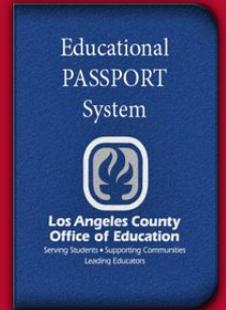




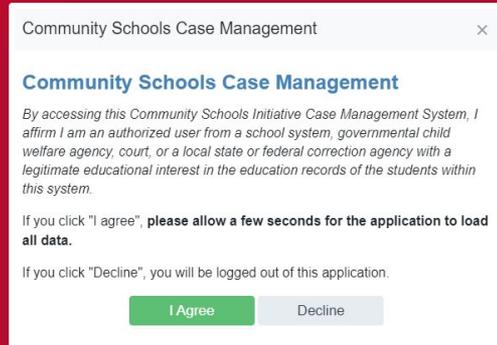
Community Schools Initiative

EPS Case Management System - Overview & Refresher Training

February 22, 2024



Los Angeles County
Office of Education



Introduction

- Go to <https://epsportal.lacoe.edu/> to begin
- Click on the red tile **Community Schools Training**
- Read and click **I Agree** to open the app

Important Notices

- This training material covers enhancements to the Community Schools Case Management System
- All data in the Community Schools Training app and training material is fictitious
- To protect privacy, do not enter real personal data



Agenda

Overview

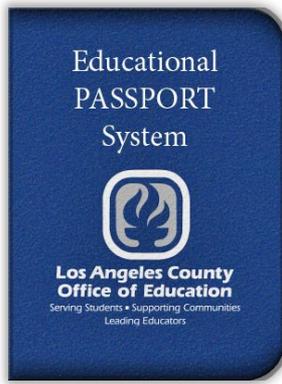
- [Home](#)
- [Students](#)
- [Community Clients](#)
- [Family Support](#)
- [Partnerships](#)
- [Service Delivery](#) *

Site Activities

- [Site Activities Home](#)
- [Planning Site Activity Details](#)
- [Adding Site Activity](#)
- [Site Activities - Review the Grid](#)



The Community Schools Impact Dashboard



Home

Community Schools Initiative Case Management System Home



- [Login and Access](#)
- [Community Schools Initiative Case Management System Home](#)
- [Pending Family Support Referrals Grid](#)

epsportal.lacoe.edu
helpdesk@lacoe.edu

Log In to EPS Portal

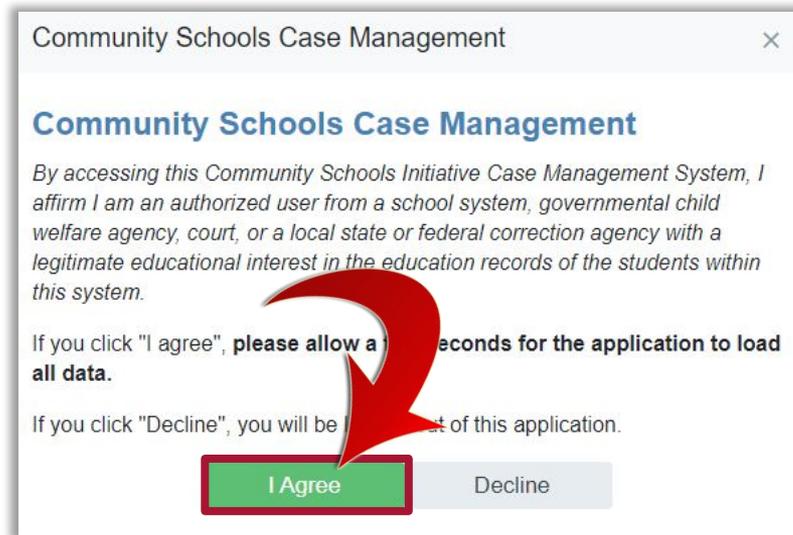
- Log in at epsportal.lacoe.edu
- Use Microsoft Log In with a LACOE account



The screenshot shows the login interface for the Los Angeles Educational Passport System. At the top left is the logo for the Educational Passport System, and to its right is the text "Los Angeles Educational Passport System". Below this is a grey banner with the text "Welcome to the Los Angeles Educational Passport System". Underneath is the instruction "Log in using your organizational email account and password". Two buttons are visible: a red "Microsoft Log In »" button and a green "Google Log In »" button. A red arrow points to the Microsoft button. Below the buttons is a link: "Microsoft Azure Active Directory Administrators - click here to approve access for your organization »". At the bottom of the page, there is copyright information: "© 2021 - Los Angeles County Office of Education", an email address "Email: HelpDesk@lacoe.edu", and a link to "LACOE Student Privacy Guidelines".

Agreement

- Select **I Agree** to the *Community School Case Management System Agreement*
- Selecting **Decline** will take you out of the application



Log In to EPS

- EPS is optimized for the Google Chrome browser
 - After logging in to EPS Portal
 - Click on **Applications**

Educational PASSPORT System

Los Angeles Educational Passport System

Home Applications

Welcome to the Los Angeles Educational Passport System

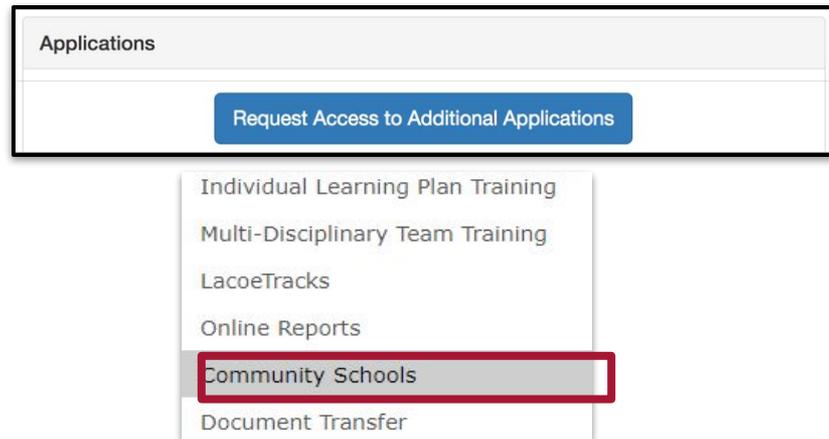
[Applications »](#)

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Email: HelpDesk@lacoed.edu
[LACOE Student Privacy Guidelines](#)



If needed, Request Access to Applications, Step 1

- Click to **Request Access**
- Select **Community Schools** from the drop down menu



If needed: Request Access, Step 2

- Click **Request Access**
- Click **Save**



Request Access to Applications

Application

Community Schools

Request Access

Active Requests

Application

Save **Cancel**



Select your application

- Your screen may look different
- Community Schools Training is for **training purposes only**
 - Actual student data should not be entered there

The screenshot displays two application cards. The top card is for 'Community Schools (Community Schools)' with a blue header and a '[Role Change]' link. The bottom card is for 'Community Schools Training (Community Schools Training)' with a red header and a '[Role Change]' link. To the right of each card, the roles the user is authorized to access are listed.

Application	Authorized Roles
Community Schools	Application Administrator, Application Administrator, Community Schools Approvers, Users who get to approve requests coming from CSI
Community Schools Training	Application Administrator, Application Administrator, Administrator, Administrator



Log Out Procedure

To log out completely:

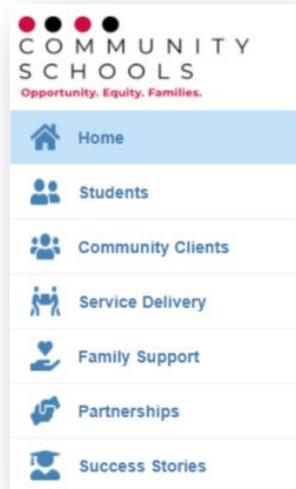
1. Click **Log Out** in the top right corner of the app
2. Click **Log in** on the CS welcome page
3. Click **Log Off** on the EPS welcome page



Case Management System Home



- You will find the ***Dashboard*** and the ***Pending Referrals Table*** below
- For more detailed information, click on the 



Think of the dashboard on the top of the **Community Schools Impact** page as a recap of your activities in the site based on the current data

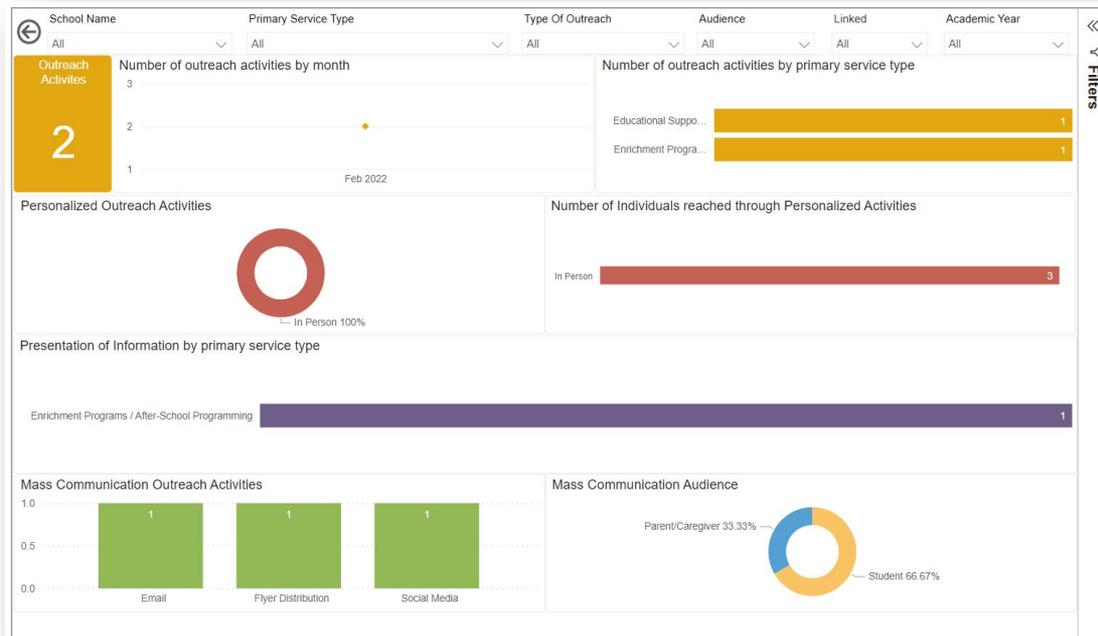
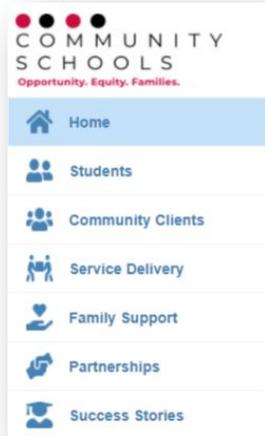




Case Management System Home

Detailed information

The interactive report provides details and insights for outreach activities

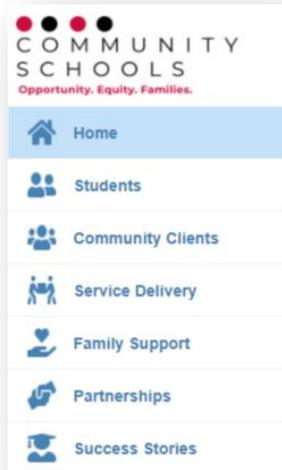


Case Management System Home

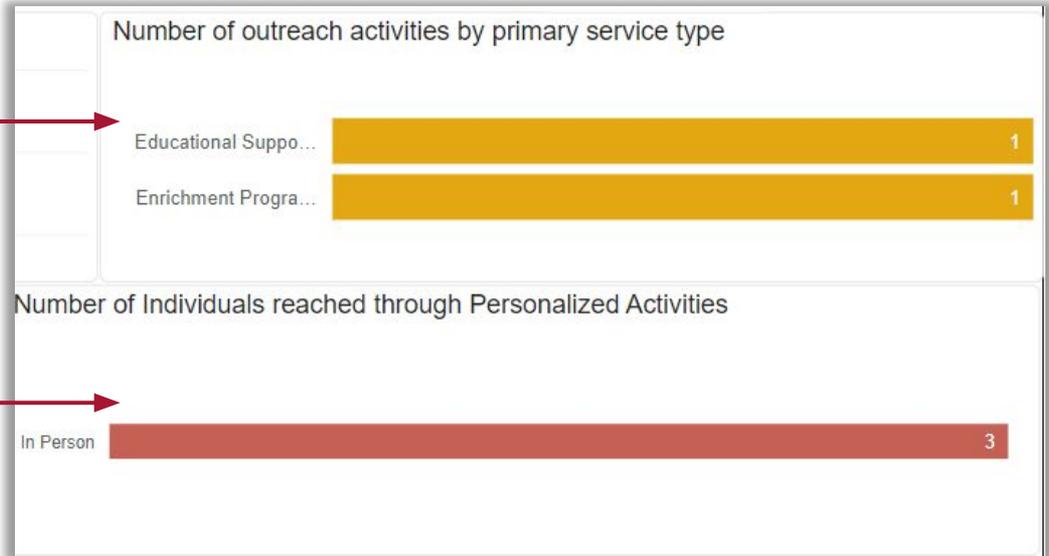


Detailed information, Continued

Examine Outreach Data by category



Outreach activities by primary service type



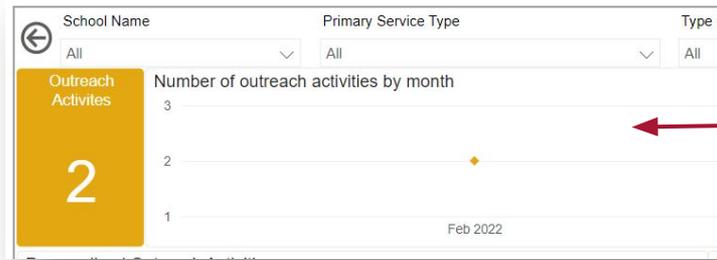
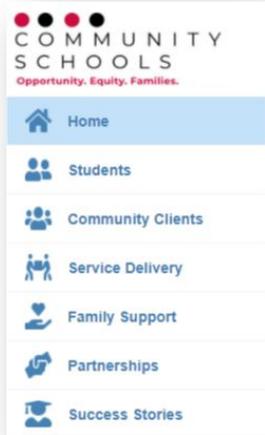
Number reached through personalized activities



Case Management System Home

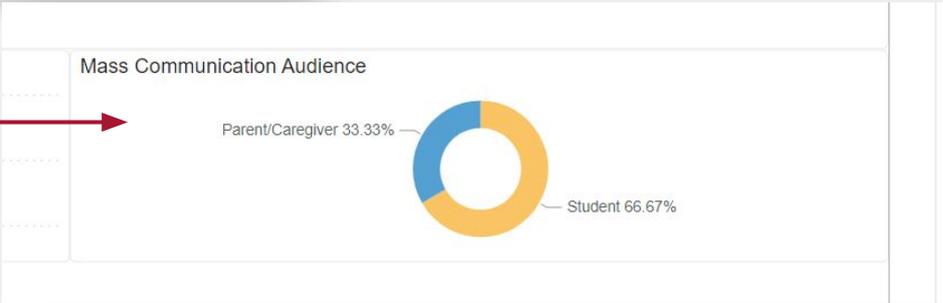
Detailed information, Continued

Examine Outreach Data by category



Count of outreach activities by month

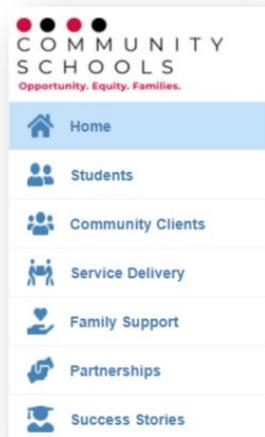
Mass Communication is broken down by audience type



Click the arrow in the upper left to go back to the main page

Pending Family Support Referrals

This grid is located below the CS Home Dashboard



PERSON SPOKE TO	NOTES	REFERRAL	WHO REFERRED
xxlejox xxnethx	Met with Student	Educational Supports (tutoring, college prep)	Student (Self)
xxlejox xxnethx	Met with Student	Housing Support	Parent / Caregiver
xxemusx xxariax	educational resources needed	Mental Health Services	Parent / Caregiver
xxuelax xxx xxuelax xxx	tutoring	DCFS	Counselor

Referrals which have been pending over two weeks are in **red**



Mental Health Activities Grid

- This grid is located below the Pending Family Support Referrals Grid
- It is only visible to CS Staff who have access to **Mental Health** activities
- Supervisors use the Status column to view Pending or Drafts

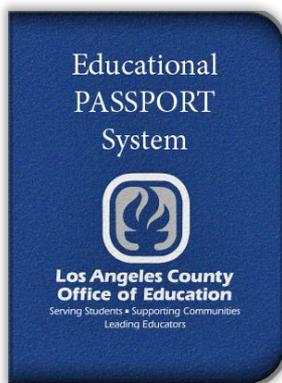


Draft's/Pending Family Support Mental Health Activities:
Click on a row link to view the Family Support case for the record.

CREATED BY	CREATED DATE	LAST MODIFIED BY	LAST MODIFIED DATE	REVIEWED BY	REVIEWED DATE	STATUS
SPADSMember1@laco.e	1/11/2023	SPADSMember1@laco.e	1/11/2023			Draft
SPADSMember1@laco.e	1/11/2023	SPADSMember1@laco.e	1/11/2023			Draft
SPADSMember1@laco.e	11/1/2022	SPADSMember1@laco.e	11/3/2022	SPADSOwner1@laco.edt	11/1/2022	Pending Review
SPADSMember1@laco.e	11/1/2022	SPADSMember1@laco.e	11/3/2022			Pending Review
SPADSMember1@laco.e	9/27/2022	SPADSMember1@laco.e	9/27/2022			Pending Review

Draft's/Pending Family Support Mental Health Activities grid





Students



- [Students – Home](#)
- [Add Student](#)
- [Add Student Details](#)
- [Student – Data](#)
- [Student – Details](#)
- [Family Tab](#)
- [Reconcile Contact](#)

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Students – Home

Key terms and functions are defined on Students Home



- Permissions
- Sorting/Search
- Data filtering
- Add Student

Students

Permissions: Your role and school assignment(s) will determine which records are displayed.

Sorting/Search: Click on a column header to sort in ascending or descending order. Enter a partial or full search string in any column to filter

Date filtering: Date fields can be filtered on different criterias by clicking on the calendar icon.

Add Student: If you cannot locate a student, please use the "Add Student" button to manually add a student. You must have the school, First

ids in reconciling the student data with the student's SIS record when it becomes available.

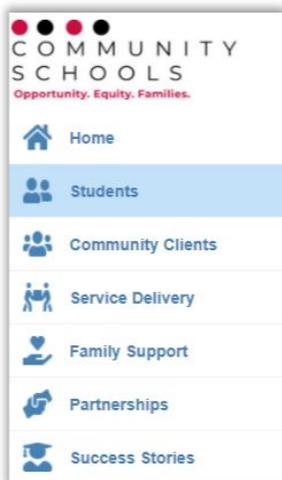
Show entries

SCHOOL NAME	FIRST NAME	LAST NAME	SSID
<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>
Azusa High School	John	Doe	0123456789
Azusa High School	xxodiox	xx Annx	135832
Azusa High School	xxladox	xx Ianx	89311
Azusa High School	xxx	xx Khax	89250



Students – Home, Continued

- You have access to only view data for the school you are assigned
- Use the selector drop-down to change the number of lines shown



Students

Permissions: Your role and school assignment(s) will determine which records are displayed.

Sort/Filter/Search: Click on a column header to sort in ascending or descending order. Enter a partial or full search string in any column to filter the field to your search criteria.

Date filtering: Date fields can be filtered on different criterias by clicking on the calendar icon.

Add Student: If you cannot locate a student, please use the "Add Student" button to manually add a student. You must have the school, First and Last Name, and SSID available when adding. This information is used in reconciling the student data with the student's SIS record when it becomes available.

Show entries +Add Student

SCHOOL NAME	FIRST NAME	LAST NAME	SSID	DISTRICT STUDENT ID	DOB	ADDED MANUALLY
Azusa High School	John	Doe	0123456789			True
Azusa High School	xxodiox	xx Annx	135832	123456	11/15/2005	False
Azusa High School	xxladox	xx Ianx	89311	123456	11/15/2002	False
Azusa High School	xxx	xx Khax	89250	123456	11/15/2002	False

Students – Home Continued

Note the color codes:

Green

= Reconciled student data (imported from district data)

Yellow

= Manually created student (added by CS staff)

- Home
- Students**
- Community Clients
- Service Delivery
- Family Support
- Partnerships
- Success Stories



Students

Permissions: Your role and school assignment(s) will determine which records are displayed.

Sorting/Search: Click on a column header to sort in ascending or descending order. Enter a partial or full search string in any column to filter the field to your search criteria.

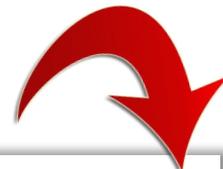
Date filtering: Date fields can be filtered on different criterias by clicking on the calendar icon.

Add Student: If you cannot locate a student, please use the "Add Student" button to manually add a student. You must have the school, First and Last Name, and SSID available when adding. This information aids in reconciling the student data with the student's SIS record when it becomes available.

Show entries +Add Student

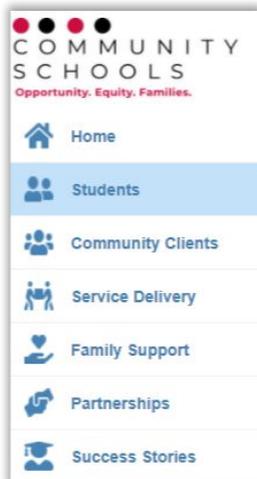
SCHOOL NAME	FIRST NAME	LAST NAME	SSID	DISTRICT STUDENT ID	DOB	ADDED MANUALLY
Azusa High School	John	Doe	0123456789			True
Azusa High School	xxodiox	xx Annx	135832	123456	11/15/2005	False
Azusa High School	xxladox	xx lanx	89311	123456	11/15/2002	False
Azusa High School	xxx	xx Khax	89250	123456	11/15/2002	False

Green = Reconciled
Yellow = Manually Created Student



Students – Add Student

- Columns have sort , calendar , and search  functions
- Select **+Add Student** button if you need to add a student



Students

Permissions: Your role and school assignment(s) will determine which records are displayed.

Sorting/Search: Click on a column header to sort in ascending or descending order. Enter a partial or full search string in any column to filter the field to your search criteria.

Date filtering: Date fields can be filtered on different criteria by clicking on the calendar icon.

Add Student: If you cannot locate a student, please use the "Add Student" button to manually add a student. You must have the school, First and Last Name, and SSID available when adding. This information aids in reconciling the student data with the student's SIS record when it becomes available.

Show entries

Legend:
Green = Reconciled
Yellow = Manually Created Student

+Add Student

SCHOOL NAME	FIRST NAME	LAST NAME	SSID	DISTRICT STUDENT ID	DOB	ADDED MANUALLY
<input type="text" value=""/>						
Azusa High School	John	Doe	0123456789			True
Azusa High School	xxodiox	xx Annx	135832	123456	11/15/2005	False
Azusa High School	xxladox	xx Ianx	89311	123456	11/15/2002	False
Azusa High School	xxx	xx Khax	89250	123456	11/15/2002	False



Add a Student Example



Click on **Students** in the CS Menu then **+Add Student**

1. Enter info:
 - District: Montebello Unified
 - School: Shurr High
 - First Name: enter a name
 - Last Name: enter a name
 - SSID: enter a number
2. Note: **High School** label is changed to **School** throughout the app
3. Click **Save**

The screenshot shows a mobile application form titled "Add Student Details". The form contains several input fields, each with a red circle and number indicating a step in the process:

- 1**: A red circle next to the "District" dropdown menu, which is currently set to "Montebello Unified".
- 2**: A red circle next to the "School" dropdown menu, which is currently set to "Schurr High".
- 3**: A red circle next to the "Save" button at the bottom right of the form.

The form fields are as follows:

- *District**: Montebello Unified
- *School**: Schurr High
- *First Name**: Mary
- *Last Name**: Washington
- *SSID**: 0987654321

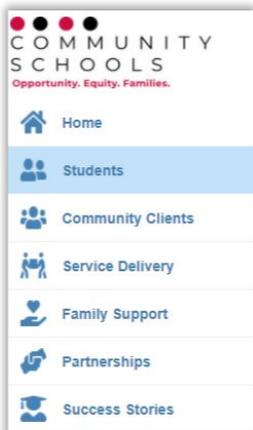
At the bottom right, there is a green "Save" button and a grey "Cancel" button.



The district and school data you have access to in the training app may differ than the example

Student – Data

- After manually adding a student, the row will be highlighted in **Yellow**
- When the student data is later merged with the automatic updates the row will have a **Green** highlight
- Click on a **student name** to view the **student details**



Students

Permissions: Your role and school assignment(s) will determine which records are displayed.

Sorting/Search: Click on a column header to sort in ascending or descending order. Enter a partial or full search string in any column to filter the field to your search criteria.

Date filtering: Date fields can be filtered on different criterias by clicking on the calendar icon.

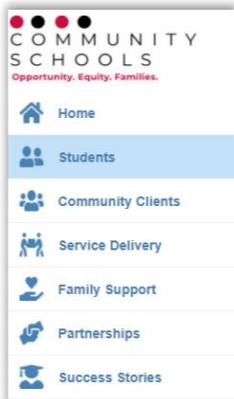
Add Student: If you cannot locate a student, please use the "Add Student" button to manually add a student. You must have the school, First and Last Name, and SSID available when adding. This information aids in reconciling the student data with the student's SIS record when it becomes available.

Show entries +Add Student

SCHOOL NAME	FIRST NAME	LAST NAME	SSID	DISTRICT STUDENT ID	DOB	ADDED MANUALLY
Azusa High School	John	Doe	0123456789			True
Azusa High School	First Name	Last Name	135832	123456	11/15/2005	False
Azusa High School	xxladox	xx lanx	89311	123456	11/15/2002	False
Azusa High School	xxx	xx Khax	89250	123456	11/15/2002	False

Student – Details

- Under **Student Details** you will find demographic, academic, discipline, enrollment, family contacts, and attendance data, updated from the automatic student information system or CALPADS imports
- For example, the student **Enrollment Details Table** will have rows added as data becomes available



Student Details

Student Name : John Doe SSID : 09
Date of Birth : District S

Details Academic Attendance Discipline Enrollment Family Success Story

First Name: John Middle Name: [Redacted]

Student's Mobile Phone: [Redacted] Student ID: [Redacted]

Date of Birth: [Calendar icon] Age: [Redacted]

Disability Status: Disability Status Special Education: Special Education Disability: [Redacted]

Foster Status: Foster Status Homeless: Homeless Housing: [Redacted]

Ethnicity: Hispanic Or Latino Parent Veteran Status: Parent Veteran Status Race: [Redacted]



Student Details – Family Tab

- Add a contact with **+Add Contact** on the family tab
- Enter the contact information and relationship to the student

COMMUNITY SCHOOLS
Opportunity. Equity. Families.

- Home
- Students
- Community Clients
- Service Delivery
- Family Support
- Partnerships
- Success Stories



Student Details
 Student Name : Matt Damon SSID : 89166 Gender : M
 Date of Birth : 11/15/1998 District Student Id : 123456 Grade : 12

Details Academic Attendance Discipline Enrollment Family Success Story

Contacts Details

Green = Reconciled with SIS Data
 Yellow = Manually Created Contact
 Click on the icon located in the "Reconcile" column to open a window where you can reconcile the manually added contact with data returned from the SIS

+Add Contact

SCHOOL NAME #	FIRST NAME #	LAST NAME #	RELATIONSHIP #	ADDRESS #	EMAIL ADDRESS #	HOME PHONE #	RECONCILE #	EDIT #	DELETE #
AZUSA HIGH SCHOOL	xxhaus	xxantx	Mother	1234 South Street Azusa Ca 91702			[X]		
AZUSA HIGH SCHOOL	xxanex	xxhardx	Father	1234 South Street Azusa CA 91702					
AZUSA HIGH SCHOOL	xxhaus	xxleex	Grandmother	1234 South Street Palmdale					
AZUSA HIGH SCHOOL	xxanex	xxhardx	Grandfather	1234 South Street					
AZUSA HIGH SCHOOL	Jane	Smith	Stepmother						

Family Support Log
 Click on an "ID" number to be taken to the Family Support screen to view the details of the support case.

ID #	SCHOOL NAME #	PERSON SPOKE TO #	FIRST NAME #	LAST NAME #	DATE OF SERVICE #
8	AZUSA HIGH SCHOOL	Student	xxljox	xxnetx	8/3/2021
15	AZUSA HIGH SCHOOL	Parent / Caregiver	Jane	Doe	8/10/2021

Student Details – Reconcile Contact

Find the contact in the drop down and select **Reconcile**

Reconcile Contact 3020004

Previous Contact Info

First Name
Bob

Last Name
Smart

Relationship
Neighbor

New Contact Info

Reconcile With

Adam Abbott - Father
<Missing> - <Missing> - Stepmother
Alice Abbott - DO NOT CONTACT
Paul Smith - Agency Representative
Bob Smart - Neighbor

If a family member is missing the name or relationship they will show "<Missing>".

Reconcile

The **History** tab will show the imported data

Family Member Id 1240467

Details History

*First Name *Last Name Lives With Student

Bob Smart

Address City State

Zip Code Zip Ext

Relationship Email Home Phone

Cell Phone Age

15

These are additional demographic fields which are not coming from the SIS. They should be manually entered.

Date of Birth Gender Assigned Sex at Birth

3/12/2005 Male Male
 Female Female
 Non Binary

Reconciled contacts will have a **Green** highlight

SCHOOL NAME	FIRST NAME	LAST NAME
Screaming Eagle High School	Bob	Smart



Student Details – Services Received

In **Student Details** the **Services Received** tab is available to summarize **Family Support** and **Service Deliveries** the student and their contacts have been linked to



- Home
- Students**
- Community Clients
- Service Delivery
- Family Support
- Partnerships
- Success Stories



Student Details

Student Name : Brad Pitt SSID : 89164 Gender : M
Date of Birth : 11/15/1998 District Student Id : 123456 Grade : 12

Details Academic Attendance Discipline Enrollment Family **Services Received** Success Story

First Name	Middle Name	Last Name
Brad		Pitt
Student's Mobile Phone	Student's Home Phone	Student's Email Address
Date of Birth	Age	Primary Language
11/15/1998	23	Filipino (Pilipino or Tagalog)
Disability Status	Special Education	Disability Code 2
<input type="checkbox"/> Disability Status	<input type="checkbox"/> Special Education	Speech or language impairment (SLI)
Foster Status	Homeless	Parent/Guardian Name
<input type="checkbox"/> Foster Status	<input type="checkbox"/> Homeless	xdejox
Ethnicity	Parent Veteran Status	Parent/Guardian Ed Level
<input type="checkbox"/> Hispanic Or Latino	<input type="checkbox"/> Parent Veteran Status	Some College or Associate's Degree



Student Details – Services Received

- View **Family Support Log** and **Service Deliveries** linked to the student and their family
- Click on a number in the ID column to view info
- Sort by column headings
- Search functions:  and 

Student Details
Student Name : Brad Pitt SSID : 89164 Gender : M
Date of Birth : 11/15/1998 District Student Id : 123456 Grade : 12

Details Academic Attendance Discipline Enrollment Family **Services Received** Success Story

Family Support Log

Click on an "ID" number to be taken to the Family Support screen to view the details of the support case.

ID	SCHOOL NAME	PERSON SPOKE TO	FIRST NAME	LAST NAME	DATE OF SERVICE
49	Azusa High School	Student	Brad	Pitt	12/6/2021
51	Azusa High School	Student	Brad	Pitt	12/9/2021
52	Azusa High School	Student	Brad	Pitt	12/9/2021
53	Azusa High School	Student	Brad	Pitt	12/9/2021
58	Azusa High School	Student	Brad	Pitt	12/16/2021

Service Deliveries

Click on an "ID" number to be taken to the Service Delivery screen to view the details of the service(s) provided.

ID	DATE	SERVICE TYPE	ENTERED BY	TYPE OF EVENT	DESCRIPTION	MODIFIED ON
177	12/16/2021	Basic Needs Support	Intern	Distribution of Goods	holiday roundtable	12/16/2021

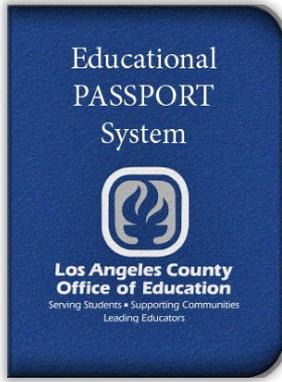


+Add Student

- The **Student Already Exists** alert will show up when the student is found in another school site
- It will list the school where the student was found
- If this happens, don't add the student, but open a help desk ticket requesting the AD&S team **reassign** the student to the current school

Reminder: when adding students, please use **SSID** and not the **district student ID**





Community Clients

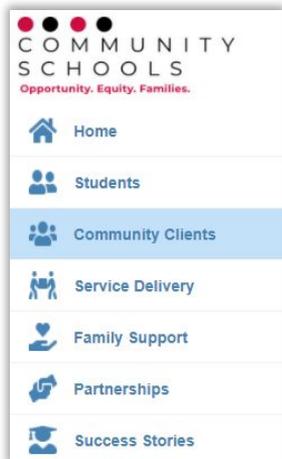


- [Community Clients – Overview](#)
- [Add Primary Household Member](#)
- [Family Support Log](#)
- [Family Tab – Add Students](#)

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Community Clients – Overview

Add **Community Clients** to cases when the student is **not** enrolled in your school



Community Clients

You can add community clients here in order to link services and support cases to members of the community who do **NOT** have a student enrolled in a participating Community School.

Do not add clients here if the person can be linked to a student as a contact or member of their family and/or household.

Add Primary Household Member: Add a Primary Household Member as your client. This will allow you to link other household member(s) and indicate their relationship to this primary person.

Grid links: Click on the primary household member's link in the grid to access their details and add additional members to their household.

"Edit" pencil icon: Click to edit the primary household member's details.

Light Green = Primary Household Member

Show entries

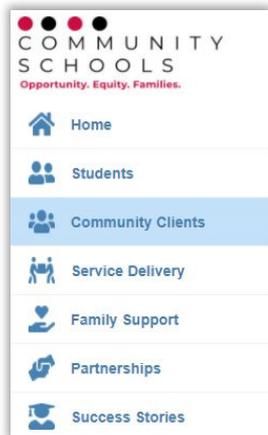
[+Add Primary Household Member](#)

SERVICING SCHOOL NAME	FIRST NAME	LAST NAME	HOME PHONE	MEMBERS ID	EDIT	INACTIVA
AZUSA HIGH SCHOOL	John	Smiths		9		

Primary Household Member in Green



Community Clients – Add Primary Household Member



Fill out as much as possible

Required fields are marked *

Community Client's Details

Name : John Smiths Servicing School : Azusa High School
Client Unique Id : 9

To edit the details for this client, locate their record in the Community Clients grid and click on the pencil icon.

Details Family

*Servicing High School
AZUSA HIGH SCHOOL X

*First Name John	Middle Name	*Last Name Smiths
Address	City	State
Zip Code	Zip Ext	
Relationship Primary Household Member	Primary Member? <input checked="" type="checkbox"/> Primary Status	*Best Contact Number 555-555-5555



Community Clients – Family Tab

- View, search and add household/family members related to the Community Client (non-enrolled community member) on the **Family** tab
- Add family members to the household who receive support



Community Client's Details

Name : Beige Salamander Initial Servicing School : Azusa High School
Client Unique Id : 27

To edit the details for this client, locate their record in the Community Clients grid and click on the pencil icon.

Details **Family** Services Received

Community Client's Household Members

Add Household Member: Click to add household members to the existing primary household

Family Support Log: This grid located below the "Family Members" grid allows you to view all family support cases linked to this community member.

[+Add Household Member](#)

SERVICING SCHOOL NAME	FIRST NAME	RELATIONSHIP	LAST NAME	HOME PHONE	MEMBERS ID	EDIT	DELETE
Azusa High School	Grey	Aunt	Salamander		28		



Community Clients – Family Tab, Continued

- Add as many details as possible
- Required fields are marked with a *
- Set the relationship of the household member to represent their relationship to the primary client
- Choose **Save** to enter the household member information

Adding Household Member

Birth Day Birth Month Birth Year

Month X

Gender

Male Female Non Binary

Assigned Sex at Birth

Male Female

Primary Language

Disability Status Disability Status Disability Type

Ethnicity

Hispanic Or Latino

Race

Birth City Birth State Birth Country

Notes

Does this member has a student in the participating district ?

Yes

Save Cancel



Community Clients – Services Received

- View, search, and sort the **Family Support Log** and **Service Delivery** grids for the community client
- Click on an **ID** number to view the details

Community Client's Details

Name : Angelica Salazar Initial Services School : Litterock High School
Client Unique Id : 21

To edit the details for this client, locate their record in the Community Clients grid and click on the pencil icon.

Details Family Services Received

Family Support Log

Click on an "ID" number to be taken to the Family Support screen to view the details of the support case.

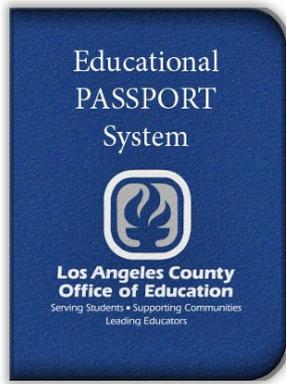
ID	SCHOOL NAME	PERSON SPOKE TO	FIRST NAME	LAST NAME	DATE OF SERVICE
102	Azusa High School	Community Client	Angelica	Salazar	10/26/2022

Service Deliveries

Click on an "ID" number to be taken to the Service Delivery screen to view the details of the service(s) provided.

ID	DATE	SERVICE TYPE	ENTERED BY	TYPE OF EVENT	DESCRIPTION	MODIFIED ON
125	11/1/2022	Basic Needs Support	Community Schools Specialist	Workshop / Training	test	11/1/2022
122	10/26/2022	Basic Needs Support	Community Schools Specialist	Workshop / Training	testing	10/26/2022





Family Support



- [Family Support - Home](#)
- [Add a Family Support Case](#)
- [Search for Student](#)
- [Procedures](#)
- [Distribution of Goods](#)
- [Family Support Gift Card Distribution](#)
- [Follow-up Support](#)
- [Student Documents](#)
- [Student Details](#)
- [Direct Services](#)

epsportal.lacoe.edu
helpdesk@lacoe.edu

Family Support Overview, Home

Family Support is where you find and add Family Support cases

1. Click on a name in the **Person Name** column or the **Edit** icon to open **Family Support Details**
2. Click on the **Student Name** will redirect you to the **Student Details** page

COMMUNITY SCHOOLS
Opportunity. Equity. Families.

***** TRAINING SITE ***** @laco.e.edu Log Out

Family Support

Permissions: Your role and school assignment(s) will determine which records are displayed.

Sorting/Search: Click on a column header to sort in ascending or descending order. Enter a partial or full search string in any column to filter the field to your search criteria.

Date filtering: Date fields can be filtered on different criterias by clicking on the calendar icon.

Add Family Support Case: Please use the "Add Family Support Case" button to add a new family support record.

+Add Family Support Case

ID	PERSON SPOKE TO	FIRST NAME	LAST NAME	SCHOOL	DATE OF SERVICE	PERSON NAME	ROLE NAME	EDIT	INACTIVATE
71	Student	xxRuizx	xxmienx	Azusa High School	9/23/2022	xxRuizx xxmienx	Intern		
66	Student	xxstorex	xxlylax	Centennial High School	9/21/2022	xxstorex xxlylax	Intern		
67	Student	xxajaxx	xxhellx	Cesar Chavez High School	9/21/2022	xxajaxx xxhellx	Intern		
68	Student	xxnderx	xxnieex	John Glenn High School	9/21/2022	xxnderx xxnieex	Intern		
69	Student	xxleasx	xxerylx	Azusa High School	9/21/2022	xxleasx xxerylx	Intern		
70	Student	xxRuizx	xxmienx	Azusa High School	9/21/2022	xxRuizx xxmienx	Intern		

See next page for more information on Student Details



Family Support Overview, Student Details

Click on the Services Received tab to view existing data

1. Click on the ID to open a **Family Support Log**
2. Click on the ID to open **Service Delivery Details**

Student Name : xxrerox xxriex SSID : 3119628237 Gender : M
Date of Birth : 11/15/2000 District Student Id : 1234567 Grade : 12

Details Academic Attendance Discipline Enrollment Family **Services Received** Success Story

Student Documents

Family Support Log

Click on an "ID" number to be taken to the Family Support screen to view the details of the support case.

ID	SCHOOL NAME	PERSON SPOKE TO	FIRST NAME	LAST NAME	DATE OF SERVICE
156	Azusa High School	Student	xrxerox	xxriex	9/27/2023

Service Deliveries

Click on an "ID" number to be taken to the Service Delivery screen to view the details of the service(s) provided.

ID	DATE	SERVICE TYPE	ENTERED BY	TYPE OF EVENT	DESCRIPTION	MODIFIED ON
253	9/13/2023	Mental Health Support	Intern	Support Groups	Azusa test	9/13/2023



Family Support – Add a Family Support Case, Cont.

- To add a support case for a student or community client, select the district and school then click the blue **Search Primary Student** button
- Search by **First Name**, **Last Name**, **SSID**, or **District Student ID** (CC **Member ID**) or click **Search** to search all students/clients

Family Support Details

Student Name : SSID :

General Information | Family Linkage | Referrals/Goods | Dis

*District Name ? Azusa Uni... x

*School Name ? Azusa Hig... x

*Select Type

- Student
- Community
- Client

Search

*Date of Service 12/1/2023

Support Information

Student Search

Search using Student First Name, Last Name, SSID, or District Student ID, or click "Search" to search all students.

Click the save icon in the search results grid to assign the selected student to the family support case.

First Name Last Name District Student ID

FIRST NAME	LAST NAME	SSID	DISTRICT STUDENT ID	SELECT
q	q	q	q	

No records to display.

Search Cancel



Family Support – Search

Student Search

Search using Student First Name, Last Name, SSID, or District Student ID, or click "Search" to search all students.

Click the save icon in the search results grid to assign the selected student to the family support case.

First Name:

Last Name:

SSID:

District Student ID:

FIRST NAME	LAST NAME	SSID	DISTRICT STUDENT ID	SELECT
?	?	?	?	
Brad	Pitt	89164	123456	<input type="button" value="Save"/>

- In addition to SSID, search by **First Name, Last Name, or District Student ID**
- After confirming you have the right student/client click on the  in the **SELECT** column of the table

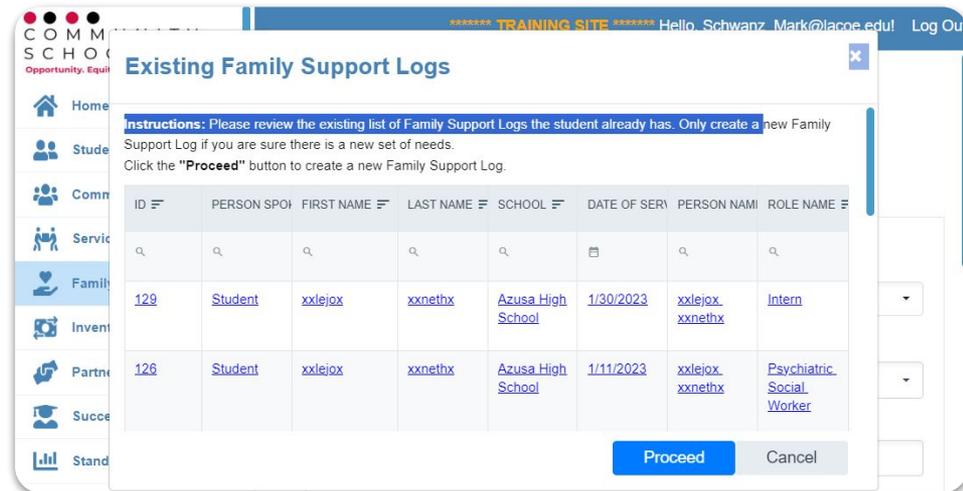
Example with Student Search by SSID



Family Support Procedures

The **Family Support** logs preview screen shows all existing family support logs (if any exist). To setup a new Family Support:

1. Review the **Existing Family Support Logs** screen
2. If you are sure there are a new set of needs, click **Proceed** to create a new log



For an example, see the next slide

Family Support Details – General Information

- Complete files on **General Information**
- Proceed to the other tabs by clicking on **Save**

Family Support Details

General Information | Family Linkage | Referrals/Goods | Follow-up Support

*School Name AZUSA HIGH SCHOOL x ▾ Search Primary Student

Student Name : Brad Pitt SSID : 89164 District Student Id : 123456

*Date of Service 9/28/2021

Support Information

*Engagement with CS Staff Outcome Met with CS Staff-Provided Referrals x ▾

*Referral Source Interdisciplinary Team x ▾

*Notes

*Select Your Role
 Community Schools Specialist
 Education Community Worker

*Person Spoke to Counselor x ▾

*First Name *Last Name

Save Cancel



Family Support Details – Linkage

Family Linkage

- Link a family member to the student
- For example: Link siblings at the same school site



Family Support Details

General Information | **Family Linkage** | Referrals/Goods | Follow-up Support

Current Household Linkages

Link Family: Use the "Link Family" button to locate a student or household contact to link to the current record you are viewing.

You will be able to add or remove linked students or contacts if changes are needed. Removing a linkage does NOT remove the person from the system, it only removes their linkage to this record.

LINKAGE ID	FIRST NAME	LAST NAME	HOMEPHONE	TYPE	STUDENT SSID	DELETE
70	xxrciax	xxnicax		Parent / Caregiver	89171	
69	Brad	Pitt		Student (Self)	89164	



Link Family

Family Support Procedure Example

1. Click on **Family Support** in the **CS Home** menu
2. Click **+Add Family Support Case** to open **Family Support Details**
3. District Name & School Name
4. Select Type: Student
5. Click **Search Primary**



Family Support Details

Student Name : SSID :

General Information | Family Linkage | Referrals/Goods | Direct Services

*District Name [?] Azusa Unified **3** *School Name [?] Azusa High School x ▾ *Select Type **4**

Student **4**
 Community Client

5 Search Primary

*Date of Service 10/6/2023

Support Information

*Initial Engagement with CS Staff Outcome [?]

*Referral Source

*Notes

Initial Family Support Details, General Information Tab

Example, Continued

Student Search

1. Type 6129533034 in SSID
2. Click **Search**
 - Alternatively search by First Name, Last Name, District Student ID
 - Or click **Search** with all fields open to view a **list** of available students
3. Click the **Save icon** to proceed



Student Search

Search using Student First Name, Last Name, SSID, or District Student ID, or click "Search" to search all students.

Click the save icon in the search results grid to assign the selected student to the family support case.

First Name

Last Name

SSID **1**

District Student ID

2

FIRST NAME	LAST NAME	SSID	DISTRICT STUDENT ID	SELECT
?	?	?	?	
Joe	Brown	6129533034	1234567	3

Student Search pop-up

Example, Concluded

- View the **Existing Family Support Logs** list
- Click a **number** in the **ID** column to view the Family Support Details in a *new browser tab*
- Only create a new Family Support Log if you are sure there is a *new set of needs*
- Click **Proceed** to create a *new* Family Support Log



Existing Family Support Logs

Instructions: Please review the existing list of Family Support Logs the student already has. Only create a new Family Support Log if you are sure there is a new set of needs. Click the "Proceed" button to create a new Family Support Log.

ID	PERSON SPOKE TO	FIRST NAME	LAST NAME	SCHOOL	DATE OF SERVICE	PERSON NAME	ROLE NAME
134	Student	Joe	Brown	Azusa High School	2/1/2023	Joe Brown	Intern
124	Student	Joe	Brown	Azusa High School	1/11/2023	Joe Brown	Psychiatric Social Worker
117	Student	Joe	Brown	Azusa High School	1/4/2023	Joe Brown	Psychiatric Social Worker

[Proceed](#) [Cancel](#)

Example of the new **Existing Family Support Logs** list



End of Example



Family Support Details – Distribution of Goods

Distribution of Goods

Instructions:
You cannot add referrals until you have filled out the Add Referral = Add a referral. Once added, this is Add Contact = When adding a referral, if you are

Please Note:
Red highlighted row(s) in grid = Person referred add values for these fields.

Distribution of Goods

If you are editing an existing record, you cannot change "Type of Item" and "Measurement Type". "Type of Item" and "Measurement Type" are used to determine the total quantities available and remaining for this particular type of item.

To change these after your initial save, please use "Add Goods" to add a new goods item and delete this item if it's no longer needed.

* Type of Item
* Measurement Type
* Quantity Distributed

Notes

Total Quantity Received: 0
Total Quantity Distributed: 0
Total Quantity Remaining: 0

Save Cancel

+Add Goods

- **+Add Goods** button on bottom of **Referrals/Goods** tab
- Fill out and choose **Save**
- For details on **Family Support Gift Card Distribution**, see next slide



Add a Family Support Case – Gift Card Distribution

- Click **+Add Family Support Case** to distribute gift cards
- Or click the **edit** icon to add to an existing case 



Family Support

Permissions: Your role and school assignment(s) will determine which records are displayed.

Sorting/Search: Click on a column header to sort in ascending or descending order. Enter a partial or full search string in any column to filter the field to your search criteria.

Date filtering: Date fields can be filtered on different criterias by clicking on the calendar icon.

Add Family Support Case: Please use the "Add Family Support Case" button to add a new family support record.

Show entries

 Edits a record
 Inactivates a record and removes it from view

+Add Family Support Case

ID	PERSON SPOKE TO	FIRST NAME	LAST NAME	SCHOOL	DATE OF SERVICE	STUDENT NAME	EDIT	INACTIVATE
27	Parent / Caregiver	Jose	Angetk	AZUSA HIGH SCHOOL	9/24/2021	Chris Pine		
25	Parent / Caregiver	Joe	Doe	AZUSA HIGH SCHOOL	9/22/2021	xxERTax xxMARKx		
18	Parent / Caregiver	Jane	Doe	AZUSA HIGH SCHOOL	8/12/2021	Brad Pitt		
15	Parent / Caregiver	Jane	Doe	AZUSA HIGH SCHOOL	8/10/2021	Matt Damon		
17	Parent / Caregiver	Parent	Parent	AZUSA HIGH SCHOOL	8/10/2021	xxndezx xxreanx		
13	Parent / Caregiver	Jane	Doe	AZUSA HIGH SCHOOL	8/5/2021	Brad Pitt		
6	Student	xxdejox	xxnetlx	AZUSA HIGH SCHOOL	8/3/2021	Brad Pitt		
8	Student	xxdejox	xxnetlx	AZUSA HIGH SCHOOL	8/3/2021	Brad Pitt		



Family Support Details – Gift Card Distribution

Example

- Fill out and select all required information then **Save**
- This will enable the next tabs: **Family Linkage, Referrals/Goods, Follow-up Support, Mental Health, Contacts/Referrals**

1. Select School
2. Select Type: Student/Community Client
3. Date of Service
4. Initial Engagement: Met with CS Staff-Provided Referrals
5. Referral Source: Teacher
6. Notes: sample
7. Click **Save**

Family Support Details

General Information | **Family Linkage** | Referrals/Goods | Direct Services | Follow-up Support | Mental Health | Consents/Referrals

*School Name: Azusa High School

*Select Type: Student Community Client

*Select Your Role: Community Schools Specialist Educational Community Worker Intern Psychiatric Social Worker School Social Worker

Student Name: xxlejox xxnethx SSID: 9389821216 District Student Id: 1234567

*Date of Service: 1/30/2023

Support Information

*Initial Engagement with CS Staff Outcome: Met with CS Staff-Provided Referrals and/or Direct Services

*Referral Source: Teacher

*Notes: sample

Family Support Id: 129 Updated By: SPADSOwner1@acoe.edu Updated On: 1/30/2023 11:20:51 AM

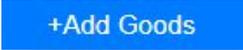
+Add Contact Inactivate **Save** Cancel



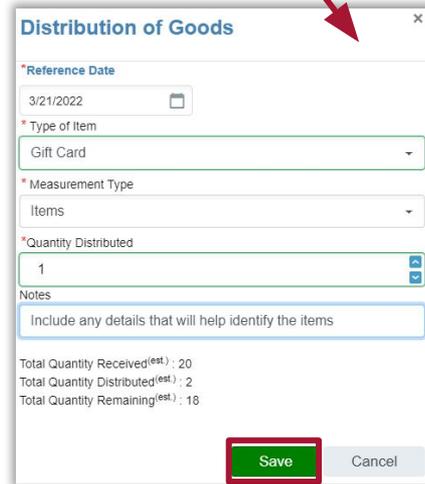
Family Support Details – Gift Card Distribution

Example, Continued



- Click **Referrals/Goods** to distribute gift cards
- Click **+Add Goods**  to open the Distribution of Goods pop up
- Complete **Distribution of Goods**

1. Reference Date
2. Type of Item:
Gift Card
3. Measurement Type:
Items
4. Quantity Distributed:1



Distribution of Goods

*Reference Date
3/21/2022

*Type of Item
Gift Card

*Measurement Type
Items

*Quantity Distributed
1

Notes
Include any details that will help identify the items

Total Quantity Received^(est.): 20
Total Quantity Distributed^(est.): 2
Total Quantity Remaining^(est.): 18

Save Cancel

- Click **Save**

- Click 



Family Support Details – Gift Card Distribution

Example, Conclusion



In the **Distribute Gift Cards** pop up

1. Check box(es) next to the gift card(s) being given
2. Change the date if needed
3. Scroll down and click **Distribute**
4. Click X in the top right to close the pop up

Distribute Gift Cards

Gift card entries displayed in light grey text indicate the service delivery or family support record it belongs to has been inactivated. **Green = Created in current service delivery**

Available **Distributed**

To select a gift card, click on the check box next to the gift card.
To select **ALL** gift cards in your inventory, click the check box in the header.

<input type="checkbox"/>	GIFT CARD NUMBER	VENDOR NAME	AMOUNT	REFERENCE ID (SERVICE DELIVERY ID)	DISTRIBUTION DATE
<input checked="" type="checkbox"/>	1000103	Vons	50.00	39	3/21/2022
<input checked="" type="checkbox"/>	1000104	Vons	50.00	39	3/21/2022
<input type="checkbox"/>	1000105	Vons	50.00	39	

3 **Distribute**

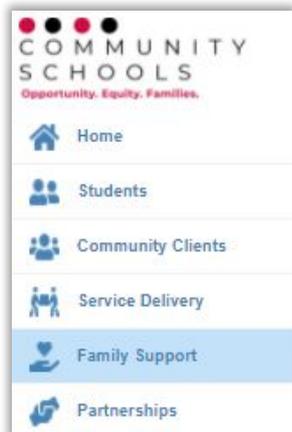


End of Example



Family Support – Follow-up Support

- In **Family Support Details**, the **Follow-up Support** tab is only available after the **General Information** tab is complete
- Click **+Add Follow-up** to add notes to contacts



Family Support Details

General Information | Family Linkage | Referrals/Goods | **Follow-up Support**

Date of Service : 09/28/2021

Instructions:
You cannot add additional supports until you have filled out the General Information for this family support.
Click "+Add Follow-up" to add additional family support follow-up.

Follow-up Coordination/Family Support

ID	DATE	CONTACT NAME	NOTES	DATE ENTERED	EDIT	INACTIVATE
🔍	🔍	🔍	🔍	🔍		

No records to display.

+Add Follow-up

Student Documents Tab

The **Student Documents** tab will support documentation connected to individual non-mental health student data (e.g. media release forms)

Family Support Details

Student Name : Joe Brown SSID : 6129533034 School : Azusa High School

General Information Family Linkage Referrals/Goods Direct Services

Follow-up Support **Student Documents**

Student Documents

Please DO NOT upload Mental Health Documents here.
+Add Document: Please use the "Add Document" button to add a document.

START DA	END DATE	NAME	NOTES	STATUS	CREATED	CREATED	MODIFIED	MODIFIED	EDIT	INACTIVATE
10/8/...	10/12/...	Futur...	Futur...	Active	Bord...	10/4/...	Bord...	10/4/...		
10/4/...	10/7/...	Curre...	Curre...	Expired	Bord...	10/4/...	Bord...	10/4/...		
10/1/...	10/3/...	Past ...	Past ...	Expired	Bord...	10/4/...	Bord...	10/4/...		

Student Documents in **Family Support Details**

Student Details

Student Name : Joe Brown SSID : 6129533034 Gender : F
Date of Birth : 11/15/2000 District Student Id : 1234567 Grade : 12

Details Academic Attendance Discipline Enrollment Family

Services Received Success Story **Student Documents**

Student Documents

Please DO NOT upload Mental Health Documents here.
+Add Document: Please use the "Add Document" button to add a document.

START DA	END DATE	NAME	NOTES	STATUS	CREATED	CREATED	MODIFIED	MODIFIED	EDIT	INACTIVATE
10/8/...	10/1/...	Futu...	Futu...	Active	Bor...	10/4/...	Bor...	10/4/...		
10/4/...	10/7/...	Curr...	Curr...	Expi...	Bor...	10/4/...	Bor...	10/4/...		
10/1/...	10/3/...	Past ...	Past ...	Expi...	Bor...	10/4/...	Bor...	10/4/...		

Student Documents in **Student Details**



Student Documents Tab, Continued

Clicking **+Add Document** opens the pop up

1. Document **Start Date** (optional)
2. Document **End Date** (expiration) optional
3. Document Name (required)
4. Document(s)

Click **Choose Files** and the **Green Upload** icon (uploads can be document files, images and small video files)



5. Click **Save**

Adding Document

Document Start Date: 10/9/2023 1 Document End Date: 10/13/2023 2

*Document Name: Media Release 3

*Notes: For short period related to the week only.

*Document(s) 4

Please upload the Document (documents, images and small video files allowed):

Choose Files help me write a media rele...e for parent_guardians.pdf 

Please click on the green upload button to upload your file.

File Name	Actions
 help me write a media ...	Download Delete

Updated By Updated On

5 [Save](#) [Cancel](#)

Student Documents Tab Status Column

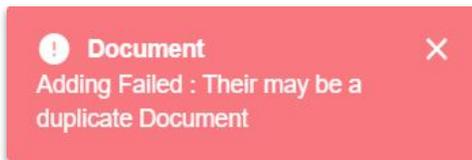
1. Status column in the **Student Documents** grid will have one of three statuses:

- Active (Current)
- Expired (Past Test)
- Not Started (Future)

START DATE	END DATE	NAME	NOTES	STATUS	CREATED BY	CREATED ON	MODIFIED BY	MODIFIED ON	EDIT	INACTIVATE
12/1/2023	12/31/2023	Future document	test	Not Started	Schwanz_Mark...	10/9/2023 11:3...	Schwanz_Mark...	10/9/2023 11:3...		
10/8/2023	10/12/2023	Future Test	Future Test	Active	Bordet_Samuel...	10/4/2023 4:05...	Bordet_Samuel...	10/4/2023 4:05...		
10/4/2023	10/7/2023	Current Test	Current test	Expired	Bordet_Samuel...	10/4/2023 4:05...	Bordet_Samuel...	10/4/2023 4:05...		
10/1/2023	10/3/2023	Past Test	Past Test	Expired	Bordet_Samuel...	10/4/2023 4:04...	Bordet_Samuel...	10/4/2023 4:04...		

2. Duplicate prevention

- Adding failed message appears when there is already a document with same **date** and **name**



End of Example



Family Support – Student Details

- Click on a student name in Family Support Home grid to link to **Student Details**
- Click the tab(s) to view data

Family Support

Permissions: Your role and school assignment(s) will determine which records are displayed.

Sorting/Search: Click on a column header to sort in ascending or descending order. Enter a partial...

Date filtering: Date fields can be filtered on different criteria by clicking...

Add Family Support Case: Please use the...

SSID : 90317
District Student Id : 123456

Gender : M
Grade : 12

Student Details

Student Name : Chris Pine
Date of Birth : 11/15/2000

Details | Academic | Attendance | Discipline | Enrollment | Family | Success Story

First Name: Chris
Middle Name: [Redacted]
Last Name: Pine

Student's Mobile Phone: [Redacted]
Student's Home Phone: [Redacted]

Age: 20

Disability Code 1: [Redacted]
Disability Code 2: [Redacted]

Primary Language: Spanish

Parent/Guardian Name: [Redacted]
Parent/Guardian Ed Level: [Redacted]

Special Education: Special Education

Homeless: Homeless

Parent Veteran Status: Parent Veteran Status

Ethnicity: Hispanic Or Latino

ID	PERSON NAME	PERSON NAME
159	Student	xx liix xxredox
156	Student	xxerox xxriex
155	Student	xxanex xxSagex
	Student	xxooksx xxincyx



Student Details – Family Tab

Click **+Add Contact** to manually add household member information

Student Details

Student Name : xxrerox xxriex SSID : 3119628237 Gender : M
 Date of Birth : 11/15/2000 District Student Id : 1234567 Grade : 12

Details Academic Attendance Discipline Enrollment **Family** Services Received Success Story Student Documents

Contacts Details

+Add Contact: If you cannot locate a contact/household member, please use the "Add Contact" button to manually add a contact. If the contact is later returned by the SIS, you can reconcile the record to use the SIS data if there is a match on name and relationship. The manually added record will be recorded on the "History" tab and the current record will use data from the SIS.

Green = Reconciled with SIS Data

Yellow = Manually Created Contact

Click on the icon located in the "Reconcile" column to open a window where you can reconcile the manually added contact with data returned from the SIS

+Add Contact

SCHOOL NAME	FIRST NAME	LAST NAME	RELATIONSHIP	ADDRESS	EMAILADDRESS	HOME PHONE	RECONCILE	EDIT	DELETE
q	q	q	q	q	q	q	X	q	q
Azusa High School	xrerox	xguelx	Family Member	1234 South Street Azusa Ca 91702					
Azusa High School	xrerox	xxciax	Mother	1234 South Street Azusa Ca 91702					
Azusa High School	xrerox	xxRosax	Family Member	1234 South Street Covina Ca 91722					

View all linked family members in the Contact Details grid



Student Details Page - Adding Family

+Add Contact

- Enter essential information
- Click **Save** to retain the new data

Adding Family

Details

Add Contact Details

*First Name

*Last Name

Lives With Student

Address

City

State

Zip Code

Zip Ext

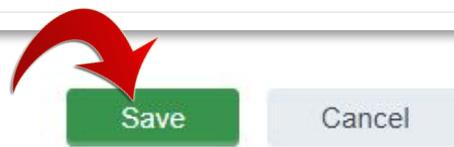
*Relationship

Email

Home Phone

Cell Phone

Age



Direct Services

Add to an existing case with the **Direct Services** tab

Family Support Details

General Information Family Linkage Referrals/Goods **Direct Services** Follow-up Support

Date of Service : 10/11/2021

Instructions:
You cannot add Direct Services until you have filled out the General Information for this family support.
Add Contact = When adding a referral, if you are unable to locate the name of the person referred, use this function to add new contact information for the person referred.

Please Note:
Red highlighted row(s) in grid = Person referred is missing one of the following fields: Primary Language, Assigned Sex At Birth, Gender Code, or Date Of Birth. Use the "Edit Demographics" pencil icon to add values for these fields.

+Add Direct Services +Add Contact

SERVICE TYPE F	OTHER TEXT F	WHO IS SERVICE FOR F	FRSTNAME F	LASTNAME F	PROVIDER F	SERVICE DELIVERY TYPE F	MODIFIEDBY F	MODIFIED F	EDIT DEMOGRAPHICS F	EDIT F	INACTVATE F
Q	Q	Q	Q	Q	Q	Q	Q	Q	X		

No records to display.

Click the **+Add Direct Services** button



Direct Services Tab

1. Enter the required information
2. Click **Save**

Examples of Direct Services:

- Technology support
- Giving a basic need
- Advocacy
- Educational support
- Enrollment support

Add/Edit Direct Services [Close]

*Service Date [Calendar icon]

*Who is this Service for?

*Service Type

Services Provided in Conjunction with:(if applicable)

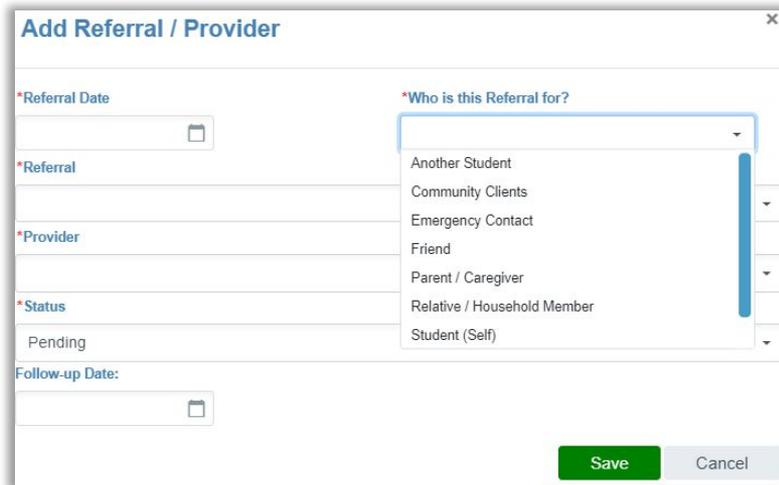
*Service Delivery Type

Save Cancel



Add a Direct Service

- When you add or edit a direct service
Select **Referral Date, Referral, Provider & Status**
 - **Who is this Service for?**
 - Depending on the selection, you will have an existing list of names or you type in a name
 - Use  if the name is not available and add as much information as possible
 - Choose **Follow-up Date**
 - Click **Save**



Add Referral / Provider

*Referral Date

*Referral

*Provider

*Status

Follow-up Date:

*Who is this Referral for?

- Another Student
- Community Clients
- Emergency Contact
- Friend
- Parent / Caregiver
- Relative / Household Member
- Student (Self)

Save Cancel



Add a Direct Service, Cont.

- Select the **Service Type**
- You have the **option** to add an agency that you worked with
 - ...**In Conjunction with**
 - **Location** of the partner organization
 - **Service Delivery Type**
 - In person, phone, virtual

Add/Edit Direct Services

*Service Date: 11/15/2021

*Who is this Service for?: Student (Self)

*Student: Betty White

*Service Type: Educational Supports (tutoring, college prep)

Services Provided in Conjunction with:(if applicable): Just Us 4 Youth

*Location: Main Office

*Service Delivery Type: Virtual

Save Cancel



Direct Services Example

General Information

- School Name: Azusa HS
- Search Primary Student
- Date of Service: Today
- Engagement with CS: Met with CS Staff-Provided Referrals and/or Direct Services
- Referral Source: Self-walk in
- Notes: Student came in stating his family was in need of groceries



Family Support Details

General Information | Family Linkage | Referrals/Goods | Direct Services

Follow-up Support

* School Name ⁱ
Azusa High S... x - Search Primary

Student Name : SSID : District Student Id
Brad Pitt 89164 123456

* Select Your Role
 Community Schools Specialist
 Education Community Worker

* Date of Service
11/18/2021

* Person Spoke to
Student x -

* First Name * Last Name
Brad Pitt

Support Information

* Engagement with CS Staff Outcome ⁱ
Met with CS Staff-Provided Referrals and/or ... x -

* Referral Source
Self-Walk in x -

* Notes
Student came in stating his family was in great need of groceries

- Select Your Role
- Person Spoke to: Student
- First Name & Last Name

Family Support Direct Services - Details Grid

- Use the grid to view existing family support direct services details, add a contact or a direct service.
- Click on the edit icon
 - Under **EDIT DEMOGRAPHICS**
 - **EDIT** the direct services record
 - Or **INACTIVATE** the record

Family Support Details

General Information | Family Linkage | Referrals/Goods | **Direct Services** | Follow-up Support

Date of Service : 11/09/2021

Instructions:
You cannot add Direct Services until you have filled out the General Information for this family support.
Add Contact = When adding a referral, if you are unable to locate the name of the person referred, use this function to add new contact information for the person referred.

Please Note:
Red highlighted row(s) in grid = Person referred is missing one of the following fields: Primary Language, Assigned Sex At Birth, Gender Code, or Date Of Birth. Use the "Edit Demographics" pencil icon to add values for these fields.

+Add Direct Services +Add Contact

WHO IS SERVICE FOR	FIRSTNAME	LASTNAME	PROVIDER	SERVICE DELIVERY TYPE
Parent / Caregiver				Phone

EDIT DEMOGRAPHICS EDIT INACTIVATE

X

[Pencil icon] [Pencil icon] [Pencil icon]



End of Example



Direct Services Example 2

+Add Direct Services In Conjunction With

- Service Date: Today
- Student
- Service Type: Basic Needs Support
- Services Provided in Conjunction with: (if applicable): ACTION Food Pantry
- Location: Main Office

The screenshot shows a web form titled "Add/Edit Direct Services". The form contains several fields with the following values:

- *Service Date:** 11/18/2021
- *Who is this Service for?:** Student (Self)
- *Student:** Brad Pitt
- *Service Type:** Basic Needs Support
- Services Provided in Conjunction with:(if applicable):** ACTION Food Pantry
- *Location:** Main Office
- *Service Delivery Type:** In-Person

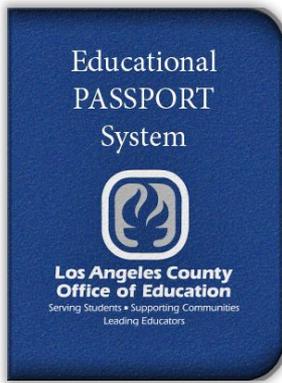
At the bottom right of the form are "Save" and "Cancel" buttons.

- Service Delivery Type: In-Person
- Who is this Service for? Student (Self)



End of Example





Partnerships



- [Partnerships Home](#)
- [Community Partnership](#)
- [School Partnership Tab](#)

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helpdesk@lacoe.edu

Partnerships Home

- Confirm the community partner exists in the system
- If needed add them for approval



Partnerships

Sorting/Search: Click on a column header to sort in ascending or descending order. Enter a partial or full search string in any column to filter the field to your search criteria.

Add Partner: Please use the "Add Partner" button to add a new agency/organization and assign school partnerships. Only designated administrators can approve new agencies and locations after the changes have been submitted.

There are agencies and/or locations pending administrator approval.

Sort or search the "Status" column to locate agencies with "Unknown" or "Pending" agency and/or location status. If you are an administrator, click on the "Edit" icon to accept/reject or modify the information pending approval.

Show entries

Edits a record
 Inactivates record and removes it from view

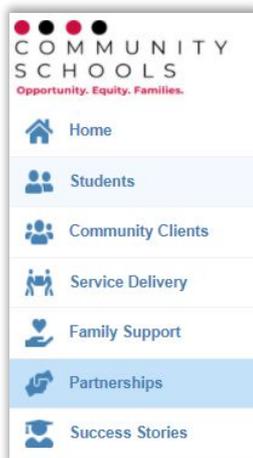
[+Add Partner](#)

ID	AGENCY/ORGANIZATION	DESCRIPTION	STATUS	EDIT
245	1736 Family Crisis Center	Help for victims of domestic violence, runaway youth and homelessness	Accepted	
1	211 LA County	Resource information	Accepted	
199	ACTION Food Pantry	Food Distribution	Accepted	



Partnerships Details - Community Partnership

- Search for Agency in **Name of Agency/Organization** box
- To avoid duplicate entries add only if Agency/Organization is **not** found



Partnerships Details

Community Partnership | School Partnership

1. Start typing the agency name. If the Agency is found, do NOT add it in order to avoid duplication. Please return to the grid and select the agency you need.

2. After saving new agency information, the button for "Add Additional Location" will appear. At least one location is required per agency. An agency can have multiple locations. If you are not in an approver role, an approval request is sent to designated administrators once you click "Save" on the location pop-up window. Once approved, locations can be selected in Service Delivery and Family Support cases.

3. You can add a school partnership to a new agency and/or location once the agency and location has been saved and while pending approval, but you can't select it in service delivery nor family support until approved.

Agency Information

*Name of Agency/Organization
1738 Family Crisis Center

*Agency Address
2116 Arlington Avenue Suite 200, Los Angeles, CA 90018

*Agency Phone (Enter in this format: xxx-xxx-xxxx)
(323) 737-3900

Agency Phone Ext.

*Description
Help for victims of domestic violence, runaway youth and homelessness

Agency Email
TED@tbd

Updated By: Chavez_Martha@laccoc.edu | Updated On: 7/21/2021 4:17:53 PM

Inactivate | Save | Cancel

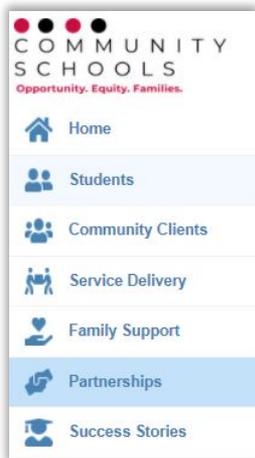
+ Add Additional Location

Add Additional Location: Please enter at least one location for this agency (if new) or enter the location you need for your school partnership if it doesn't exist yet.

ID #	LOCATION NAME #	LOCATION ADDRESS #	LOCATION PHONE #	LOCATION EMAIL #	STATUS #	EDIT #	INACTIVATE #	ACCEPT #	REJECT #
399	Santa Monica/ Malibu Unified Schools District	1651 16th St. Santa Monica, CA 90404	310-450-8338		Accepted	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
479	Test Location for Training	1234 Main St.	5551234567	dona@d Disney.com	Accepted	<input checked="" type="checkbox"/>	<input type="checkbox"/>		

Partnerships Details - Community Partnership

- **Save** and then click 
- At least one location is required per agency
- *Each provider's location must be linked to school site to be able to select them as a provider for activities*



Partnerships Details

Community Partnership | School Partnership

1. Start typing the agency name. If the Agency is found, do NOT add it in order to avoid duplication. Please return to the grid and select the agency you need.
2. After saving new agency information, the button for "Add Additional Location" will appear. At least one location is required per agency. An agency can have multiple locations. If you are not in an approver role, an approval request is sent to designated administrators once you click "Save" on the location pop-up window. Once approved, locations can be selected in Service Deliveries and Family Support cases.
3. You can add a school partnership to a new agency and/or location once the agency and location has been saved and while pending approval, but you can't select it in service delivery nor family support until approved.

Agency Information

*Name of Agency/Organization
1736 Family Crisis Center

*Agency Address
2116 Arlington Avenue Suite 200, Los Angeles, CA 90018

*Description
Help for victims of domestic violence, runaway youth and homelessness

*Agency Phone (Enter in this format: xxx-xxx-xxxx) (323) 737-3900 Agency Phone Ext

Agency Email
TBD@ed

Updated By: Chavez_Martha@laccoe.edu Updated On: 7/21/2021 4:17:53 PM

+ Add Additional Location

Add Additional Location: Please enter at least one location for this agency (if new) or enter the location you need for your school partnership if it doesn't exist yet

ID #	LOCATION NAME #	LOCATION ADDRESS #	LOCATION PHONE #	LOCATION EMAIL #	STATUS #	EDIT #	INACTIVATE #	ACCEPT #	REJECT #
390	Santa Monica/ Malibu Unified Schools District	1651 16th St, Santa Monica, CA 90404	310-450-8338		Accepted	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
478	Test Location for Training	1234 Main St.	5551234567	dona@d@disney.com	Accepted	<input checked="" type="checkbox"/>	<input type="checkbox"/>		

Partnerships Details - School Partnership Tab

- Filter the table by clicking on column headers
- Click to add a partner organization



Partnerships Details

Community Partnership | **School Partnership**

You can add a partnership with an agency even if the agency is pending approval. You cannot add or edit partnerships to schools that you have not been assigned to.

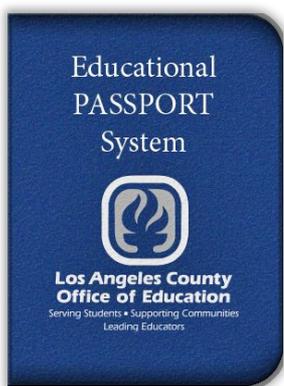
Sorting/Search: Click on a column header to sort in ascending or descending order. Enter a partial or full search string in any column to filter the field to your search criteria.

Add School Partnership: Please use the "Add School Partnership" button to add a partnership with this agency/location to the school.

- Edits a record
- Inactivates a record and removes it from view
- Click to view details (you cannot edit this record)

ID	SCHOOL NAME	FORMAL AGREEMENT	PRIMARY SERVICE TYPE	ACTION	INACTIVATE
360	AZUSA HIGH SCHOOL	N	DCFS		





Service Delivery



- [Service Delivery Home](#)
- [Outreach](#)
- [Event](#)
- [Household Linkage](#)
- [Grants/Monetary Donations](#)
- [Direct Gift Card Donations](#)
- [Distribution Event](#)
- [Store Distribution](#)
- [Quantity Advisements](#)
- [Shared Decision-Making](#)

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Service Delivery Overview



- Use **Service Delivery** to add new activities or view existing data
- Click **+Add Service Delivery** for a new case

The screenshot displays the 'Service Delivery' page within the 'COMMUNITY SCHOOLS' system. The top navigation bar includes the user's name 'Hello, Schwanz_Mark@lacc.edu!' and a 'Log Out' link. The left sidebar contains a menu with options: Home, Students, Community Clients, Service Delivery (highlighted), Family Support, Inventory Management, Partnerships, Success Stories, Standards Assessment, CALPADS Upload, and Reports. The main content area is titled 'Service Delivery' and contains several informational sections: 'Permissions', 'Sorting/Search', 'Date filtering', and 'Add Service Delivery'. A 'Show 10 entries' dropdown is visible. Below these sections is a search area with filters for 'District', 'High School', 'Type Of Data', 'Person Entering Data', 'ID', 'From Date', 'To Date', and 'Date Search Criteria'. A '+Add Service Delivery' button is highlighted with a red box. On the right side, there are two icons: a pencil for 'Edits a record' and a trash can for 'Inactivates a record and removes it from view'. At the bottom right of the search area are 'Clear' and 'Search' buttons.



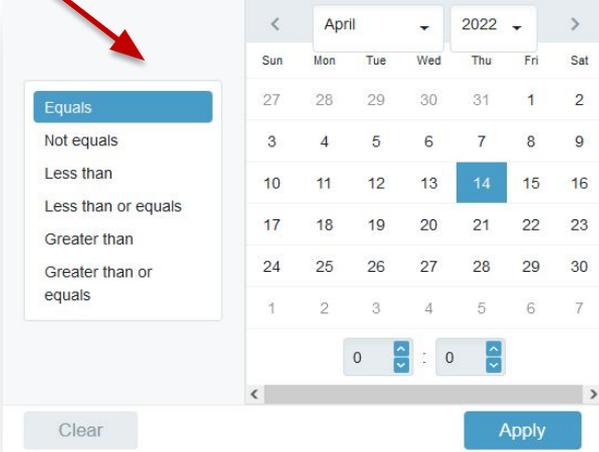
Service Delivery Home

Search and Filter With the Grid



- Sort any column of the grid by clicking on ≡
- Enter text and press **Enter** in any column heading with 🔍
- Click 📅 to open the calendar pop-up, choose settings & click 

ID ≡	DATE OF REFERENCE 📅	SERVICE TYPE ≡	ENTERED BY ≡	TYPE OF DATA ≡	LINKED ≡
🔍	📅	🔍 Basic	🔍	🔍	🔍
36	3/10/2022	Basic Needs Support	Community Schools Specialist	Transfer of Goods	
32	3/8/2022	Basic Needs Support	Community Schools Specialist	Transfer of Goods	
27	3/8/2022	Basic Needs Support	Community Schools Specialist	Transfer of Goods	



A calendar pop-up window is shown, displaying the month of April 2022. The date April 14, 2022, is highlighted. A dropdown menu is open over the calendar, showing filter options: Equals, Not equals, Less than, Less than or equals, Greater than, and Greater than or equals. The 'Equals' option is selected. A red arrow points from the 'Apply' button in the instructions above to the 'Equals' option in the dropdown. The calendar has 'Clear' and 'Apply' buttons at the bottom.



Service Delivery Grid with "Basic" in **Service Type**

Calendar set for Date = April 14, 2022

Service Delivery Home

Continued



- Search fields are available above the Service Delivery Grid
- Search by District, High School, Type of Data, Person Entering, ID, & Date

Search

District X

High School X

Type Of Data X

Person Entering Data X

ID From Date To Date

Date Search Criteria X

Clear Search

ID	DATE	SERVICE TYPE	ENTERED BY	TYPE OF DATA	LINKED	DESCRIPTION	MODIFIED ON	EDIT	INACT
<input type="text"/>									

Use **Search** to filter the grid and quickly locate Service Delivery data



School Success Stories

Example



A new feature allows you to complete a success story that is not linked to a particular student. This success story links to a school as a Service Delivery.

The screenshot shows the 'Service Delivery Details' form. It includes a 'Service Delivery' dropdown menu (1) with the selected value 'Systems Building / Reflections / Success Stories'. Below it is a 'Date of Reference/Week Ending Date' field (2) with the value '3/9/2023'. The 'Primary Service Type' dropdown (3) is set to 'Basic Needs Support'. The 'Additional Services Provided' section (4) contains a list of checkboxes, with 'Basic Needs Support' selected. The 'Community Schools Pillar' section (5) has a dropdown menu with 'Integrated Student Supports' selected. The 'Person Entering Data' dropdown is also visible.

Click **Service Delivery** and **+Add Service Delivery**

1. Type of Data: **Systems Building / Reflections / Success Stories**
2. Primary Service Type: **Basic Needs Support**
3. Community Schools Pillar: Int. Student Supports
4. Additional Services Provided: N/A
5. Person entering data: choose one



School Success Stories

Example, Concluded



Complete details for the success story:

1. District/School: Azusa
2. Systems Building / Reflections: Success Stories
3. Description: Type a summary of the success story
4. Choose and upload documents, images, and small video files
5. Click **Save**

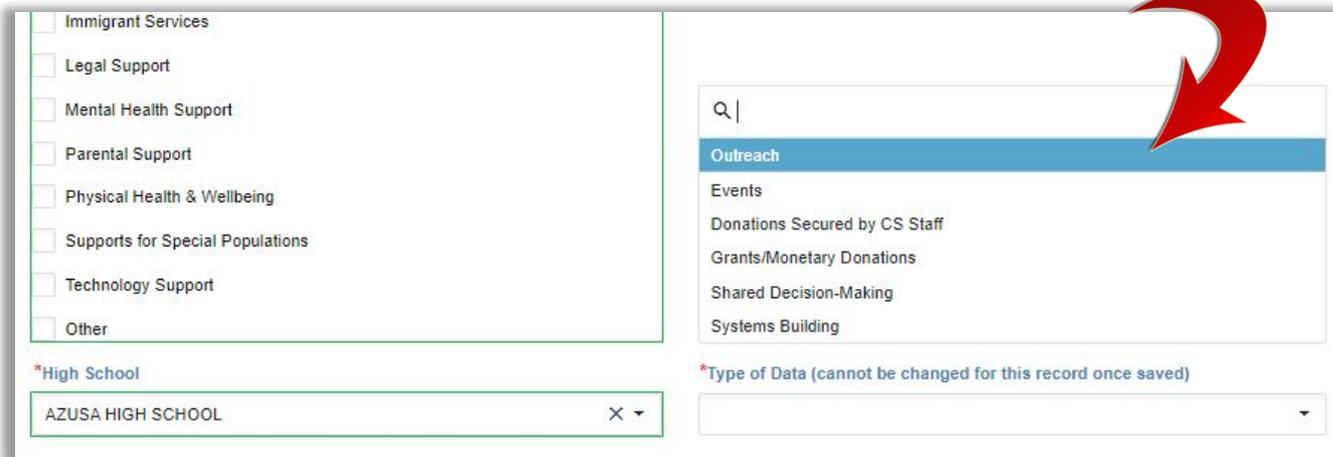
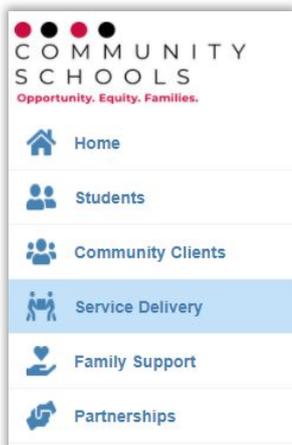
The screenshot shows a web form for creating a success story. It is divided into several sections:

- District and School:** Two dropdown menus. The first is labeled "District" and contains "Azusa Unified". The second is labeled "School" and contains "Azusa High School". A red circle with the number "1" is next to the "School" dropdown.
- Systems Building / Reflections:** A section with a heading and a "Select Type" label. It contains a list of radio button options: "Community Partner Collaboration", "County Collaboration", "District Collaboration", "LACOE Collaboration", "Program Development", "Reflection", "School Systems Change", "Success Stories", and "Other". The "Success Stories" option is selected. A red circle with the number "2" is next to it.
- Description:** A text area containing the text: "This is a fuller description of a school success story. The supporting documentation is added to the uploaded files (see the list on the right)." A red circle with the number "3" is next to the text area.
- Supporting Documents:** A section titled "Systems Building / Reflections Supporting Documents" with a sub-heading "(documents, images, and small video files allowed)". It includes a "Choose files to upload" label, a "Choose Files" button, and a file name "Success Story Document.pdf" next to a green upload icon. Below this is a table with two columns: "File Name" and "Actions". The table contains one row with the file name "Success Story Document..." and two buttons: "Download" and "Delete". A red circle with the number "4" is next to the table.
- Save Button:** A green "Save" button and a grey "Cancel" button. A red circle with the number "5" is next to the "Save" button.



Service Delivery – Outreach

- On the **Service Delivery** page select 
- When you enter outreach it must be linked to an event
- After you choose **Outreach** as the **Type of Data** more options will appear below



Immigrant Services
Legal Support
Mental Health Support
Parental Support
Physical Health & Wellbeing
Supports for Special Populations
Technology Support
Other

*High School
AZUSA HIGH SCHOOL

Search |
Outreach
Events
Donations Secured by CS Staff
Grants/Monetary Donations
Shared Decision-Making
Systems Building

*Type of Data (cannot be changed for this record once saved)



Service Delivery – Outreach Details

1. Type in the **Purpose of Outreach**
2. Choose the **Outreach Audience** (Select all that apply)
3. Additional information about outreach efforts (Please identify the event or reason for outreach.)

Outreach

*Purpose of Outreach

1.

*Outreach Audience

2. Parent/Caregiver
 Student
 Community
 Staff

Additional Information about outreach efforts (Please identify the event or reason for outreach.)

3.

Linkage Instructions
If you are adding this outreach for a future event, please remember to link this outreach to the event after the event has occurred and you have entered the event information as its own service delivery.



Service Delivery – Outreach Details, Continued

1. Select **Type of Outreach** with estimated number contacted. Select all that apply.

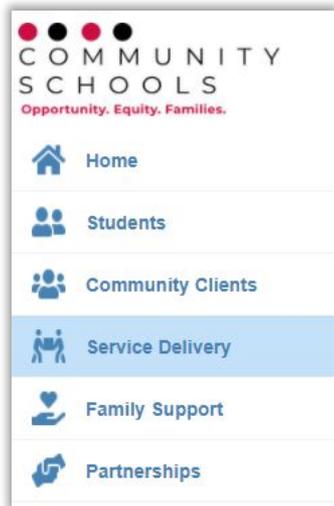
2. Include supporting documentation uploads then **Save**

For supporting documentation include MS Office files, Adobe PDF, Images (PNG, JPG) and/or small video files (< 50 mb)

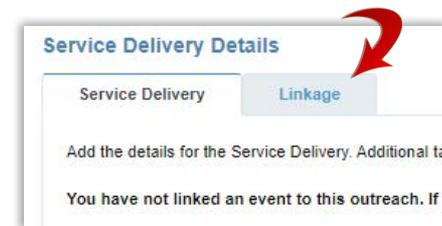
The screenshot shows a web form titled "Type of Outreach". It has three columns: "Type of Outreach", "Estimated Number Attempted", and "Number Contacted". The first column contains a list of outreach methods with checkboxes: Presentation of Information, In Person, Personalized Phone/Text, Email, Social Media, District/School Website, Flyer Distribution, Automated Phone Calls, Mass Text Messages, and Other. The second and third columns have corresponding input fields with up/down arrows. A blue box labeled "1." highlights the "Presentation of Information" checkbox. Below this is a section titled "Outreach Supporting Documents" with the text "(documents, images, and small video files allowed): Choose files to upload". It features a "Choose Files" button, a text input field showing "No file chosen", and a green upload icon. A blue box labeled "2." highlights the "Choose Files" button. At the bottom right are "Save" and "Cancel" buttons. A red note at the bottom says "Please click on the green upload button to upload your file."



Service Delivery – Outreach Linkage



- One way to link your outreach to an event is to search for the event on the **Service Delivery** table
- Select the **Edit** icon then **Linkage** tab
- Click **Link Event** if you don't see the event in the **Current Event(s) Linked to this Outreach** table
- Search for the event and then click the **Save** icon under **SAVE AND LINK**



Staff Development

Example 1



In Service Delivery click **+Add Service Delivery**

Service Delivery Details

Service Delivery | Linkage | Household Linkage

Add the details for the Service Delivery. Additional tabs will appear for an "Outreach" or "Event" selection for the "Type of Data" field.

*Type of Data (cannot be changed for this record once saved)

Events

*Date of Reference/Week Ending Date

9/29/2022

*Primary Service Type (Select the category MOST RELATED to the Event's topic.)

Mental Health Support

Additional Services Provided

- Basic Needs Support
- Behavioral Interventions and Supports
- Educational Support (books, tutoring, college prep)
- Enrichment Programs / After-School Programming
- Employment / Career Support
- Family Engagement
- Financial Support
- Housing Support
- Immigrant Services
- Legal Support
- Mental Health Support

Community Schools Pillar

- Integrated Student Supports
- Expanded and Enriched Learning Time and Opportunities
- Active Family and Community Engagement
- Collaborative Leadership and Practices

*Person Entering Data

- Community Schools Specialist
- Educational Community Worker
- Intern
- Psychiatric Social Worker
- School Social Worker

[Click here for a list of the Activity Types and their definitions.](#)

1. Type of Data: **Events**
2. Date: Use the prefilled date for today or choose a date
3. Primary service type: **Mental Health Support**
4. Person Entering Data: **Intern**



Click the blue text to review the list of the **Activity Types** and their definitions

Staff Development

Example 1, Continued



*High School
Azusa High School 1

Events
*Type of Events
 Workshop / Training 2
 Health / Resource Fair
 Enrollment Event
 Classroom Enrichment
 Distribution of Goods
 Presentation / Informational / Q&A
 Other

* Sponsor/Provider
Azusa High School 3

* Location
Counseling Staff 4

*Event Topic
Indicate content or information covered (e.g. social media, bullying, graduation requirements)
How to make a referral for mental health assessment 5

*Role in Coordinating Event
A "direct" role in coordinating an event means that you initiated and facilitated the planning for the event (e.g. without your efforts this event would not have taken place). If you played an "indirect" role it means that you were involved in assisting but the school/partner initiated the event.
 Direct Indirect 6

*Primary Event Audience
Staff 7

*Event Audience
Number of Participants (Including # of Household Linkages)
 Parent/Caregiver
 Student
 Community
 Staff 8 12

Event Notes

PBIS
 Academic
 Attendance
 Behavior 9

Event Supporting Documents
(documents, images, and small video files allowed):
Choose files to upload
Choose Files No file chosen 9
Please click on the green upload button to upload your file.

1. High School: Select one
2. Events: **Workshop/Training**
3. Sponsor/Provider: Select one
4. Location: Select one
5. Event Topic: fill in
6. Role in Coordinating: Direct
7. Primary Event Audience: **Staff**
8. Click the Staff box and enter 12
9. PBIS and file upload: if applicable
10. Click **Save**



End of Example



Shared Decision-Making

Example 2



In Service Delivery click **+Add Service Delivery**

1. Type of Data: **Shared Decision-Making**
2. Date: the prefilled date for today or choose a date
3. Primary service type: **Mental Health Support**
4. Person Entering Data: **Intern**
5. Choose a school

The screenshot shows the 'Service Delivery Details' form. It includes the following fields and options:

- Type of Data:** Shared Decision-Making (marked with a red circle 1)
- Date of Reference/Week Ending Date:** 9/30/2022 (marked with a red circle 2)
- Primary Service Type:** Mental Health Support (marked with a red circle 3)
- Additional Services Provided:** A list of checkboxes including Basic Needs Support, Behavioral Interventions and Supports, Educational Support, Enrichment Programs, Employment / Career Support, Family Engagement, and Financial Support.
- Community Schools Pillar:** A list of checkboxes including Integrated Student Supports, Expanded and Enriched Learning Time and Opportunities, Active Family and Community Engagement, and Collaborative Leadership and Practices.
- Person Entering Data:** A list of checkboxes including Community Schools Specialist, Educational Community Worker, Intern (checked, marked with a red circle 4), Psychiatric Social Worker, and School Social Worker.
- High School:** Azusa High School (marked with a red circle 5)

Red callout boxes with numbers 1 through 5 are placed over the corresponding fields. A red arrow points from a text box on the right to the 'Person Entering Data' section.

Click the blue text to review the list of the **Activity Types** and their definitions



Shared Decision-Making

Example 2, Continued



1. Grouping Type: **Coordination of Service Teams**
2. Number of New Students Reviewed: 12
3. Date of Meeting: choose a date
4. Summary of Meeting Outcome: Enter details to summarize the meeting outcome
5. Role in coordinating: Direct (initiated) Indirect (assisted)
6. Attendees: Check boxes for attendees and enter numbers for each (required)*
7. Upload documents, if any, then click **Save**

End of Example



Shared Decision-Making

1 *Grouping Type
Coordination of Services Teams

2 *Number of New Students Reviewed (numeric only)
12

3 *Date of Meeting
10/3/2022

4 *Summary of Meeting and Outcome
Enter as much detail as needed to summarize the meeting outcome.

5 *Role in Coordinating Meeting
A "direct" role in coordinating a meeting means that you initiated and facilitated the planning for the meeting (e.g. without your efforts this meeting would not have taken place). If you played an "indirect" role it means that you were involved in assisting but the school/partner initiated the meeting.
 Direct Indirect

*Attendees

	Number of Attendees
<input type="checkbox"/> Parent/Caregiver	
<input checked="" type="checkbox"/> Student	4
<input checked="" type="checkbox"/> Community	4
<input checked="" type="checkbox"/> Staff	3
<input type="checkbox"/> Other	

6

Shared Decision-Making Supporting Documents
(documents, images and small video files allowed):
Choose files to upload

Choose Files No file chosen

7

Please click on the green upload button to upload your file.

Save

Support Groups Event Category

Example 3



Click **Service Delivery** in the main menu

1. Click **+Add Service Delivery**
2. Type of Data: **Events**
3. Date: Use the default or choose a date
4. Primary Service Type: **Mental Health Support**
5. High School: Azusa (choose a school available to you)
6. Type of Events: **Support Groups**
7. Other items (top section)

Events

*Type of Events

- Workshop / Training
- Health / Resource Fair
- Enrollment Event
- Classroom Enrichment
- Distribution of Goods
- Presentation / Informational / Q&A
- Community Building
- Support Groups
- Other

- ✓ Community Schools Pillar: Make selection(s)
- ✓ Person entering data: Select one
- ✓ Co-Facilitators: Click select to search and choose, if any



Community Schools Pillar

Integrated Student Supports

- Expanded and Enriched Learning Time and Opportunities
- Active Family and Community Engagement
- Collaborative Leadership and Practices

*Person Entering Data

- Community Schools Specialist
- Educational Community Worker
- Intern
- Psychiatric Social Worker
- School Social Worker

Click [here](#) for a list of the Activity Types and their definitions.

Co-Facilitator(s)

Select...

Support Groups Event Category

Example 3, Continued



1. Primary Event Audience: **Students**

2. Event Audience

Parent/Caregiver: 0

Student: **12**

Community: 0

Staff: 0

3. Event Notes: **Sample for training**

4. Sponsor/provider: **211 LA County**

5. Location: **211 LA County-Your site**

6. Event Topic: **Mental health workshop**

7. Role in coordinating: **Direct**

The screenshot shows the 'Events' form with the following fields and values:

- Type of Events:** Support Groups (selected)
- Primary Event Audience:** Student (selected)
- Event Audience:** Student (selected), Number of Participants: 12
- Event Notes:** sample for training
- Sponsor/Provider:** 211 LA County
- Location:** 211 LA County-Azusa HS
- Event Topic:** mental health workshop
- Role in Coordinating Event:** Direct (selected)

Red callouts 1-7 point to the following elements:

- Primary Event Audience dropdown
- Student checkbox in Event Audience
- Event Notes text field
- Sponsor/Provider dropdown
- Location dropdown
- Event Topic text field
- Direct radio button in Role in Coordinating Event

Click  to complete the entry



End of Example



Events – Household Linkage



After **Save**, Service Delivery tabs are available

1. Click on **Household Linkage**
2. Click **Link Family** to search for a student or contact and link them to the event
3. Use **Student/Family Search** to link students or contacts one at a time
4. Or, use **Upload List/Link Multiple Attendees**

Service Delivery Details

Service Delivery | **Linkage** | Household Linkage

Add the details for the Service Delivery. Additional tabs will appear for an "Outre

*Type of Data (cannot be changed for this record once saved)

Events

Student/Family Search

Create Link To* Student Family

School Enter partial or full First Name, Last Name or SSID

FIRST NAME	LAST NAME	HOMEPHONE	RELATIONSHIP	STUDENT SSID	SELECT
xxlejox	xonethx			9389821216	<input type="checkbox"/>
xxloax	xxesuxx			3047639397	<input type="checkbox"/>
xxMorax	xxfielx			9119630271	<input type="checkbox"/>
xxleabx	xxleaxx			8136993338	<input type="checkbox"/>

Upload List/Link Multiple Attendees

A) Upload a Roster for Linking Multiple Attendees

To quickly link families/students to this event, upload a roster in an approved Excel format.



Events – Household Linkage



Upload Roster

A) Upload a Roster for Linking Multiple Attendees

1. **Download** the sample file and fill out the workshop attendee information
2. Click **Choose Files** to upload
3. Click the upload icon 

Upload List/Link Multiple Attendees

A) Upload a Roster for Linking Multiple Attendees

To quickly link families/students to this event, upload a roster in an approved Excel format.

1. Click [here](#) to download a sample file. First Name and Last Name are required to be entered, all others are optional. You may add additional columns of data after the last column in this file and they will be ignored by the matching process.
2. Click “**Choose Files**” to browse your computer and select the file containing attendee information.
3. Click on the green upload icon to upload your file. If the file was successfully uploaded, the file name will display in a grid.
4. **VERIFY THE CORRECT FILE WAS UPLOADED.** If the incorrect file was uploaded, click the delete button to remove and re-upload.
5. This will undo any linkages that might have already occurred if you have used **Linked Attendees**.

Please upload the Excel roster file:

No file chosen 

Please click on the green upload button to upload your file.



The steps are listed under **Upload List/Link Multiple Attendees**

Events – Household Linkage

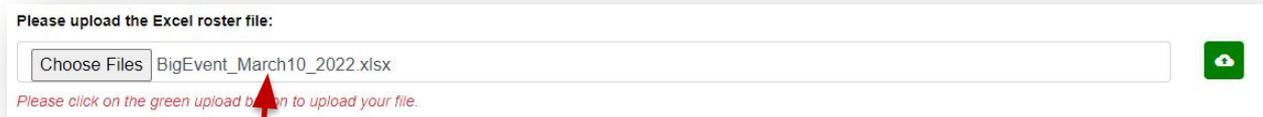


Upload Roster

Tip for File Management

- After downloading the sample file use **File > Save As** with name, including the title and date for easy identification

- Example:



- **Title:** BigEvent

- **Date:** March10_2022

BigEventMarch10_2022.xlsx



	A	B	C	D
1	District Student ID	First Name	Middle Name	Last Name
2		Joe		Brown
3		Charles		Diaz
4		Juan		Esposito
5		Mike		Graham

For best results, roster file should include *at least* school ID, first and last name



Events – Household Linkage

Upload Roster

B) Link Attendees to Event

1. Verify by clicking on the file name in the **File Name** table
2. Delete and re-do if needed
3. Click 
4. Wait a moment for it to load and process

	File Name	Actions
	BigEvent_March10_2022.x...	

B) Link Attendees to Event

Click "**Link Attendees**" to begin the process. The application will read each line of the Excel file and try to automatically link attendees to this event.





End of Example



Parent Workshops

Example

Click **Service Delivery** in the main menu to view

1. Click **+Add Service Delivery**
2. Type of Data: **Events**
3. Date: Use the default or choose a date
4. Primary Service Type: **Mental Health Support**
5. High School: Azusa
6. Type of Events: **Workshop/Training**
7. Other items (top section)

✓ Community Schools Pillar: Make selection(s)

✓ Person entering data: Select one

✓ Co-Facilitators: Click select to search and choose, if any



Events

*Type of Events

- Workshop / Training
- Health / Resource Fair
- Enrollment Event
- Classroom Enrichment
- Distribution of Goods
- Presentation / Informational / Q&A
- Community Building
- Support Groups
- Other

Community Schools Pillar

- Integrated Student Supports
- Expanded and Enriched Learning Time and Opportunities
- Active Family and Community Engagement
- Collaborative Leadership and Practices

*Person Entering Data

- Community Schools Specialist
- Educational Community Worker
- Intern
- Psychiatric Social Worker
- School Social Worker

Click [here](#) for a list of the Activity Types and their definitions.

Co-Facilitator(s)

Select...

Parent Workshops

Example, Continued



1. Primary Event Audience: **Parent**
2. Event Audience
Parent/Caregiver: **12**
Student: **2**
Community: **2**
Staff: **0**
3. Event Notes: **Sample for training**
4. Sponsor/provider: **DPH Wellbeing**
5. Location: **DPH Wellbeing Center**
6. Event Topic: **Mental health workshop**
7. Role in coordinating: **Indirect**

The screenshot shows the 'Events' form with the following fields and values:

- 1** Primary Event Audience: Parent/Caregiver
- 2** Event Audience: Parent/Caregiver (12), Student (2), Community (2), Staff (0)
- 3** Event Notes: sample for training
- 4** Sponsor/Provider: Department of Public Health (DPH) Wellbeing Center
- 5** Location: Wellbeing Center-Azusa HS
- 6** Event Topic: Mental Health Workshop
- 7** Role in Coordinating Event: Indirect

Click  to complete the entry



End of Example



Grants/Monetary Donations

Gift Card Example

Click [+Add Service Delivery](#) to record your purchased gift cards

Service Delivery

Permissions: Your role and school assignment(s) will determine which records are displayed.

Sorting/Search: Click on a column header to sort in ascending or descending order. Enter a partial or full search string in any column to filter the field to your search criteria.

Date filtering: Date fields can be filtered on different criterias by clicking on the calendar icon.

Add Service Delivery: Please use the "Add Service Delivery" button to add a new service delivery record.

Show entries

Edits a record

Inactivates a record and removes it from view

[+Add Service Delivery](#)

ID	DATE	SERVICE TYPE	ENTERED BY	TYPE OF DATA	LINKED	DESCRIPTION	MODIFIED ON	EDIT	INACTIVATE
366	9/22/2021	Mental Health Support	Educational Community Worker	Events	N	The Return of Children to School During Covid-19	9/23/2021		
365	9/22/2021	Mental Health Support	Educational Community Worker	Events	N	El Regreso de niños a la escuela durante Covid-19	9/23/2021		
364	9/16/2021	Family Engagement	Educational Community Worker	Events	N	Local Resources, Events, Calendar and Intervention...	9/23/2021		



Grants/Monetary Donations

Gift Card Example, Continued

1. Select **Grants or Monetary Donations** for **Type of Data**
2. Click the calendar if you need to change the **Date of Reference**
3. Select **Basic Needs Support** for **Primary Service Type**
4. Choose **Community Schools Pillar** and **Person Entering Data**

Service Delivery Details

Service Delivery

Add the details for the Service Delivery. Additional tabs will appear for an "Outreach" or "Event" selection for the "Type of Data" field.

1. *Type of Data (cannot be changed for this record once saved)
Grants/Monetary Donations

2. *Date of Reference/Week Ending Date
2/22/2022

3. *Primary Service Type
Basic Needs Support

*Community Schools Pillar

- Integrated Student Supports
- Expanded and Enriched Learning Time and Opportunities
- Active Family and Community Engagement
- Collaborative Leadership and Practices

4.

*Person Entering Data

- Community Schools Specialist
- Educational Community Worker
- Intern

Additional Services Provided

- Basic Needs Support
- Behavioral Interventions and Supports
- Educational Support (tutoring, college prep)
- Enrichment Programs / After-School Programming



Grants/Monetary Donations



Gift Card Example, Continued

1. Select High School from the drop-down and click **Grants**
 - Complete all fields (will vary based on donation type selected)
 - **Monetary Donations** are uncommon but do occur
2. Choose files to upload (Grant award letter, receipts)
 - File types allowed: MS Office, Adobe PDF, images (PNG, JPG) and/or short video
3. Click **+Add** to record the donations

The screenshot shows a web form for recording a grant. The form is titled "Grants/Monetary Donations" and has two radio buttons: "Grants" (selected) and "Monetary Donations". The form fields are as follows:

- High School:** A dropdown menu with "Azusa High School" selected. A blue box with the number "1." is around the dropdown.
- Grants Supporting Documents:** A section with a "Choose Files" button and a green upload button. A file named "Grant award letter.jpeg" is listed in a table below. A blue box with the number "2." is around the "Choose Files" button.
- Grant Start Date:** A date field with "2/22/2022" entered.
- Grant End Date:** A date field with "3/22/2022" entered.
- Grant Award Amount (numeric only):** A text field with "1000" entered.
- Description of Grant Purpose:** A text area with the text "This gift was specifically to help students with basic needs. We purchased 50 gift cards."

A blue box with the number "3." is around the "+Add" button at the bottom right of the form.

File Name	Actions
Grant award letter.jpeg	



Grants/Monetary Donations

Gift Card Example, Continued

- Complete the **Grants/Monetary Donations** pop-up for the gift cards purchased with the grant
 1. Type of Item: Gift Card
 2. Measurement Type: Items
 3. Description of Goods: Grocery gift cards
 4. Total Estimated Value: 500
 5. Quantity Received: 10
- Click **Save**

Grants/Monetary Donations x

If you are editing an existing record, you cannot change "Type of Item" and "Measurement Type". "Type of Item" and "Measurement Type" are used to determine the total quantities available and remaining for this particular type of item.

To change these after your initial save, please use "Add Goods" to add a new goods item and delete this item if it's no longer needed.

*Type of Item
Gift Card

*Measurement Type
Items

Description of Goods
Grocery gift cards

*Total Estimated Value (numeric only)
500

*Quantity Received
10

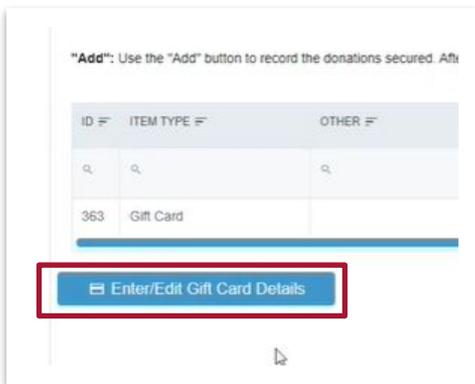
Save Cancel



Grants/Monetary Donations

End of Example

- **Details** opens automatically
- Click  if needed



- Add Starting Serial Number, Vendor Name, Quantity, and Amount of each card
- Click  to save them
- To close, click "X" in the top right corner

Gift Cards - Details

Gift card entries displayed in light grey text indicate the service delivery or family support record it belongs to has been inactivated. **Green = Created in current service delivery**

Available Distributed

All available gift cards display on this screen. Gift cards related to this service delivery are in green and displayed at the top

+Add Gift Cards: Enter the vendor name, the quantity of gift cards received, and the dollar amount of each gift card.

Once you click "+Add Gift Cards", this information will be used to create the appropriate number of rows for the gift cards and you must enter the gift card number or identifier for each gift card.

Starting Serial No(numeric only) Vendor Name Quantity Amount (each)

0 

End of Example



Distribution Event Gift Card Example 2

1. **Type of Data:** Events
2. **Date of Reference**
3. **Primary service type:**
Family Engagement
Additional:
Basic Needs Support
4. **Community Schools
Pillar and
Person Entering Data**

Service Delivery Details

Service Delivery | Linkage | Household Linkage

Add the details for the Service Delivery. Additional tabs will appear for an "Outreach" or "Event" selection for the "Type of Data" field.

*Type of Data (cannot be changed for this record once saved)

1. Events

*Date of Reference/Week Ending Date ?

2. 3/22/2022

*Primary Service Type (Select the category MOST RELATED to the Event's topic.)

3. Family Engagement

Additional Services Provided

Basic Needs Support
 Behavioral Interventions and Supports

*Community Schools Pillar

Integrated Student Supports
 Expanded and Enriched Learning Time and Opportunities
 Active Family and Community Engagement
 Collaborative Leadership and Practices

*Person Entering Data

Community Schools **4.**
 Educational Community worker



Distribution Event

Gift Card Example 2, Continued



1. **Select the High School**
2. **Type of Events:** Distribution of Goods
3. **Sponsor/Provider:** ACTION Food Pantry
Location: Main Office
4. **Event Topic:**
"Virtual Food Fair" event with information about community food resources; giving participating families gift cards for groceries
5. **Role in Coordinating:** Indirect



1.

2. **Events**
***Type of Events**

- Workshop / Training
- Health / Resource Fair
- Enrollment Event
- Classroom Enrichment
- Distribution of Goods
- Presentation / Informational / Q&A
- Other

3. ***Sponsor/Provider**

***Location**

4. ***Event Topic**
Indicate content or information covered (e.g. social media, bullying, graduation requirements)

5. ***Role in Coordinating Event**
A "direct" role in coordinating an event means that you initiated and facilitated the planning for the event (e.g. without your efforts this event would not have taken place). If you played an "indirect" role it means that you were involved in assisting but the school/partner initiated the event.
 Direct Indirect

Distribution Event

Gift Card Example 2, Continued

1. **Primary Event Audience:** Parent/Caregiver
2. **Event Audience:** enter number of participants for each category
3. **Event notes:** event held virtually, gift cards distributed to families by CS office
4. **PBIS:** Attendance
5. **Event Notes Supporting Documents**
6. **Click +Add Goods** to open the **Distribution of Goods** popup

The screenshot shows a web form titled "Primary Event Audience" with the following sections and callouts:

- 1.** A dropdown menu at the top left is set to "Parent/Caregiver".
- 2.** The "Event Audience" section contains a table with categories and participant counts:

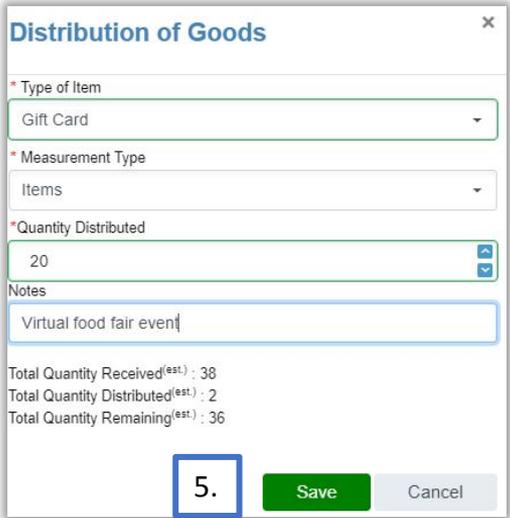
Event Audience	Number of Participants (Including # of Household Linkages)
<input checked="" type="checkbox"/> Parent/Caregiver	20
<input checked="" type="checkbox"/> Student	23
<input type="checkbox"/> Community	
<input type="checkbox"/> Staff	
- 3.** The "Event Notes" section contains the text: "event held virtually, gift cards distributed to families by CS office".
- 4.** The "PBIS" section has "Attendance" selected with a checked checkbox.
- 5.** The "Event Supporting Documents" section has a "Choose Files" button and a "No file chosen" message.
- 6.** A blue "+Add Goods" button is located at the bottom right of the form.



Distribution Event

Gift Card Example 2, Continued

1. **Type of Item:** Gift Card
2. **Measurement type:** Items
3. **Quantity Distributed:** 20
4. **Notes:** Virtual food fair event
5. **Click Save** on the **Distribution of Goods** popup and the Event Service Delivery



The screenshot shows a 'Distribution of Goods' popup window with the following fields and values:

- 1. * Type of Item: Gift Card
- 2. * Measurement Type: Items
- 3. * Quantity Distributed: 20
- 4. Notes: Virtual food fair event

Summary statistics at the bottom of the form:

- Total Quantity Received^(est.): 38
- Total Quantity Distributed^(est.): 2
- Total Quantity Remaining^(est.): 36

Buttons: Save (green), Cancel (grey)

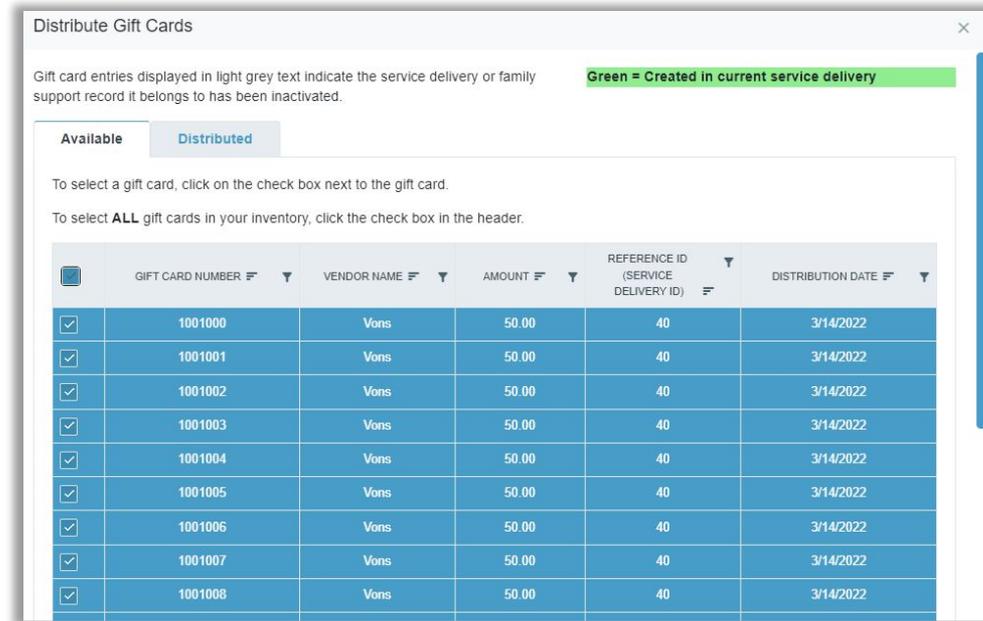


Distribution Event

End of Example 2



- On the **Available** tab view all available gift cards in inventory
- Check the boxes for the cards you gave out
- Click 



<input type="checkbox"/>	GIFT CARD NUMBER	VENDOR NAME	AMOUNT	REFERENCE ID (SERVICE DELIVERY ID)	DISTRIBUTION DATE
<input checked="" type="checkbox"/>	1001000	Vons	50.00	40	3/14/2022
<input checked="" type="checkbox"/>	1001001	Vons	50.00	40	3/14/2022
<input checked="" type="checkbox"/>	1001002	Vons	50.00	40	3/14/2022
<input checked="" type="checkbox"/>	1001003	Vons	50.00	40	3/14/2022
<input checked="" type="checkbox"/>	1001004	Vons	50.00	40	3/14/2022
<input checked="" type="checkbox"/>	1001005	Vons	50.00	40	3/14/2022
<input checked="" type="checkbox"/>	1001006	Vons	50.00	40	3/14/2022
<input checked="" type="checkbox"/>	1001007	Vons	50.00	40	3/14/2022
<input checked="" type="checkbox"/>	1001008	Vons	50.00	40	3/14/2022

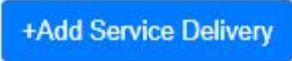
Distribute Gift Cards Popup



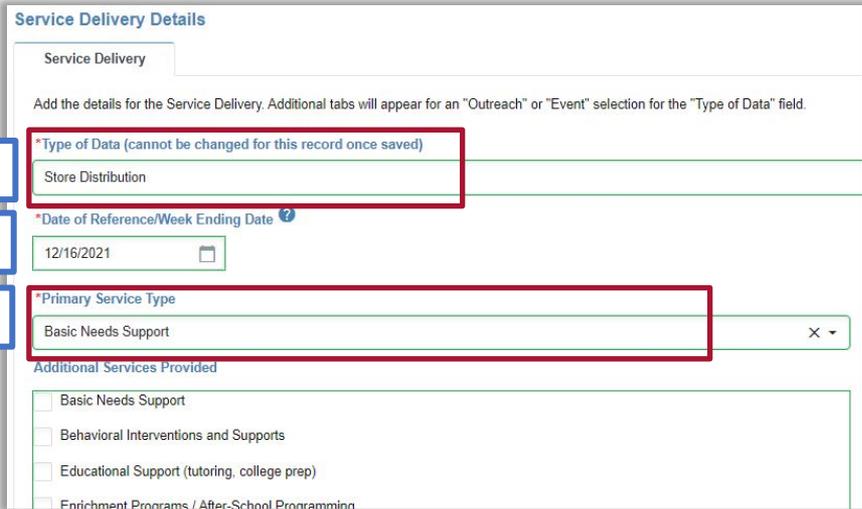
End of Example 

Store Distribution



On the **Service Delivery** page select 

1. Select **Store Distribution** for **Type of Data**
2. Enter **Date of Reference/Week Ending Date**
3. Select **Basic Needs Support** for **Primary Service Type**
4. Choose **Community Schools Pillar** and **Person Entering Data**



Service Delivery Details

Service Delivery

Add the details for the Service Delivery. Additional tabs will appear for an "Outreach" or "Event" selection for the "Type of Data" field.

1. *Type of Data (cannot be changed for this record once saved)
Store Distribution

2. *Date of Reference/Week Ending Date
12/16/2021

3. *Primary Service Type
Basic Needs Support

Additional Services Provided

- Basic Needs Support
- Behavioral Interventions and Supports
- Educational Support (tutoring, college prep)
- Enrichment Programs / After-School Programming



4. *Community Schools Pillar

- Integrated Student Supports
- Expanded and Enriched Learning Time and Opportunities
- Active Family and Community Engagement
- Collaborative Leadership and Practices

*Person Entering Data

- Community Schools Specialist
- Educational Community Worker
- Intern

Store Distribution, Continued



1. **High School:** Select your school
2. **Type of Distribution:** Day-to-Day Operations & Activities (most common for walk-in traffic)
3. **Client Type:** Enter totals for the week
4. **Supporting Documents:** Choose files to upload
5. Click **+Add Goods**

The screenshot shows a web form for 'Store Distribution'. It includes a dropdown for 'High School' (Azusa High School), radio buttons for 'Type Of Distribution' (Day-to-Day Operations & Activities selected), checkboxes for 'Client Type' (Parent/Caregiver, Student, Community), and a 'Number of Clients' section with input fields (10, 6, 5). There is a 'Choose Files' section with a 'Choose Files' button, a 'No file chosen' text, and a green upload button. A '+Add Goods' button is at the bottom right. Red text below the upload button says 'Please click on the green upload button to upload your file.'.

1.

2. Day-to-Day Operations & Activities Other

3. Parent/Caregiver Student Community

Number of Clients

10
6
5

4. No file chosen

Please click on the green upload button to upload your file.

5.



Store Distribution, Continued



Clicking **+Add Goods** will open the Distribution of Goods popup

1. Add as many items as were given away in the week
2. Only items already entered through a service delivery may be distributed
3. In this example 14 items of clothing are entered
4. Click **Save** to update the information

Distribution of Goods

*High S Azusa

* Type of Item Clothing

* Measurement Type Items

* Quantity Distributed 14

* Type Day

* Client

Notes
For the regular day-to-day store functions this week

Total Quantity Received^(est.) : 14
Total Quantity Distributed^(est.) : 0
Total Quantity Remaining^(est.) : 14

Save Cancel

+Add Goods



Store Distribution, Conclusion

1. Click on  to change the **Quantity Distributed** or revise or edit the **Notes**
2. Click on  to **Inactivate**
3. The **Type of Item** and **Measurement Type** are greyed-out when editing



"Add": Use the "Add" button to record the goods distributed for this Service Delivery. After adding/editing an entry, you must click "Save" to save your modification.

Totals shown are estimated totals.

GOODS TYPE	OTHER TEXT	SCHOOL NAME	MEASUREMENT	TOTAL QTY DISTR	TOTAL QTY REMA	MODIFIEDBY	MODIFIEDON	EDIT	INACTIVATE
Food		Azusa High School	Boxes	5					
Basic Needs Support (e.g. hygiene, cleaning, blankets)		Azusa High School	Items	20					
Gift Card		Azusa High School	Items	3					
Food		Azusa High School	Boxes	4					

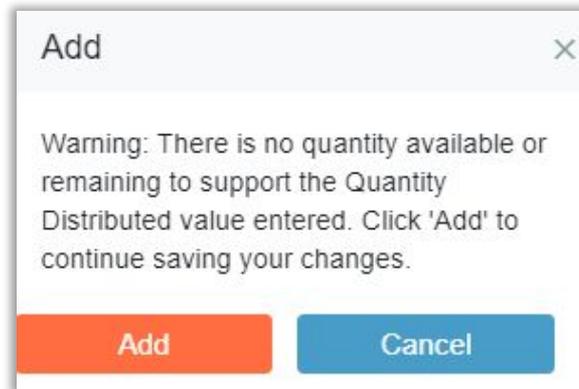
  

When finished, click **Save**



Quantity Advisement 1

- If you distribute more items than are listed in inventory you will get a warning message
- Select **Add** then **Save**
- The **Distribution of Goods** item will reflect the negative balance
- You can now go back and adjust the items in inventory under **Service Delivery**



The screenshot shows a form with the following fields and text:

- *Quantity Distributed: 15 (with up/down arrows)
- Notes: For the regular day-to-day store functions this week
- Total Quantity Received^(est.): 14
- Total Quantity Distributed^(est.): 15
- Total Quantity Remaining^(est.): (-1)



Quantity Advisement 2

- In the case that you distribute goods and there is **zero** inventory for that item you will see a message in red
- **Cancel** the distribution
- Go back to **Service Delivery** and create the record for the donation received to show the items are in inventory

Distribution of Goods

* Type of Item
Household Support (e.g. furniture, appliances)

* Measurement Type
Items

* Quantity Distributed
2

Notes
Two small desks for students to work remotely|

Total Quantity Received^(est.) : 0
Total Quantity Distributed^(est.) : 0
Total Quantity Remaining^(est.) : 0

There is no quantity available to support the Quantity Distributed value entered. Please create a Service Delivery record for goods received in order to distribute goods.

Save Cancel



Shared Decision-Making Example

To view this feature, start a new **Service Delivery**

1. Under **Type of Data** select **Shared Decision Making**
2. Select **Mental Health Support**
3. Select **School, Pillar, and Person Entering Data**

Service Delivery Details

Service Delivery

Add the details for the Service Delivery. Additional tabs will appear for an "Outreach" or "Event" selection for the "Type of Data" field.

1. *Type of Data (cannot be changed for this record once saved)
Shared Decision-Making

*Date of Reference/Week Ending Date ?
2/3/2022

2. *Primary Service Type
Mental Health Support

3. *Community Schools Pillar
 Integrated Student Supports
 Expanded and Enriched Learning Time and Opportunities
 Active Family and Community Engagement
 Collaborative Leadership and Practices

Additional Services Provided
 Basic Needs Support
 Behavioral Interventions and Supports
 Educational Support (tutoring, college prep)
 Enrichment Programs / After-School Programming

*Person Entering Data
 Community Schools Specialist
 Educational Community Worker
 Intern



Shared Decision-Making

Example, Continued

Select the types of **Event Audience** present

- For each audience type **Number of Attendees** is required
- Click Save after entering all required information

Shared Decision-Making

***Grouping Type**

Mental Health Integration Teams X ▾

***Number of New Students Reviewed (numeric only)**

4

***Date of Meeting**

2/21/2024

***Summary of Meeting and Outcome**

lkn;

***Role in Coordinating Meeting**

A "direct" role in coordinating a meeting means that you initiated and facilitated the planning for the meeting (e.g. without your efforts this meeting would not have taken place). If you played an "indirect" role it means that you were involved in assisting but the school/partner initiated the meeting.

Direct Indirect

***Attendees**

Parent/Caregiver
 Student
 Community
 Staff
 Other

*** Number of Attendees**

9

You must enter a Number of Participants that is greater than zero (0).

Shared Decision-Making Supporting Documents
(documents, images and small video files allowed):
Choose files to upload

Choose Files No file chosen

Please click on the green upload button to upload your file.



Shared Decision-Making

Example, Continued

Under **Shared Decision-Making**

- Click **Direct** if you initiated and facilitated the planning for the meeting
- Click **Indirect** if you assisted but the school/partner facilitated

Shared Decision-Making

*Grouping Type

Mental Health Integration Teams ✕

*New Number of Students Reviewed (numeric only)

12 ↕

*Date of Meeting

2/2/2022 📅

*Summary of Meeting and Outcome

Meeting held to discuss all twelve students and services recommended by the team

*Role in Coordinating Meeting 

A "direct" role in coordinating a meeting means that you initiated and facilitated the planning for the meeting (e.g. without your efforts this meeting would not have taken place). If you played an "indirect" role it means that you were involved in assisting but the school/partner initiated the meeting.

Direct Indirect



End of Example



Transfer of Goods



+Add Service Delivery

1. Choose **Transfer of Goods** from the **Type of Data** drop down menu
2. Select **Basic Needs Support** for the **Primary Service Type**
3. **Receiving school:** Centennial HS
4. **Source school:** John Glenn HS
5. Click **+Add** to open pop-up

Service Delivery Details

The screenshot shows the 'Service Delivery Details' form. Red arrows from the instructions point to the following fields:

- Type of Data:** A dropdown menu with 'Transfer of Goods' selected.
- Primary Service Type:** A dropdown menu with 'Basic Needs Support' selected.
- High School:** A dropdown menu with 'Centennial High School' selected.
- Source High School:** A dropdown menu with 'John Glenn High School' selected.
- +Add button:** A blue button at the bottom right of the form.

The form also includes a date field for 'Date of Reference/Week Ending Date' (3/8/2022), a list of 'Additional Services Provided' (Basic Needs Support, Behavioral Interventions and Supports, Educational Support, Enrichment Programs), and a 'Community Schools Pillar' section with 'Integrated Student Supports' checked.



Transfer of Goods, Continued

Transfer of Goods Pop-up

- Type of item: Food, Boxes
- Quantity Received: 20
- New totals for quantity received, etc.
- Click **Save** on the Pop-up
- Click **Save** on Service Delivery

Transfer of Goods Pop-up

Transfer of Goods

Measurement Type is pre-determined for the Type of Item you select. For "Food", the measurement type can be "Boxes" or "Items". To change the measurement type for "Food" after your initial save, please use "Add Goods" to add a new Food entry with the desired measurement type, and delete this record if it's no longer needed.

*Type of Item
Food

*Measurement Type
Boxes

Description of Goods
Essential food necessities

*Quantity Received
20

Total Quantity Received^(est.) : 150
Total Quantity Distributed^(est.) : 103
Total Quantity Remaining^(est.) : 47

Save Cancel



Goods available are from the sending school's inventory

Transfer of Goods, Continued



How to find records of transferred goods if you are the *source* of a transfer:

1. Type "transfer" into the search for the TYPE OF DATA column on the table
2. Click the  icon to view the record (Only the receiving school may edit)

End of Example

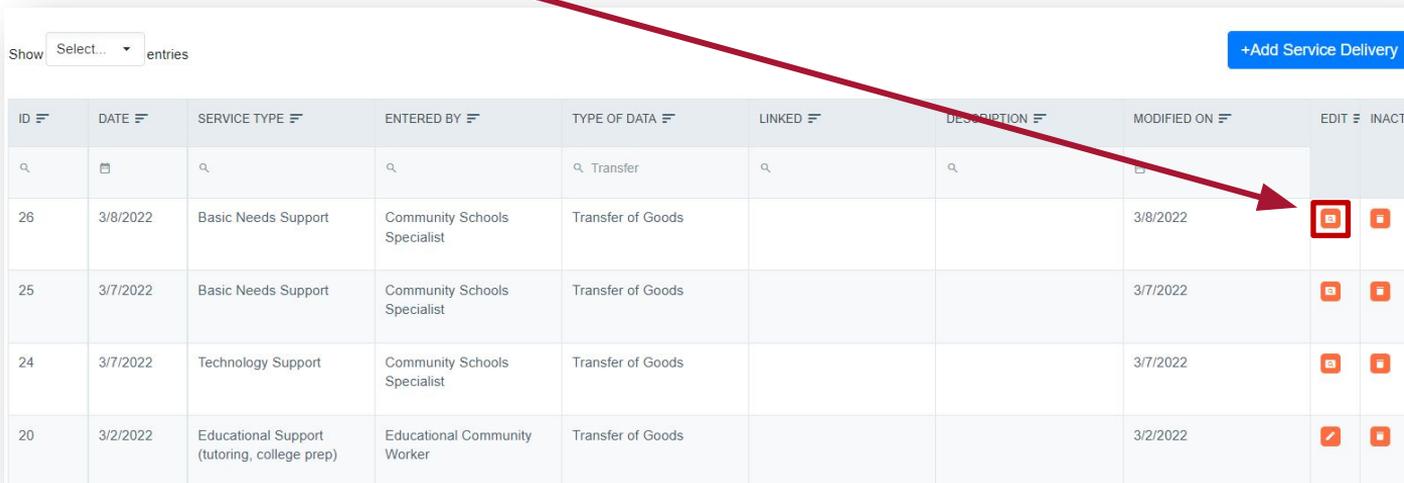
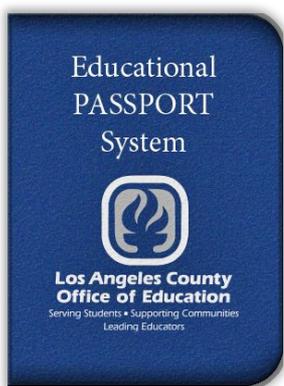


Table with 9 columns: ID, DATE, SERVICE TYPE, ENTERED BY, TYPE OF DATA, LINKED, DESCRIPTION, MODIFIED ON, EDIT, INACT. The table is filtered for 'Transfer of Goods' in the TYPE OF DATA column. The first row (ID 26) has its EDIT icon highlighted with a red box and a red arrow pointing to it from the text above.

ID	DATE	SERVICE TYPE	ENTERED BY	TYPE OF DATA	LINKED	DESCRIPTION	MODIFIED ON	EDIT	INACT
26	3/8/2022	Basic Needs Support	Community Schools Specialist	Transfer of Goods			3/8/2022		
25	3/7/2022	Basic Needs Support	Community Schools Specialist	Transfer of Goods			3/7/2022		
24	3/7/2022	Technology Support	Community Schools Specialist	Transfer of Goods			3/7/2022		
20	3/2/2022	Educational Support (tutoring, college prep)	Educational Community Worker	Transfer of Goods			3/2/2022		



Screenshot of the Service Delivery table with Transfer of Goods filter



Site Activities

- [Site Activities Home](#)
- [Planning Site Activity Details](#)
- [Adding Site Activity](#)
- [Site Activities - Review the Grid](#)



epsportal.lacoe.edu
helpdesk@lacoe.edu

Planning Site Activity Details

1. Chose **District** and **School** (prefilled if you have access to one site)
2. Click on **Week Ending Date**
3. Click **Choose Files** and upload documents, images and small video files
4. Click **+Add Activity** to add a collection of activities for that week

The screenshot shows the 'Planning Site Activity Details' form. It includes dropdown menus for 'District' (Azusa Unified) and 'School' (Azusa High School), and a date field for 'Week Ending Date' (2/23/2024). Below these is a section for 'Activity Documents' with a 'Choose Files' button and a green upload icon. At the bottom right, there is a blue '+Add Activity' button. A table at the bottom shows 'No records to display.' with columns for TYPE, DATE, DESCRIPTION, EDIT, and INACTIVATE. A 'Save' button is at the bottom right.

1 District: Azusa Unified, School: Azusa High School

2 Week Ending Date: 2/23/2024

3 Activity Documents: Choose Files (No file chosen)

4 +Add Activity

TYPE	DATE	DESCRIPTION	EDIT	INACTIVATE
No records to display.				

Save Cancel



Site Activities Home

- Click on **Site Activities** in the Community Schools menu
- This opens the Planning Site Activities home page
- Click **+Add Activity** to create a new list of activities

COMMUNITY SCHOOLS
Opportunity. Equity. Families.

***** TRAINING SITE ***** Hello, Schwanz_Mark@laoe.edu! Log Out

Planning Site Activities

Permissions: Your role and school assignment(s) will determine which records are displayed.

Sorting/Search: Click on a column header to sort in ascending or descending order. Enter a partial or full search string in any column to filter the field to your search criteria.

Date filtering: Date fields can be filtered on different criteria by clicking on the calendar icon.

Add Activity: Please use the "Add Activity" button to add a new planning site activity record.

Show 10 entries

+Add Activity

ID	SCHOOL	WEEK ENDING DATE	ACT	CREATED BY	CREATED ON	EDIT	INACTIVATE
10	Waite Middle School	2/16/2024	Ev - Sc Sp	Santos_Priscilla@laoe.edu	2/13/2024		
9	Inglewood High School	2/16/2024	Oti	Crump_Alexis@laoe.edu	2/13/2024		
11	Mckinley Elementary School	2/9/2024	Ga Da	Gomez_Yesenia@laoe.edu	2/13/2024		



Adding Site Activity

1. Click **+Add Activity**
2. Type of Activity & Date
3. Description required
4. Click **Save** for each activity and for **Planning Site Activity Details**



Section/Module	Description
Community Schools	The goal is to ensure that all staff are consistently trained about the role of community schools.
Community Schools	Community Schools are defined as schools that have been certified as such by the state.
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Reminder: To access the **Site Planning Activity - Data Definition Guide** click on **? Help** in the Community Schools main menu.

Site Activities - Review the Grid

1. Most recent on top
2. **Sort** as needed
3. **Edit** to add more details or make changes
4. **Inactivate** (delete)

COMMUNITY SCHOOLS
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TRAINING SITE Hello, Schwanz_Mark@lacoe.edu! Log Out

Planning Site Activities

Permissions: Your role and school assignment(s) will determine which records are displayed.

Sorting/Search: Click on a column header to sort in ascending or descending order. Enter a partial or full search string in any column to filter the field to your search criteria.

Date filtering: Date fields can be filtered on different criterias by clicking on the calendar icon.

Add Activity: Please use the "Add Activity" button to add a new planning site activity record.

Show 10 entries

ID	SCHOOL	WEEK ENDING DATE	ACTIVITIES	CREATED BY	CREATED ON	EDIT	INACTIVATE
10	Waite Middle School	2/16/2024	Event - School District Sponsored		2/13/2024	<input checked="" type="checkbox"/>	<input type="checkbox"/>
9	Inglewood High School	2/16/2024	Other		2/13/2024	<input checked="" type="checkbox"/>	<input type="checkbox"/>
11	Mckinley Elementary School	2/9/2024	Gathering Data		2/13/2024	<input checked="" type="checkbox"/>	<input type="checkbox"/>
8	Sierra Vista High School	2/9/2024	Gathering Data		2/7/2024	<input checked="" type="checkbox"/>	<input type="checkbox"/>
7	Littlerock High School	2/9/2024	Consultation on - site with School, Outreach / Marketing of CSI, Focus Group(s)		2/7/2024	<input checked="" type="checkbox"/>	<input type="checkbox"/>

+Add Activity



