

Nita M. Lowey 21st Century Community Learning Centers



21st CCLC Data System

Getting Started Checklist

- Schedule a call with the Office of Public Instruction's (OPI) 21st CCLC Data Specialist to introduce yourself.
- The Program Director must request user access for all data reporting staff to utilize the Transact Cayen AS21 Data Collection and Reporting System
- Enroll in the Learning Hub course on the Family and Educational Rights and Privacy Act (FERPA)
- Add Required Data Trainings & Due Dates to your Calendar.
- Login to the Cayen AS21 system, using the login information sent to your email from noreply@cayen.net
- Turn off pop-blockers under settings within your web browser for the Cayen website.
- Preview the Transact menu tabs to familiarize yourself with the system.
- Submit a list of *Registered* students to the local school district to mark as 21st Century Participants in their Student Information System (SIS)
- Follow the Checklist Instructions in the Table of Contents for entering data each month

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Transact Cayen AS21 System: User Access and Login

Transact Cayen AS21 User Access

The Montana Office of Public Instruction (OPI) 21st CCLC team will submit a User Access Request to our OPI Internet Technology (IT) staff, and they will set up the user. To start the user access request for Cayen, the grantee's Program Director must send the following information to michelle.cusey@mt.gov and adomino@mt.gov.

1. Email
2. First and Last Name
3. Official Grant Name from the E-grants application
4. Site Name(s)- Include all sites each staff member will need access to. If all sites, please state "all sites."
5. Security Level- See below for levels and descriptions of all options.

Once the OPI IT staff have approved and set up the user, the user will receive an email from noreply@cayen.net. Please note: this email may end up in spam or junk folder. If you do not receive an email within 14 days of your request, please let the OPI 21st CCLC team know.

Security Level	Description
Program Director	Identified within the E-grants application and has access to all sites/centers within the grant as outlined within the application. The program director can conduct all tasks within AS21.
Site Coordinator	Has access to site specific information and can conduct all data entry requirements for the site/center.
Data Entry	Has access to all data entry requirements for sites/centers they work with. (Identified within excel spreadsheet)
Attendance Only	Only has access to take attendance at the site/center identified. <i>Attendance: Add/Edit Attendance</i>

Transact Cayen AS21 Login

Open the Transact Cayen AS21 system login page, <https://montanaopi.cayen-server.net/AplusV3/Signin.asp> NOTE: Your **Username** is your **Email Address**.

Turn Off Pop-Up Blockers

Pop-ups are used throughout the system when saving information. **If these pop-ups are blocked, the information you enter may not save correctly.** For instructions on turning off pop-up blockers, see instructions in the [AS21 Handbook](#), page 4.

Family and Educational Rights and Privacy Act (FERPA)

The Family Educational Rights and Privacy Act (FERPA) (20 U.S.C. § 1232g; 34 CFR Part 99) is a federal law that protects the privacy of student education records. The law applies to all schools that receive funds under an applicable program of the U.S. Department of Education. [Family Educational Rights and Privacy Act \(FERPA\)](#). It is recommended that all 21st CCLC Grantee personnel who work with participants' Personally Identifiable Information (PII) login (or create an account) in the OPI's [Teacher Learning Hub](#). Once logged in, enroll in, and complete the course *Information Sharing: HIPAA & FERPA for Schools*.

Program Year Monthly Task Lists

The tables below provide the monthly 21st CCLC Cayen AS21 Reporting, and the State Evaluation Reporting required tasks. For specific Program Year due dates, please view the [Master Calendar](#) on the OPI's Nita M. Lowey's 21st CCLC website under the Program Information tab.

MAY - JUNE

✓	MENU PATH	TASK INSTRUCTIONS- <u>REMEMBER TO SAVE PAGES</u>
	<p>PROGRAM SETTINGS: (Entered by the Program Director)</p> <ul style="list-style-type: none"> • Settings/Program Settings/Grantee Information-Set Up Grantee/Actions-Edit Grantee • Settings/Program Settings/Partners • Settings/Program Settings/Terms/Actions-Edit TERM & Edit Calendar • Settings/Program Settings/Schools/Edit • Settings/Program Settings/Sites/Actions-Edit • Settings/Program Settings/Teachers <p>NOTE: Transact Program Years (TERMS) are active for one year. Grantees organizing summer programs that start after June 1, 2024, and school year programs that continue into June 2025, can input the actual Start Date in Program Settings/Terms. (e.g. Start Date: June 10, 2024, will have an End Date of June 9, 2025). This process allows Site Coordinators to input accurate summer and school year Site Settings/Reporting Period dates.</p>	<p>Grantee Information: Click on the General and the Contact Information tabs. Enter or review the information and update as necessary.</p> <p>Partners: Click on Add New to add new Partners. Instruct Site Coordinators to request additional partners under Site Information/Partners/Add New - Request New Partner to include it in the Partner list.</p> <p>Edit Term: (see NOTE) Click on Actions-Edit Term. Enter the Actual Start date of your program (e.g. June 10, 2024)</p> <p>Edit Calendar: Check All program site's open dates between the program's Start and End dates. Uncheck the dates that all sites will be closed. Uncheck holidays, vacation days, PIR days, or other dates the program will be closed. (Site Coordinators must edit the SITE calendars to only include the dates their specific site is open).</p> <p>Edit Schools: Add New School and/or review the address & principal for each active school listed. To update a school's information, click edit in the school's row. Complete the General Info tab.</p> <p>Edit Sites: Click on Actions-Edit Site. Click on Main Info and CLC Details and enter updates as needed.</p> <p>Add Teachers: Instruct each Site Coordinator to submit a list of their 21st CCLC participating school's teachers (Grades 1-5). Add teachers by School Name to Settings/Program Settings/Teachers</p>

MAY - JUNE

✓	MENU PATH	TASK INSTRUCTIONS- <u>REMEMBER TO SAVE PAGES</u>
	<p>SITE SETTINGS: (Entered by the Program Director, Site Coordinator, or Data Entry Staff)</p> <ul style="list-style-type: none"> • Settings/Site Settings/Reporting Periods- Configure APR Info/APR Reporting Period AND Hours of Operation • Settings/Site Settings/APR Information-Site Calendar-Edit Calendar <p>NOTE: The TERM in Transact will be active for one year from the Start Date (e.g. Start Date: June 10, 2024, will show an End Date of June 9, 2025); therefore, Site Coordinators may input actual summer and school year Site Settings/Reporting Period dates.</p>	<p>APR Reporting Period: (See NOTE) Complete the Summer and the School Year Reporting Periods table.</p> <ul style="list-style-type: none"> • Enter the Current School Year for Grades and Tests on APR Report: • Enter the Prior School Year for Grades and Tests on APR Report: • Enter the Site's Operating Budget • Click Save <p>Hours of Operation: Click on Hours of Operation. Complete each of the 4 tables on the page for Summer and School Year (NOTE: Read the header for each table carefully to enter the correct information for the days per week the site is open, number of weeks open, and number of hours open in both the summer and school year.</p> <p>Edit Calendar: On the Site Calendar, check each box for the dates the site is scheduled to be open throughout the program year.</p> <ul style="list-style-type: none"> • Un-check dates for all holidays, vacations, PIR days, etc. • Update the calendar monthly to un-check dates the site is closed (e.g. Inclement weather).
	<p>REGISTRATION: Registration/Add New/From Pre-Registration List.</p> <p>NOTE: Previous 21st CCLC participants' registration information is in the Transact data collection and reporting system, and their records are available. Such students can be transferred to the new program year, or TERM, using the instructions provided on the right.</p>	<p>To move students from a previous TERM to the current TERM: Under Change Credentials, confirm you are logged in to the current program year's TERM.</p> <p>Click on Registration Click on Registration List-Manage Participants Click on Add New Click on From Prior Term Select a TERM to move students from (e.g., prior year=2023 -2024) On the right-side of the alphabetic header row, click All. On the pop-up, click OK.</p>

MAY - JUNE

✓	MENU PATH	TASK INSTRUCTIONS- <u>REMEMBER TO SAVE PAGES</u>
	<p>In October and April, the OPI uploads student demographics data from the Infinite Campus system into the Transact system. However, to record new students' participation in summer programs, 21st CCLC staff must enter the data manually. To enter new students, follow the instructions on the right.</p> <p>NOTE: New students enrolling in-between upload dates throughout the program year must be hand-entered into the Transact system.</p> <p>* NOTE: School Day Teachers must be entered first under Program Settings/Teachers, see JUNE, page 1)</p> <p>Summer Students' Teacher Name: When completing the Registration/Participant Information page for summer students, if you do not know the student's Teacher Name:</p> <ul style="list-style-type: none"> • Click on Add New Teacher, under Elem. Homeroom Teacher • Enter First Name: UNKNOWN • Enter Last Name: TEACHER. • Click Save and Close. • As you add new students, UNKNOWN TEACHER will be on the list of Teachers. <p>When the school year begins, enter the correct Teacher Name (watch for instructions in August on the Weekly Update).</p>	<p>Under Reg, on the left, select the students you want to move to the current year.</p> <p>Click on Register Selected.</p> <p>The students will now show on the current year's Registration List</p> <p>To enter NEW Students:</p> <p>Click on Registration</p> <p>Click on Registration List-Manage Participants</p> <p>Click on Add New</p> <p>Click on Individual Participant</p> <p>If prompted, enter Last Name & First Name</p> <p>Click Search</p> <p>Click on + No Match – Create a New Record (on bottom right-hand)</p> <p>To save the Participant Information page's data, you must enter:</p> <ul style="list-style-type: none"> • Last Name • First Name • Date of Birth • Gender <p>For the Summer Enrollments, use the upcoming school year information (e.g., If enrolling the student in the summer of 2024, enter the school year 2024-2025 data) for the following:</p> <ul style="list-style-type: none"> • School Attending During Day • Grade • * (See NOTE) Elem Homeroom, MS/HS Math Teacher, or MS/HS English Teacher

JULY

✓	MENU PATH	TASK INSTRUCTIONS- <u>REMEMBER TO SAVE PAGES</u>
	<p>ATTENDANCE: Attendance/Enter Attendance by Session or Enter Classic Attendance</p> <p>NOTE: The previous month's attendance is due on the First Thursday of the current month. (EXAMPLE: Attendance through June 30, 2024, is due by the first Thursday of July 2024.)</p>	<p>Enter Attendance through June 30, 20XX, by the first Thursday in July.</p> <p>To check for missing attendance, click on Reports/Attendance Totals/Missing Attendance Report. How to Read the report (e.g., *40//)</p> <p>* = There should be attendance on the Date 1st # = Number of students in Attendance 2nd #/ = How many are on an <i>enrolled</i> Roster (optional) 3rd #/ = How many are on a <i>Session</i> Roster (optional)</p>
	<p>PROGRAM INFORMATION: PROFESSIONAL DEVELOPMENT: Program Information/Professional Development-Configure Events/Add New Event</p>	<p>For instructions on adding Professional Development Events, see the <u>AS21Handbook</u>, page 25.</p> <p>Note: Update as New Events occur throughout the program year. If you purchase or obtain a research-based or evidence-based curriculum at a training or conference, include the name of the curriculum in the Event Description box.</p>
	<p>SITE INFORMATION:</p> <ul style="list-style-type: none"> • Site Information/Site Staff-Configure Staff • Site Information/General Information <p>NOTE: Update Partners and Site Staff throughout the year</p>	<p>Site Staff-Configure Staff For instructions on adding Staff Information, see the <u>AS21Handbook</u>, pages 28-29.</p> <p>NOTE: Staff information must be completed within both the Add/Edit Staff and the Staff Info*APR tabs</p> <p>General Information Review and complete the entire page.</p>

AUGUST

✓	MENU PATH	TASK INSTRUCTIONS- <u>REMEMBER TO SAVE PAGES</u>
	Add Current Year's Student Teacher Names	<p>Click on Search On the right-hand side, click on Edit Search Criteria In the Header row, click on Reg Info</p> <ul style="list-style-type: none"> • On the bottom left, click on Find Records <p>On the right-hand side, Quick Edit/Export Spreadsheet</p> <ul style="list-style-type: none"> • Under the General Information column, click in the right-hand text box for Last Name, First Name, Date of Birth, and Gender • Under School Information, click in the right-hand text box for Grade Level, Day School Attending, Elem. Homeroom Teacher, MS/HS Math Teacher, and MS/HS English Teacher • Under Registration Information, click on the right-hand text box for Active. • Click on Quick Edit Form <p>In the rows of Student Information</p> <ul style="list-style-type: none"> • Enter the correct Elem/MS/HS Teacher Name. • Change UNKNOWN TEACHER name to the correct Teacher Name <p>NOTE: If the Teacher Name box is empty:</p> <ul style="list-style-type: none"> • Click on Select. • Click on the correct Teacher name from the list of Teachers, or Add New Teacher • Click on Save and Close

AUGUST

✓	MENU PATH	TASK INSTRUCTIONS- <u>REMEMBER TO SAVE PAGES</u>
	Attendance/Enter Attendance by Session or Enter Classic Attendance NOTE: Attendance is due through the end of the prior month of the First Thursday Data Review. (EXAMPLE: Attendance through June 30, 2022, is due by the first Thursday of July 2022.)	Enter Attendance through Jul 30, 20XX, by the first Thursday in August.
	Activities/Sessions/Student Rosters	Add all Activities/Sessions/and Rosters for the School Year Program NOTE: For instructions on adding activities, see the AS21Handbook , pages 30-33. Also, review Activities/Sessions Best Practices (See Appendix)
	Google Drive/Shared with me/Family Engagement Tracker	Each Montana 21st CCLC grantee may access a shared Google Drive folder containing multiple grantee documents. The Family Engagement Tracker is in this folder. Use this workbook to record family participation in 21st CCLC family engagement events. Click on the Instructions tab for information on how to enter the data. For additional technical assistance, contact Amanda Domino at adomino@mt.gov or 406-431-0466.

SEPTEMBER

✓	MENU PATH	TASK INSTRUCTIONS-<u>REMEMBER TO SAVE PAGES</u>
	Attendance/Enter Attendance by Session or Enter Classic Attendance NOTE: Attendance is due through the end of the prior month of the First Thursday Data Review. (EXAMPLE: Attendance through June 30, 2022, is due by the first Thursday of July 2022.)	Enter Attendance through August 30, 20xx, by the first Thursday in September.
	Google Drive/Shared with me/Family Engagement Tracker	Add or update Family Engagement Tracker Information as needed.

OCTOBER

✓	MENU PATH	TASK INSTRUCTIONS- <u>REMEMBER TO SAVE PAGES</u>
	Attendance/Enter Attendance by Session or Enter Classic Attendance NOTE: Attendance is due through the end of the prior month of the First Thursday Data Review. (EXAMPLE: Attendance through June 30, 2022, is due by the first Thursday of July 2022.)	Enter Attendance through September 30, 20xx, by the first Thursday in October.
	PARTICIPATING STUDENT LIST SUBMITTED TO SCHOOLS: Search/Edit Search Criteria/Find Records <p>To ensure that participating student demographic information in the Transact system is accurate and complete, each 21st CCLC student is marked as a "21st Century Participant" in the attending school district's Infinite Campus (IC) system each year. Conducted by the school Student Information System (SIS) Coordinator, this process enables the 21st CCLC OPI staff to transfer required demographic data into the Transact system. It also allows us to collect student outcome data from other OPI student information systems.</p> <p>Follow the instructions to the right for preparing and submitting the list of 21st CCLC student participants for the current year to the IC Coordinator at the local school district.</p> <ul style="list-style-type: none"> • NOTE: To identify the School SIS Coordinator, contact the School Administration Office. 	Click on Search Click on Edit Search Criteria On the header row, click on Participation . Scroll down to Number of Days Attended . Enter 1 in the first text box (leave the text box on the right blank) Click on Find Records : Click on Quick Edit/Export Spreadsheet Click on Last Name, First Name, Date of Birth, Gender, STATE Participant ID, Grade Level, Day School Attending, and Active Click on Quick Edit Form On the bottom of the page, click on Print/Export to Excel When the list pops up, click on Click Here to Download Open Downloaded File: <ul style="list-style-type: none"> • Print the downloaded 21st CCLC Student Participant List. • Submit the list to the School District's Student Information System (SIS) Coordinator. • Ask SIS Coordinator to mark each student in the IC Enrollment-Program Participation section as a 21st Century participant.
	Google Drive/Shared with me/Family Engagement Tracker	Add or update Family Engagement Tracker Information as needed.

NOVEMBER

✓	MENU PATH	TASK INSTRUCTIONS- <u>REMEMBER TO SAVE PAGES</u>
	<p>Attendance/Enter Attendance by Session or Enter Classic Attendance</p> <p>NOTE: Attendance is due through the end of the prior month of the First Thursday Data Review. (EXAMPLE: Attendance through June 30, 2022, is due by the first Thursday of July 2022.)</p>	Enter Attendance through October 31, 20xx, by the first Thursday in November.
	<p>Moving student records from Pre-Registration to Registration/Merging Registration Records:</p> <p>Registration/Add New/From Pre-Registration list</p> <p>The OPI completes two student demographics uploads (October, April) from the infinite Campus system into the Cayen AS21 system each year. Once school district personnel mark students as 21st Century participants in their SIS system and it is confirmed in the OPI Infinite Campus system, the state 21st CCLC personnel conducts an upload of the information into the Transact Cayen AS21 system. If students are listed on the registration page with a STATE ID, their REGISTRATION page information will automatically be updated with the required demographic information. If NEW 21st CCLC participants are included in the upload, their information will appear on the Cayen AS21 "PRE-REGISTRATION" page. For those student's required demographic information to be added to their Participant information page, it must be moved over to the 'REGISTRATION' page. Please use the Task Instructions to the right to move new students from the "PRE-REGISTRATION" page to the "REGISTRATION" page.</p>	<p>WATCH FOR WEEKLY UPDATE INDICATING THAT THE UPLOAD INTO THE TRANSACT CAYEN AS21 SYSTEM HAS BEEN COMPLETED, THEN:</p> <ol style="list-style-type: none"> Move students from the Pre-Registration page to the Registration Page: <ul style="list-style-type: none"> Click on Registration Click on Registration List-Manage Participants Click on Add New – From Pre-Registration List Choose School/s for list of participants to move to the "Registration" list. Choose Grade(s) for participant Grade Levels to move to the Registration list Click Continue In the alphabetic header row, click on "All" (right hand side) Click OK on the Pop-up On the left-hand side either "Select All" or click on each box to select the participants that you want to move. Click on Register Selected (top center of list) If any duplicate registrations appear on the Registration page, Merge Registration Records (see instructions in the Appendix, page 23, REGISTRATION: MERGING DUPLICATE REGISTRATION RECORDS)

NOVEMBER

✓	MENU PATH	TASK INSTRUCTIONS- <u>REMEMBER TO SAVE PAGES</u>
	<p>CONFIRM DEMOGRAPHICS/CERTIFY SUMMER DATA: Sites who provided a summer program must review the APR Report data to ensure the students' demographics, Grantee Information, Site Information, Schools, Partners, Activities, Staffing, and Attendance are accurate and complete. Then, the OPI Data Processor will enter the Family Engagement numbers for the site.</p> <p>NOTES: ALL STUDENT DEMOGRAPHIC DATA MUST BE ENTERED PRIOR TO CERTIFYING THE APR REPORT.</p> <p>AFTER THE REVIEW IS COMPLETE, YOU MUST CONTACT THE OPI DATA PROCESSOR <u>PRIOR TO CERTIFYING EACH SITE'S APR REPORT.</u></p> <p>Finally, the Site Staff Certifies the Summer APR Report.</p> <p>Once the APR Report is certified, programs may not make corrections. It will be reported as the official summer data for the site.</p>	<ul style="list-style-type: none"> • Confirm Demographics are complete: (<u>All</u> demographics <u>must</u> be entered for each summer participant). <ul style="list-style-type: none"> • Click on Registration/Quick Edit Tools/Edit Demographics. <ul style="list-style-type: none"> • Select the demographic field from the drop-down list (Day School, ethnicities, gender, grade level, LEP Category, Lunch Type, Special Ed). • Enter any missing data for each field. (Fields may not be left blank). • Click on Reports/CLC APR by Reporting Period/APR Report <ul style="list-style-type: none"> • Ensure that the Reporting Period "Summer 20xx" (current year) is showing. • Click View Report • Verify that there are no <u>Participation APR Verification Failures</u> listed. If any participation demographic values show in the failures list, return to the Quick Edit Tools, and make corrections. • Click on View Report with APR Verification Failures <ul style="list-style-type: none"> ○ NOTE: ONLY click on View Report with APR Verification Failures if there are <u>NO APR Participation Verification Failures</u> listed. ○ NOTE: The Outcomes APR Verification Failures will still show on the page. • CERTIFY DATA: <ul style="list-style-type: none"> • Click on Reports/CLC Reporting by Period/APR Report. • Select Reporting Period: Summer • Click on View Report • Verify that all data on the report is accurate and complete. • Click on Certify APR Data

NOVEMBER

✓	MENU PATH	TASK INSTRUCTIONS- <u>REMEMBER TO SAVE PAGES</u>
	Google Drive/Shared with me/Family Engagement Tracker	Add or update Family Engagement Tracker Information as needed.

DECEMBER

✓	MENU PATH	TASK INSTRUCTIONS- <u>REMEMBER TO SAVE PAGES</u>
	Attendance/Enter Attendance by Session or Enter Classic Attendance NOTE: Attendance is due through the end of the prior month of the First Thursday Data Review. (EXAMPLE: Attendance through June 30, 2022, is due by the first Thursday of July 2022.)	Enter Attendance through November 30, 20xx, by the first Thursday in December.
	Google Drive/Shared with me/Family Engagement Tracker	Add or update Family Engagement Tracker Information as needed.

JANUARY

✓	MENU PATH	TASK INSTRUCTIONS-REMEMBER TO SAVE PAGES
	Attendance/Enter Attendance by Session or Enter Classic Attendance NOTE: Attendance is due through the end of the prior month of the First Thursday Data Review. (EXAMPLE: Attendance through June 30, 2022, is due by the first Thursday of July 2022.)	Enter Attendance through December 31, 20xx, by the first Thursday in January.
	Google Drive/Shared with me/Family Engagement Tracker	Add or update Family Engagement Tracker Information as needed.

FEBRUARY

✓	MENU PATH	TASK INSTRUCTIONS- <u>REMEMBER TO SAVE PAGES</u>
	Attendance/Enter Attendance by Session or Enter Classic Attendance NOTE: Attendance is due through the end of the prior month of the First Thursday Data Review. (EXAMPLE: Attendance through June 30, 2022, is due by the first Thursday of July 2022.)	Enter Attendance through January 31, 20xx, by the first Thursday in February.
	Google Drive/Shared with me/Family Engagement Tracker	Add or update Family Engagement Tracker Information as needed.

MARCH

✓	MENU PATH	TASK INSTRUCTIONS- <u>REMEMBER TO SAVE PAGES</u>
	Attendance/Enter Attendance by Session or Enter Classic Attendance NOTE: Attendance is due through the end of the prior month of the First Thursday Data Review. (EXAMPLE: Attendance through June 30, 2022, is due by the first Thursday of July 2022.)	Enter Attendance through February 28, 20xx (or the last day in February), by the first Thursday in March .
	FINAL 21st CCLC PARTICIPATING STUDENT LIST SUBMITTED TO SCHOOLS: Search/Edit Search Criteria/Find Records Submit the FINAL updated list of all participating 21st CCLC students to the local School District's SIS Coordinator. Ask the School SIS Coordinators to mark the 21st CCLC participants in Infinite Campus (IC) by the first day in April. This task ensures participating students' demographic data gets updated in the Transact system before the 21st CCLC program staff certifies their local year-end APR Report. It is also necessary for accessing and including student outcome data for OPI's annual federal reporting.	Click on Search Click on Edit Search Criteria Click on Participation tab on the top right. Scroll down to Number of Days Attended . Enter 1 in the first text box (do not enter anything in the right-hand text box "to") Click on Find Records : Click on Quick Edit/Export Spreadsheet Click on Last Name, First Name, Date of Birth, Gender, STATE Participant ID, Grade Level, Day School Attending, and Active Click on Quick Edit Form Review the list and enter any missing data you have available for each student. (At a minimum, Last Name, First Name, Date of Birth, Gender, Grade Level, Day School Attending, and Active must be entered) On the bottom of the page, click on Print/Export to Excel When the list pops up, click on Click Here to Download Open Downloaded File: <ul style="list-style-type: none"> • Print the downloaded new 21st CCLC Student Participant List. • Submit the list to the School District's Student Information System (SIS) Coordinator.
	Google Drive/Shared with me/Family Engagement Tracker	Add or update Family Engagement Tracker Information as needed.

APRIL

✓	MENU PATH	TASK INSTRUCTIONS- <u>REMEMBER TO SAVE PAGES</u>
	<p>Attendance/Enter Attendance by Session or Enter Classic Attendance</p> <p>NOTE: Attendance is due through the end of the prior month of the First Thursday Data Review. (EXAMPLE: Attendance through June 30, 2022, is due by the first Thursday of July 2022.)</p>	Enter Attendance through March 31, 20xx, by the first Thursday in April.
	<p>Moving student records from Pre-Registration to Registration/Merging Registration Records:</p> <p>After school district SIS personnel have marked students as 21st Century participants in Infinite Campus (IC), state 21st CCLC personnel upload the data into the Transact data collection and reporting system. Once this is done, the Student Participation Information pages showing a STATE ID will be automatically updated.</p> <p>Any new students or students on the uploaded document whose Transact demographic information does not include a STATE ID will appear on the Cayen AS21 "PRE-REGISTRATION" page. In this case, program staff must move their demographic information to the "REGISTRATION" page. To do this, please refer to the Task Instructions on the right-hand side of this page.</p> <p>NOTE: This is the program year's last upload from Infinite Campus into the Transact system. After this upload, Program Staff must hand-enter any missing student demographic information before certifying the APR Report at the end of the program year (May/June).</p>	<p>WATCH FOR WEEKLY UPDATE INDICATING THAT THE UPLOAD INTO THE TRANSACT CAYEN AS21 SYSTEM HAS BEEN COMPLETED, THEN:</p> <p>3. Move students from the Pre-Registration page to the Registration Page:</p> <ul style="list-style-type: none"> • Click on Registration • Click on Registration List-Manage Participants <ul style="list-style-type: none"> ○ Click on Add New – From Pre-Registration List • Choose School/s for registering current-year participants. • Choose Grade(s) for registering current-year participants. • Click Continue • In the alphabetic header row, click on "All" (right-hand side) • Click OK on the Pop-up • Under "Select All" click on the box for each current year participant. <ul style="list-style-type: none"> ○ NOTE: Only transfer students from the most recent "Record Date" (see right side of the header row). • On the top of the page, click on Register Selected <p>If any duplicate registrations appear on the Registration page, Merge Registration Records (see instructions in the Appendix, page 27, REGISTRATION: MERGING DUPLICATE REGISTRATION RECORDS)</p>

APRIL

✓	MENU PATH	TASK INSTRUCTIONS- <u>REMEMBER TO SAVE PAGES</u>
	REVIEW STUDENT DEMOGRAPHIC INFORMATION UPLOAD FOR ACCURACY IMPORTANT: Programs will be notified when the OPI's 21 st CCLC Data Specialist uploads the April student participant's demographics data into the Cayen AS21 system.	All demographics must be entered for each participating student. CONFIRM DEMOGRAPHICS IS COMPLETE: Registration/Quick Edit Tools/Edit Demographics. <ul style="list-style-type: none"> • Select the demographic field from the drop-down list (Day School, ethnicities, gender, grade level, LEP, Category, Lunch Type, Special Ed). • Enter any missing data for each field. <p>NOTE: This is a requirement for the year-end reporting. It must be completed prior to certifying program year's <i>APR Report</i> data.</p>
	UNWEIGHTED GRADE POINT AVERAGE (GPA) SCORES COLLECTION (GRADES 7-8 & 10-12 ONLY) NOTE: This is the process for collecting the unweighted GPA data. Because the data will not be available until the last day of the school year, the unweighted GPA reporting instructions are listed under the May/June – Year-End Reporting calendar (below); however, it is important to collect and enter the student's prior year and current year GPA scores into the Transact system before the May/June Year-End reporting due dates. IMPORTANT: If your school does not collect GPA Data for 6th-grade students, enter 7th-grade GPAs as your base year.	SET UP GPA COLLECTION WITH THE LOCAL SCHOOL DISTRICT <ol style="list-style-type: none"> 1. Schedule a meeting with the School District by the end of the second week in April. Explain that, as a federal reporting requirement, the 21st CCLC program must collect previous year and current year unweighted GPA scores for all participating 21st CCLC students in grades 7-8 & 10-12. <ol style="list-style-type: none"> 1. Schedule a time to collect the data before the year-end reporting due date. 2. Use the following template to collect the previous and current year GPA data: <ol style="list-style-type: none"> 1. Login to: Data Uploads (datapropeller.com) <ul style="list-style-type: none"> ▪ Complete the Unweighted GPA Template (click the "FileLayout" worksheet tab). 2. Save a copy of the template. Name it: <u>GPAdata the Program Year the Grantee Name the Site Name</u> (e.g., <u>GPAdata_2023-2024_GranteeName_SiteName</u>). <p>(In the May/June Instructions calendar below, follow the instructions to upload the GPA template into the Transact system).</p>
	Google Drive/Shared with me/Family Engagement Tracker	Add or update Family Engagement Tracker Information as needed.

MAY

✓	MENU PATH	TASK INSTRUCTIONS- <u>REMEMBER TO SAVE PAGES</u>
	Attendance/Enter Attendance by Session or Enter Classic Attendance NOTE: Attendance is due through the end of the prior month of the First Thursday Data Review. (EXAMPLE: Attendance through June 30, 2022, is due by the first Thursday of July 2022.)	Enter Attendance through April 30, 20xx, by the first Thursday in May.
	ENTER YEAR-END FINAL 21st CCLC PARTICIPATING STUDENT DEMOGRAPHICS <u>NOTE: Do not leave data fields blank.</u> Students enrolled after the April upload must have their student demographic information manually entered into their <u>Participation Information</u> page or through the <u>Registration-Quick Edit Tools-Edit Demographics</u> page. Correcting this information is a requirement before certifying the School Year APR Report.	All demographics must be entered for each participating student. CONFIRM DEMOGRAPHICS IS COMPLETE: Registration/Quick Edit Tools/Edit Demographics. <ul style="list-style-type: none"> • Select the demographic field from the drop-down list (Day School, ethnicities, gender, grade level, LEP, Category, Lunch Type, Special Ed). • Enter any missing data for each field.
	All Surveys Completed For information on completing surveys, please contact, Miriam Resendez, State Evaluator, at miriam@jemrllc.com	<ul style="list-style-type: none"> • All survey results must be launched and returned via survey links by one week after the end of your program or June 1, 20xx whichever is sooner. (To <u>Associate Students to Teachers</u>, see Instructions Guide in Appendix page 32.
	Google Drive/Shared with me/Family Engagement Tracker	Finalize Family Engagement Tracker Information as needed.

May/JUNE - YEAR-END REPORTING

✓	MENU PATH	TASK INSTRUCTIONS- <u>REMEMBER TO SAVE PAGES</u>
	Program Year-End Data Program Settings (Grantee Information, Partners, Schools, Sites, Teachers, Program Calendar) Site Settings (Reporting Periods, Site Calendar) Program Information (Professional Development) Site Information (Partners, Site Staff) Activities & Attendance	<p>Review all data for accuracy and completeness.</p> <ul style="list-style-type: none"> • Program Settings and Site Settings reviewed and updated within ALL TABS. • Program Information: Update all Professional Development events throughout the program year. Update staff who attended events. Enter all research-based or evidence-based curricula. • Site Information: Update all Partners and Site Staff pages. • Activities and Attendance must be finalized.
	<u>SUBMIT UNWEIGHTED GRADE POINT AVERAGE (GPA) SCORES (GRADES 7-8 & 10-12)</u> In April, programs were instructed to work with the local school district to collect and complete previous year and current year unweighted GPA scores for all participating 21st CCLC students in grades 7-8 & 10-12. This includes any students who participated during a summer <i>and/or</i> a school year program. (June 1 – May 31).	<p>Submit GPA Scores through the following process:</p> <p>On the Data Uploads (datapropeller.com) website, complete the form at the bottom of the screen to:</p> <ol style="list-style-type: none"> 1. “Initiate Upload” 2. “Select File” (select the GPA Template you saved on your computer), 3. “Submit” the template. (You will receive a message stating the upload was successful)
	FINALIZE ALL SCHOOL YEAR DATA CORRECTIONS:	<ul style="list-style-type: none"> • Click on Reports/CLC APR by Reporting Period/APR Report • Ensure that the Reporting Period “School Year 20xx-20xx” (current year) is showing. • Click View Report <p>Confirm that there are <u>NO Participation APR Verification Failures</u> listed. If any failures exist (e.g., Day School, Ethnicity, Gender, Grade Level, LEP Category, Lunch Type, or Special Ed), return to the Registration/Quick Edit Tools/Edit Demographics page, and make corrections. <i>Do not leave any fields blank.</i></p>

MAY/JUNE - YEAR-END REPORTING

✓	MENU PATH	TASK INSTRUCTIONS- <u>REMEMBER TO SAVE PAGES</u>
	CONTACT OPI 21st CCLC DATA PROCESSOR TO ENTER CONFIRM FAMILY MEMBER COUNTS INTO THE SCHOOL YEAR APR REPORT	<p>AFTER the 21st CCLC site staff confirms that the Transact School Year reporting is accurate and complete, <i>contact the 21st CCLC Data Processor, Amanda Domino.</i></p> <ul style="list-style-type: none"> • The OPI 21st Data Processor enters the school year's Family Member Counts into the APR Report. <p><u>Do not certify the APR Report until the Data Processor has added the Family Member Counts. NO CORRECTIONS may be made after the Family Member Counts are entered.</u></p>
	CERTIFY SCHOOL YEAR APR REPORT <p>Grantee Program Directors and Site Coordinators must complete all aspects of the year-end APR report <u>BEFORE LEAVING FOR THE SUMMER</u>. The Grant Director is ultimately responsible for confirming that all sites' data reporting is complete by the due date. Failure to complete the year-end reporting will affect the grantee's data reporting Risk Assessment Score.</p>	<ul style="list-style-type: none"> • CERTIFY DATA: <ul style="list-style-type: none"> • Click on Reports/CLC Reporting By Period/APR Report. • Select Reporting Period: School Year 20xx-20xx • Click on View Report: • Click on Certify APR Data <p>NOTE: Once the data is certified, programs may not make corrections. The certified APR report provides the official data reported to the federal government and state 21st CCLC program.</p>

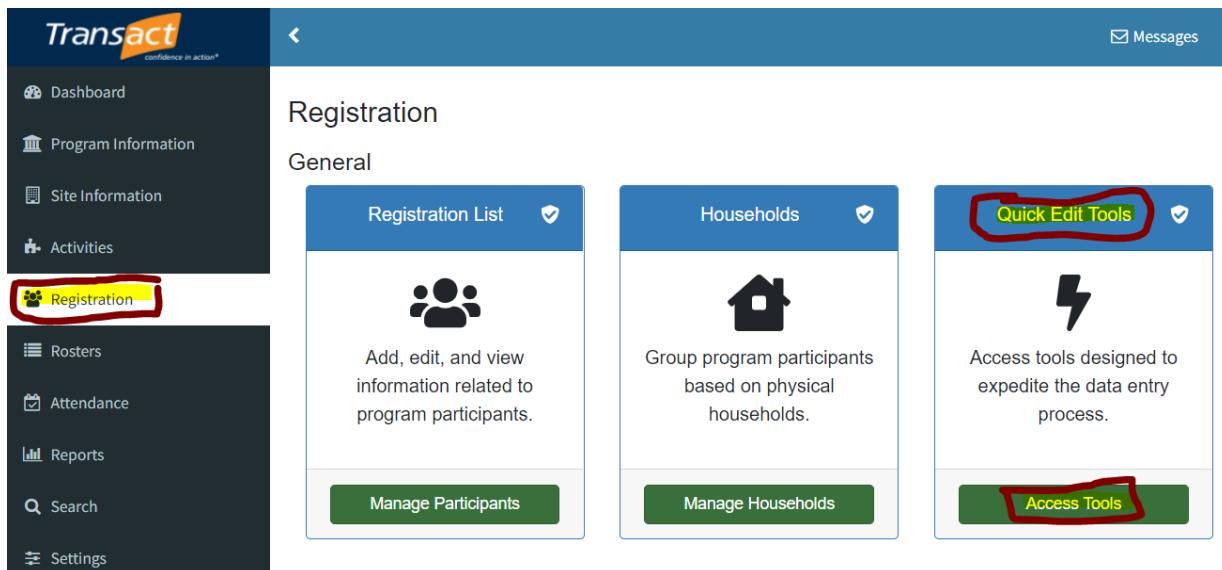
Appendix: Data Entry Instructional Guides

As well as using the [AS21 Handbook](#), found in the Transact Cayen AS21 system under the Support tab at the top of the website, the following documents guide entering data into the Cayen AS21 system.

REGISTRATION: MERGING DUPLICATE REGISTRATION RECORDS

In the Cayen AS21 system, student registration records may be duplicated due to updating the information with the official OPI data uploads three times per year. If you find duplicate entries for the same student in the site's **Registration** List, follow the instructions below:

1. Click on **Registration** in the left-hand menu bar.
2. Click on the **Quick Edit Tools-Access Tools**



3. On the “Quick Data Entry Tools” page, click on the “Select a Quick Edit Tool” drop-down menu and select “**Merge Registration**”.

The screenshot shows the Transact software interface. On the left is a dark sidebar with various menu items: Dashboard, Program Information, Site Information, Activities, Registration, Rosters, Attendance, Reports, Search, and Settings. The 'Registration' item is currently selected. On the right, the main content area has a blue header with a back arrow and the text 'Registration'. Below the header is the title 'Quick Data Entry Tools' with a question mark icon. A dropdown menu titled 'Select a Quick Edit Tool' is open, showing several options: 'Edit Demographics', 'Merge Registration' (which is highlighted with a yellow box), 'Quick Session Selection', and 'Print Surveys/Enter Responses'.

4. In the table, “**Merge Registration Records**”,

- For the duplicated Registration record, click in the left-hand circle, “**Keep this primary record**”, for the record that has the 9-digit STATE ID.
- Click in the right-hand circle, “**Merge this duplicate record, then delete it**” for the temporary record created at the site.

The screenshot shows the 'Merge Registration Records' page. The left sidebar is identical to the previous screenshot. The main content area has a blue header with a back arrow and the text 'Registration'. Below the header is the title 'Quick Data Entry Tools' with a question mark icon. A dropdown menu titled 'Merge Registration' is open. The main area is titled 'Merge Registration Records' with instructions: 'Purpose: Merge duplicate participant records into a single record.' and 'Instructions: Select a primary record to be the base. Then select a duplicate record to merge in to the primary.' A warning message states: 'Warning: This process cannot be undone. The process will merge as much Registration related information as it can however information may be lost.' Below the instructions is a table with two rows. The first row has a red box around the 'Keep this primary record' radio button. The second row has a red box around the 'Merge this duplicate record, then delete' radio button. The table columns are 'ID Number', 'Name', and 'Date Of Birth'. At the bottom of the page is a 'Save' button, which is also highlighted with a red box.

- Click Save at the bottom of the page.
- Repeat for each duplicated student.
 - NOTE:** Student records must be merged one at a time. It will not work if you try to select more than one student's duplicated records.

ACTIVE/INACTIVE PARTICIPANTS

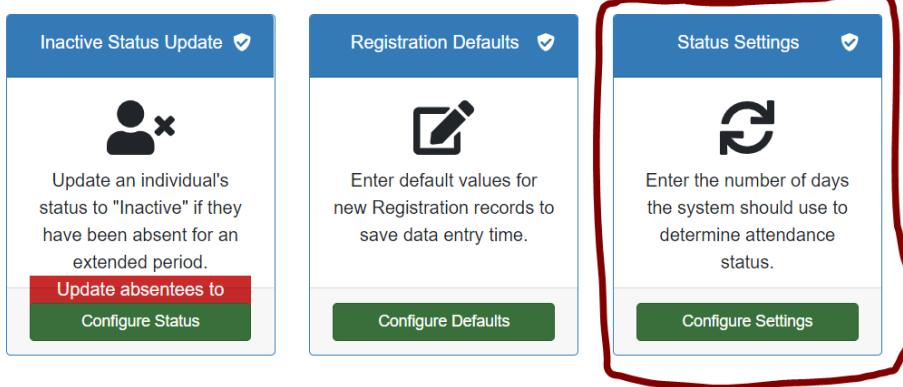
In the Cayen AS21 system, participants who have not been enrolled in courses or marked in attendance for a set time are automatically “inactivated”. When this happens, they are not visible in rosters and attendance cannot be taken for them. The number of days when AS21 “inactivates” a participant can be set for each site. The Instructions below show how to set the time in the system to inactivate participants. In addition, instructions are provided on how to “re-activate” participants in the system.

HOW TO SET THE TIME FOR THE AS21 SYSTEM TO INACTIVATE A PARTICIPANT:

1. In the left-hand menu, click on **Settings**.
2. Click on **Registration Settings**
3. Click on **Status Settings-Configure Settings**

Registration Settings

General



4. In the text boxes, **"Inactive Status Qualification (Days)"** and **"Inactive Status Update Check (Days)"**, increase the number of days so that you do not keep getting the message. If a student participates at least one day, you may want to increase the number of days to as much as 180 days. That way it won't deactivate a student if they have participated within the program year over both the summer and school year program periods.

Status Settings

* – Indicates a required field

Regular Status Qualification (Days) <small>i</small>	30	Inactive Status Qualification (Days) <small>i</small>	15	Inactive Status Update Check (Days) <small>i</small>	15
--	----	---	----	--	----

Last date 'Inactive Status Update' was run: 11/10/2021 9:10:05 AM

HOW TO “RE-ACTIVATE” A PARTICIPANT IN THE AS21 SYSTEM:

1. In the left-hand menu, click on **Search**.
2. On the right-hand side of the page, under **Search Criteria**, click on **Edit Search Criteria**.

Search Criteria:

[Edit Search Criteria](#)

[Clear Search Criteria/Results](#)

[Print Demographics Report](#)

[Generate Survey Links Report](#)

[Print Mailing Labels](#)

[Print File Folder Labels](#)

[Quick Edit/Export SpreadSheet](#)

3. In the table:
 - a. Along the top tabs, click on **Reg Info**.
 - b. In the **Active** row, click on the drop-down arrow and select **No** (This will pull participants who are not active).
 - c. On the bottom right, click on **Find Records**.

4. If there are any inactive participants in your site, a list of participants will appear in grey.
 - a. On the bottom right, click on **Quick Edit/Export Spreadsheet**.

Search Criteria:

[ALL]

[Edit Search Criteria](#) [Clear Search Criteria/Results](#) [Print Demographics Report](#) [Generate Survey Links Report](#) [Print Mailing Labels](#) [Print File Folder Labels](#) [Quick Edit/Export SpreadSheet](#)

5. Select Registration Information for Report

- a. Under General Information, click on **Last Name, First Name, Participant ID**.
- b. Under **School Information**, click on **Grade Level, Day School Attending**.
- c. Under **Registration Information** click on **Active**.
- d. On bottom right-hand side, click on **Quick Edit Form**.

Select Registration information to include on an editing form, report or spreadsheet [?](#)

General Information	School Information	Household
<input type="checkbox"/> Last Name	<input type="checkbox"/> Grade Level	<input checked="" type="checkbox"/> Household ID
<input type="checkbox"/> First Name	<input checked="" type="checkbox"/> Day School Attending	<input checked="" type="checkbox"/> Household Name
<input type="checkbox"/> Middle Name	<input type="checkbox"/> Registration Information	<input type="checkbox"/>
<input type="checkbox"/> Email	<input type="checkbox"/> Registered	<input type="checkbox"/>
<input type="checkbox"/> Participant ID	<input checked="" type="checkbox"/> Date Form Signed	<input type="checkbox"/>
<input type="checkbox"/> Barcoded Participant ID	<input type="checkbox"/> Signed By	<input type="checkbox"/>
<input type="checkbox"/> Home Address	<input type="checkbox"/> Active	<input checked="" type="checkbox"/>
<input type="checkbox"/> Home Address City	<input type="checkbox"/> Adult	<input type="checkbox"/>
<input type="checkbox"/> Home Address Zip	<input type="checkbox"/> Adult Participant Type	<input type="checkbox"/>
<input type="checkbox"/> Mailing Address	<input type="checkbox"/> Date Record Last Changed	<input type="checkbox"/>
<input type="checkbox"/> Mailing Address City	<input type="checkbox"/> Date Term Record Created	<input type="checkbox"/>
<input type="checkbox"/> Mailing Address State	<input type="checkbox"/> Enrolled in Session	<input type="checkbox"/>
<input type="checkbox"/> Mailing Address Zip	<input type="checkbox"/> Contacts	<input type="checkbox"/>
<input type="checkbox"/> Phone	<input type="checkbox"/> First Name	<input type="checkbox"/>
<input type="checkbox"/> Lives With	<input type="checkbox"/> Last Name	<input type="checkbox"/>
<input type="checkbox"/> Transportation Home	<input type="checkbox"/> Relationship	<input type="checkbox"/>
<input type="checkbox"/> Bus Route	<input type="checkbox"/> Home Phone	<input type="checkbox"/>
<input type="checkbox"/> Corner Bus Stop	<input type="checkbox"/> Work Phone	<input type="checkbox"/>
<input type="checkbox"/> Pickup Restriction	<input type="checkbox"/> Alt/Cell Phone	<input type="checkbox"/>

6. The Inactive students will come up in a list.

- a. On the right-hand side, under **Active**, the text box will show **No**.
- b. For each student you want to re-activate, click on the drop-down arrow, and select **Yes**.

7. On the bottom right-hand side, click on **Save and Refresh**.

Edit the form / Print a report / Export a spreadsheet

Purpose: Allows easy editing of multiple Registration records at once.
Instructions: Edit the desired information, and click on Save and Refresh to update the Registration records in the database. Click on Print/Export to Excel for a printer-friendly report, or to export the data to Excel.

Search Criteria					
Last Name	First Name	Participant ID	Grade	Day School Attending	Active
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED] Elementary Select Clear	<input type="button" value="No"/>
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED] Elementary Select Clear	<input checked="" type="button" value="Yes"/> <input type="button" value="No"/>

Print/Export to Excel **Save and Refresh**

ADDING ACTIVITIES & SESSIONS

1. Small Program:

- a. Same group of Participants served on the same dates and times.
- b. Example:
 - i. Activity: Well-rounded Education Activities:
 1. Description:
 - a. Arts & Music: leaf art, pumpkin carving, holiday crafts, watercolor painting, musical bands of the past, musical genres,).
 2. Sessions:
 - a. Art Classes (M/W) 3:00 – 3:45
 - b. Music Classes (Tues/Thurs) 3:00 – 3:45
 - c. Pottery Class (M) 3:00 – 3:45
 - d. Guitar Class (Tues) 3:00 – 3:45
 - ii. Activity: Science, Technology, Engineering, and Mathematics (STEM)
 1. Description:
 - a. Science of Rockets, water ecology, history of technology, bridges, robotics, Astronomy)
 2. Sessions:
 - a. STEM Activities (M-Thurs) 3:45– 4:30
 - i. OR
 - a. Science (M) 3:45– 4:30
 - b. Technology (T) 3:45– 4:30
 - c. Engineering (W) 3:45– 4:30
 - d. Math (Th) 3:45– 4:30
 - iii. Activity: Homework Help (Time and space provided to complete homework with assistance from peers and/or adults)
 1. Session:
 - a. Homework Help (M-Thurs) 4:30-5:00
 - iv. Activity: Physical Activity & Nutrition (Cooking, making trail mix, Snack ideas, soccer, basketball, volleyball, tennis, hiking, running, water sports)
 1. Session:
 - a. Health and Physical Activities (M- Thurs) 5:00 – 5:30
 - i. OR
 - b. Nutrition (M) 5:00 5:30
 - c. Sports (T) 5:00 – 5:30
 - d. Free Play (W/Th) 5:00 – 5:30
 - e. Outdoor Club (W/Th) 4:30-5:30

2. Large Program

- a. Different groups of participants served on different dates or times.

b. Example:

i. Activity: Arts and Music (K-5: leaf art, how to draw animals, watercolor painting; 6-8)

1. Sessions:

- a. K-2 Art Class (M) 3:00 – 3:45
- b. 3-4 Art Class (T) 3:00 – 3:45
- c. 5-6 Art Class (W) 3:00 – 3:45
- d. K-2 Music Class (T) 3:00 – 3:45
- e. 3-4 Music Class (W) 3:00 -3:45
- f. 5-6 Music Class (M) 3:00 – 3:45
- g. Guitar Class (Th)
- h. Pottery Class (W)

ii. Activity: STEM

1. Sessions:

- a. K-2 STEM Class (M/W) 3:45 – 4:30
- b. 3-4 STEM Class (T/Th) 3:45 – 4:30
- c. 5-6 STEM Class (M-Th)
 - i. OR
 - d. K-2 STEM Introductory (M) 3:45 – 4:30
 - e. 3-4 Robotics Club (T-Th) 3:45 -4:30
 - f. 5-6 Drones and Aircraft (M-Thus) 3:45 – 4:30

iii. Activity: Homework Help

1. Sessions:

- a. K-2 Quiet Time-Reading Corner (M-Thurs) 4:30-5:00
- b. 3-6 Homework Help (M-Thurs) 4:30 – 5:00

iv. Activity: Physical Activity

1. Session:

- a. K-2 Health and Physical Activities (M- Thurs) 5:00 – 5:30
- b. 3-6 Health and Physical Activities (M-Thus) 5:00- 5:30

CREATING ROSTERS:

See Instructions in the [AS21 Handbook](#), pages 42-47.

ADDING ATTENDANCE for STUDENTS AND FAMILY MEMBERS

See Instructions in the [AS21 Handbook](#), pages 48-51.

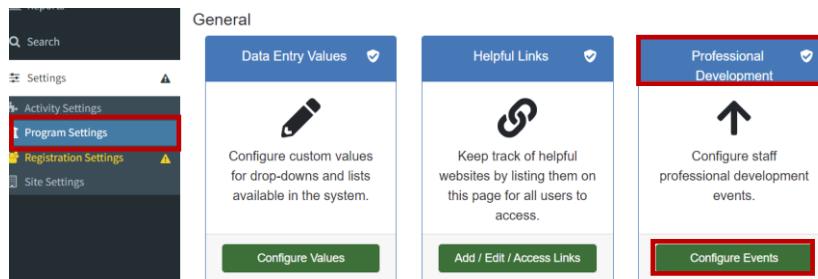
ADDING PROFESSIONAL DEVELOPMENT EVENTS

Instructions for recording your staff's Professional Development are below:

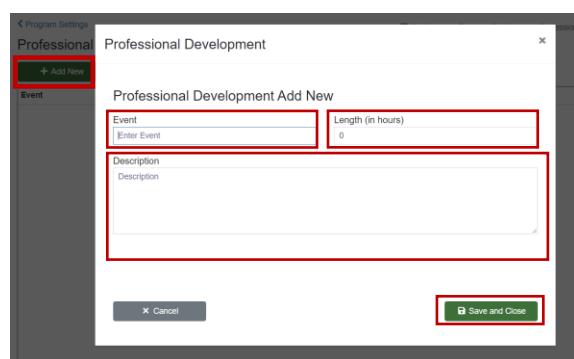
Creating a Professional Development Event:

NOTE: The Program Director must create the event before Site Coordinators can apply it to staff members' information pages.

1. Click on **Settings-Program Settings**.
2. Click on **Professional Development-Configure Events**.



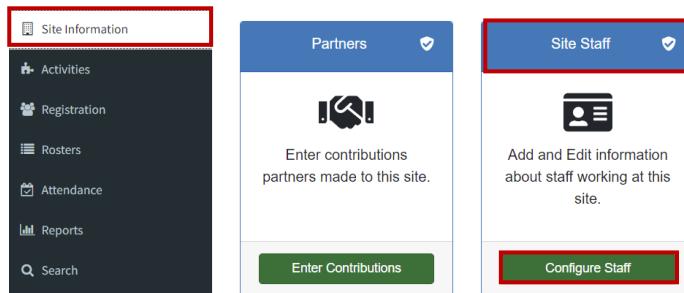
3. Click on **Add New**
 - a. Enter the **Event**.
 - b. Enter the **Length (in hours)** of the training (NOTE: do not include travel or breaks).
 - c. Enter a **Description** of the purpose of the training, and lessons learned. If the event was more than one day, list the dates and times in the description.
 - d. Click **Save and Close**.



Adding Professional Development Participation to Staff Information Page:

Once the Professional Development event is created by the Program Director, Site Coordinators can apply the information to Staff pages.

1. Click on **Site Information**
2. Click on **Site Staff-Configure Staff**



3. On Add/Edit Staff:

- a. For each staff member who attended a Professional Development event, click on the **edit** link on the right-hand side of the page.

Site Staff

Last Name	First Name	Phone
Nominn	Amanda	406-431-0466

- b. In the left-hand menu bar, click on **Professional Development**
 - i. Click on **Add New**
 - ii. Click in the **Date** textbox and click on the date from the calendar pop-up.
 - iii. Select the **Event** from the drop-down menu.
 - iv. Enter the **Hours Attended**
 - v. Enter the training **Results** (What was learned, what did the staff member bring back to the program, enter research-based or evidence-based curricula obtained, etc.).
 - vi. Click **Save and Close**
 - vii. Repeat for each Professional Development event the staff member attended.

Staff Information for: I Domino, Amanda

Main Info
Terms Employed
Hire Info
Staff Info *APR
Emergency Info
Photo
Notes
Attendance
Professional Development

Professional Development 

Date	Event	Results

Add New

Close

Professional Development - Add New - Work - Microsoft Edge

https://montanaopi.cayen-server.net/AplusV3/StaffEditProfDev_Edit.asp?StaffProfessi...

Professional Development - Add New

Date 3/22/2022	Event <input type="button" value="▼"/>	Hours Attended 0
Results <input type="text"/>		

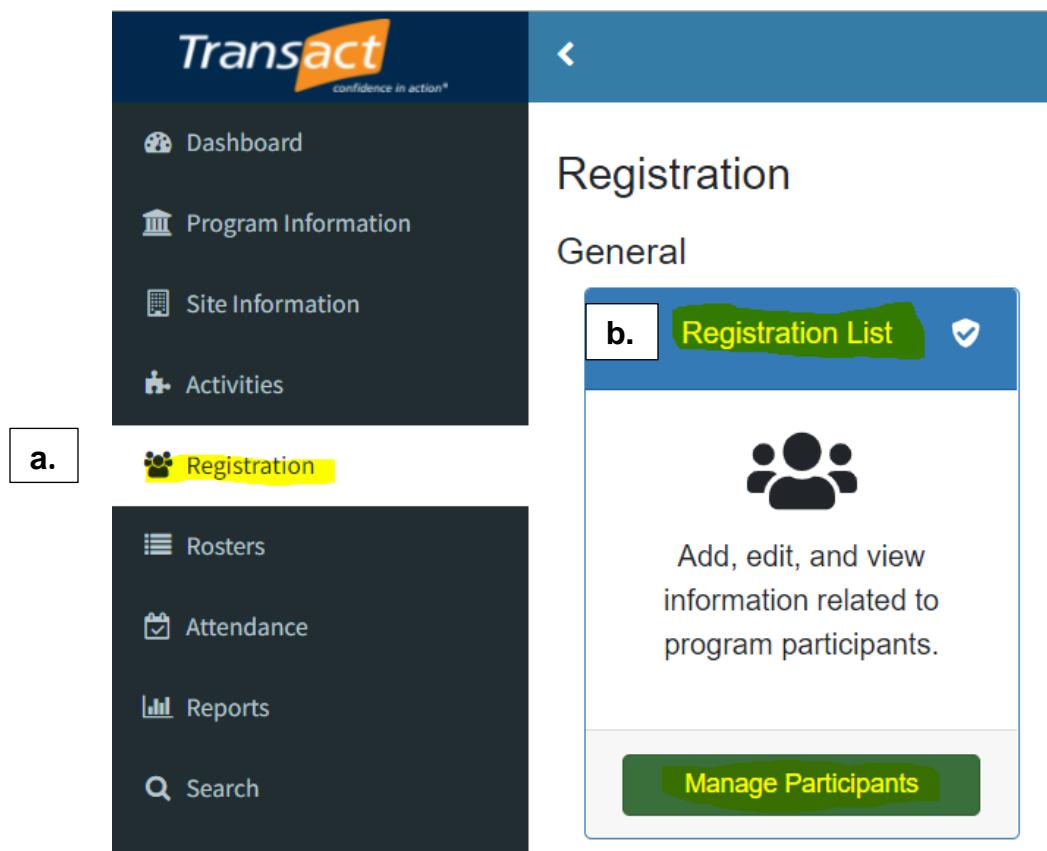
Cancel **Save and Close**

ASSOCIATING STUDENTS TO TEACHERS

The Government Performance Reporting Act (GPRA) measure for Engagement in Learning is collected through a Teacher Survey in the Cayen AS21 system. To launch the surveys, all elementary students (grades 1-5) who have attended the 21st CCLC program for 5 hours or more in either the summer or school year must be associated with a ***school-day classroom teacher***. Below are instructions for how to 1) associate an individual student with a teacher on the Registration page, or 2) associate multiple students with their teachers through the Search feature.

1. Associate an individual student with a teacher on the registration page.

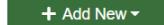
- a. In the left-hand menu bar, click on **Registration**.
- b. Click on **Registration List-Manage Participants**



- c. On the **Registration List** page, click on **Search** to pull the list of registered students in your site.
- d. Under the **Actions** header, in the student's information row, click on the blue icon to pull up the student's registration page.

Registration List 

Enter Participant's Last Name, First Name, or ID Number

 F Search + Add New ▾

Showing 1 to 24 of 24 entries

 Copy  Print  Export ▾

Actions	Participant ID	Last Name	First Name	Registered	Active	Adult	Household
 				Yes	Yes	No	

e. On the **Participant Information** page, scroll down and select the **School Attending During the Day** from the drop-down menu.

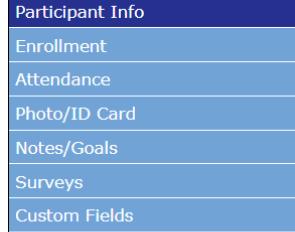
f. On the next row, select the **Elem. Homeroom Teacher**

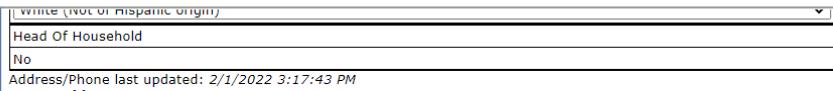
i. **NOTE:** If teachers have not been entered on the Settings/Program Settings/Teachers page, they will not appear in the drop-down list. Contact your Program Director to have the teachers entered.

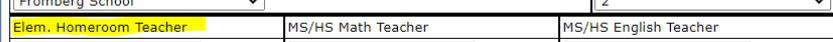
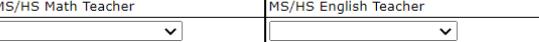
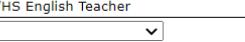
g. Click **Save**

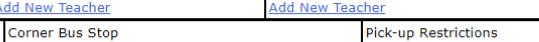
h. If there are only a few students, repeat for each student.

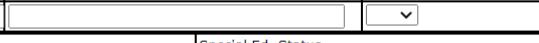
Participant Information





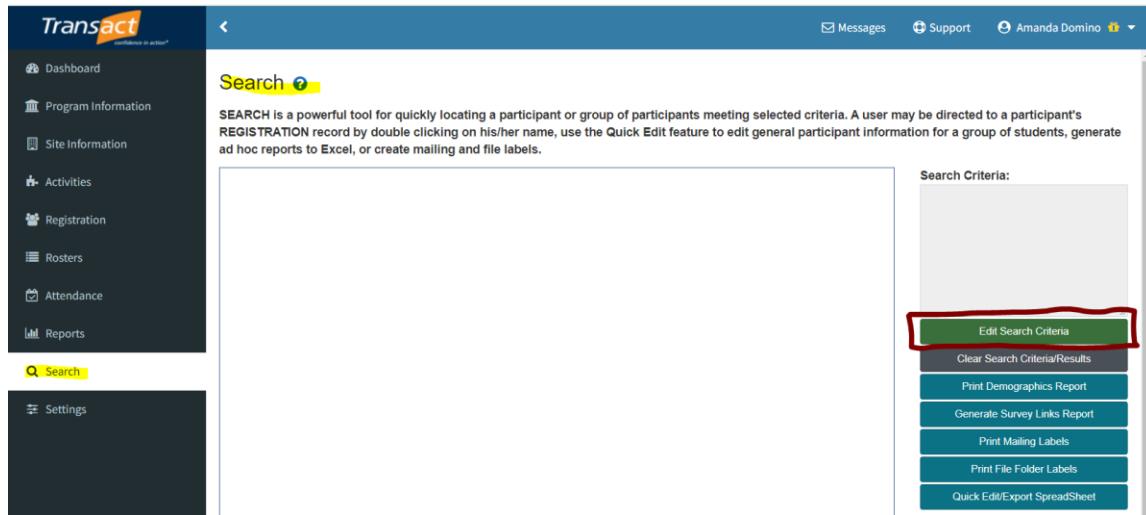




2. If there are multiple students who need to be associated with their school-day classroom teachers:

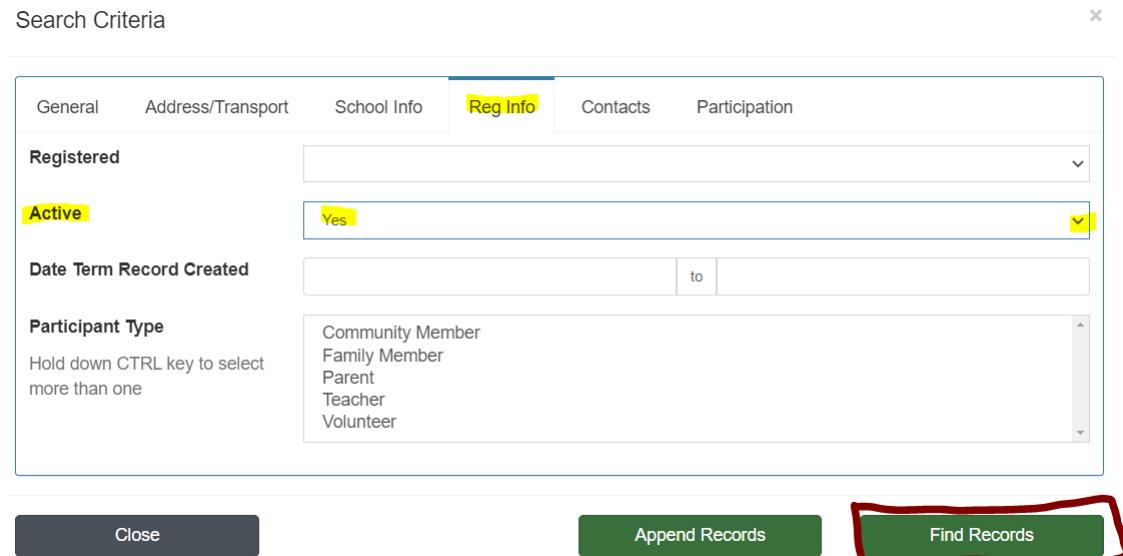
a. In the left-hand menu bar, click on **Search**.

b. On the **Search** page, in the right-hand menu bar, click on the green highlighted **Edit Search Criteria**



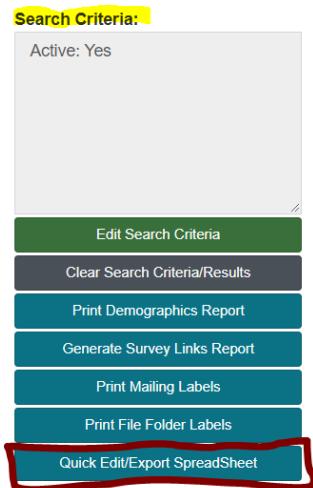
The screenshot shows the Transact software interface. On the left is a dark sidebar with various menu items: Dashboard, Program Information, Site Information, Activities, Registration, Rosters, Attendance, Reports, and a Search icon. The 'Search' icon is highlighted with a yellow box. The main content area is titled 'Search' with a question mark icon. It contains a brief description of the search function and a 'Search Criteria' section. On the right, there is a vertical menu with several options: 'Edit Search Criteria' (highlighted with a red box), 'Clear Search Criteria/Results', 'Print Demographics Report', 'Generate Survey Links Report', 'Print Mailing Labels', 'Print File Folder Labels', and 'Quick Edit/Export Spreadsheet'.

c. On the **Search Criteria** page, click on the **Reg Info** tab.
 d. In the **Active** row, click on the drop-down arrow and select **Yes**.
 e. At the bottom right-hand side, click on **Find Records**.



The screenshot shows the 'Search Criteria' dialog box. At the top, there are tabs: General, Address/Transport, School Info, Reg Info (highlighted with a yellow box), Contacts, and Participation. Below these tabs are two sections: 'Registered' and 'Active'. The 'Active' section has a dropdown menu with 'Yes' selected. There is also a 'Date Term Record Created' field with a date range and a 'Participant Type' section with a dropdown menu containing 'Community Member', 'Family Member', 'Parent', 'Teacher', and 'Volunteer'. At the bottom of the dialog box are three buttons: 'Close', 'Append Records', and 'Find Records' (highlighted with a red box).

f. When the list of students appears, under **Search Criteria** on the right, click on the bottom tab, **Quick Edit/Export Spreadsheet**.



g. Within the table that appears:

- Under **General Information** click on **Last Name, First Name, Date of Birth, Gender, STATE Participant ID**
- Under **School Information** click on **Grade Level, Day School Attending, and Elem. Homeroom Teacher**
- Under **Registration Information** click on **Active**

h. At the bottom of the page, click on **Quick Edit Form**

i. On the **Edit the form / Print a report / Export a spreadsheet**

- For each student in *Grades 1-5*, if a teacher is not listed under the **Elem. Homeroom Teacher** column, click on Select.

Edit the form / Print a report / Export a spreadsheet

Purpose: Allows easy editing of multiple Registration records at once.

Instructions: Edit the desired information, and click on Save and Refresh to update the Registration records in the database. Click on Print/Export to Excel for a printer-friendly report, or to export the data to Excel.

Search Criteria

Last Name	First Name	Participant ID	Grade	Day School Attending	Elem. Homeroom Teacher	Active
ACORD	MR	7717	▼	Select Clear	Mary Smith	Yes ▼
ALATORRE	IEL	081	▼	Select Clear	Jane Johnson	Yes ▼
ALATORRE	N	74212	▼	Select Clear	Jane Johnson	Yes ▼
Allias	ton		▼	Select Clear	Select Clear	Yes ▼
Anderson						Yes ▼
Anderson						Yes ▼
BAKER						Yes ▼
BISSELL						Yes ▼
BREKKE						Yes ▼

Back Print/Export to Excel **Save and Refresh**

2. A pop-up box will appear with a list of Teacher Names.

i 2

Teacher Picker - Work - Microsoft Edge

https://montanaopi.cayen-server.net/AplusV3/Te...

Select a teacher

Teacher's Name

Mary Smith
Jane Johnson
John White

i 3 a i Add New Teacher

3. Select the Student's School Day Classroom Teacher from the list. It will appear in the student's **Elem. Homeroom Teacher** text box.

- a. If the teacher's name is not in the pop-up box list:
 - i. Click on **Add New Teacher**
 - ii. **Complete the information on the page.**
 - iii. At the bottom of the page, click on **Save and Close**

i 3 a ii

Save Teacher

School * – Indicates a required field
[REDACTED]

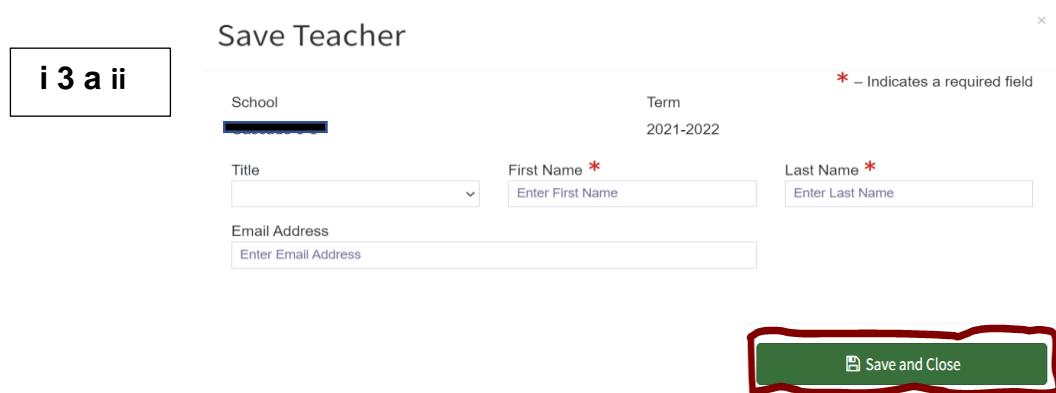
Term
2021-2022

Title First Name *
[REDACTED] Enter First Name

Last Name *
[REDACTED] Enter Last Name

Email Address
[REDACTED] Enter Email Address

Save and Close



- j. Repeat steps in (i) for each student in Grades K-5.
- k. At the bottom of the page, click **Save and Refresh** after every few students to ensure the page saves correctly.