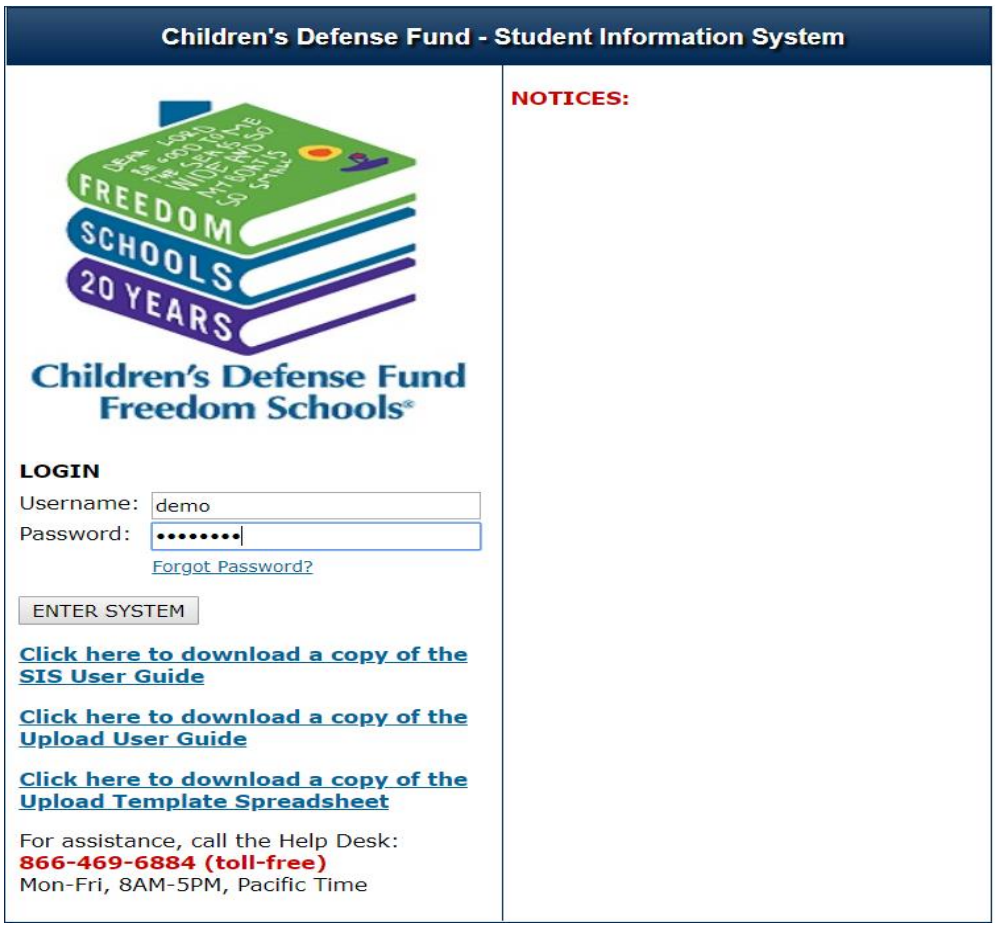
Children's Defense Fund
A strong, effective, independent voice for *all* the children of America

Student Information System User Guide

This User Guide is designed to help you get started using the Student Information System. We'll take you step by step in using your organization's database, so that you can being to use SIS right away.

Login

Navigate to cdfund.cityspan.com in you web browser. Input your login credentials, which have been provided for you via email from accountinfo@cityspan.com.



Toll-free Help Desk Support

Please be sure to contact our toll-free help desk if you have questions, problems, or have forgotten your password.

Our toll-free help desk phone number is **1-866-GO-YOUTH** or **1-866-469-6884**.

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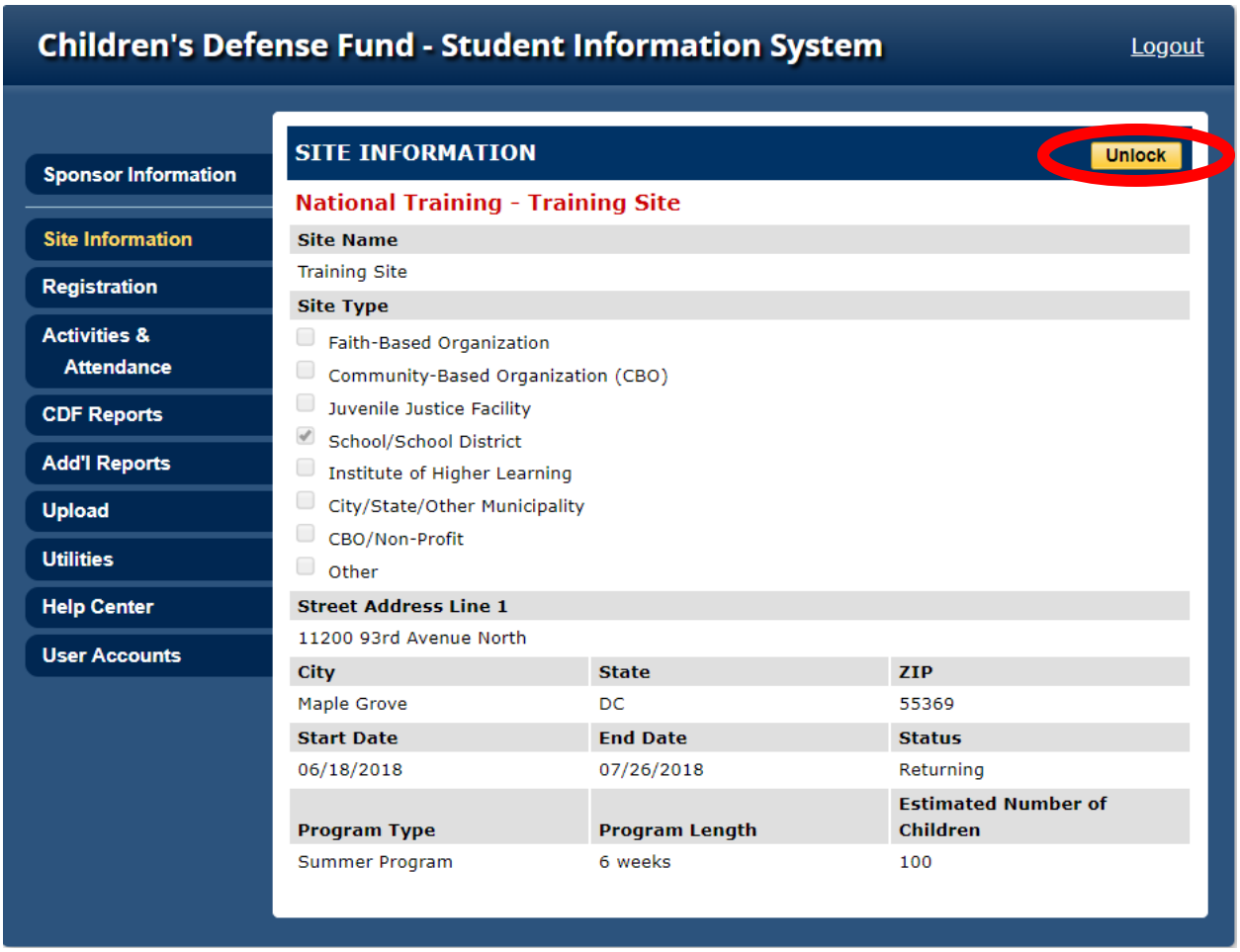
Editing Sponsor Organization and Site Information

Upon logging in, you will first want to update the Sponsor Organization and Site Information pages.

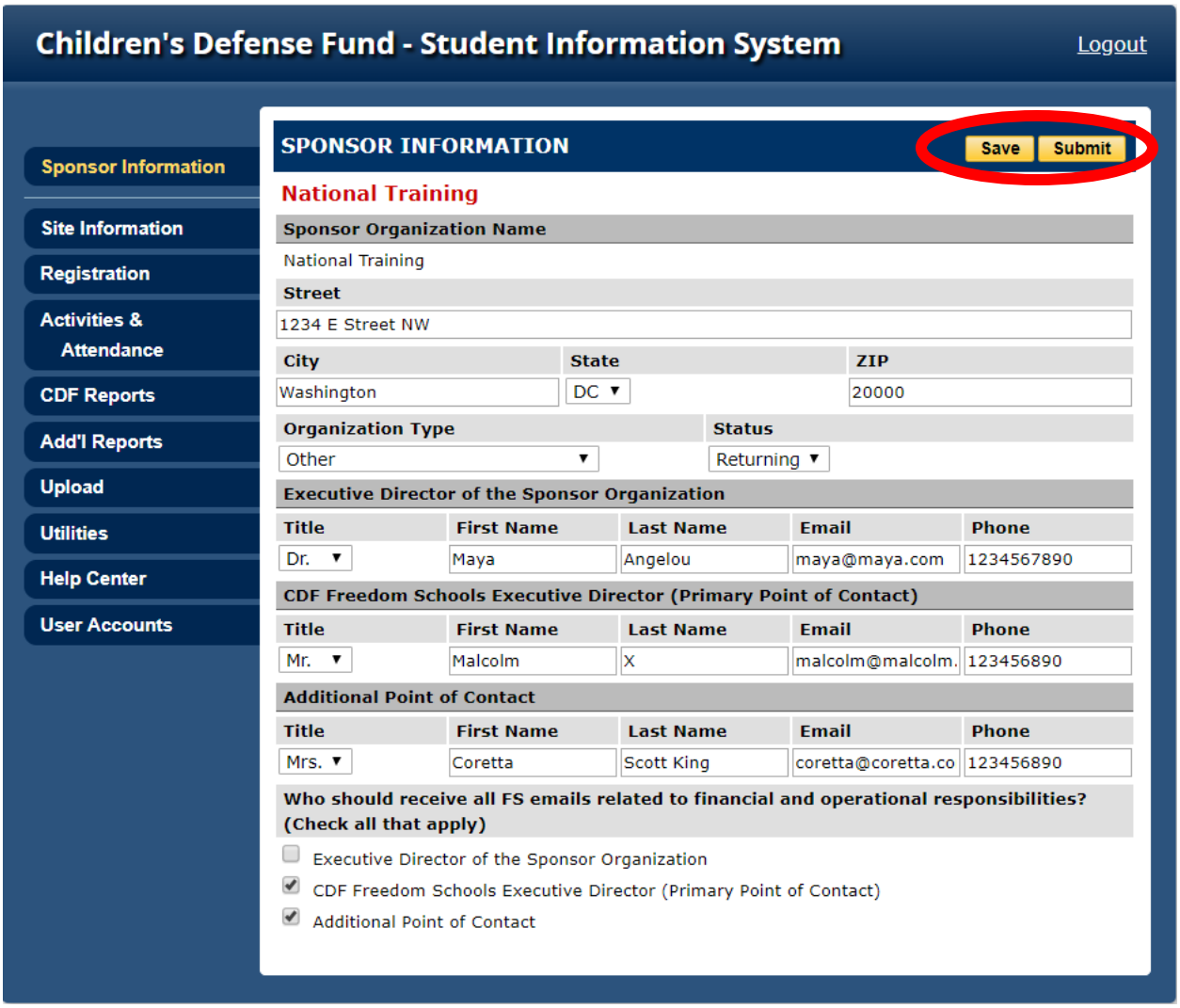
Step 1:

First, you will want to update your Site Information page by clicking the "Unlock" button to edit and then selecting "Save" and "Submit" once you have completed the form.



Step 2:

After completing the Site Information page, you will want to navigate to the Sponsor Information page by clicking on "Sponsor Information" in the left menu. Once you are there, you can follow the same steps for completing the Site Information page and click "Submit" once the form has been completed.

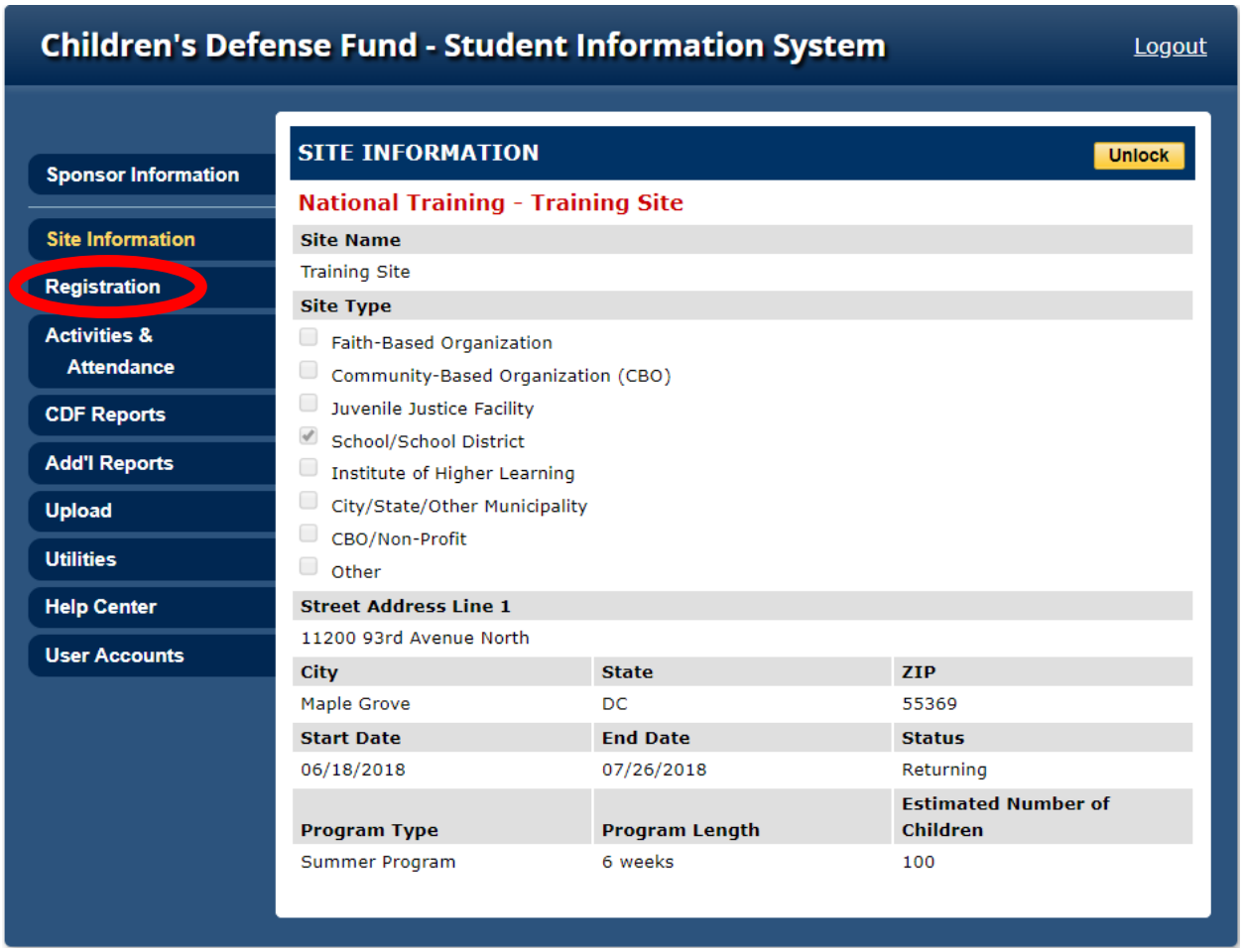


Please complete each form to the best of your ability with as much detail possible. If you notice that your Sponsor or Site name is incorrect, you can contact Erica Fields with a change requests and it will be updated with 48 hours.

Once you have finished updating the form(s), click "Submit". **Sponsor and Site Information forms will be permanently locked on May 1st, 2018 at midnight.** If further updates are needed, please contact Erica Fields (efields@childrensdefense.org) to request that the form be unlocked.

Registration

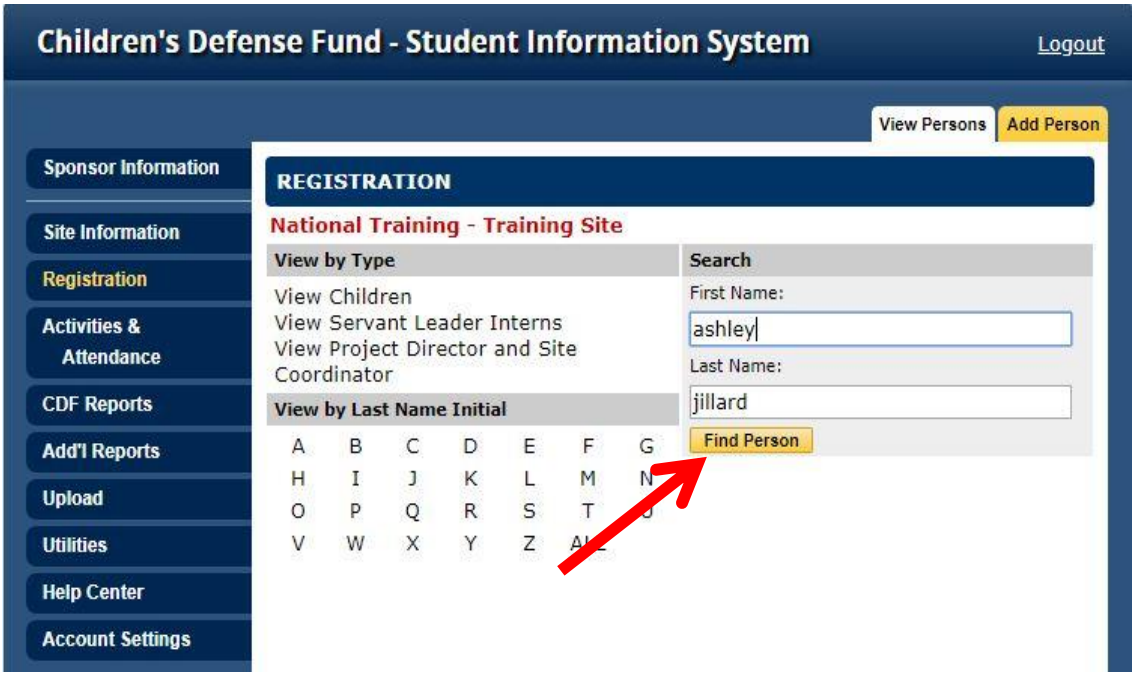
In this section you'll learn how to add Children, Servant Leader Interns, Project Directors, and Site Coordinators to the system.



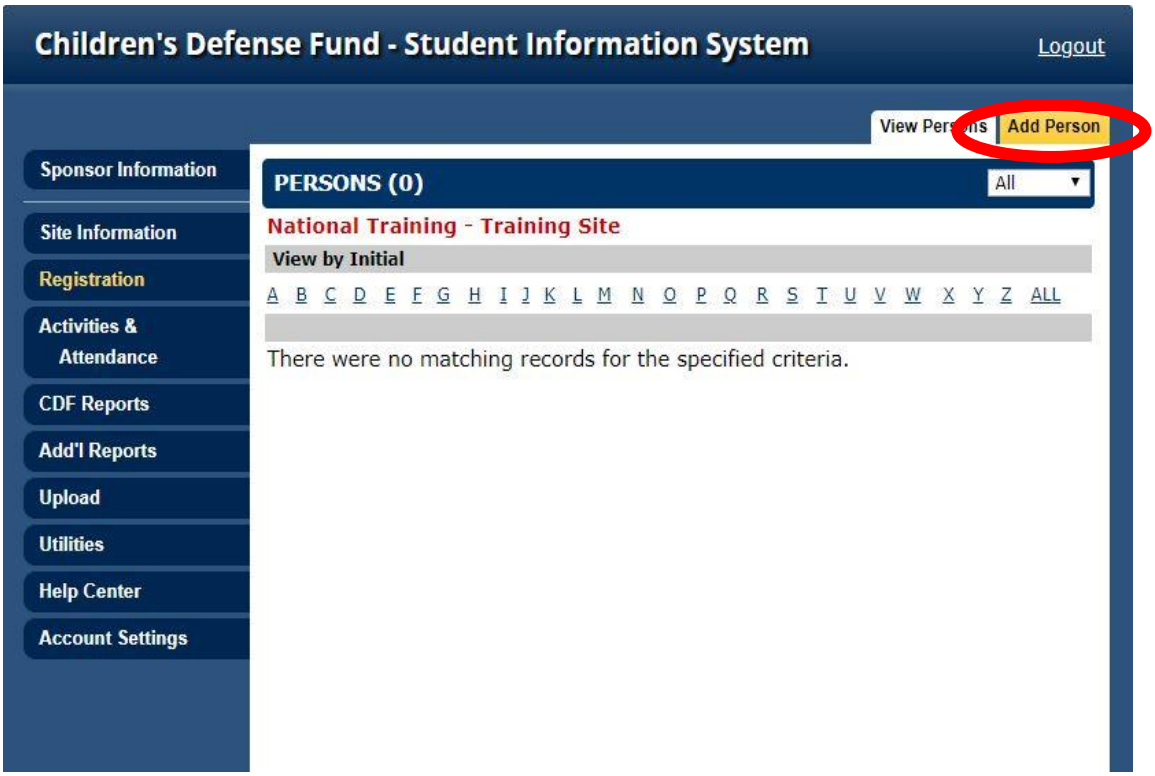
Adding Children

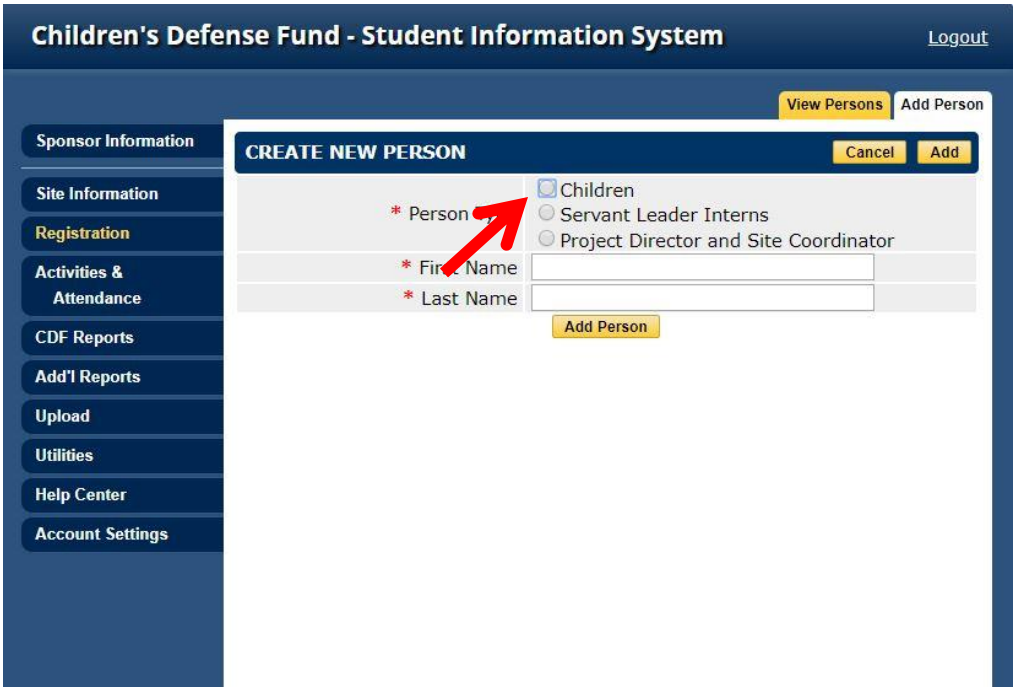
1. From the Site Information screen, select the **Registration** tab from the left menu.

2. To create a **Child** record, first enter the youth's name in the **Search** fields and click "Find Person" ensure that the participant is not already in the system. It is a good idea to get in the habit of searching the database for participants to prevent the creation of duplicate records for one individual. If the person is already in the system his or her name will appear, and you can then click on that name to enter data into their registration form. If there is more than one person with the same name, a list of all the names will appear along with their phone numbers to help distinguish between them.

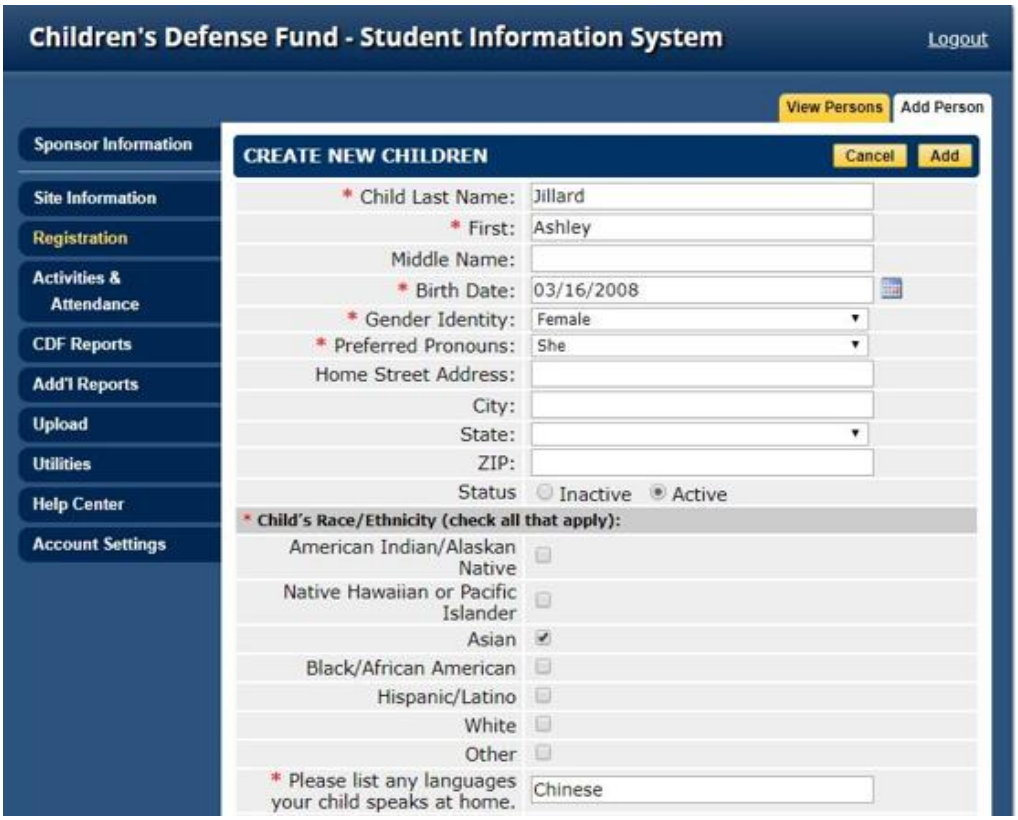


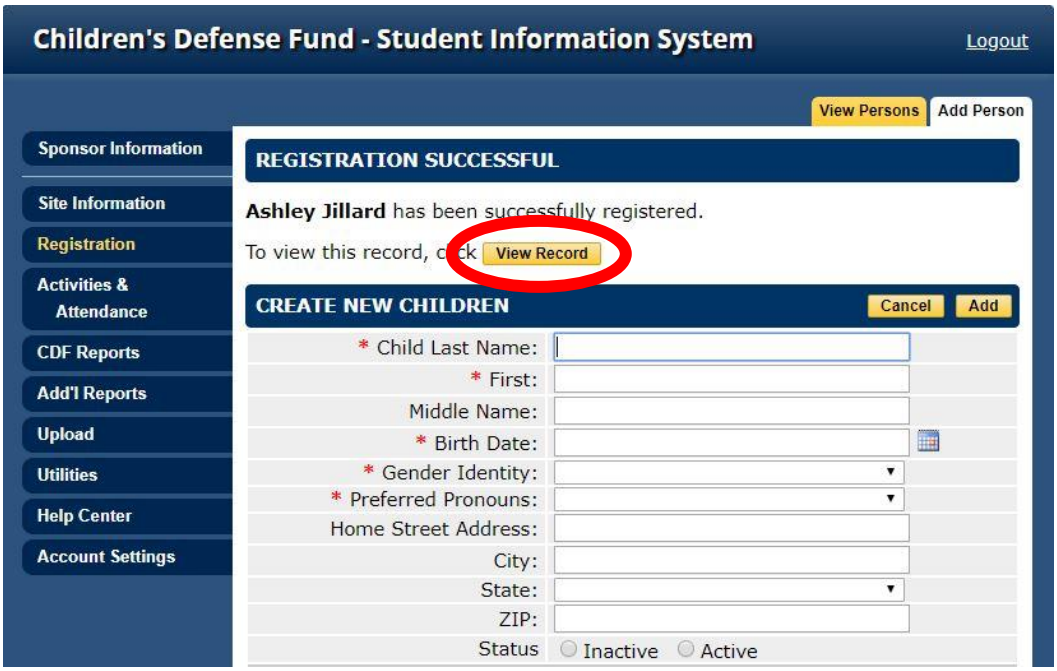
3. If it is determined that the child is not in the system, click on the yellow **Add Person** tab and select the "Children" Person Type.



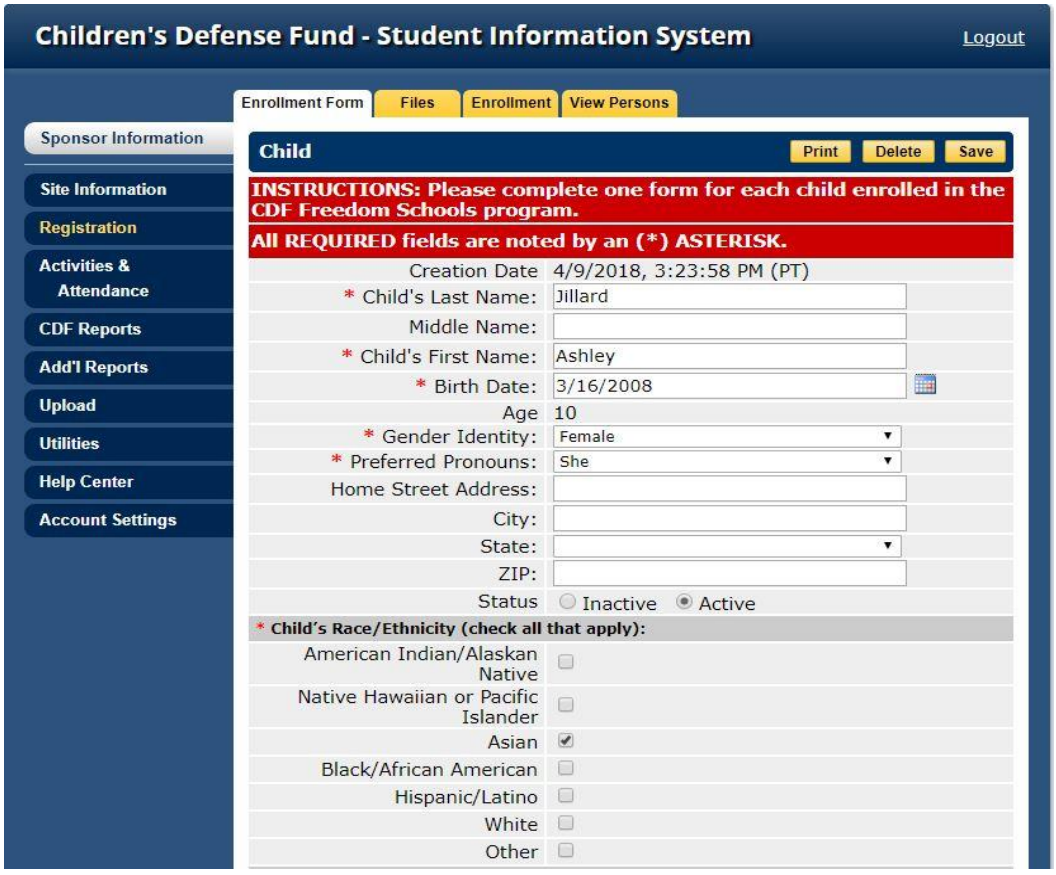


4. Enter the required registration information indicated by a red asterisk. You may also complete any additional fields to save time and reduce the risk of omitting relevant data from the child's record after it has been created. Once you have completed their form, click 'Add'. To view the record, click 'View Record' or continue to create new child records.



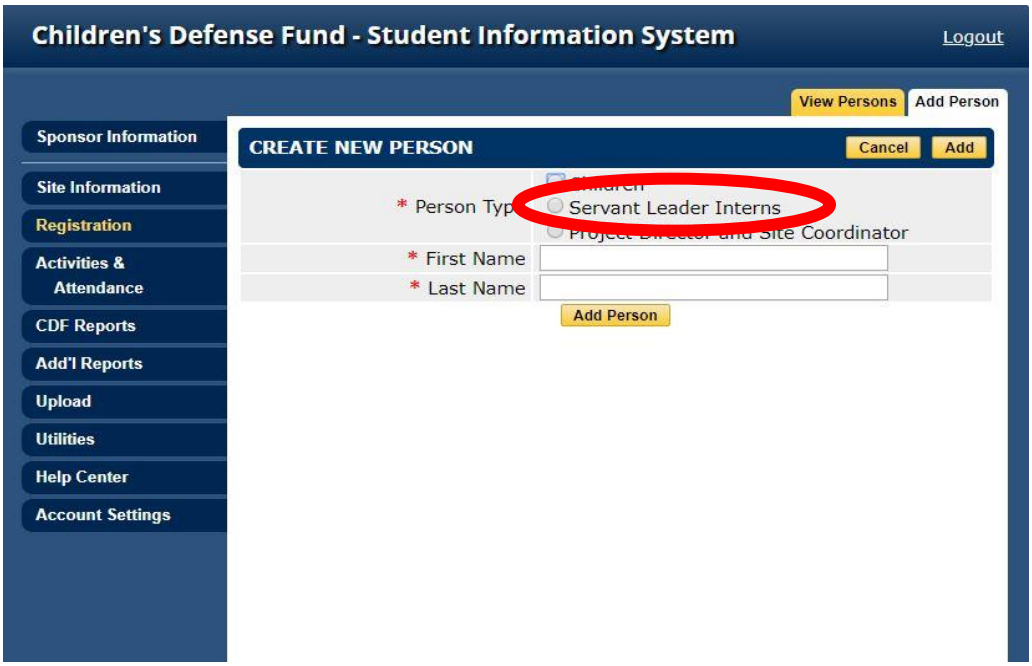


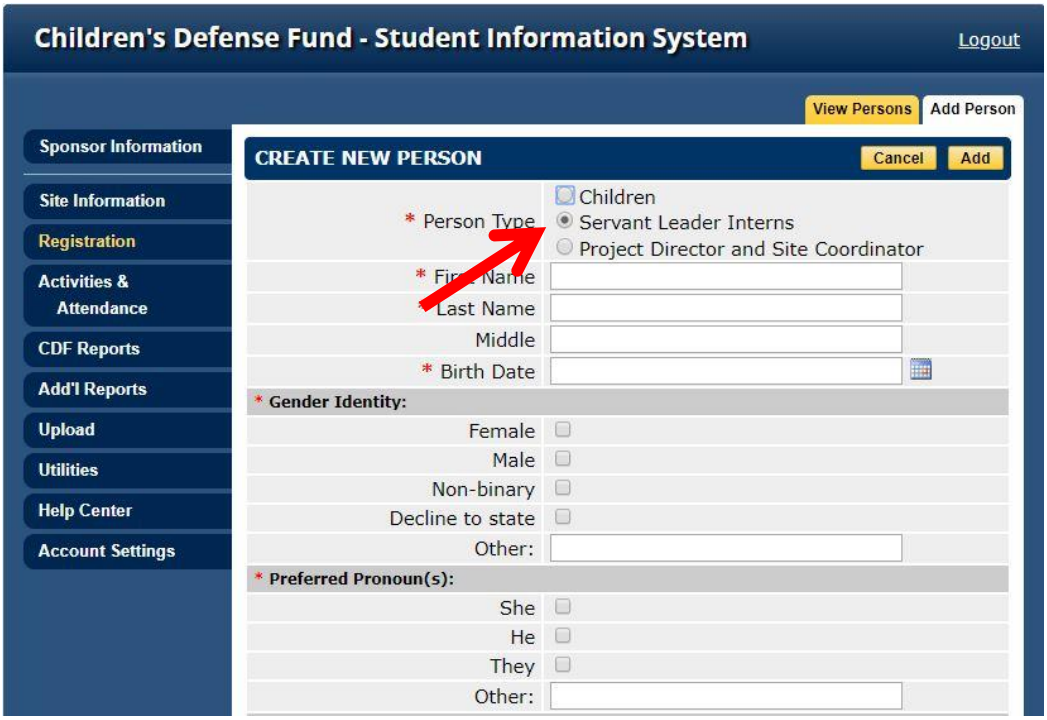
Below is the participant record. Make sure to fill out all information as required on the Enrollment Form, especially any information that was not completed during the record creation process.



Adding Servant Leader Interns

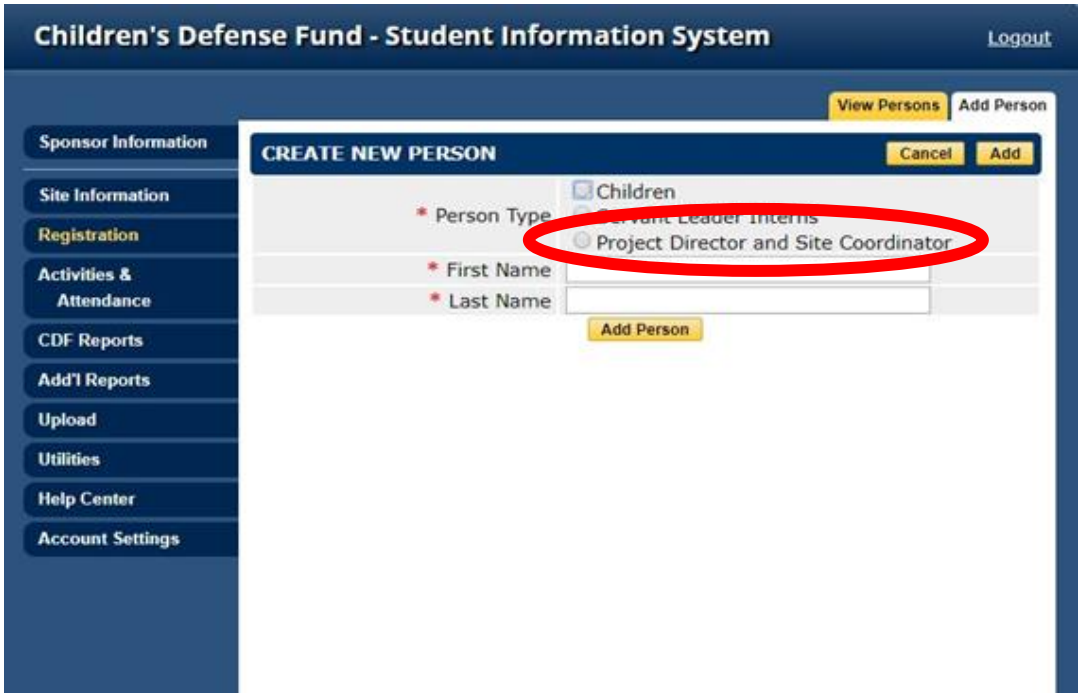
Click back to the "Registration" and click "Add Person" again, this time selecting Servant Leader Interns. Complete the form and view the record in the same steps as above when adding a child participant.

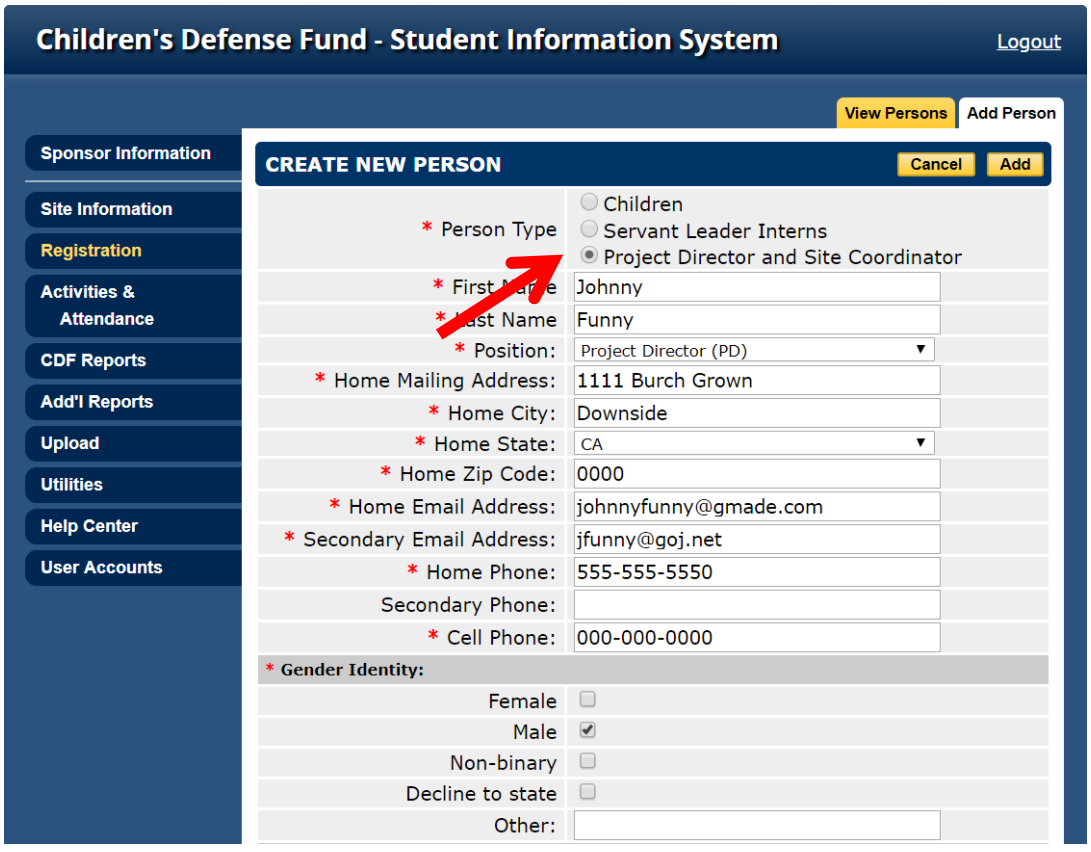




Adding Project Directors and Site Coordinators

To add a Project Director and/or Site Coordinator, repeat the steps above, but instead select the relevant Person Type when adding the person.





Once all staff have been registered into the system they will be displayed on any staff drop-down menus in the system. Click the View Record button to continue filling out the registration form for the staff person.

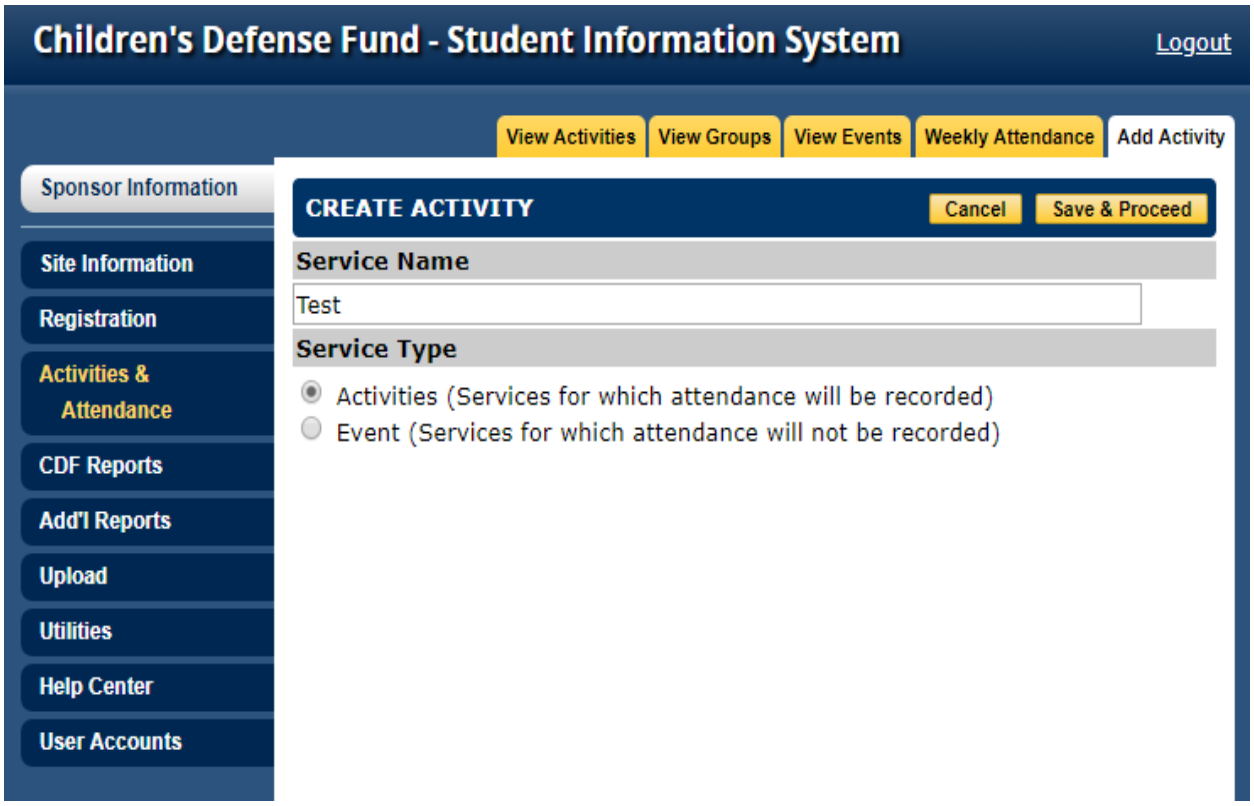
Activities & Attendance

This section will guide you through the process of creating an activity and taking attendance. You will create the service name, select service categories, create the service schedule, assign staff, and enroll participants.

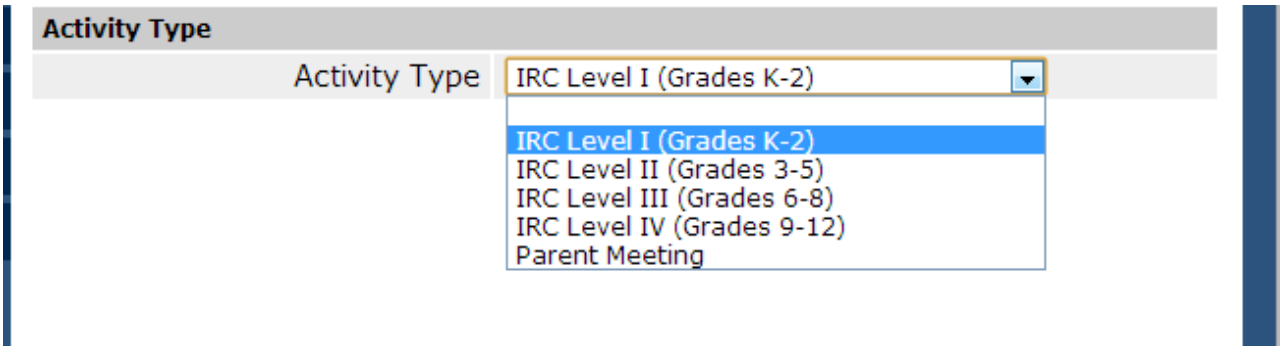
Creating Activities

1. From the left menu, select the "Activities & Attendance" tab, this is where a list of your activities will be displayed once you have created them. To add an activity, click the "Add Activity" tab in the upper right corner.

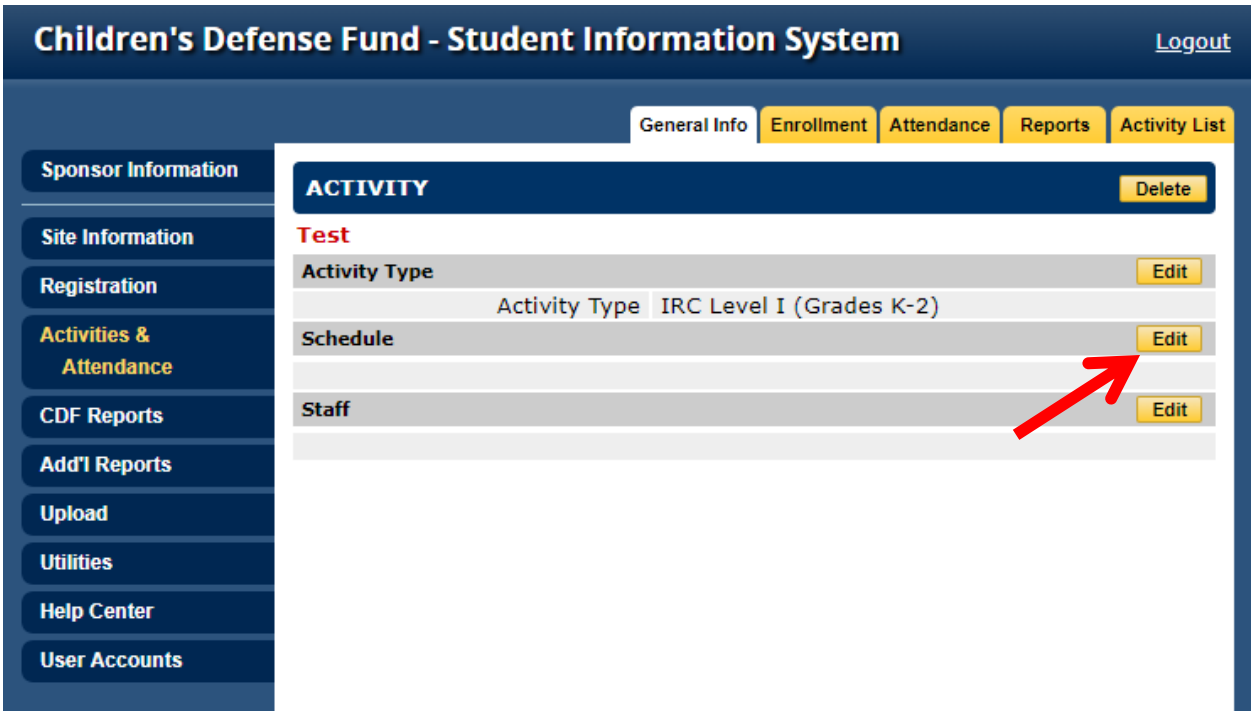
2. Enter the Service Name and select a Service Type. Once you select "Activities" as the service type the next screen you see will ask you to select an Activity Type.



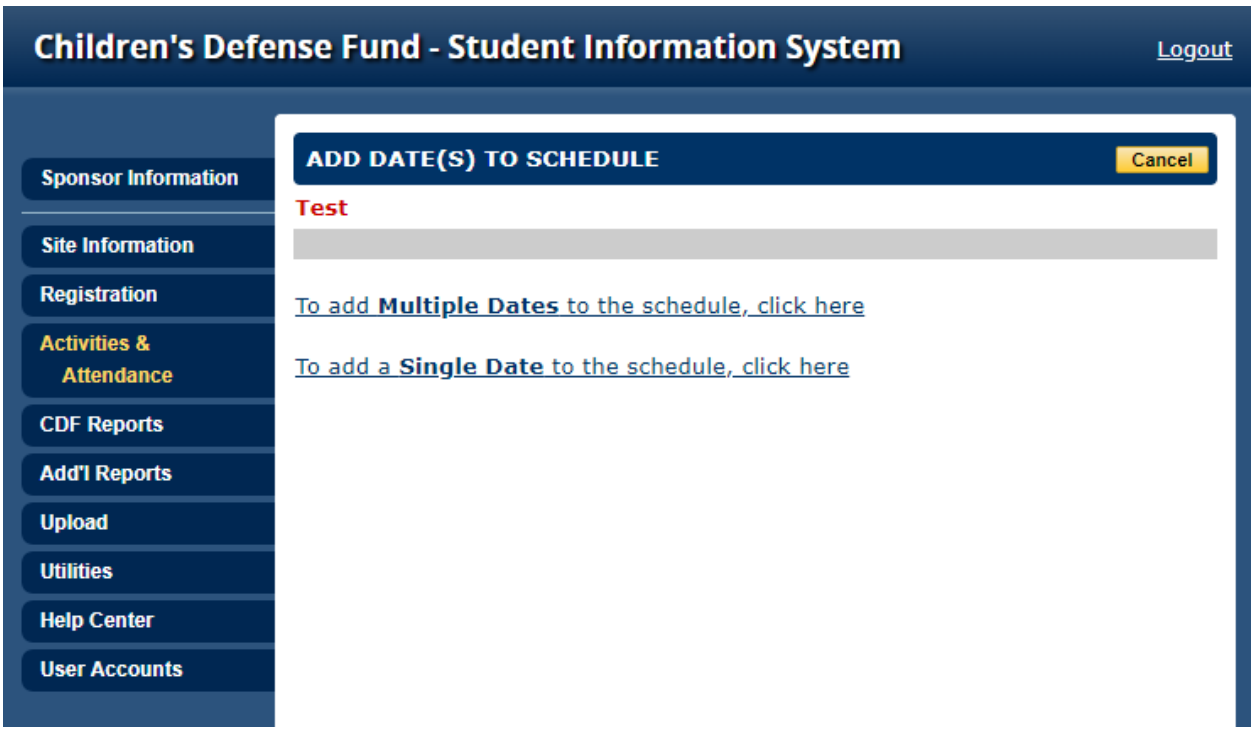
3. Activity Types are based off IRC levels (If your activity will be a Parent Meeting then you will select Parent Meeting from the drop down list). Click Save & Proceed when finished.



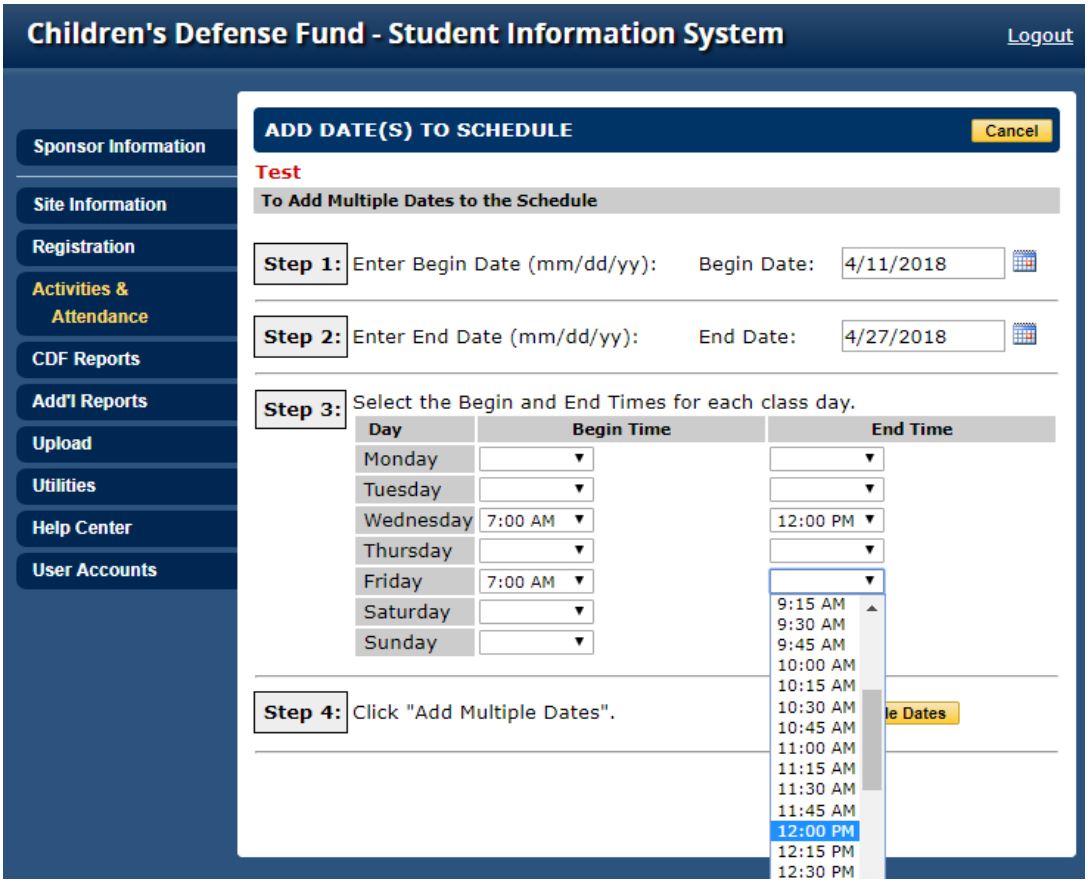
4. You will now be directed to the General Info page for this activity. Proceed to creating a schedule for this activity by selecting the "Edit" button next to the "Schedule" section.



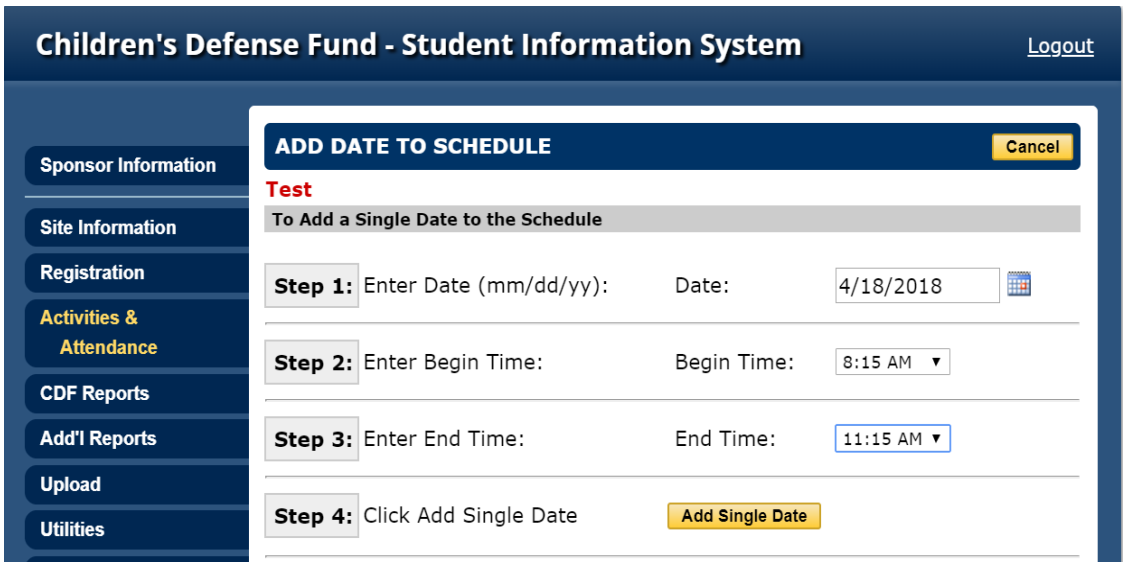
5. The next screen gives you the option to add Multiple Dates or a Single Date to the schedule. In general, if the service will only take place once (like an event) then the Single Date option should be used. For services that will take place over the course of a semester or a year, the Multiple Dates option should be chosen.



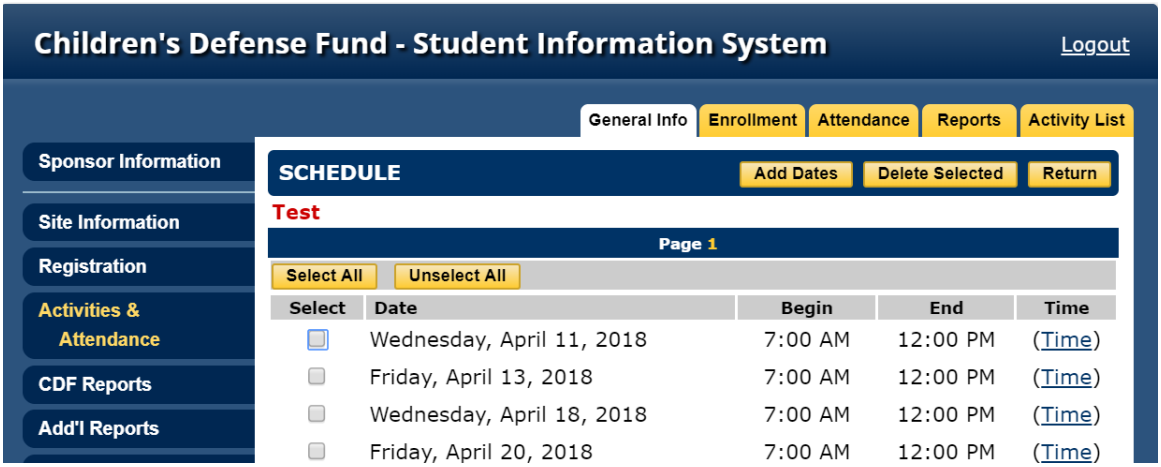
6. If you choose Multiple Dates, enter the begin date, end date and the times for each day that the service will be in session. Click the **Add Multiple Dates** button to add the schedule to the activity.



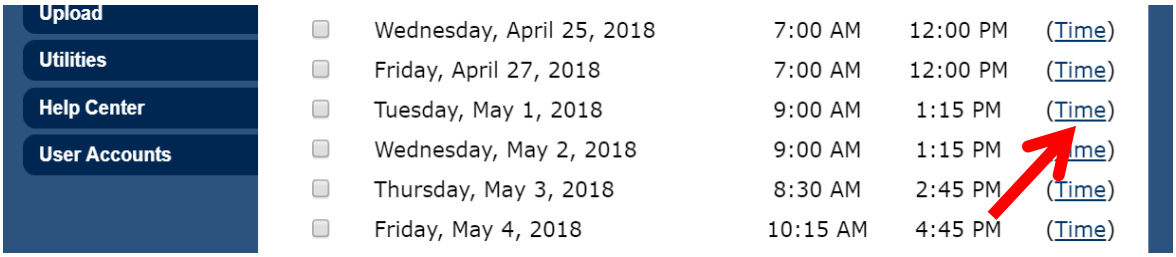
7. If you click on Single Date, enter the date, the begin time, and end time. Click on the **Add Single Date** button.

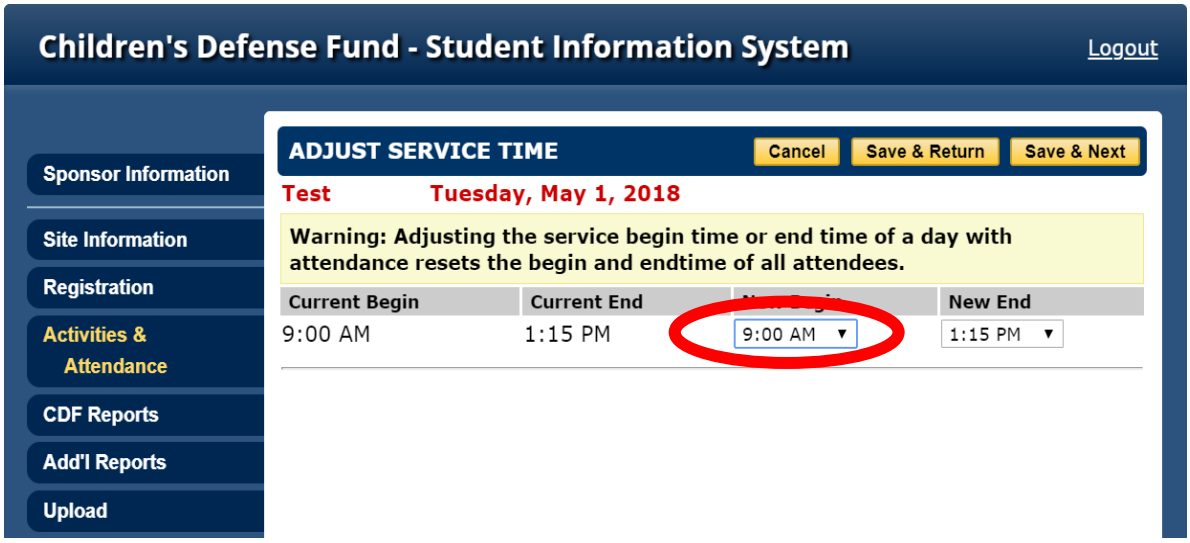


8. A page with all scheduled dates is displayed. If the activity will not meet on certain dates (e.g. holidays etc.), you may select those dates and click "Delete Selected" to update the schedule.

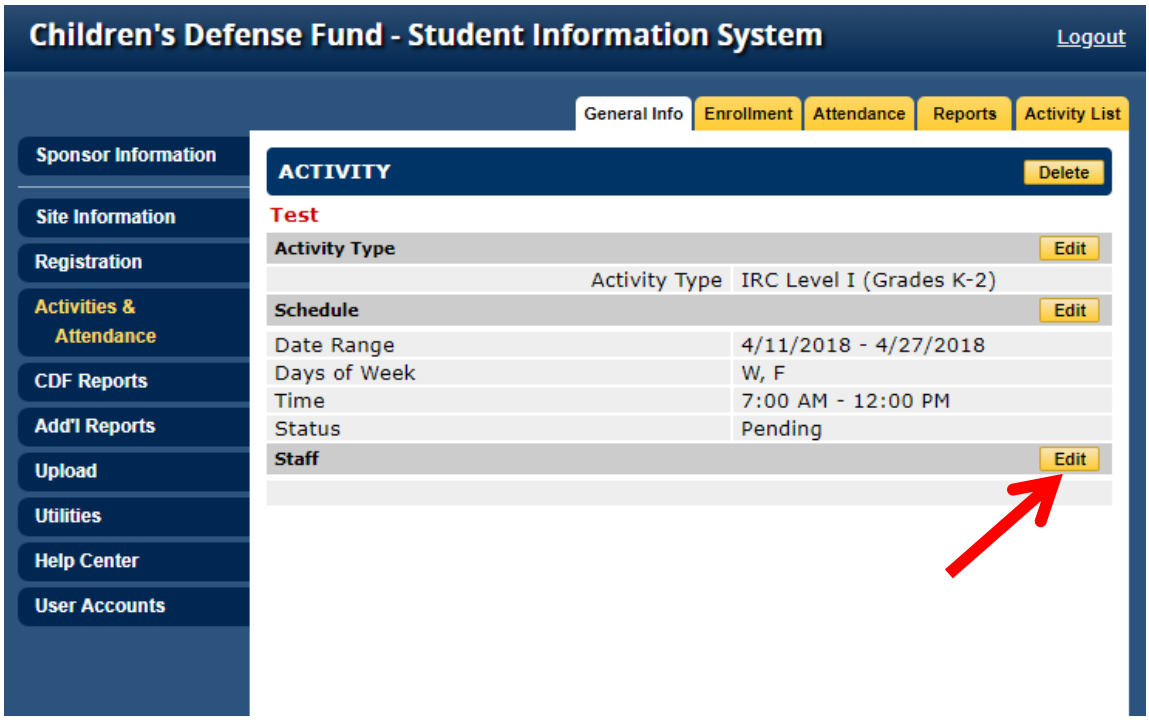


If you would like to make changes to the time(s) selected for any dates within the schedule, you can do so by clicking the "Time" link in the Schedule screen. (see below)

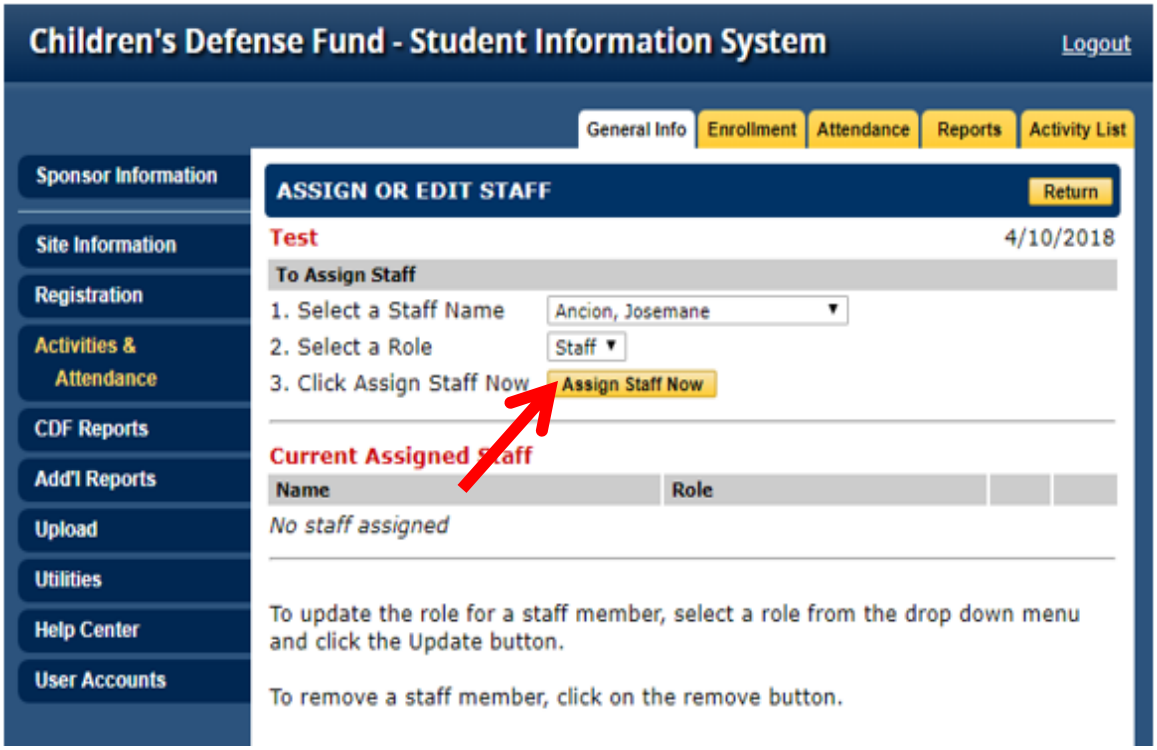


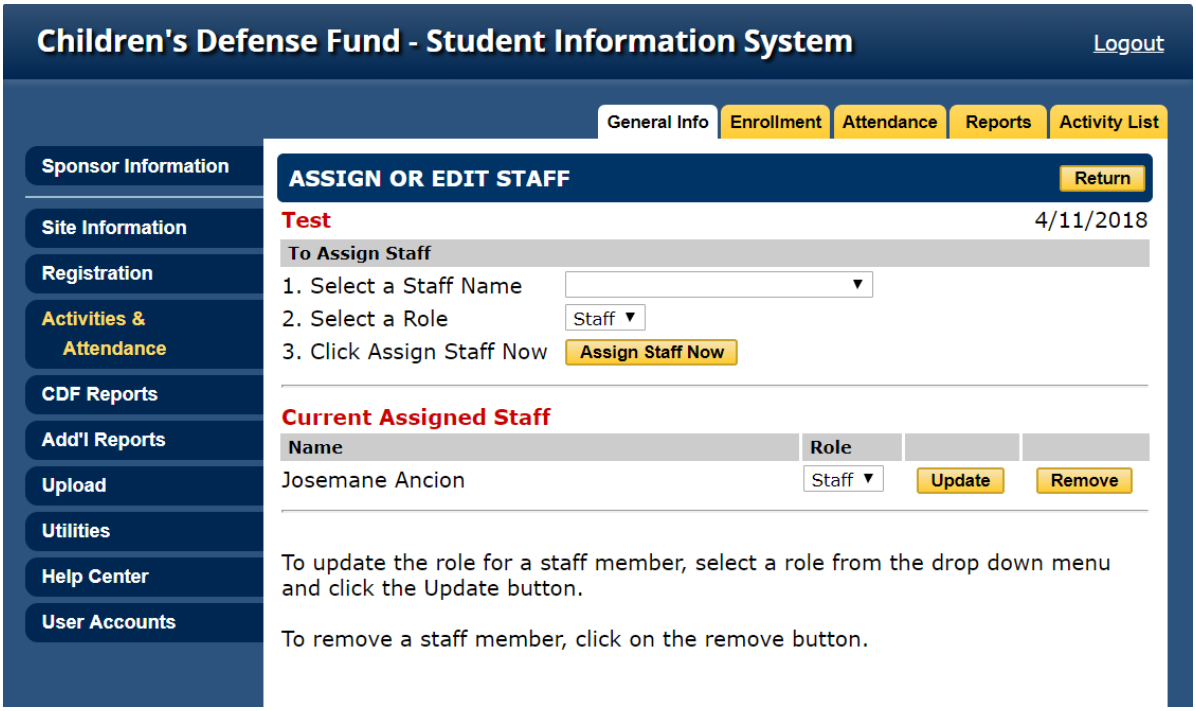


9. To assign a Staff Member to the activity, click the Return button to go back to the main General Info page when done. Then select the "Edit" button next to the Staff section.



10. Select a staff name from the drop-down menu to assign a staff member to the activity.

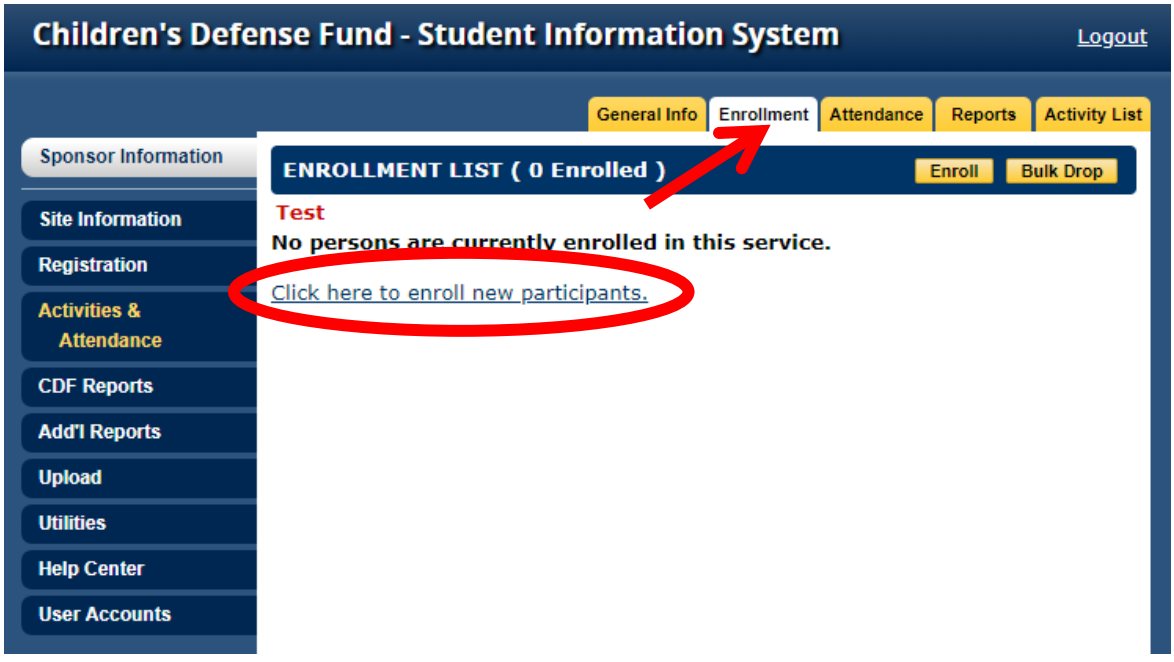


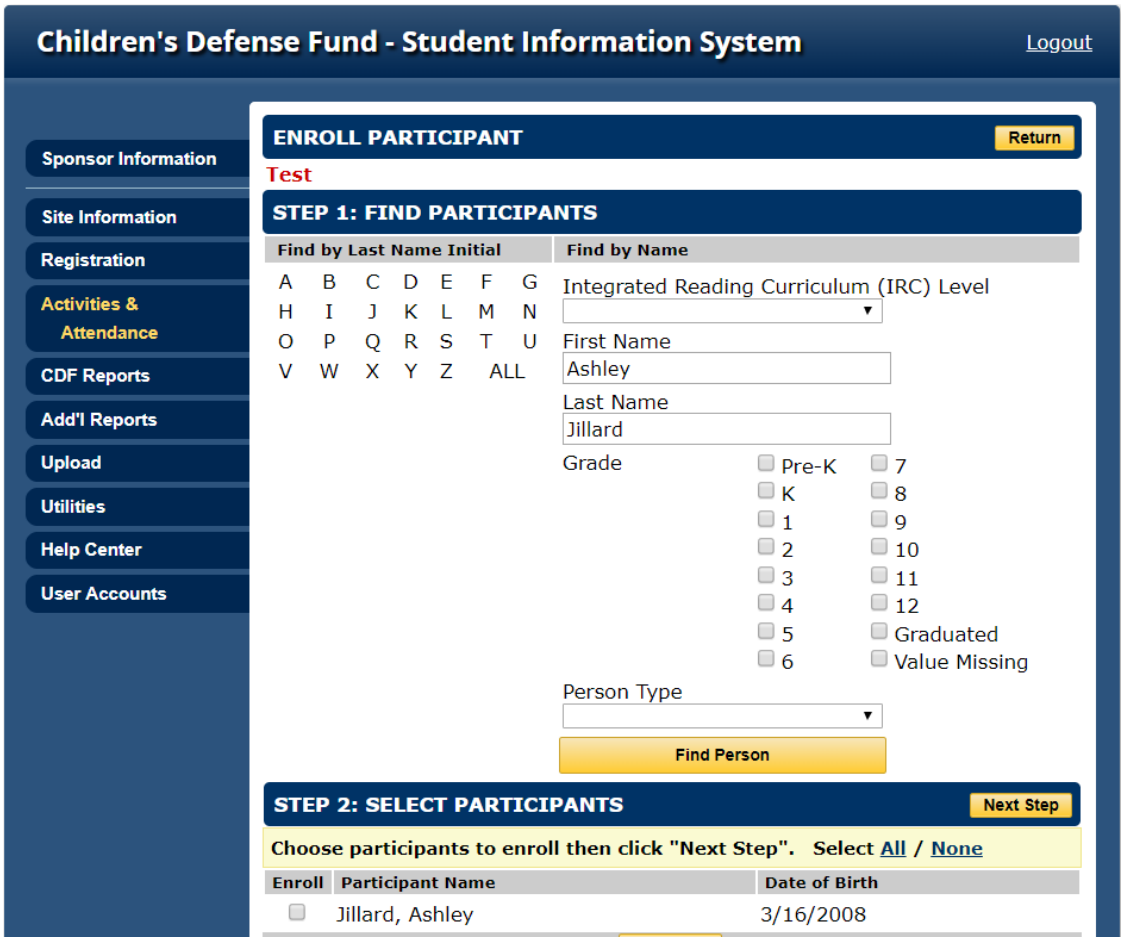


11. The staff member has now been assigned to the activity. You can add multiple staff members to an activity by repeating the steps above.

Enrolling Participants

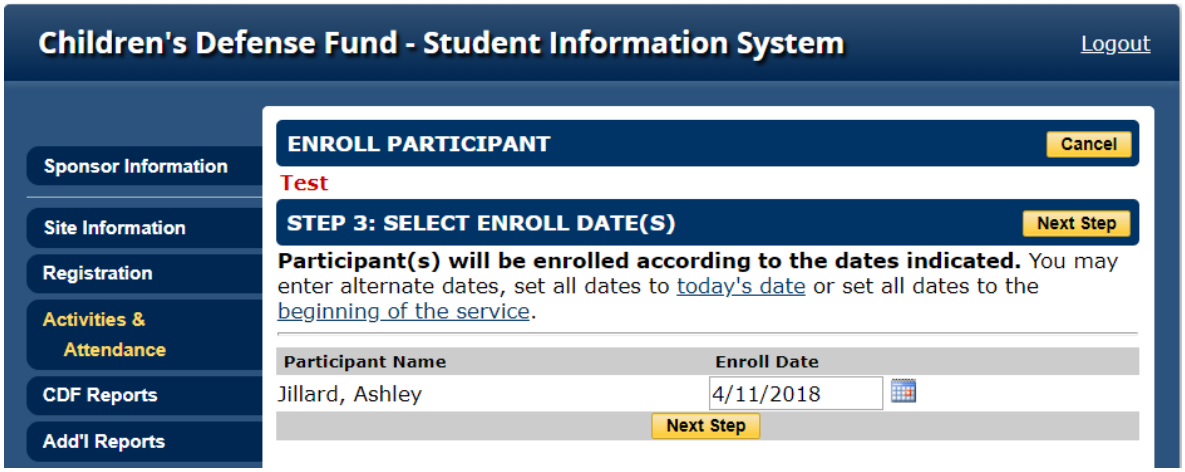
Once the activity information has been entered, you can begin enrolling participants into the activity. Select the Activity Name and then click on the "Enrollment" tab. Then select the "Click here to enroll new participants" link to begin enrollment.

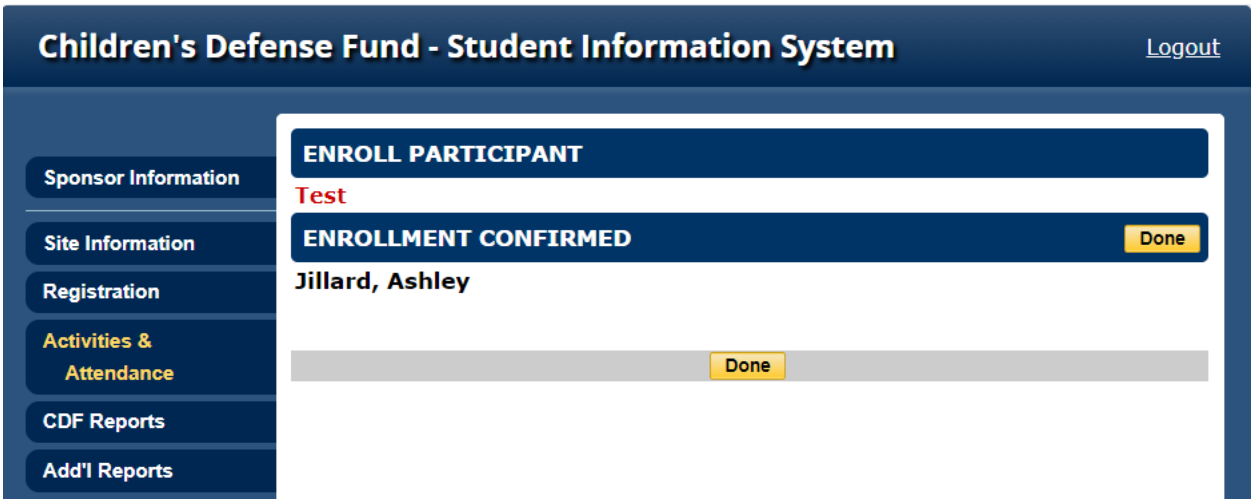




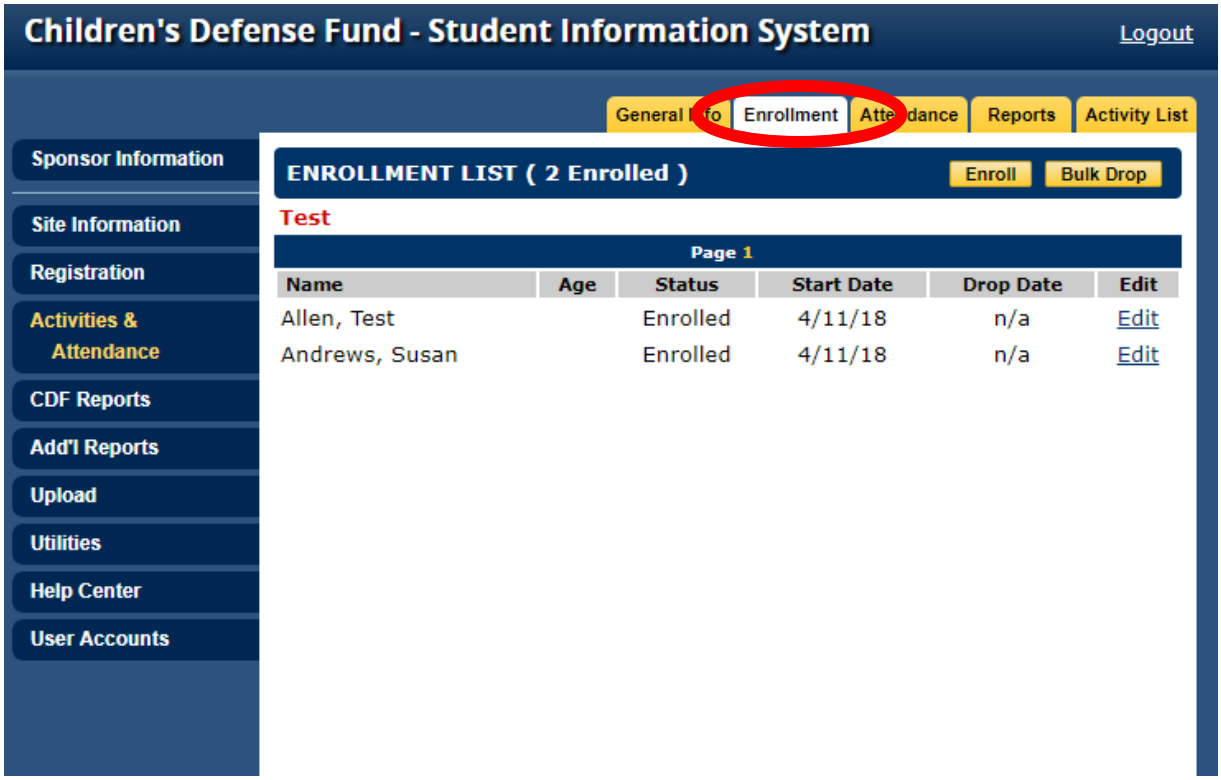
You may search for participants by various parameters. In this case we searched by First and Last Name. The results are displayed at the bottom of the screen where you can check off the participants you wish to enroll in the activity and then click “Next Step”.

The screen that follows will ask you to verify the enroll date of the participant and make further adjustments as needed. Once you are finished click on “Next Step”.



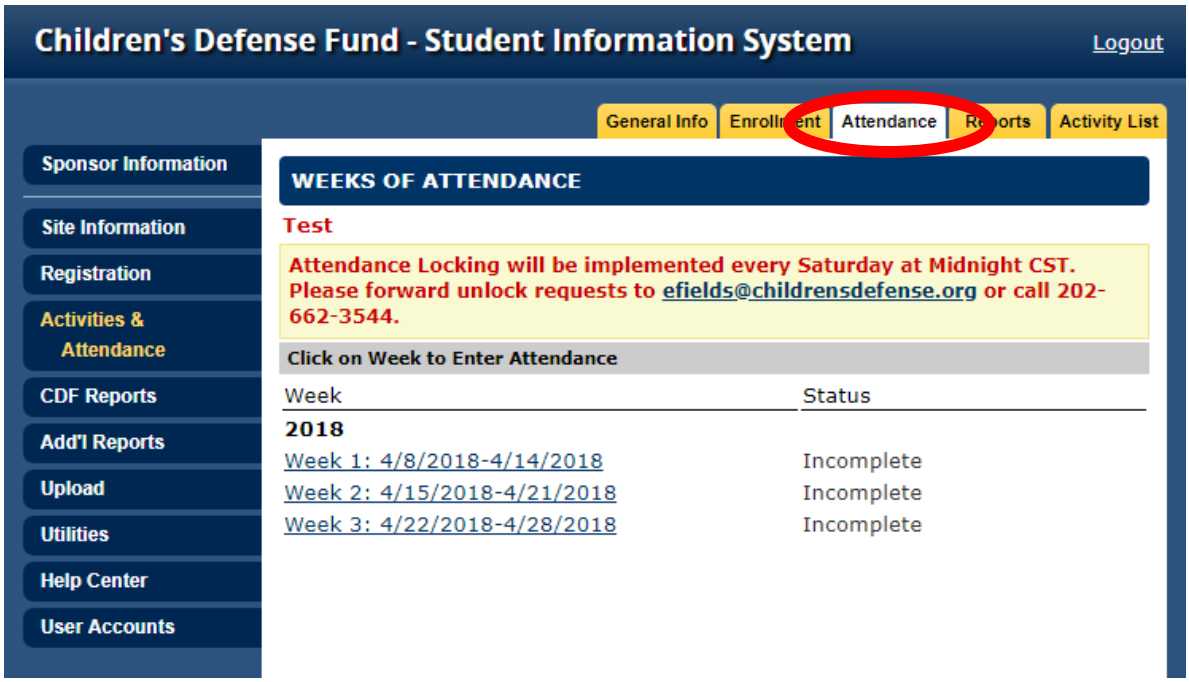


You are now finished enrolling participants and will be able to confirm enrollment. To see a list of participants you enrolled in the activity you can click on the activity and select the "Enrollment" tab to view the list.

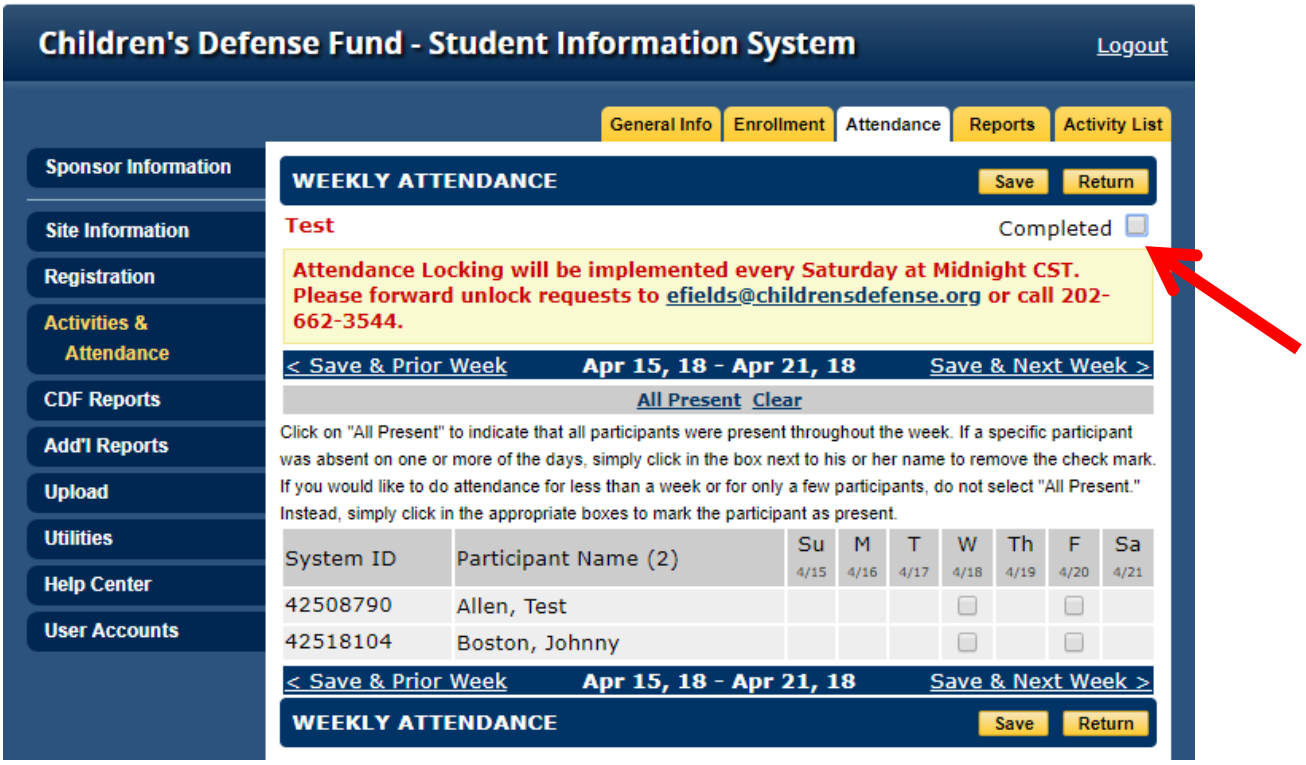


Activity Attendance

To take attendance for the activity click on the "Attendance" tab as shown below:

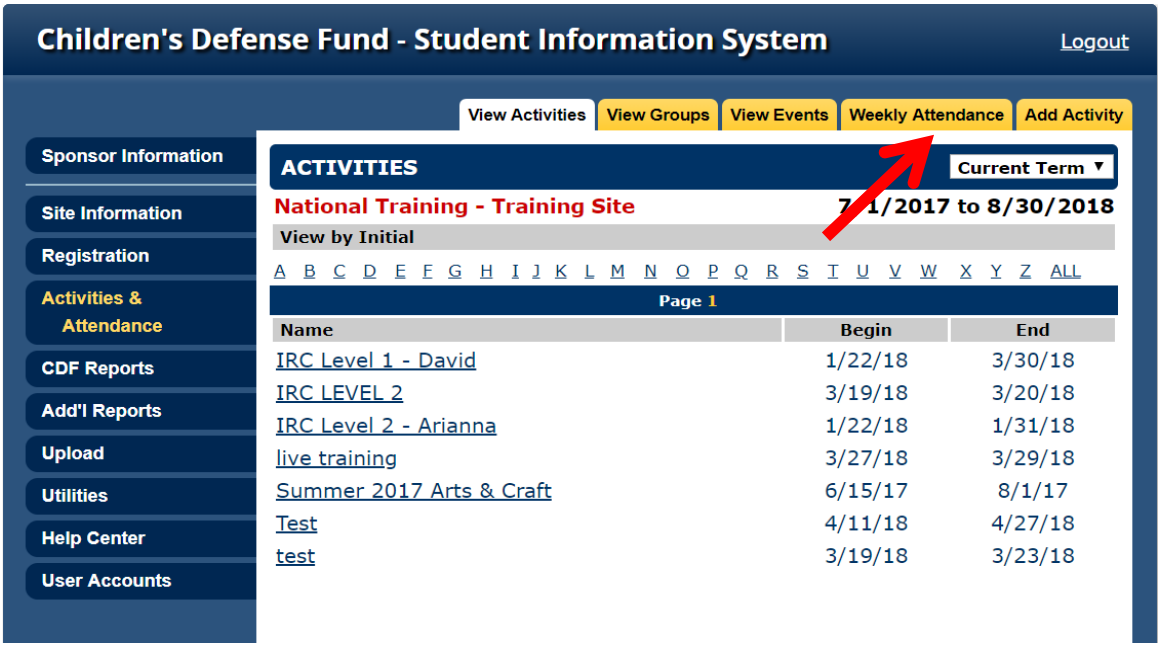


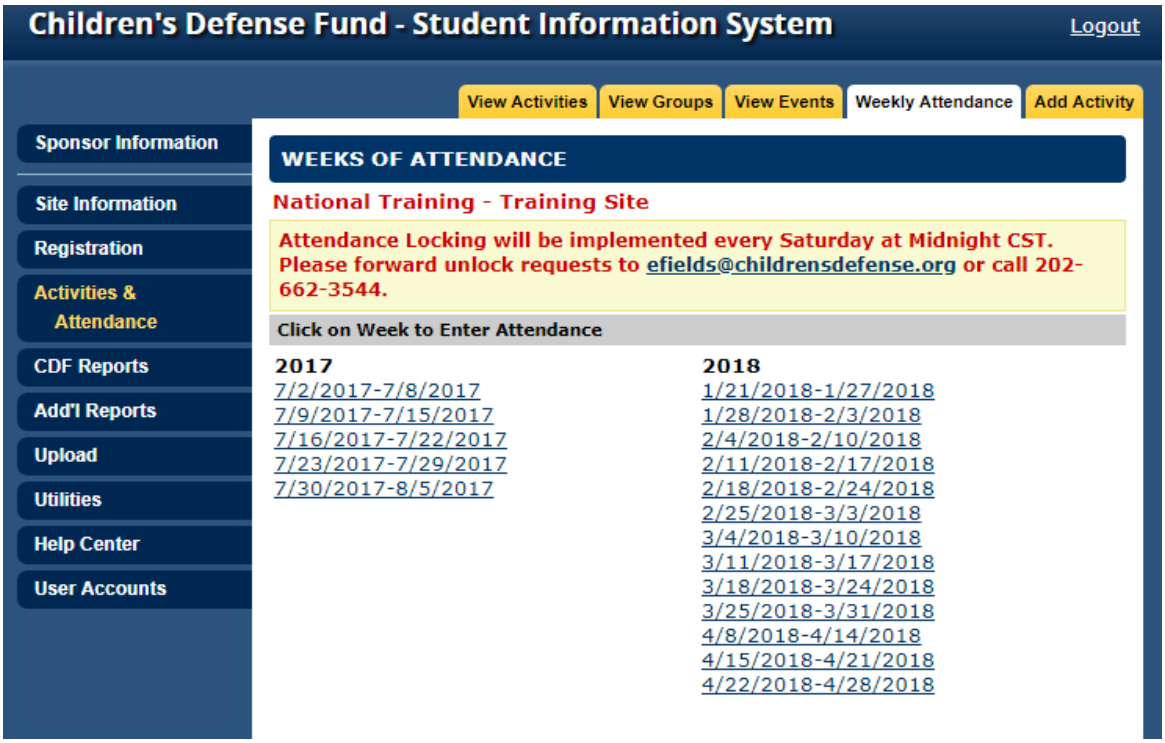
Select the week you will be taking attendance for and enter attendance by selecting the correct checkboxes. Once you are finished, click save and select the "Completed" checkbox.



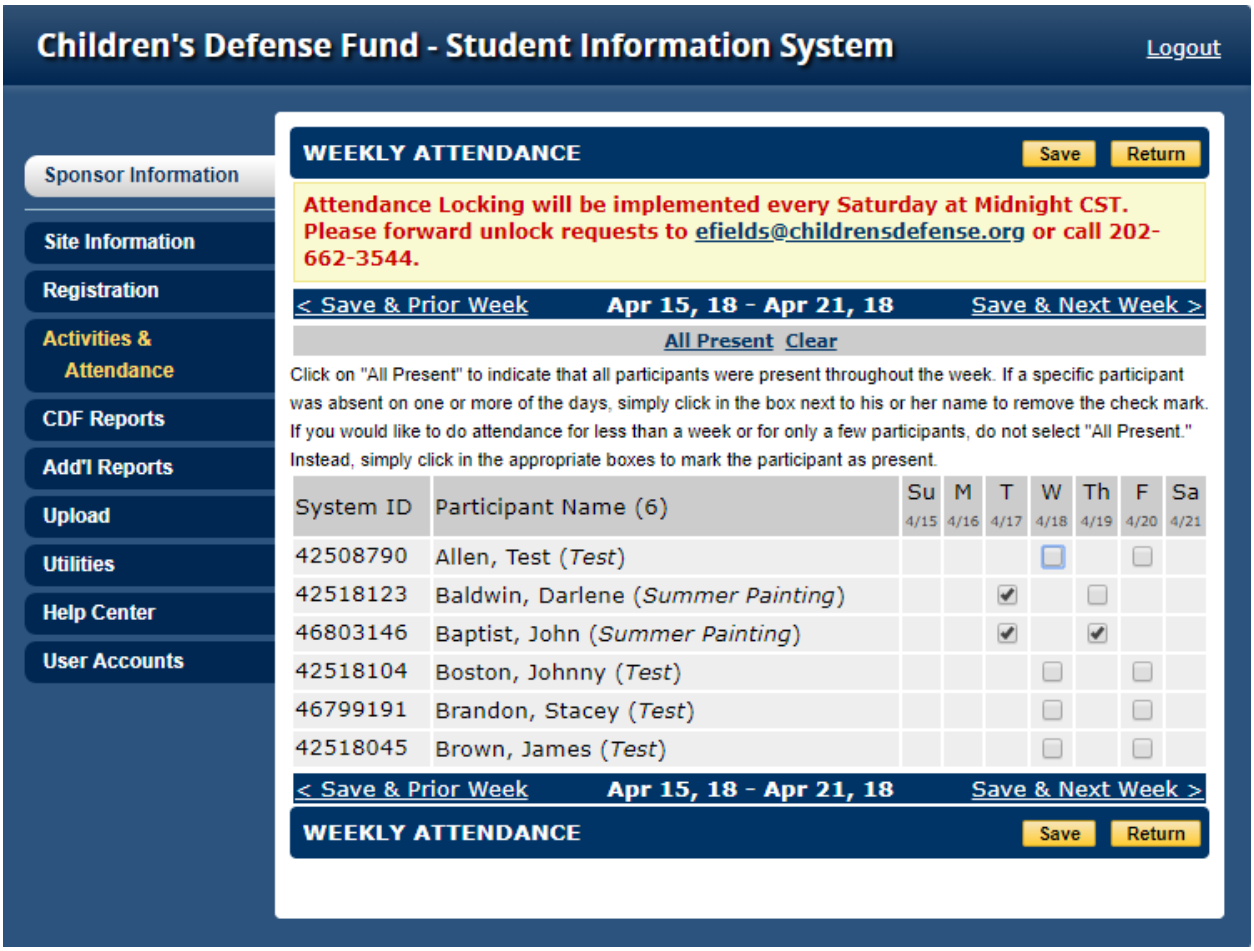
Weekly Attendance Data Entry

There is also an alternate method to taking attendance. Click on the Activities and Attendance tab to view your activities list. Then select the Weekly Attendance tab shown below.



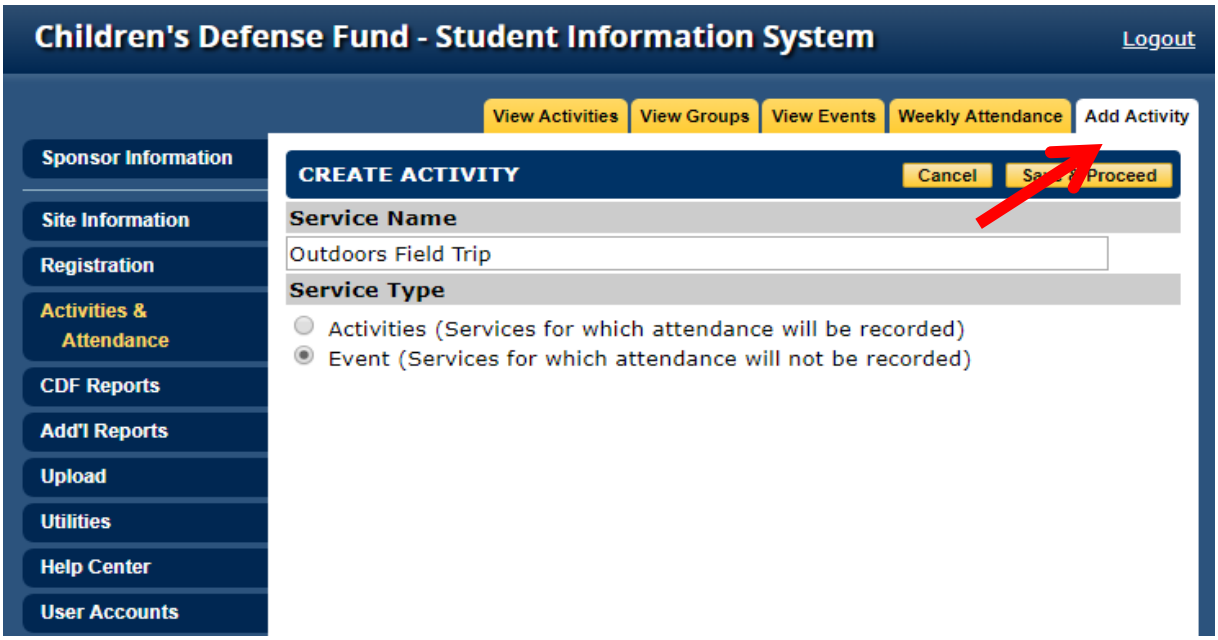


Once you click into the week you are taking attendance for you will be given a list of participants with the activity they are enrolled in listed in parentheses. This will list all activities on a given day so that you do not have to go into each activity separately to take attendance.

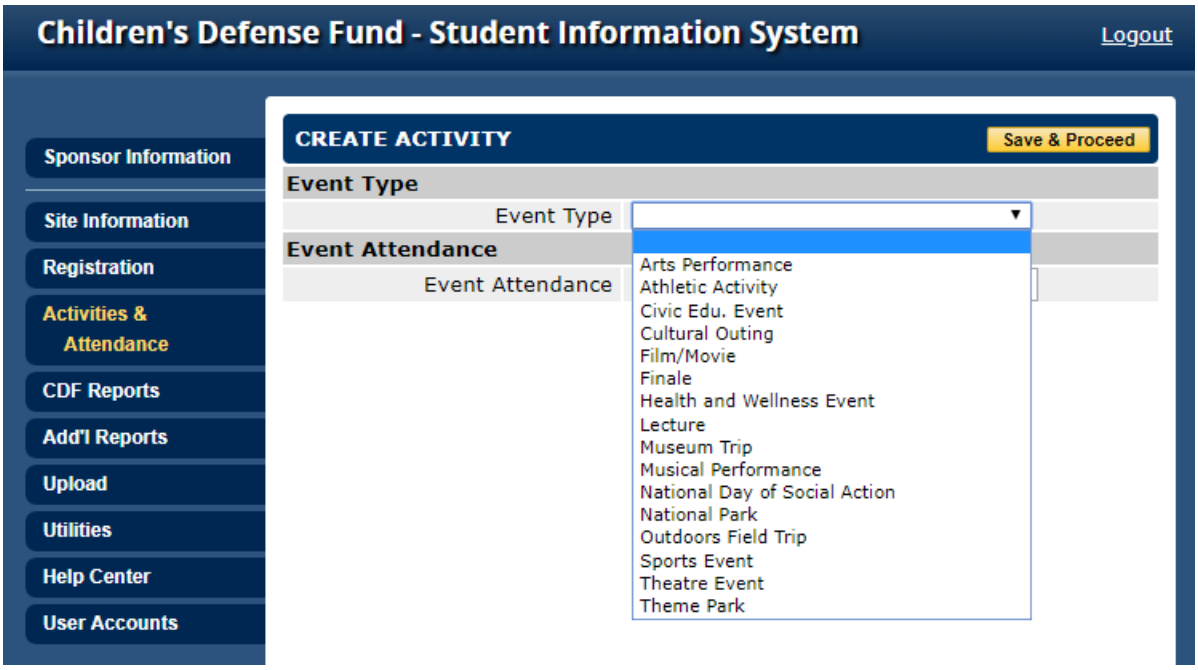


Special Events

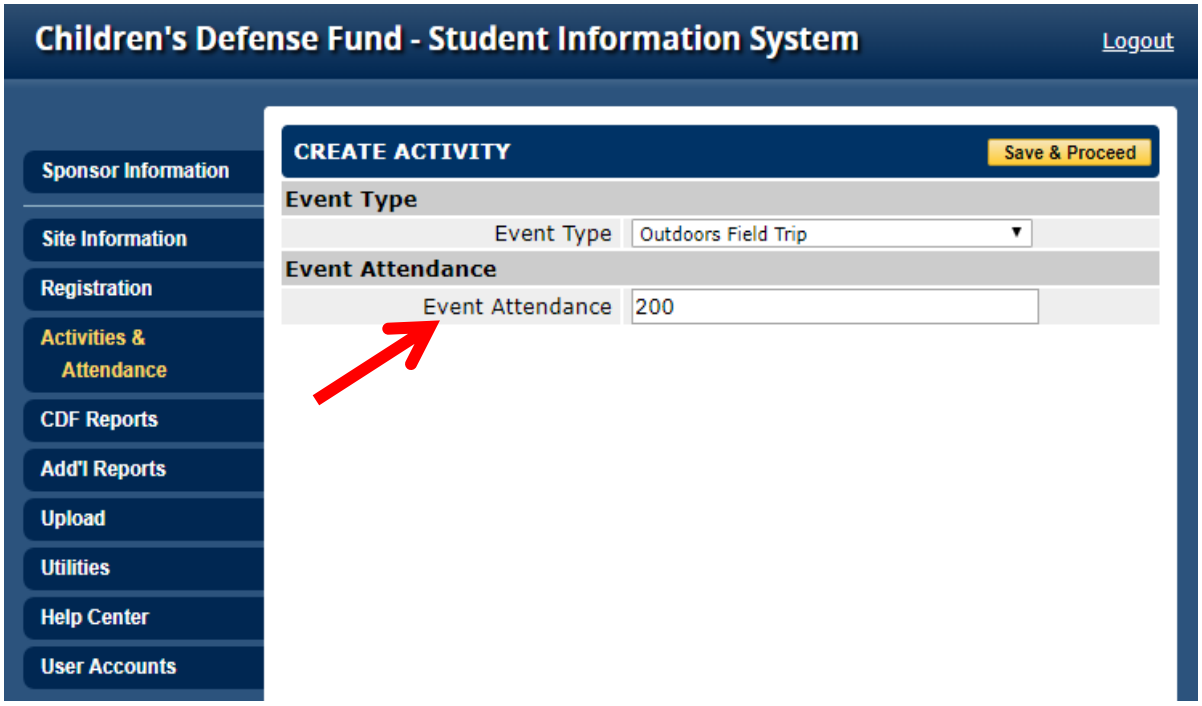
You can set up events in the system (Services for which attendance totals are entered).



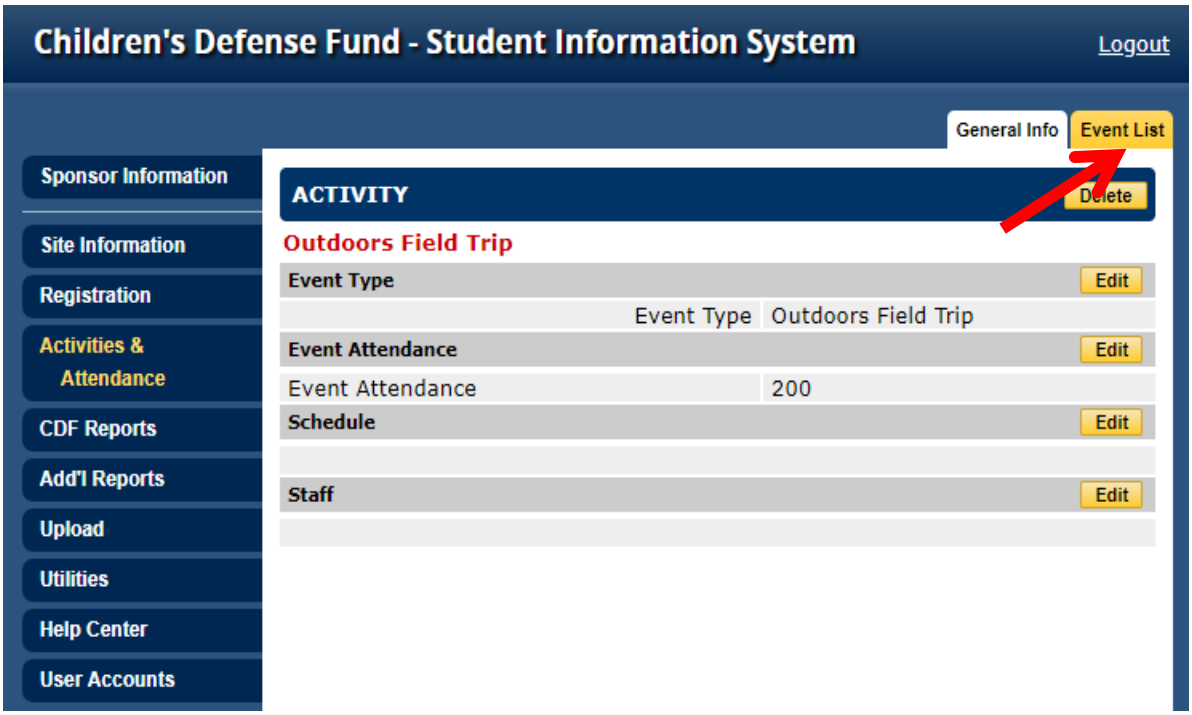
On the next screen you will select from a dropdown of choices under Activity Type. Be sure to select the type that pertains to the event.



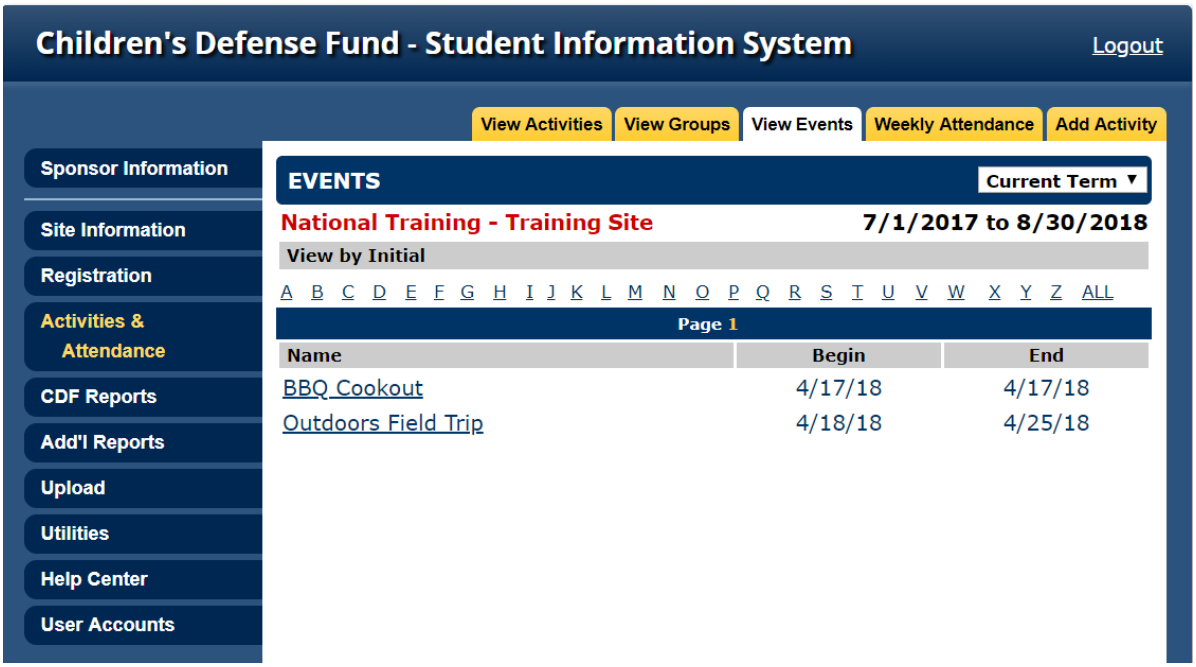
For Event Attendance you input the number for total attendees for the event/



Click "Save & Proceed" and on the following screen you can update the schedule and/or assign staff just as you did for regular activities.

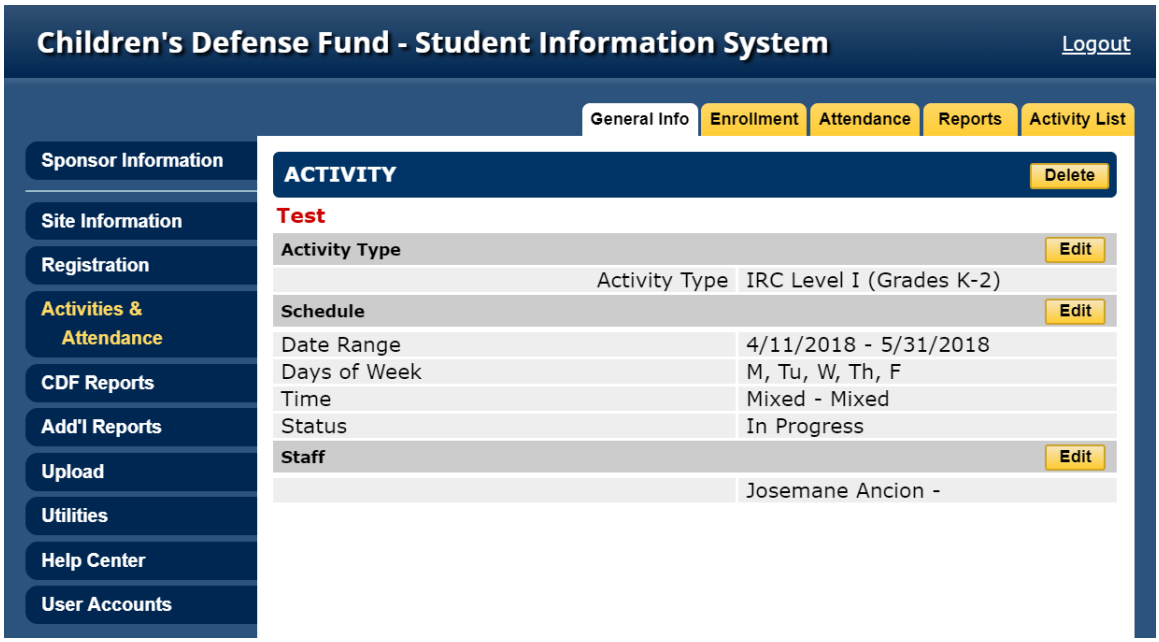


Once you are finished and can select Event List and you will be directed the Events page which lists all of your Events.

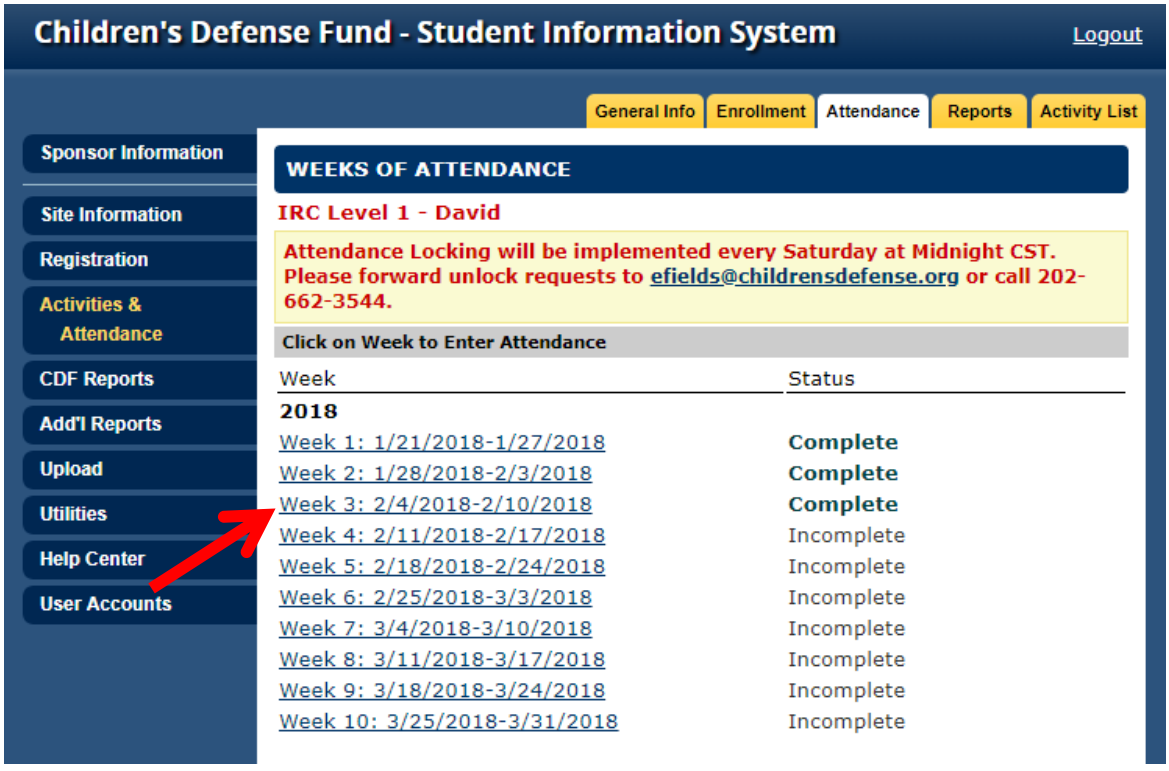


Attendance Locking

Attendance locking will be implemented every Saturday at Midnight CST. Unlock requests will have to be sent to efields@childrensdefense.org. To see how attendance locking is displayed you can click on an activity from the activity list.



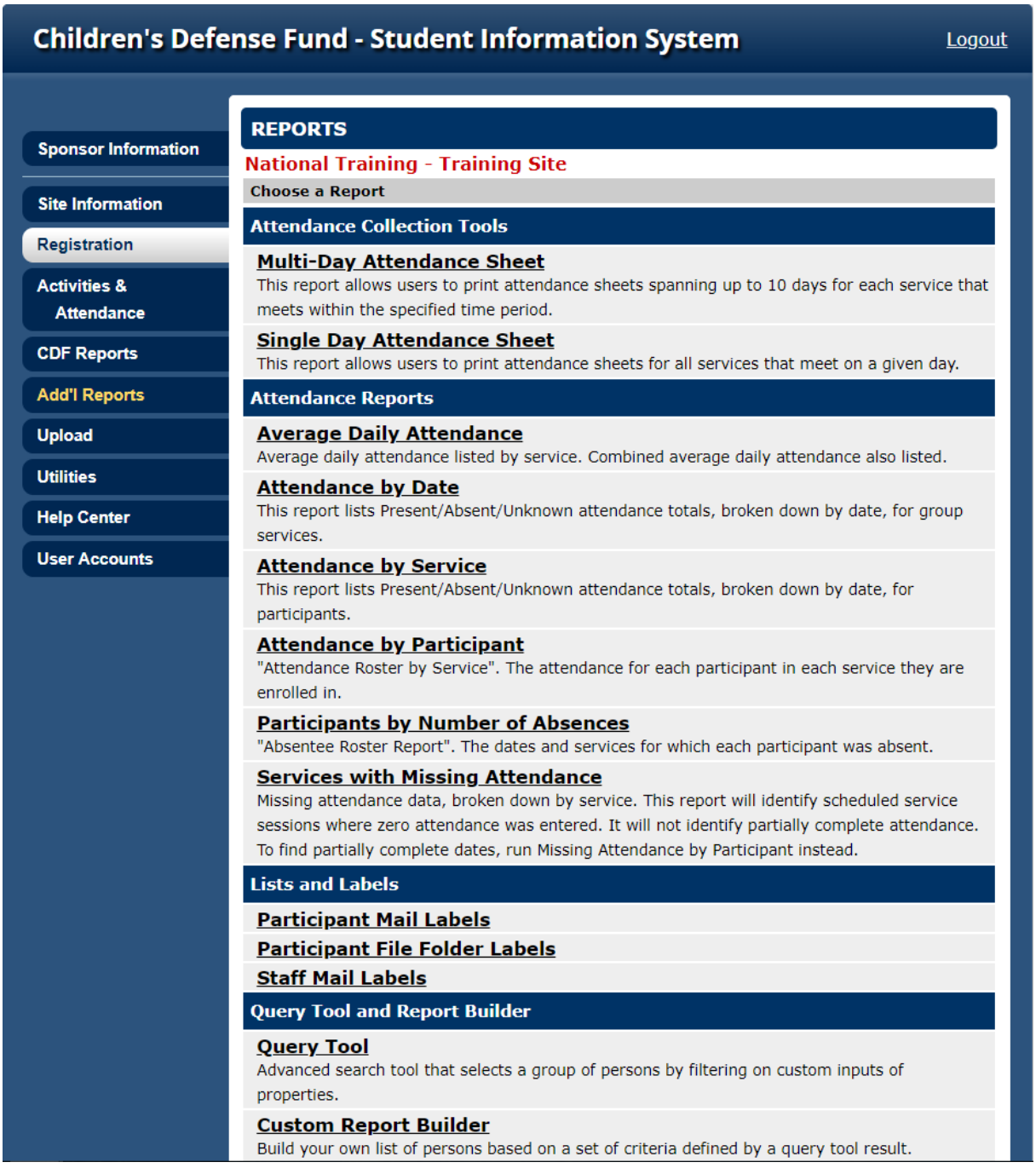
Then select any week prior to the current weeks date range to see that it has been locked.



You will see that the attendance markers are set to read only for any previous weeks because those weeks have been now been locked. The marked attendance is displayed but no additional attendance can be entered for that week unless you submit an unlock request to have.

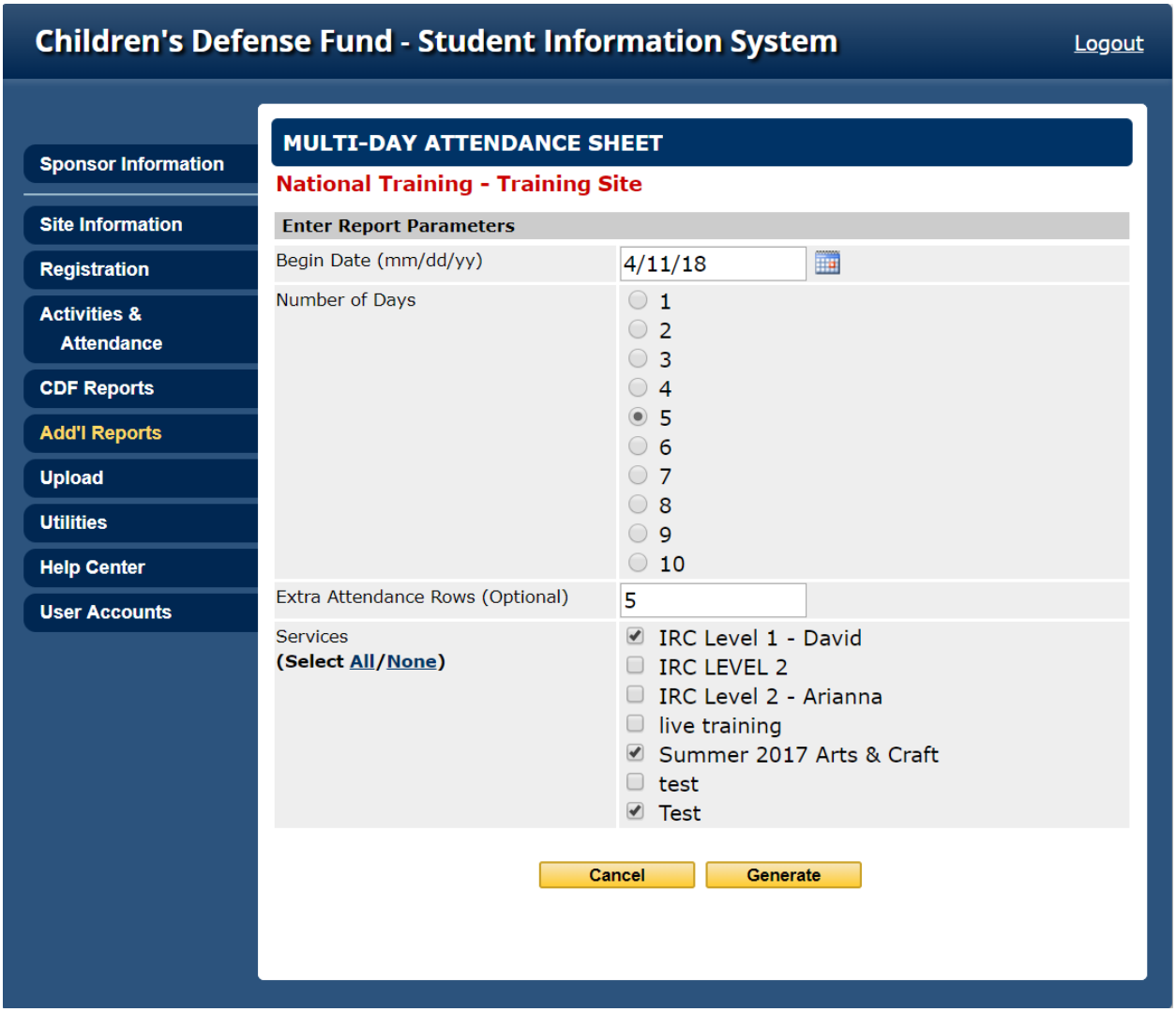
Multi- Day Attendance Sheet

The following report is the Multi Day Attendance Sheet which is located under the Add'l Reports menu.

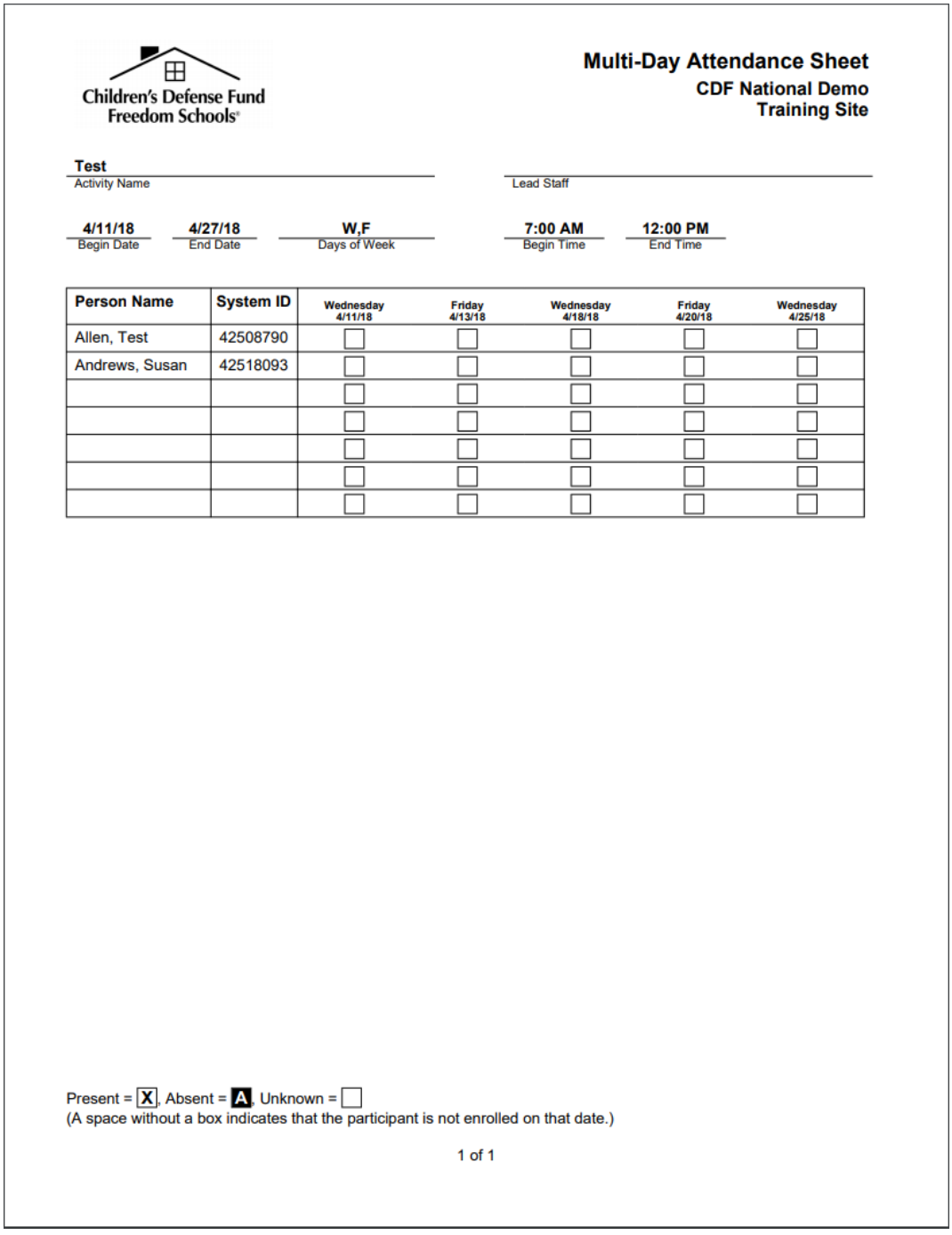


For an attendance sheet for a particular service, look under the heading **Attendance Collection Tools**, and click on **Multi-Day Attendance Sheet**.

Enter the **Begin Date** for the first date you would like to print an attendance sheet, and then select the **Number of Days** you would like on the attendance sheet (you are allowed up to 10 days). Then mark the checkbox next to the service you're interested in, and finally click the **Generate Report** button.



This is the multi day attendance sheet you will be using to mark attendance.



Children's Defense Fund
Freedom Schools®

Multi-Day Attendance Sheet
CDF National Demo
Training Site

Test
Activity Name

Lead Staff

4/11/18	4/27/18	W,F	7:00 AM	12:00 PM
Begin Date	End Date	Days of Week	Begin Time	End Time

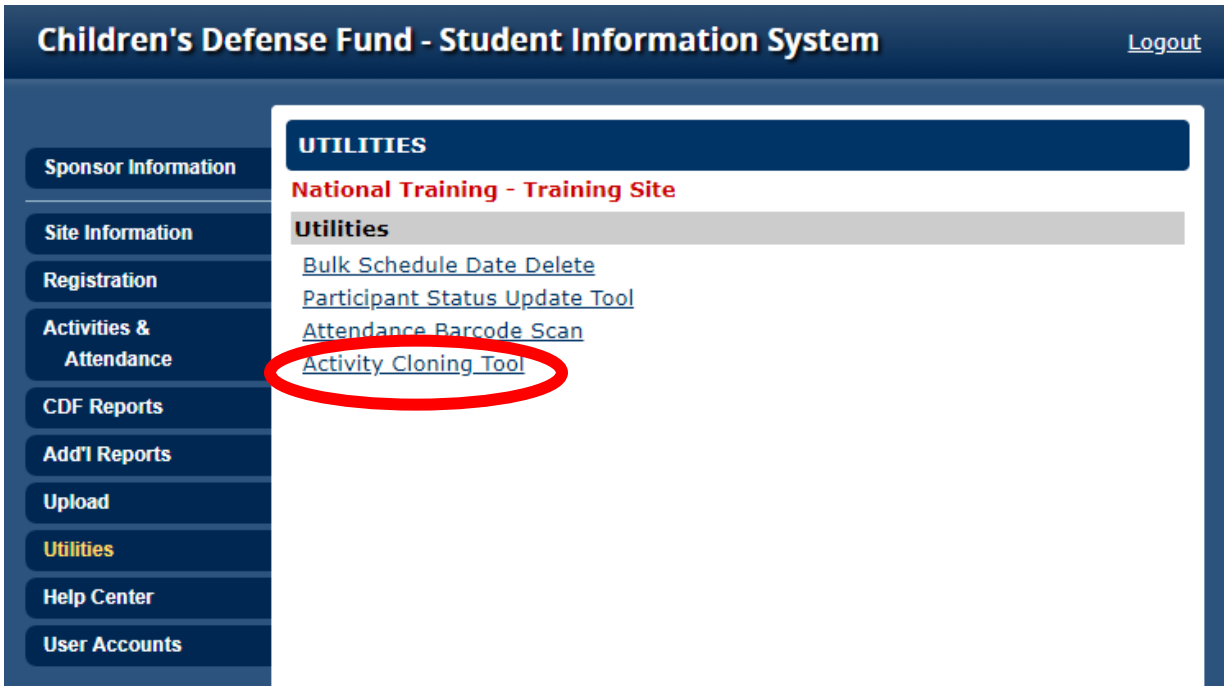
Person Name	System ID	Wednesday 4/11/18	Friday 4/13/18	Wednesday 4/18/18	Friday 4/20/18	Wednesday 4/25/18
Allen, Test	42508790	☐	☐	☐	☐	☐
Andrews, Susan	42518093	☐	☐	☐	☐	☐
		☐	☐	☐	☐	☐
		☐	☐	☐	☐	☐
		☐	☐	☐	☐	☐
		☐	☐	☐	☐	☐
		☐	☐	☐	☐	☐

Present = ☒, Absent = **A**, Unknown = ☐
(A space without a box indicates that the participant is not enrolled on that date.)

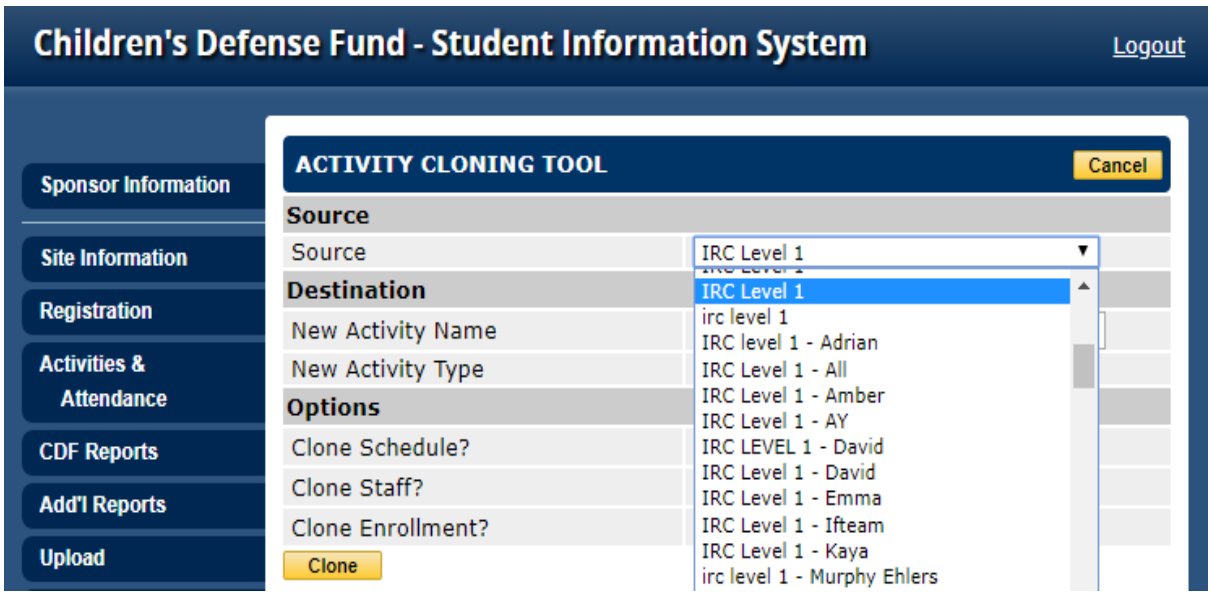
1 of 1

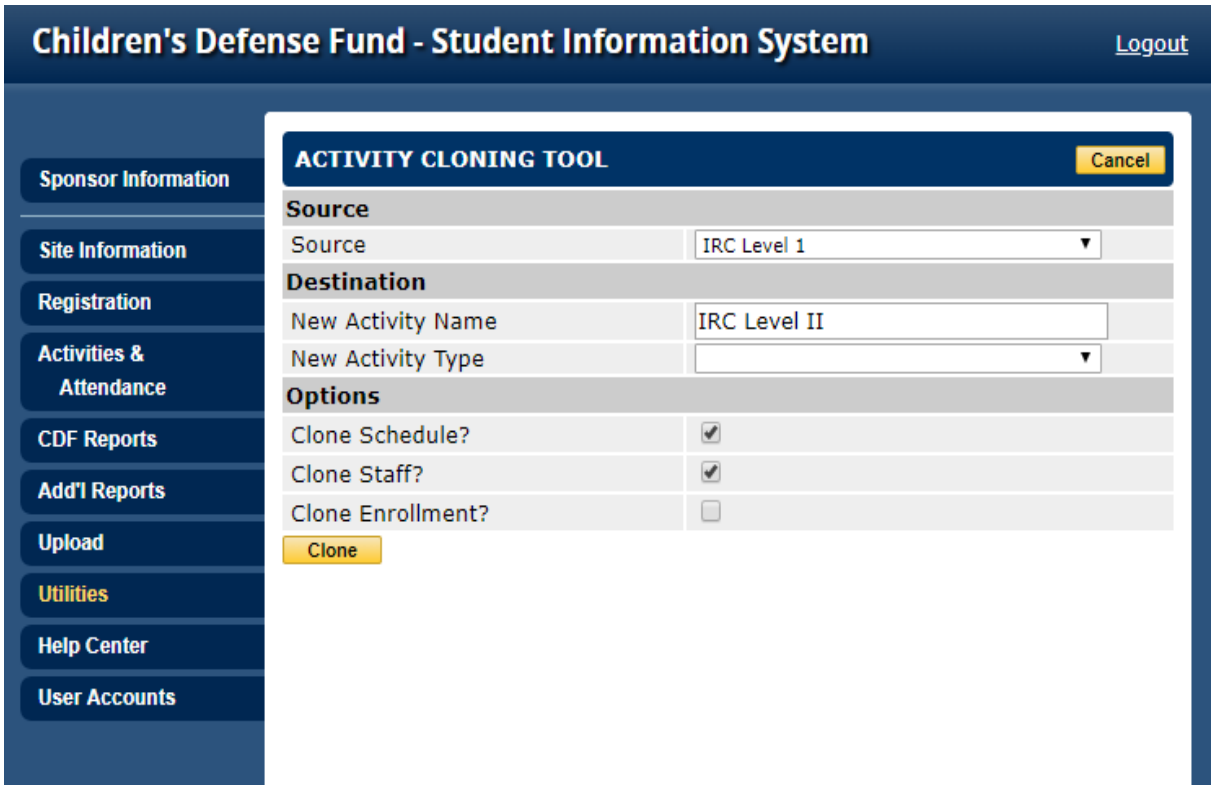
Activity Cloning Tool

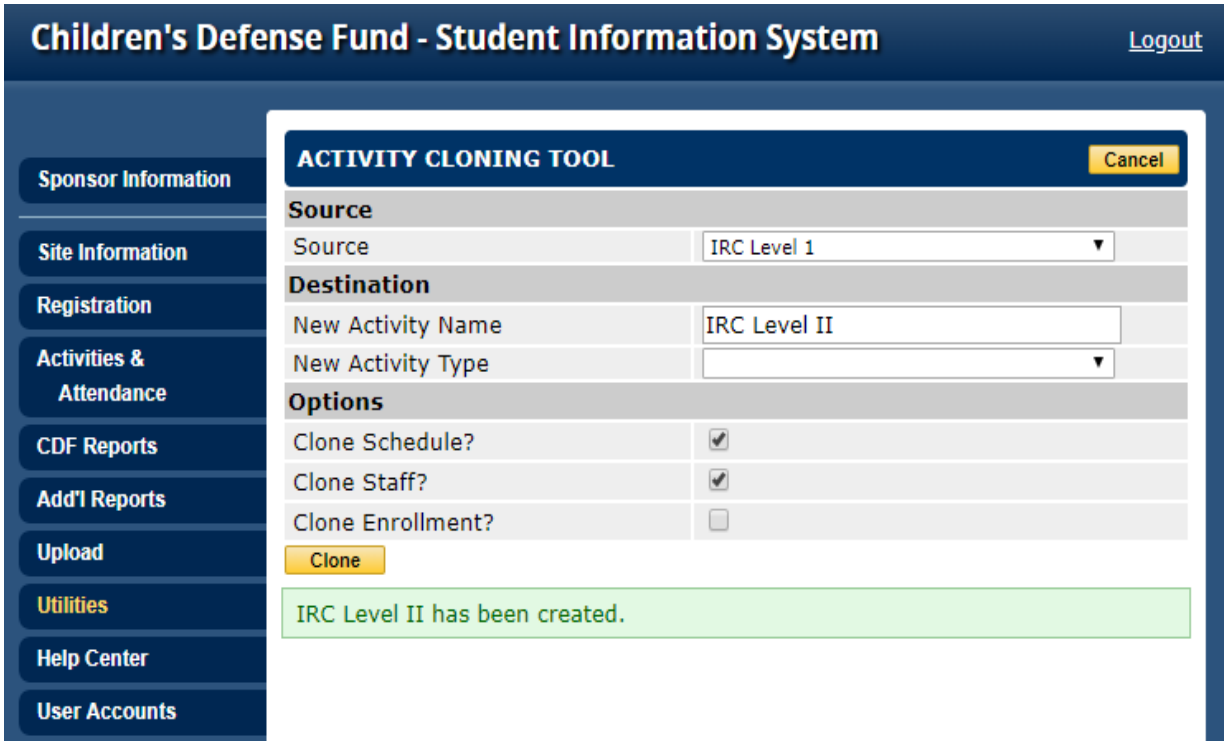
The activity cloning tool can be used to clone activities so that you do not have to manually re-enter activities that have the same information. It can be found under the Utilities left menu tab.



You can select the source activity and then fill out the information for the new activity that you wish to create. The section for "options" lets you choose which parts from the source activity should be cloned into the new activity.




Children's Defense Fund - Student Information System
Logout
Sponsor Information
Site Information
Registration
Activities & Attendance
CDF Reports
Add'l Reports
Upload
Utilities
Help Center
User Accounts
ACTIVITY CLONING TOOL
Cancel
Source
Source
IRC Level 1
Destination
New Activity Name
IRC Level II
New Activity Type
Options
Clone Schedule?
Clone Staff?
Clone Enrollment?
Clone


Children's Defense Fund - Student Information System
Logout
Sponsor Information
Site Information
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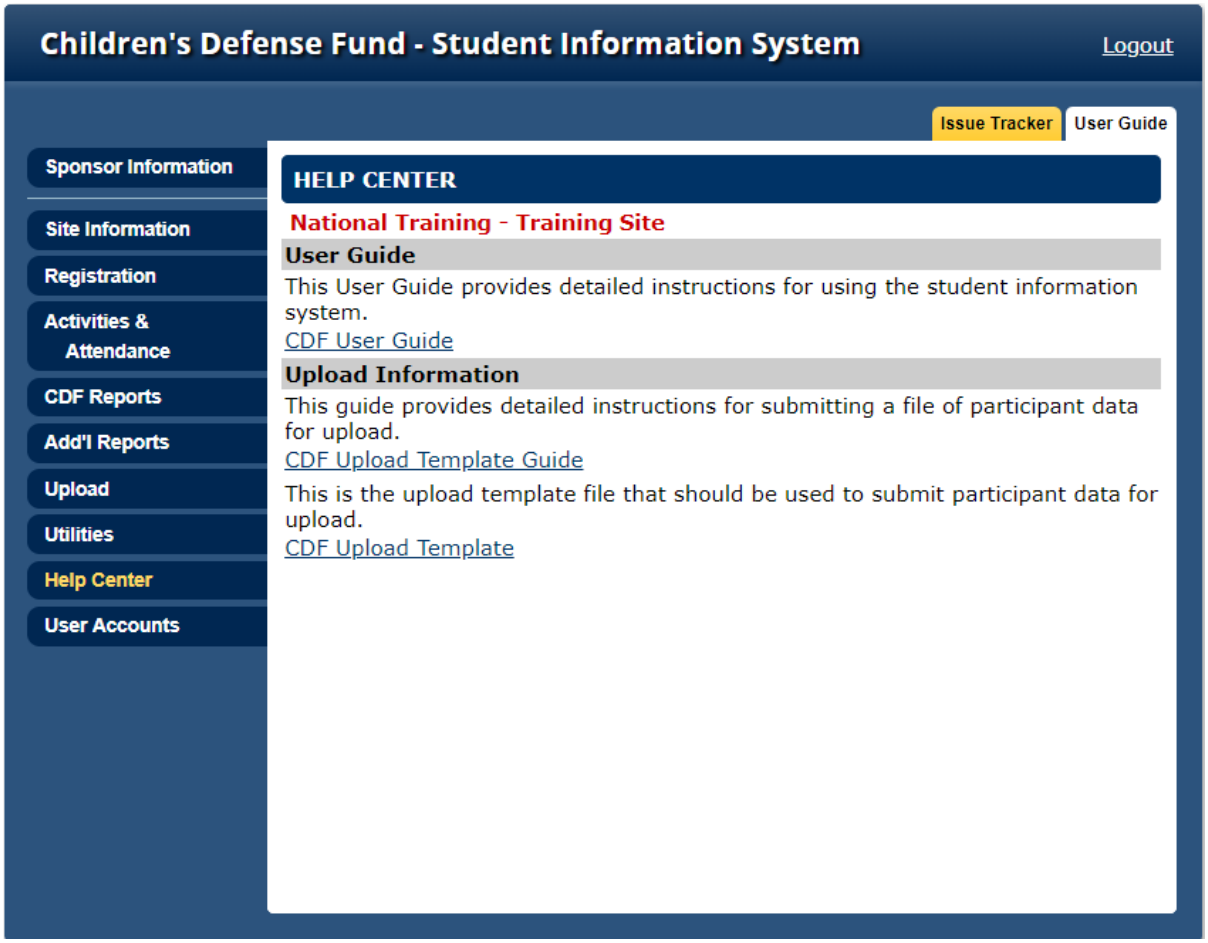
Activities & Attendance
CDF Reports
Add'l Reports
Upload
Utilities
Help Center
User Accounts
ACTIVITY CLONING TOOL
Cancel
Source
Source
IRC Level 1
Destination
New Activity Name
IRC Level II
New Activity Type
Options
Clone Schedule?
Clone Staff?
Clone Enrollment?
Clone
IRC Level II has been created.

Help Center

In this section you can find access to a copy of this User Guide as well as resources for using the Upload Tool, which is not covered in this guide. You can also access the Issue Tracker where you can send messages directly to our Support team. You can expect a response within 24 hours.

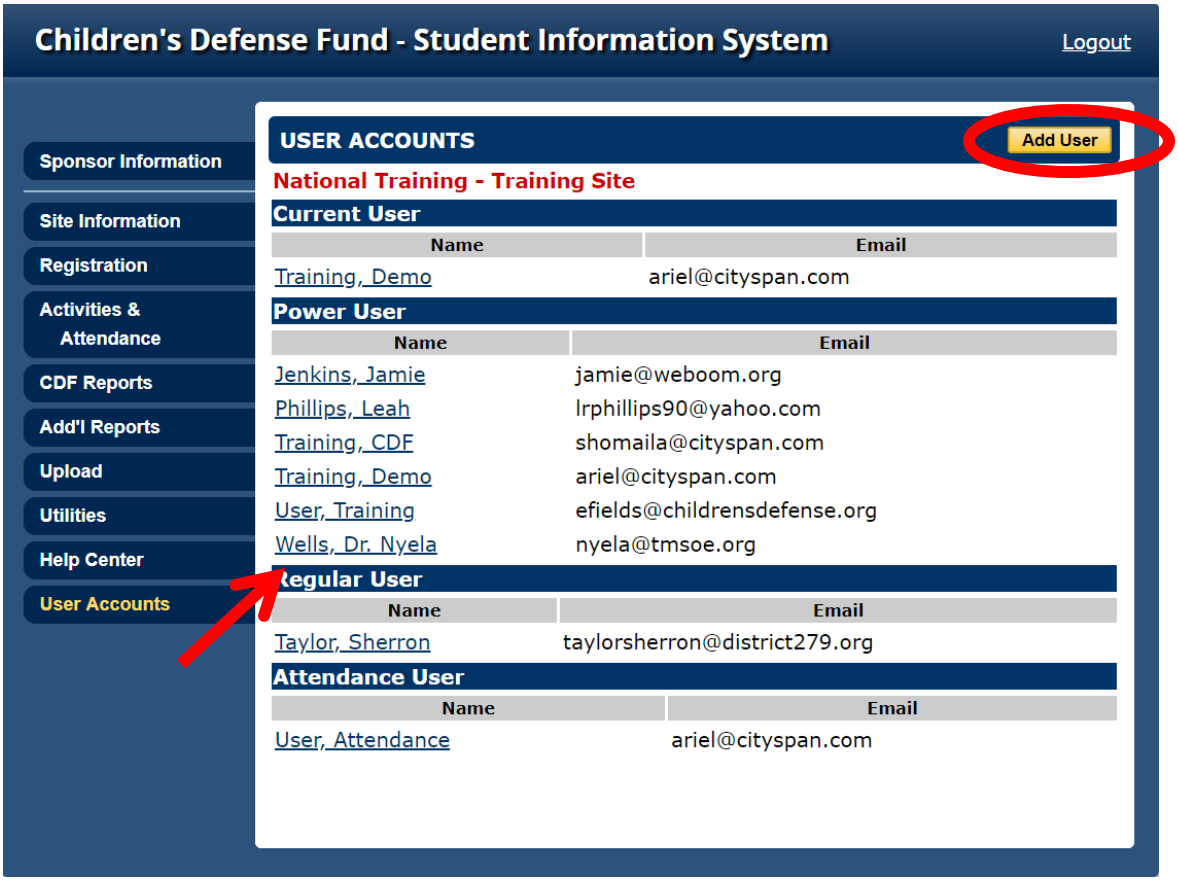


Creating User Accounts

There are various types of users and the type of permissions you select for each individual user will depend heavily on their role within the organization, and further on whether they should have access to certain information that may be considered sensitive, like the names of Children participating in the programs at your site.

If you would like to create an account for one of your team members, select the "User Accounts" tab from the left menu and then select "Add User" to be taken to a screen where you can create a new user account. Please note that any users you create accounts for through the Student Information System will not automatically receive their login information. You must share the username and password to their account with them directly as well as instructions on how to update their information if needed.

If you would like to update the account information after creation or change any information on your own account, you can do so by clicking on the name in the list of accounts.



There are three different types of user roles within SIS:

Power User

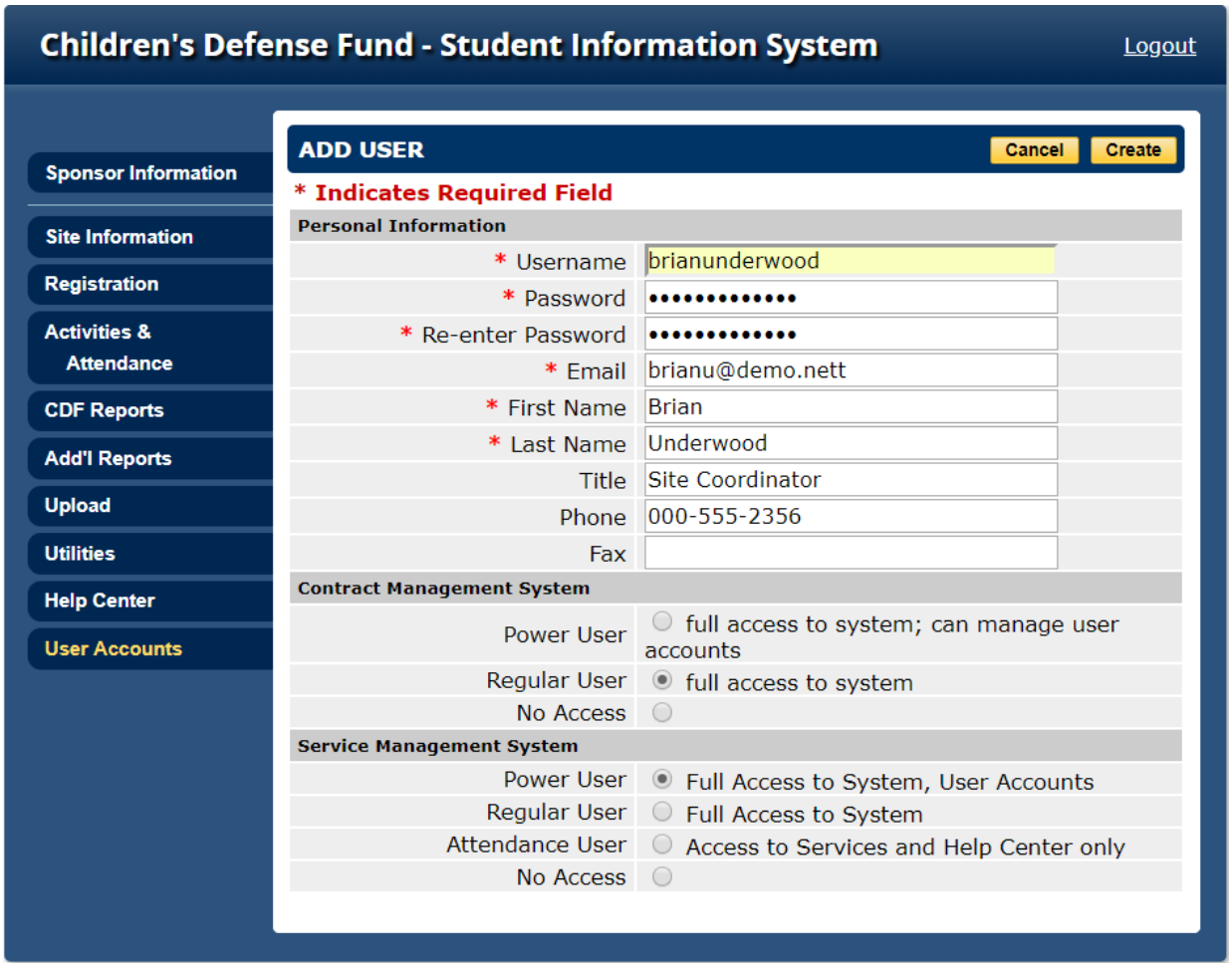
These types of users have access to the entire system which means that they have access to all left menu tabs as well as all other features within the Student Information System. Additionally, they can update, create, or de-activate user accounts for the sites they have access to.

Regular User

Regular users are also able to access all left menu tabs and all features. However, they are only able to update their user account information, not including their permissions.

Attendance User

Attendance users have very limited access to the Student Information System. They are unable to view any participant data nor access the Upload Tool or run reports. These types of users have the ability update sponsor and site information, change activity details, take attendance, access the Help Center, and update their account information only.



Assistance

If you encounter problems with the system, have questions or concerns regarding SIS, please give us a call at **1-866-GO-YOUTH** or **1-866-469-6884**.

For any questions or concerns regarding deadlines for data entry or custom report needs, please contact Erica Fields directly at **efields@childrensdefense.org**. Additionally, you should reach out to Erica directly if you need access to more than one site.