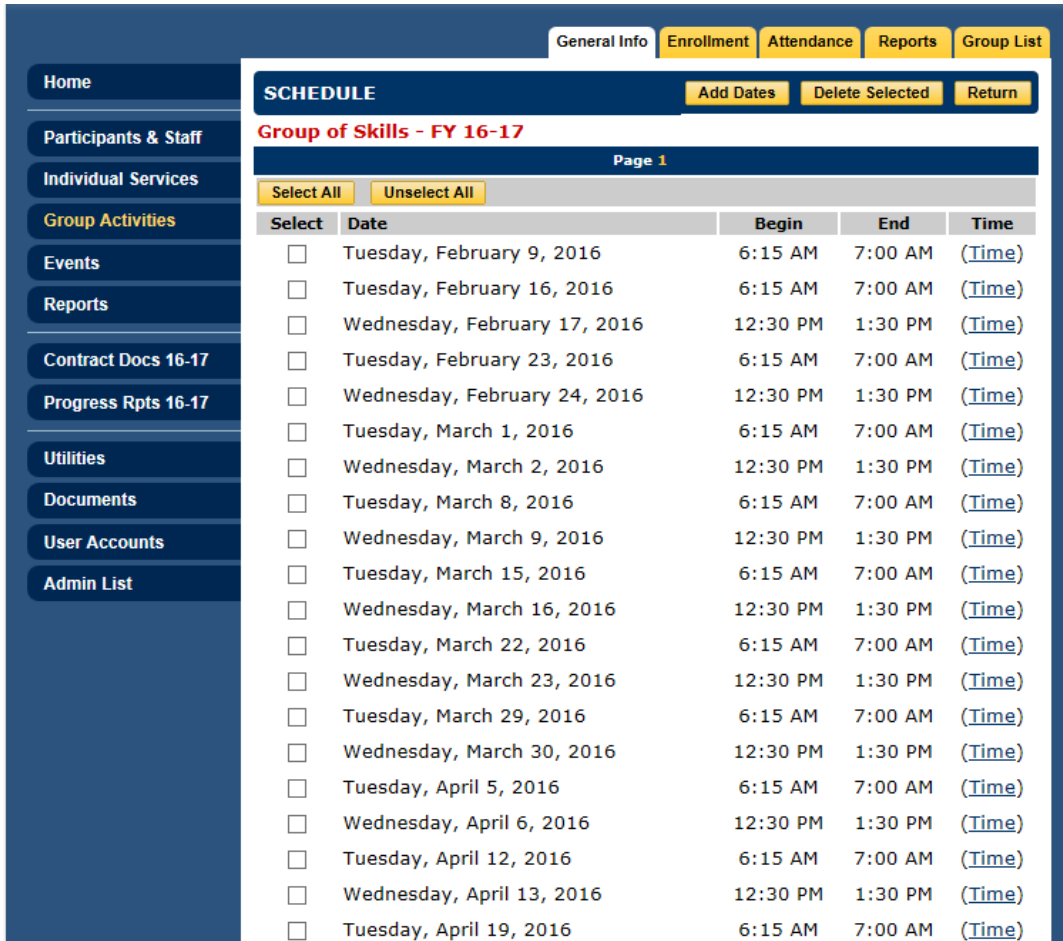
The screenshot shows the 'Add Activity' form in the Cityspan database. The left-hand navigation menu has 'Group Activities' highlighted. The main content area is titled 'SERVICE DETAILS' and includes the following fields and options:

- Service Name:** Group of Skills - FY 16-17
- Description (Please specify the purpose, content, and audience/target population.):** A group focused on skill-building
- General Categories (Please select ONE):**
 - Basic Education Training
 - Community Training
 - Family Involvement
 - Job Skills/Vocational Training
 - Life Skills and Pre-employment Skills
 - Mental Health
 - Other
 - Outreach
 - Peer Support / Counseling
 - Social
 - Sports/Physical Activity
 - Street Outreach
 - Substance Abuse
 - Violence Prevention/Anger Management/Conflict Resolution
 - Work Experience

Buttons for 'View Groups', 'View by Date', 'Add Activity', 'Cancel', and 'Save & Proceed' are located at the top of the form area.

4. Save & Proceed
5. Select 'Edit' on Schedule line to add the appropriate dates and times for group meetings
 - a. Select 'To add Multiple Dates to the schedule' if the group meets repeatedly
 - b. Select 'To add a Single Date to the schedule' if the group is a one-time meeting

6. Complete the schedule and select the button reference in the last step to view the complete group schedule, which appears



Select	Date	Begin	End	Time
<input type="checkbox"/>	Tuesday, February 9, 2016	6:15 AM	7:00 AM	(Time)
<input type="checkbox"/>	Tuesday, February 16, 2016	6:15 AM	7:00 AM	(Time)
<input type="checkbox"/>	Wednesday, February 17, 2016	12:30 PM	1:30 PM	(Time)
<input type="checkbox"/>	Tuesday, February 23, 2016	6:15 AM	7:00 AM	(Time)
<input type="checkbox"/>	Wednesday, February 24, 2016	12:30 PM	1:30 PM	(Time)
<input type="checkbox"/>	Tuesday, March 1, 2016	6:15 AM	7:00 AM	(Time)
<input type="checkbox"/>	Wednesday, March 2, 2016	12:30 PM	1:30 PM	(Time)
<input type="checkbox"/>	Tuesday, March 8, 2016	6:15 AM	7:00 AM	(Time)
<input type="checkbox"/>	Wednesday, March 9, 2016	12:30 PM	1:30 PM	(Time)
<input type="checkbox"/>	Tuesday, March 15, 2016	6:15 AM	7:00 AM	(Time)
<input type="checkbox"/>	Wednesday, March 16, 2016	12:30 PM	1:30 PM	(Time)
<input type="checkbox"/>	Tuesday, March 22, 2016	6:15 AM	7:00 AM	(Time)
<input type="checkbox"/>	Wednesday, March 23, 2016	12:30 PM	1:30 PM	(Time)
<input type="checkbox"/>	Tuesday, March 29, 2016	6:15 AM	7:00 AM	(Time)
<input type="checkbox"/>	Wednesday, March 30, 2016	12:30 PM	1:30 PM	(Time)
<input type="checkbox"/>	Tuesday, April 5, 2016	6:15 AM	7:00 AM	(Time)
<input type="checkbox"/>	Wednesday, April 6, 2016	12:30 PM	1:30 PM	(Time)
<input type="checkbox"/>	Tuesday, April 12, 2016	6:15 AM	7:00 AM	(Time)
<input type="checkbox"/>	Wednesday, April 13, 2016	12:30 PM	1:30 PM	(Time)
<input type="checkbox"/>	Tuesday, April 19, 2016	6:15 AM	7:00 AM	(Time)

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

*****Note: Once a date is deleted, it cannot be undone. Date will have to be manually re-entered.*****
9. When satisfied with schedule, select 'Return'
10. Select 'Edit' on the Staff line to assign Staff to activity; only one Staff person can be named as 'Lead Staff'; however, there can be multiple Staff assigned to a group

Enrolling Participants in a Group Activity

Can be viewed on YouTube from 34:43 – 37:14

1. Select 'Group Activities' from blue menu on left-hand side of the screen
2. Select the group desired
3. Select 'Enrollment' tab at the top of the screen
4. Select 'Click here to enroll participants'
5. Select Participants for enrollment in one of the following ways:
 - a. Enter the first and last name (whole or initials) and 'Person Type' → 'Find Person'
 - b. Select the first letter of their last name in the alphabet chart
 - c. Select 'ALL' in the alphabet chart (only if user would like to add multiple Participants at once)
6. Once Participant is found, select the Participant and click 'Next Step'
7. Enter the date the Participant will start the class

Note: The system will automatically default to the first date of the group **unless** the enroll date is changed by the user
8. Select 'Next Step'

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

Completing Group Activity Attendance

1. Select 'Group Activities' from blue menu on left-hand side of the screen
2. Select the group desired
3. Select 'Attendance' tab at the top of the screen
4. Select the date desired
5. Mark Participants as 'Present' or 'Absent' based on sign-in sheets

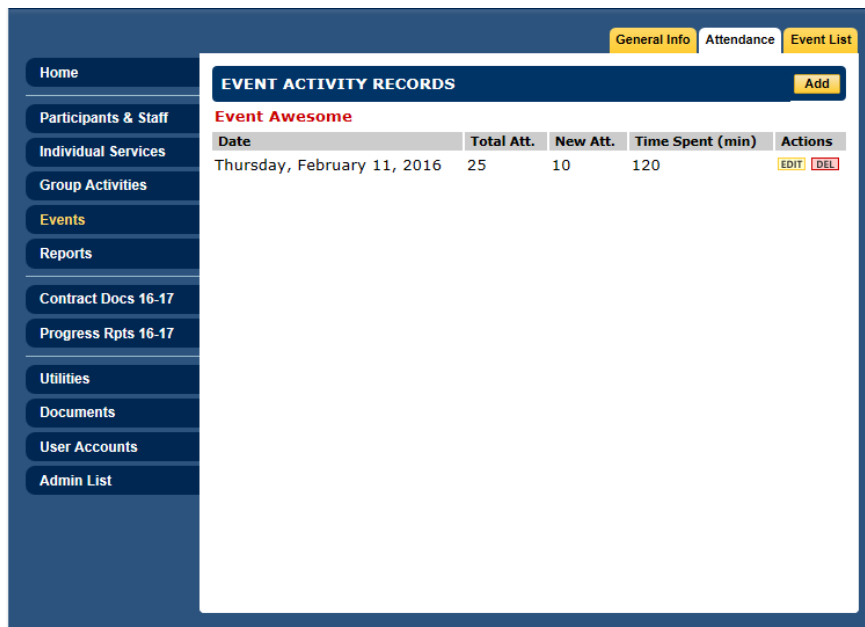
Note: Sign-in sheets will be reviewed during audits. Please maintain all sign-in sheets for evaluators.
6. Select 'Save' and 'Return', or
7. Select 'Save & Next Date' to input multiple dates of attendance from previous weeks

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

Green: Completed attendance records for all Participants

Brown/Yellow: Did not complete attendance for some Participants

Red: Did not complete attendance for any Participants for the day



EVENT ACTIVITY RECORDS				
Date	Total Att.	New Att.	Time Spent (min)	Actions
Thursday, February 11, 2016	25	10	120	EDIT DEL



Cityspan Database Instructions

Creating Event Activities

Can be viewed on YouTube from 1:08:40 – 1:10:40

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

1. **Go to: Events** (Blue Menu)
2. **Go to: Add Events** (Yellow Tab)
3. **Enter: Service Name** – Give a name to the event
4. **Enter: Description** – Provide an explanation for the purpose of the event
5. **Enter: Funded by?**– Measure Y
6. **Select: General Category** – You must select the category that matches your event deliverables for it to count towards your Measure Y deliverables under Progress Reports.
7. **Save and Proceed** (Yellow Tab)
8. **Go to: Attendance** (Yellow Tab)
9. **Go to: Add** (Yellow Tab)
10. **Enter:**
 - Date of Event Activity
 - Total # of Attendees (Total number of people at event)
 - First Time Attendees (If this event meets regularly, you may be entering multiple incidents for the event – here you enter how many people were new to the event on this date)
 - Total Staff Attendees – How many program staff were present
 - Time Spent – entered in minutes
11. **Save and Return**
12. Once you have returned – you can always go back to add additional incidents of the event by selecting the event from the event list – go to Attendance (Step 7 above), and go to Add (Step 8), and repeat data entry for the new date (Step 9).

Creating Reports

Can be viewed on YouTube from 1:12:55 – 1:26:15

Because there are so different types of reports requested of Oakland Unite grantees, there will not be a step by step included in these instructions; however, the ~14 minute clip provided above will review the majority of commonly requested reports – such as:

- Deliverables
- Individuals Services List
- Milestones & Access to Services List
- Attendance by Service
- Attendance by Participant
- Query Tool
- Custom Report Builder



Cityspan Database Instructions

Submitting Quarterly Reports

Can be viewed on YouTube from 1:00:35 – 1:07:02

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

- **Narrative** – Type in a narrative response to each question and click **Submit** when done.
- **Stats** – Generate your stat report and review it for thoroughness and accuracy. Participant data entry should have no or minimal numbers missing for ethnicity, gender, age, zipcode (Oakland), referral source, consent form on file. Service data should be current and accurate. Once you have verified the Stat report, you must click **Submit** when done.
- **Deliverables** – For each deliverable listed, review your **Year-to-date Benchmark** in relation to your **Year-to-date Actual** to ensure that deliverable benchmarks for the quarter have been met. If they have not, you will need to provide a narrative explanation. Any deliverable with a **Year-to-date Actual** that has a text box present, instead of a number, you are to manually enter the correct total for that particular deliverable. For all other **Year-to-date Actual**, the total number of services delivered will appear automatically, based on the service data entry that has been done up until that point. Once you have verified that the Deliverable numbers are correct, you must click **Submit** when done.
- **Expenditures – Oakland Unite** – Enter the amount you are requesting for the quarter and complete the line item budget of expenditures. You must click **Submit** when done.
- **Corrective Actions** – If there are corrective actions listed, enter a narrative description of how the corrective action has been addressed. You must click **Submit** when done.
- **Signoff** – You must be logged-on to Cityspan with the Username and Password of the Grantee Signatory in order to officially submit your report and invoice.
- **Signature is the assigned signatory's password for their Cityspan account.**
 - **Don't know who your assigned signatory is?** Go to the User Accounts tab to view the name of the Signatory for your agency.
 - **Need to change the assigned signatory?** Email your Oakland Unite Program Officer and Josie (JHalpern-Finnerty@oaklandnet.com) to request a change of signatory. Include the name and email of the person who should be assigned as signatory. Someone from Cityspan will email that person to provide them with their username and password as the updated signatory.
 - **Grant Pay. Auth. – Oakland Unite** – This is for your program officer to complete. You do not do anything here.



Cityspan Database Instructions

Maintaining User Accounts

Can be viewed on YouTube from 1:32:00 – 1:37:00

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

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

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

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

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

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