Pathwise Afterschool 21 (AS 21) Starter Guide

This guide provides step-by-step instructions for new users of AS 21. It is designed to help staff quickly understand their roles, enter accurate information, and manage program operations effectively.

1. Users, Roles, and Permissions

- Access permissions are role-based: Each user is assigned a specific role that defines the information they can view, modify, or manage within the system.

  - Grantee Admin: The primary user(s) who can create user accounts within the AS21system and have full access to all sites and functions in their project. The Grantee Admin can create and manage user accounts, assign roles, and approve permissions, configure system settings, generate reports, control access levels, and determine what functions and data each type of user can view. Permissions for each of the following can be set up by the Grantee Admin.

  - Grantee User/ Data Manager:
    Grantee Users have permissions defined by the Grantee Admin and usually access most grant- and site-level functions, including data entry, attendance, activity setup, and reporting. The Data Manager (DM) should be assigned as a Grantee User with full access to ensure accurate data management and quality control.

  - Site Admin: Site Admins are often Site Coordinators who are responsible for overseeing the day-to-day operations on site. These users can register, enroll, and take attendance for students attending the program. They can also 02*-create activities, sessions, and run site-specific reports.

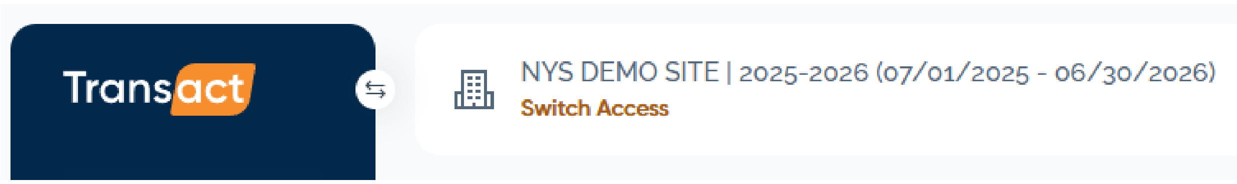
  - Site User: May have a specific role within the system, such as data entry or running reports. These users can register, enroll, and take attendance for students attending the program. They can also create activities and sessions.

  - Grantee Evaluator: Perform evaluative functions for the 21st CCLC program. They may have limited access to specific sections or data within a system based on their role and responsibilities. It is recommended that the local evaluator have access to all information associated with the program in the data collection system.
    If the Evaluator is also the Data Manager it is strongly recommended that the Evaluator/DM be assigned as a Grantee User, with full access to the necessary permissions needed for data management and quality control.

- Typical roles include Administrator (full access), Data Entry/Staff (enter attendance and activities), and Read-Only (view only).

2. Uploading and Registering Students

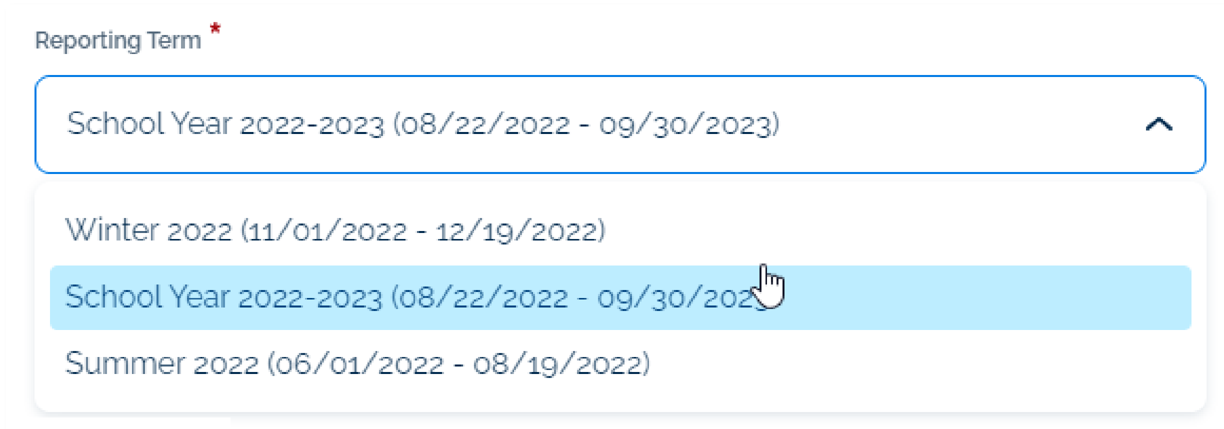
Participant data can be imported for only one site at a time. You must be connected to the site for which you want to import data.
Locate and click on the Switch Access link in the top left-hand part of the screen.



Use the menu option to select the appropriate items from the three drop-down menus.
Examples in this document will be different from your system.

Reporting Term

This is the date range for current or past programs.



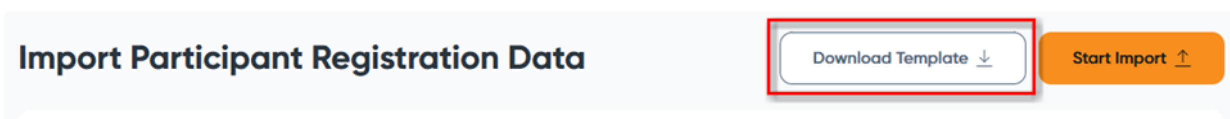
Organization

This is an entity that provides services to individuals, such as a School District, School, Site or Partner.
You can use the search bar to locate a specific organization by typing all or part of the Organization's name.
You can also "drill down" the Organization list by clicking on the drop-down arrows to the left of each Organization name; this will expand the list to reflect how your Organization Tree is built. You can see data from all organizations below your chosen organization. For example, if you choose "Region 1," you will see all data for all organizations that are part of region 1 per the Organization Tree.
If an institution or site is inactive in the selected reporting term, it may not be available in the organization drop-down menu when selecting the organization.

- When connected to the site where Participant Registration data is to be uploaded, select ***Tools*** from the left-hand navigation menu. Then click ***Import Data.*** To import potential participant data, select **Participant Pre-Registration.**

Downloading the Data Template

To facilitate the data importation process, you will need to convert your data into the format of the provided data template.



To start a new import, click the ***Download Template*** button and download the template to your computer. It is recommended that you save it with a familiar name that will distinguish it from other uploaded files you have or will create.

Open the file on your computer using Excel or another application that can open Excel files and can save the data file in an Excel or CSV formatted file (e.g, Google Sheets). Excel is not required.

Over 80 participant data fields can be imported, but only <u>four fields are required</u> for a record to be imported: Last Name, First Name, Participant ID (usually the school district-generated

Student ID), and School. Add your participant data so it fits into the template format. You can do this by typing values into the renamed template or copying and pasting from your own spreadsheet. Be sure not to change the template column heading labels or the order of the columns.

The data put into the template does not have to be perfect. For example, if you have gender as 'M,' when the file is being prepared for import, the import interface will allow you to easily replace all the 'M' values with 'Male,' which is the value used by the system. It can be easier to clean your data in the import tool than in the template. Another notable benefit of using the import tool to clean up your data is that values that are replaced (like 'M' for 'Male') will be automatically made the next time the same user imports a new file, which can be a real time-saver.

Uploading Your Participant Data File

On the **Import Participant Registration Data** screen, click **Start Import**. Upload your prepared data file by dragging it in or using the ⊕ icon to browse. The system will analyze the file and display any data errors for review. Upload time may vary by file size.

Reviewing the Uploaded File for Issues

On the **Review & Finalize** screen, you'll see a summary of clean and problematic rows. Some errors can be auto corrected, while others require manual edits in the table. If many rows show issues, it may be faster to fix the file and re-upload it.

Here are some items to look at on this screen, along with some of the validation issues and how to address them.

At the top left of the **Review & Finalize** screen shows a summary of clean and error rows. If many records contain issues, it may be quicker to correct them in your original file and re-upload.

Data Issue Summary Boxes

In the Issues section on the right, each field/column with issues is listed in a box. In this sample uploaded file, there are issues with FirstName, Grade Level, School, and SpecialEducationStatus.

There are a few commonalities in these issue boxes:

The **green box** shows how many cells in a column have issues.

The **orange box** flags invalid data (e.g., “seven” instead of a valid grade). Hovering over the error displays a “See column” prompt clicking it brings that column into view for editing.

The **blue box** indicates the total number of issue cells and links directly to the first one that needs correction.

Importing the Fixed Data File

Once all issues are resolved, a confirmation message replaces the issue boxes. Click Import to finalize and upload the data into the system. The import status will appear as Initiated, In Progress, Partial Success, Success, or Failure. Refresh the list under Tools → Import Data → Participant Pre-Registration to confirm completion.

Statuses are:

- **In Progress** - Our system has retrieved the data file and is starting to import data into the database.
- **Partial Success -** The import process was unable to import all the data due to an import exception, such as the participant already being in the system or the school not being found.
- **Success** - The import process was completed without any errors.
- **Failure -** The import process failed. This could be a system error or an error in all import records because some system value/ID changed and was not visible to the user.

Repeat this import process as needed to import additional Participant Pre-Registration data.

3. Adding Staff

Your system can store information about paid and volunteer staff. This tool is useful for several reasons.

- The Staff section acts like a mini-HR database. It can store data on employment history and emergency contacts. The system also offers a secure place for uploading relevant documents for staff members, such as awards or certifications.
- When adding or editing a session on the **Session Schedule form**, a drop-down list of the staff created in the Staff section will be available. This is a helpful way for administrators to assign certain activities to certain staff.
- Records of employed and volunteer staff are also required for reporting to some funding sources.

Step by step instructions:

1. Select ***People*** from your left-hand navigation menu.
2. Select ***List of Staff***. This opens the **List of Staff** table.

Staff members will continue to appear on the staff list for future reporting terms until an Employment End Date (described below) is entered in their Employment Information record. Until an Employment end date (described below) is entered in a staff member's Employment information record, they will continue to appear in this Staff list, even into future reporting terms.

3. Click ***Add Staff*** +

A staff record includes four sections: *Personal Information, Employment Information, Address, and Relationships*. Required fields are marked with red asterisks (*) and must be completed before saving or moving to the next section. Additionally, your administrator may customize fields, some of which may be required, and might not appear in the images shown. The required fields for each section must be completed before proceeding to the next section or saving. Red asterisks indicate required fields. There also may be fields not shown in the images in this article that were added as custom fields by your system administrator, some of which may be required.

Fill out the required **Personal Information**. Any field marked with a red asterisk is required and must be completed before proceeding to the next step.

Click ***Next Step***.

4. Next, complete the **Employment Information.** Any field marked with a red asterisk is required and must be completed before proceeding to the next step. Click ***Next Step.***
5. Fill out the **Address Information** if needed. Click "***Next Step."***Click **+ *Add Relationship*** in the **Relationships** section to add one or more relationship persons.

Any field marked with a red asterisk is required and must be completed before proceeding to the next step.

Click ***Save Staff*** to finish the process of adding your staff member.

6. You will be returned to the Staff list, where the newly added staff members will appear.

Editing a Staff Record

To edit an existing record, click the **pencil icon** next to the staff member's name. Update details in any section—**Personal, Employment, Address, Relationships,** or **Documents**—and click **Save**. Common updates include role changes, new reporting term details, or uploading performance reviews or commendations.

Deleting a Staff Record

If a staff member leaves, enter an **Employment End Date** in their record to preserve history. Only delete a record if it was entered in error. To delete, open the **Employment Information** section and click the **trash can icon**. If the staff member has only one employment record, deleting it will permanently remove the entire staff profile.

4. Adding Activities/Sessions

Switch access to your selected site.

Select the ***Activities*** tab from the left-hand navigation menu.
Activities previously created will appear on the Activities page.
Click ***Add Activity* +** to add a new activity.

Step 1 - Activity Information

Enter the activity name in the required field, indicated by a red asterisk. If the activity name you enter is the same as an existing activity name, the system will prompt you to avoid duplicates. You can also enter a description of the activity if desired.
Custom field(s) may appear on the activity information form. Required fields, indicated by a red asterisk, must be completed. Be sure to click the Save button after editing data in any section.

Click ***Next Step.***

Step 2 - Session Information

Next, you will establish one or more sessions for the new activity. Enter a **Session Name**. If you plan to create more than one session, be sure to give each session a unique name.
At the end of the Session Information form, you will have the opportunity to create an additional session (if needed).

Complete the other fields as appropriate for your program, including **Session description**, **Session location**, **Funder(s), and Designated Staff**

Schedule Type

Next, to make this a Scheduled Activity, select Scheduled from the **Schedule type** dropdown.

Frequency of the Activity
Choose the appropriate **Frequency** for the activity:

One-Time Event

- Select this option if the activity is offered only once.
- To enter the date:
    - Click the date on the calendar (selected dates turn blue), or
    - Type the date directly into the date field.
- **Note:** Some dates may be unavailable if the site is closed (based on the Site Calendar) or if they fall outside the Reporting Term Date Range.

Recurring Event

- Select this option if the activity occurs more than once, even without a fixed pattern (e.g., every Monday).
- First, set the **Start** and **End Dates** for the event. These default to the Reporting Term Date Range but can be adjusted.
- Then choose how to enter session dates. You may use either or both of the following options:

Option 1: Scheduled Days of the Week

- Use this if the event occurs regularly on specific weekdays.
- From the **Scheduled Dates** dropdown, select the relevant days.
- All matching dates within the selected range will be automatically highlighted in blue on the calendar.

Option 2: Manual Date Selection

- Use this if the event occurs on varying days.
- Click each date the activity will be offered; selected dates will turn blue.
- **Note:** unselect able dates indicate site closure or fall outside the allowed date range.

Session Details (Applicable to Both One-Time and Recurring Events)

- Enter the **Start Time** and **End Time** using the time selector or by typing.
- The **End Time** must be later than the **Start Time**. If not, the system will automatically set it to one minute after the Start Time.

Default Participation Time

According to AS21 Help Center: Default participation time refers to the start and end times automatically recorded for each participant when tracking attendance. You can choose to use the session's scheduled times or the actual current time, depending on whether you want to track exact attendance duration or just note presence.
When recording group participation for this activity, the system automatically stores each participant's start and end times.
Two options regarding the times that will be recorded for participants are available:

1. The **Current Time** option is best when entering participation in real-time at an event, and each participant's exact start and end times are needed.
2. The **Session Start/End Times** option is best if you want the participant's start and end time by default to match those of the Session. These times can be modified for each participant.

Choose the appropriate option for this activity.

Who can participate?

Next, indicate who can participate in this activity. Typical activities are only for participants from one site. If this is the case for this activity, in the **Who can participate?** dropdown, choose ***Only participants from this site***.

If the activity being created is for participants from multiple sites (for example, a summer program where students from multiple sites attend this activity), select the ***Participants from any sites*** option.

Enrolling Participants

Do you want to sign people up for this activity ahead of time? Or can participants just come and go without being enrolled?

If you **do not want** to sign people up ahead of time, you can skip the process of checking names; this will make this a "drop-in" type of activity, where the activity is at a defined place and time, but it is not known which participants will attend.

If you want to sign up ahead of time, a list of all participants at this site with a current Registration record will appear. Using the checkboxes to the left of each name, select which participants are expected to attend this session of the Activity. You can do this by scrolling down through the list or using the search field to find names quickly.

If "Participants from any sites" was selected in the ***Who can participate?*** *dropdown option above, the participant list will not appear.*

Review the session information and the enrolled participant list to ensure accuracy.
If necessary, click ***Previous Step*** to edit the Activity information. If this is the only session for this Activity, click ***Next Step***. If other sessions are needed, click + ***Schedule Another Session*** and repeat the steps above. Note that an activity can only have *Scheduled* or *Unscheduled* sessions. One activity cannot have both *Scheduled* and *Unscheduled* sessions.

Step 3 - Review and Save
Review the Activity and Session(s) you have created. If necessary, click ***Previous Step*** to edit the information. If everything looks accurate, click ***Save Activity.***

5. Special Events

- Special events (family night, community events, etc.) should be added under Activities with the category that best fits.
- Enter participation counts and hours like a regular activity.
- Can be created as **Scheduled Activities** with specific dates/times and participant sign-ups.
    - Or as **Unscheduled Activities** without fixed schedules, like drop-in events.
    - Both types allow tracking of participation and help organize community programs efficiently.

6. Marking a Holiday

- When the program is closed, do not enter attendance for that day.
- Document the closure reason for audit/reference.
- Some states may require a formal 'Holiday/Closure' marker in the system.

7. Enrollment and Attendance Methods

- Enrollment details are managed in the Registration Information section, recording participation dates and enrolled programs.

  - Attendance is recorded by selecting the activity/session and date.
  - Participants can be marked as Present, Excused Absence, or Unexcused Absence.
  - Start and End times for attendance can be adjusted manually or set to current/session times.
  - Barcode scanning can be used to mark attendance efficiently.
  - Filters allow viewing Enrolled or All Participants for attendance tracking.

8. Attendance Sign-In / Sign-Out

Your Out-of-School TimeTracker software allows for easy recording of participation, including whether a person was present or absent.

1. To track participation in an activity for multiple participants, start by clicking ***Participation*** in the left-hand navigation menu.
2. Click ***Enter for activity***.
3. **Selecting the Activity/Session and Date of Participation**

This opens the **Record Participation for Activity** form.
The form has dropdown menus for selecting the **Activity** and **Session** for which you are recording participation. Any field marked with a red asterisk is required. If the activity for which you are recording attendance is not in the drop-down list, users with the proper security role can add it to the Activities section of the system.

4. Select the desired **Activity** and **Session.**
5. Select the date of attendance using the calendar control icon or type the date in the date field. Click ***Next Step***.

Some dates on the calendar will be crossed out and are not selectable. Crossed-out dates represent dates not within the date range of the Session's Schedule or that the site is closed as defined in the Site Calendar section of the system. Dates in previous or subsequent months are sometimes visible but not selectable; use the arrows at the top of the calendar to move forward or back between the months to select those dates.

6. consider how you want to record participation. When participation is recorded in the system's database, a **Start time** and **End Time** for each participant are always recorded. By default, the session's **Start Time** and **End Time** are used. These times can be adjusted to meet your attendance recording requirements.
7. You are now ready to begin recording each participant's participation in the selected activity session on the selected date. If the activity has a long list of **Enrolled Participants** or you are recording participation from the list of **All Participants**, you can use the search bar to locate participants by name.
8. A count of participants by status is shown. These counts will be updated as participants are marked as present, unexcused absent, etc.

9. Review and Certify Attendance

- At reporting deadlines, review all student attendance records.
- Ensure totals equal the number of registered students.
- Correct discrepancies flagged by the system.
- Certification requires the Administrator role to confirm data accuracy.

10. Most Common Q&A

- Q: What if a student switches centers? A: End their enrollment at the first center, then re-enroll them at the new center.
- Q: How do I correct an error in attendance? A: Edit the record directly before certification. After certification, contact the state help desk.
- Q: Do high school students working as staff count as participants? A: No, staff cannot also be counted as participants.
- Q: How do I manage students with missing demographic info? A: Use 'Data Not Provided,' but minimize usage.