

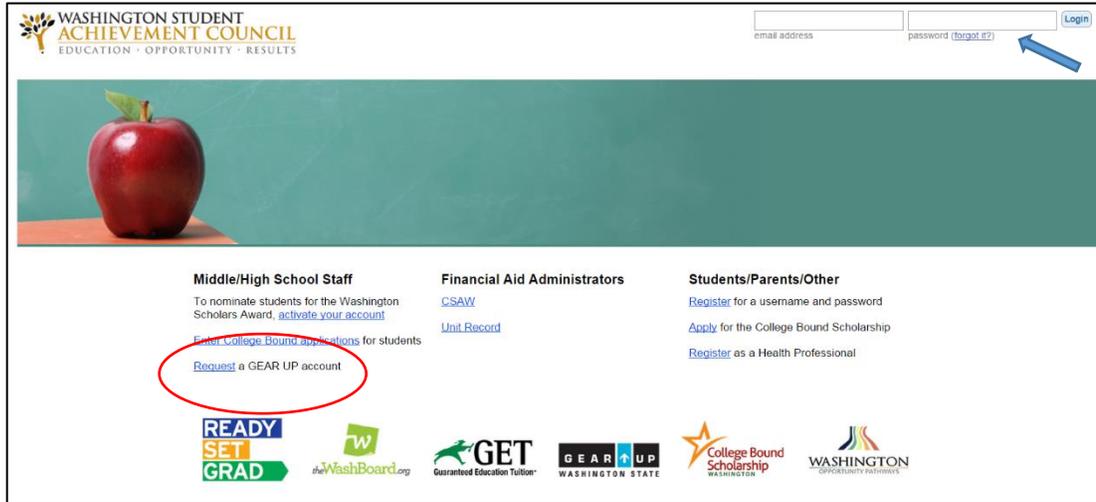
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I. Introduction

This manual provides instructions on how to use the GEAR UP database. The database is accessed from the Washington State GEAR UP Website found at <http://www.gearup.wa.gov/grant-management/access-portal>.



Request an Account

This is the first screen to appear as you enter the WSAC Portal. If you don't already have a Portal account you can request one from this screen.

Once you request a GEAR UP Portal account, your user name and password will be assigned by WSAC-GEAR UP and emailed to you. This is also where you are going to login into the Portal in order to enter students or run activity reports. After entering your username and password in the top, right-hand corner of the page, click on the **“login”** button. The next screen will then appear.

Forgotten Password

If you've forgotten your password, you can reset it by clicking on the **“(forgot it?)”** link at the very top of the page, under where you login.



At this screen you will be asked to enter your email address and then to click on the **“Get Password Reset Instructions”** button. The reset instructions will be sent to your email. Please note, that to reset your password, you will need to

know the answer to the security question you set up the during the initial registration process.

Forgot Password

Your E-mail Address:

except: State Work Study Employers

[Get Password Reset Instructions](#)

If you can't remember your security question please contact Kelly Keeney at 360-753-7838 or kellyk@wsac.wa.gov for further instructions.

II. Welcome to the WSAC Portal

The screenshot shows the WSAC Secure Portal interface for an administrator. At the top left is the logo for the Washington Student Achievement Council, with the tagline 'EDUCATION · OPPORTUNITY · RESULTS'. At the top right, it says 'WSAC Secure Portal' and 'Welcome Kelly Keeney' with a 'Logout' link. Below this is a blue navigation bar with 'Home', 'Admin', 'Common', 'Programs', and 'Utilities' menus. A search bar on the right says 'Choose a menu item'. The main content area contains a 'Welcome to the WSAC portal.' message and a note: 'This website is for use only by authorized WSAC staff, institution staff, employers, and students. This site is not for use by the general public.'

This screen provides a set of menus at the top of the page. At the top right of the screen is your login name and an option to log out of the Portal.

The view displayed above is a screen shot of a database administrator's page. Based on security permissions, your view may differ. A GEAR UP site portal user's view will be as displayed below, with only the **"Home"**, **"Common"**, and **"Program"** menu choices available.

The screenshot shows the WSAC Secure Portal interface for a user. The navigation bar is blue and contains 'Home', 'Common', and 'Programs' menus. A search bar on the right says 'Choose a menu item'. The main content area contains a 'Welcome to the WSAC portal.' message and a note: 'This website is for use only by authorized WSAC staff, institution staff, employers, and students. This site is not for use by the general public.'

"Common" Menu Selections

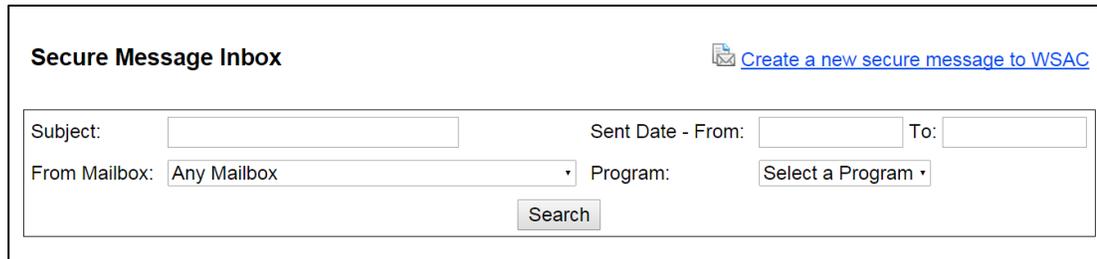
Change Your Password Screen:

Use this screen to change either your password or your security question. You don't need to change both in order for one change to take effect.

The screenshot shows the 'Change Your Password' screen. It lists WSAC's password requirements: 1. Passwords must be at least 8 characters long. 2. Passwords must contain characters from the following four categories: Uppercase, Lowercase, Numbers, Special Symbols (!@#\$%^&*). 3. Passwords must be different than the last 3 passwords used. There are three input fields for 'Old password:', 'New password:', and 'Repeat new password:', followed by a 'Submit New Password' button. Below this, it says 'Optionally reset your security question:' and 'We are not showing your original question or answer for security reasons.' There is a dropdown menu with 'What is the name of your first pet?' and an input field, followed by a 'Submit Security Question' button.

Messages and Files Screen

The **“Secure Message Inbox”** feature allows you to send secure messages to the GEAR UP. Any time an email or an attachment contains identifying student data, such as student ID numbers, SSN's or birthdates, you must send it using this secure feature.

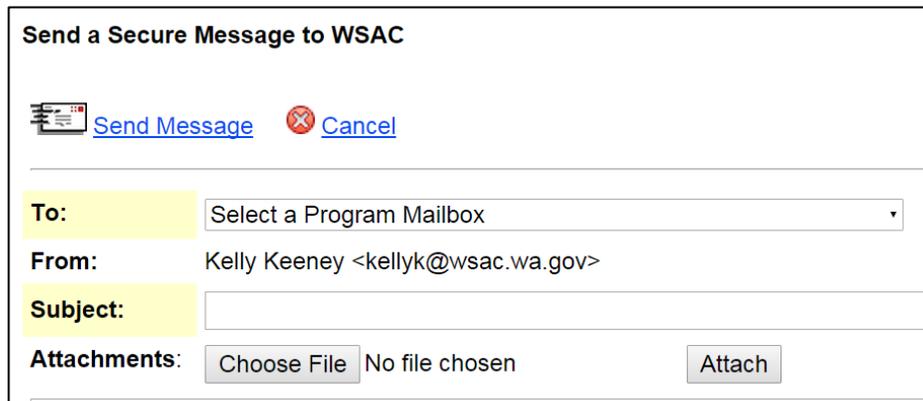


Secure Message Inbox [Create a new secure message to WSAC](#)

Subject: Sent Date - From: To:

From Mailbox: Program:

Using the **“Create a new secure message to the WSAC”** link you will be redirected to the screen shown below. Fill in the appropriate information, upload any files that need to be attached to the message. Click on the **“Send Message”** link.



Send a Secure Message to WSAC

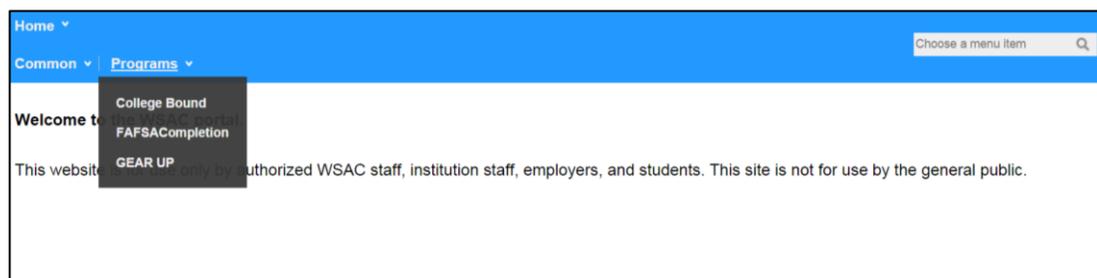
To:

From: Kelly Keeney <kellyk@wsac.wa.gov>

Subject:

Attachments: No file chosen

The second menu option on this screen is **“Programs”**. The dropdown options you see may vary depending on your secure access.



Home

Common

- College Bound
- FAFSAC completion
- GEAR UP**

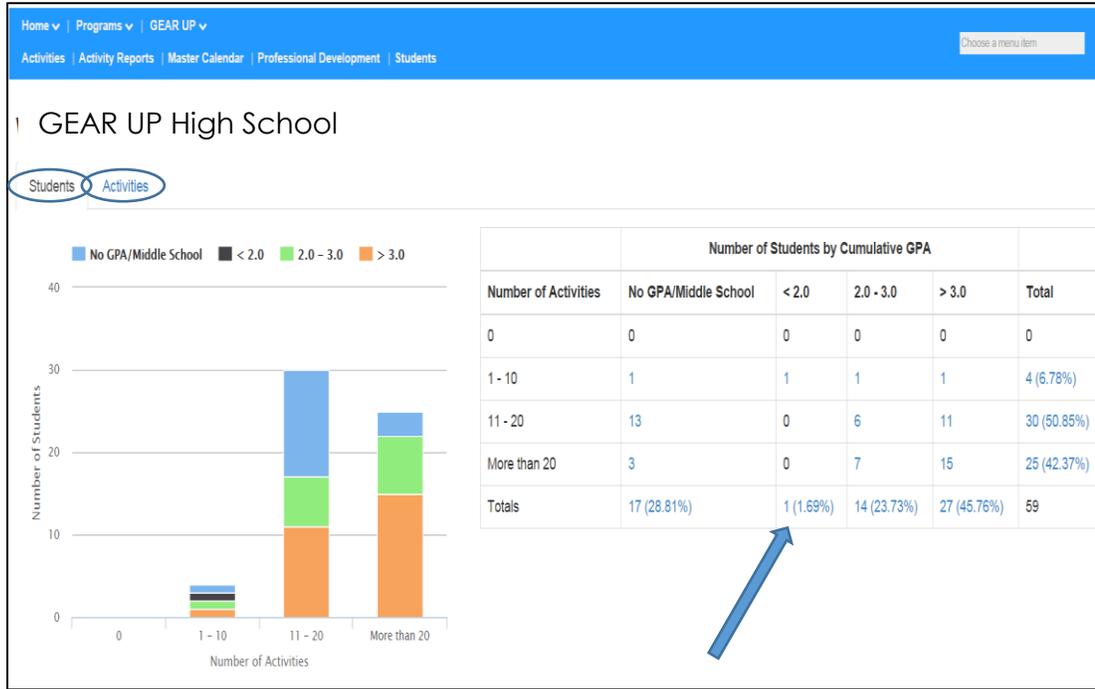
Welcome to... This website is for authorized WSAC staff, institution staff, employers, and students. This site is not for use by the general public.

Click on the **“GEAR UP”** option to take you to the GEAR UP Dashboard and home page of the GEAR UP Activity Portal.

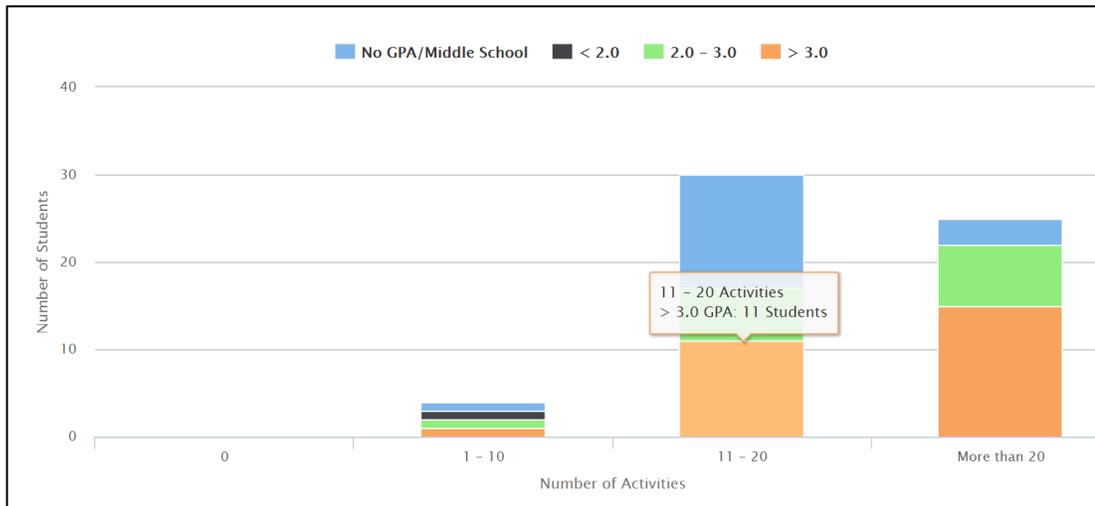
III. Your GEAR UP Dashboard

GEAR UP Dashboard Student Tab

The GEAR UP dashboard is a tool for GEAR UP sites to track their current activity data. There are two tabs associated with the Dashboard, the Student Tab and the Activity Tab. The **Student Tab** tracks the data in relation to a student's GPA.

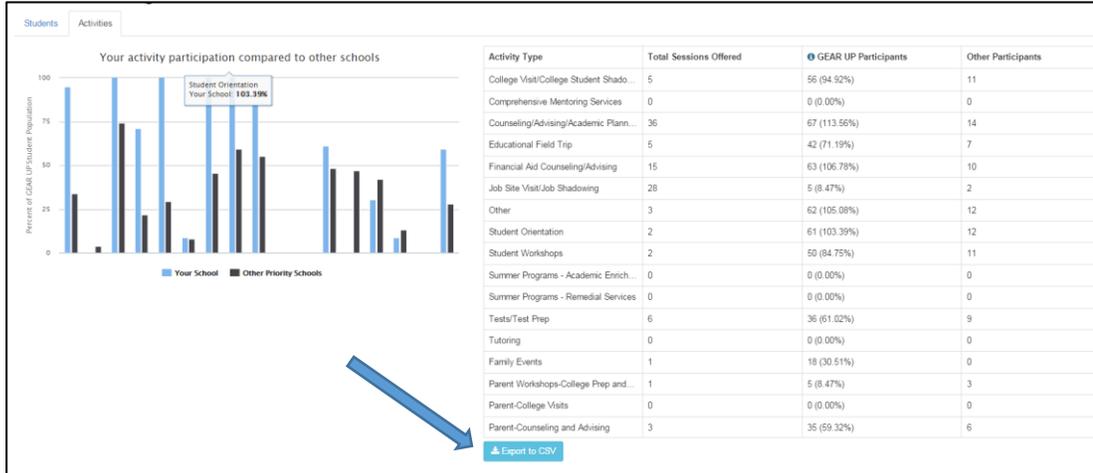


Use your mouse to hover over the bar graph and find the percentage tags in relation to the table beside the chart. You can click on the blue numbers (links) in the table to bring up a list of the current students in that GPA category.



GEAR UP Dashboard Activity Tab:

The **Activity Tab** displays your students' GEAR UP activity participation compared to other same-model (Priority, or Cohort), GEAR UP schools.



By clicking on the [Export to CSV](#) button at the bottom of the screen, the activity type data in the table on the right can be exported into a CSV file. A CSV file is like an Excel file, but without the fancy formatting capabilities.

Below is a snapshot of what the data from your school's activity tab would look like.

Activity Type	Total Sessions Offered	GEAR UP Participants	Other Participants
College Visit/College Student Shado	5	56	11
Comprehensive Mentoring Services	0	0	0
Counseling/Advising/Academic Plan	36	67	14
Educational Field Trip	5	42	7
Financial Aid Counseling/Advising	15	63	10
Job Site Visit/Job Shadowing	28	5	2
Other	3	62	12
Student Orientation	2	61	12
Student Workshops	2	50	11
Summer Programs - Academic Enrich	0	0	0
Summer Programs - Remedial Servic	0	0	0
Tests/Test Prep	6	36	9
Tutoring	0	0	0
Family Events	1	18	0
Parent Workshops-College Prep and	1	5	3
Parent-College Visits	0	0	0
Parent-Counseling and Advising	3	35	6

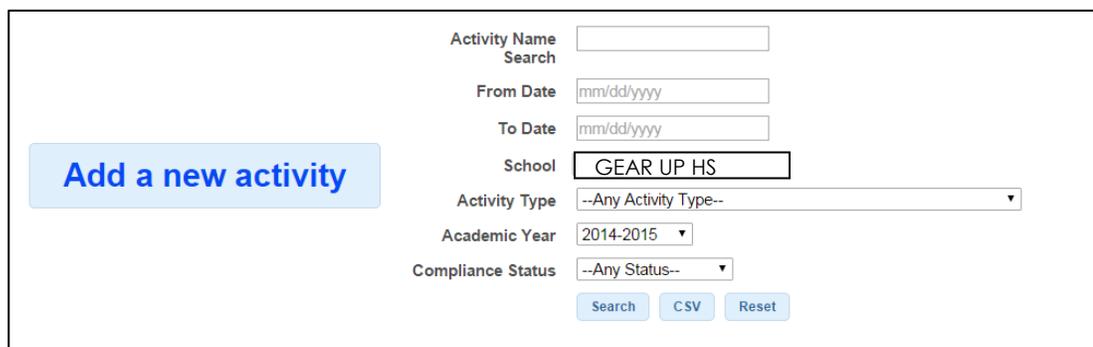
IV. Activities

The Activity screen is where you will add new activities, search for activities that have been already entered, and manage the activities that you have already established for the current academic year.

Adding a New Activity

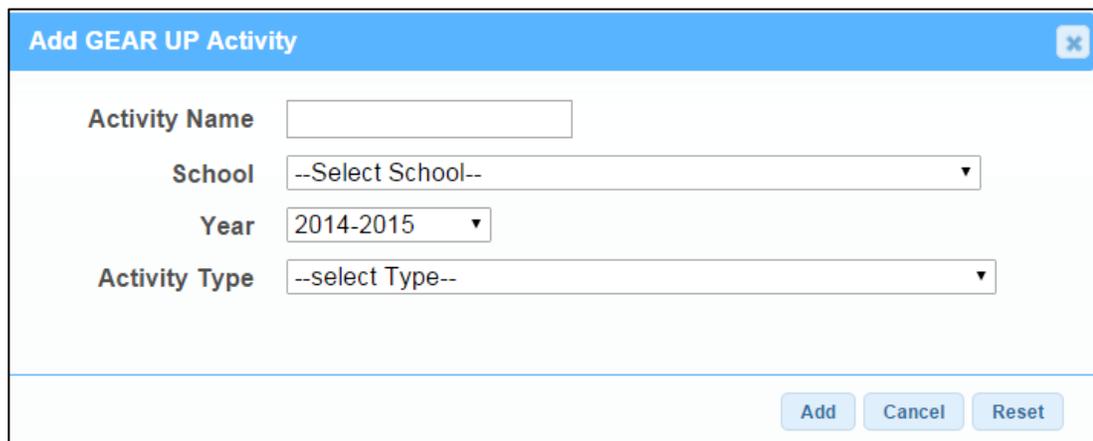


To add a new student activity select “**Activities**” from the blue bar at that top of your Portal screen. Once you do that you will be redirected to the “**Activities**” screen.



A form titled 'Add a new activity' with a blue button on the left. The form fields are: Activity Name Search (text input), From Date (mm/dd/yyyy), To Date (mm/dd/yyyy), School (GEAR UP HS), Activity Type (--Any Activity Type--), Academic Year (2014-2015), and Compliance Status (--Any Status--). There are Search, CSV, and Reset buttons at the bottom.

Click on the “**Add a new activity**” button. The following screen will appear:

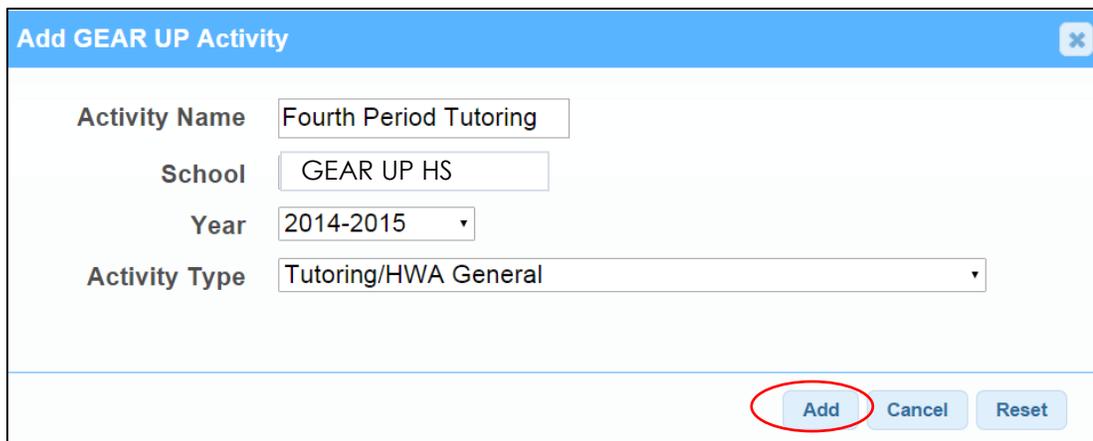


A form titled 'Add GEAR UP Activity' with a blue header and a close button. The form fields are: Activity Name (text input), School (--Select School--), Year (2014-2015), and Activity Type (--select Type--). There are Add, Cancel, and Reset buttons at the bottom.

In the “**Add GEAR UP Activity**” box, fill in the following information:

- Activity Name:** Give the activity a descriptive name; the more descriptive, the less there are compliance questions. The activity name doesn't need to fit in the space allotted for it, there is no character limit.
- School:** This will default to the name of your GEAR UP school, or if there is more than one school in your district, select from the school drop-down box.
- Year:** Will default to the current academic year.
- Activity Type:** This is important. Using the “**GEAR UP Service Definitions**” handout, choose the activity type from the drop-down of choices. This handout can be found on the GEAR UP Website at: <http://www.gearup.wa.gov/file/gear-service-definitions>.

The next step to adding the activity to the Portal is to click on the “**Add**” button at the bottom of the text box.



Add GEAR UP Activity

Activity Name Fourth Period Tutoring

School GEAR UP HS

Year 2014-2015

Activity Type Tutoring/HWA General

Add **Cancel** **Reset**

After you click on the “**Add**” button you will be brought to the Activity Detail calendar screen.

Activity Detail Screen

This screen is where the details of the GU activity are entered. Until you add the activity details, the activity remains empty of the date the activity took place and who participated in the activity. Multiple dates can be entered for one activity, as long as it's the same activity with the same name, and the same activity type.

For example, when entering an activity that spans the entire school year, such as tutoring, you will only need to set up the actual activity once. Then, using the activity calendar as shown below, click on the date that the activity took place.

GEARUP 3 - Activity Details [You have 1 new message](#)

Activity Name: Fourth Period Tutoring
Activity Type: Tutoring/HWA General
School: Wilson Creek High
Year: 2014-2015

[Delete](#) [Edit](#) [Back to Activity Search](#)

Click on a day to add a session.

Show Master Calendar

today **May 2015** month week day

Sun	Mon	Tue	Wed	Thu	Fri	Sat
26	27	28	29	30	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31	1	2	3	4	5	6

Color Legend (mouse over): ■ ■ ■ ■

This particular activity session was scheduled May 26, 2015.

Activity Session

Activity Name: Fourth Period Tutoring

ActivityDate: 5/26/2015

Start Time: 08:00AM

End Time: 08:00AM

Session Notes:

Full School Event:

Enter new activity session information and press 'Save'.

[Save & Return to Calendar](#) [Save & Go to Participants](#) [Cancel](#) [Reset](#)

Start Time	<input type="text" value="08:00AM"/>	
End Time	<input type="text" value="08:00AM"/>	
Session Notes	<input type="text"/>	

Activity start and end times: Use the scroll buttons next to the default start and end times to adjust the session time, or type the time in the boxes manually.

Session notes: Use this space to put any notes that you might find helpful for the session. For example, let's say for this particular tutoring session you handed out some new incentives; you could make a note of it here.

The notes that you put in for the session are only for that session's date and are not displayed anywhere else except in the activity session box. The only way to get back to the notes is to click on that day's activity session date.

Activity Session

Activity Name	Fourth Period Tutoring	
ActivityDate	5/26/2015	
Start Time	<input type="text" value="10:40AM"/>	
End Time	<input type="text" value="11:20AM"/>	
Session Notes	<input type="text" value="Handed out GU pencils."/>	
Full School Event	<input type="checkbox"/>	

Enter new activity session information and press 'Save'.

Save & Return to Calendar: To save and add the session without adding any participants, click on the “**Save & Return to Calendar**” button. This will bring you back to the activity detail calendar.

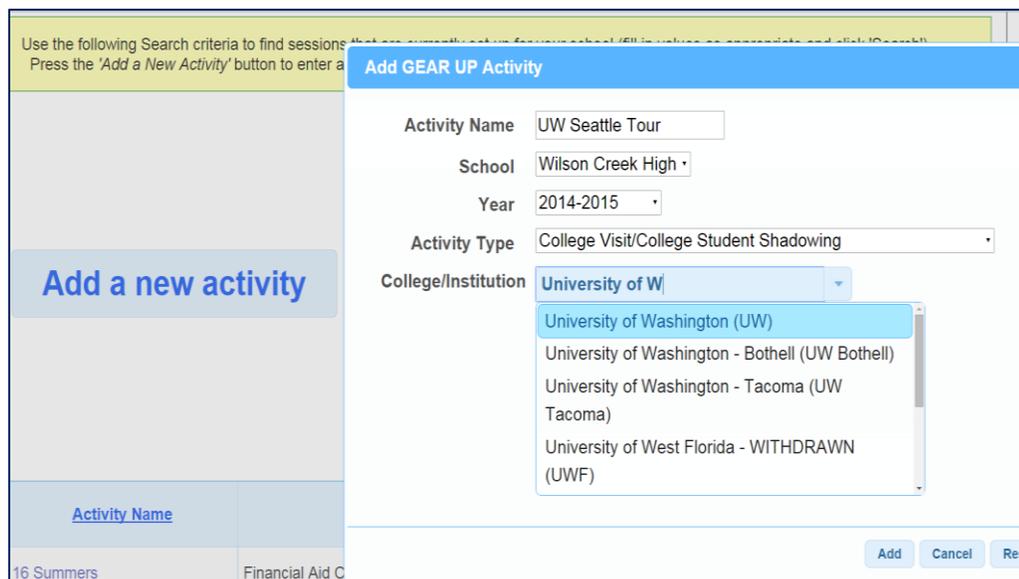
Save & Go to Participants: Clicking on the “**Save & Go to Participants**” button will take you to the “Activity Participants Screen”. It's at this screen where you will enter your students. Please note, that only currently enrolled students can be added to an activity.

Entering a College Visit Activity

Entering a college visit in the Portal is not much different than entering any other activity, except that you will also be asked to enter the name of the college or university your GU students visited. Each college or university visited should be a separate activity, they do not get entered on the same activity calendar.

At the “**Activities**” page click on the “**Add a new activity**” button. In the “**Add GEAR UP Activity**” pop-up box, fill in the essential information to establish activity.

For your “Activity Type” choose “**College Visit/College Student Shadowing.**” Notice that once you have chosen the college visit activity type, a new drop-down box called “**College/Institution**” becomes available. The easiest way to find the college or university you need to enter is to start typing in the drop-down box.



The screenshot shows a web interface for adding a GEAR UP activity. A blue header bar reads "Add GEAR UP Activity". Below it, several form fields are visible: "Activity Name" with the text "UW Seattle Tour", "School" with a dropdown menu showing "Wilson Creek High", "Year" with a dropdown menu showing "2014-2015", and "Activity Type" with a dropdown menu showing "College Visit/College Student Shadowing". A new dropdown menu for "College/Institution" is open, showing a list of institutions: "University of W", "University of Washington (UW)", "University of Washington - Bothell (UW Bothell)", "University of Washington - Tacoma (UW Tacoma)", and "University of West Florida - WITHDRAWN (UWF)". At the bottom right of the form are three buttons: "Add", "Cancel", and "Res".

The name of the college/university will now reflect in the name of the activity. If you can't find the college that your students visited, please contact Kelly Keeney at kellyk@wsac.wa.gov for help.

Once you click on the “**Add**” button, you will be taken to the next screen where you add the time, the number of days you visited the college, and the participants. Please only count the actual time spent on campus, not the travel time to and from the activity. If the visit is over the span of multiple days, enter each day separately.

Activity Participants Screen

The screen below appears after you've clicked on the **“Save and Go to Participants”** button in the **“Activity Session”** box.

GEARUP 3 - Activity Participants [You have 1 new message](#)

Activity Name	Fourth Period Tutoring	School	Wilson Creek High
Activity Type	Tutoring/HWA General	Year	2014-2015

Not Reviewed

no messages about this activity [view/send messages](#)

[Activity Search](#) [Return to Calendar](#) [Print Me](#) [Excel](#)

Tuesday - 5/26/2015 10:40 AM (0.67 hrs)

Enter student name (first, last or SSID) in the box below to search/add participants.

Add students by name/SSID: **Add by grade:** --Select a Grade--

Student	Student Last	Student First & MI	Grade	SSID	Participation (hh:mm)	Save All
Attended <input type="checkbox"/>						

All off the links on this screen are active and will either take you to another screen view, or will perform a specific task.

- [Message Alert Link](#)-check your Portal Compliance messages.
- [Activity Name](#) -will take the user back to the “Activity Detail” calendar.
- [Activity Search](#)-will take the user back to the “Activities” screen.
- [Return to Calendar](#)-will take the user back to the “Activity Detail” calendar.
- [Print Me](#)-will PDF and enable you to print out a sign-in sheet for the activity. This is extremely handy for field trips.
- [Excel](#)-will download the activity details and student participants into a CSV file which can be then saved as an Excel file.
- [Student Last](#) -once entered, sort the list of students alphabetically by their last name.
- [Student First & M](#)-once entered, sort the list of students alphabetically by their first name and middle initial.
- [Grade](#)-sort the students by grade level.
- [SSID](#)-sort the students by their SSID.

Entering Students in the Activity Participant Screen

To enter students into an activity, begin typing the student's first name, last name, or SSID in the “**Add students by name/SSID,**”

The screenshot shows the 'Activity Participant Screen' for 'Fourth Period Tutoring' at 'Wilson Creek High' for the '2014-2015' school year. The activity type is 'Tutoring/HWA General'. A 'Not Reviewed' message box is present. Below the activity details, there is a search bar with the instruction: 'Enter student name (first, last or SSID) in the box below to search/add participants.' Below the search bar, there are two options: 'Add students by name/SSID:' with a text input field containing 'A' and a dropdown menu, and 'Add by grade:' with a dropdown menu set to '--Select a Grade--'. Below these options is a table with columns for 'Student', 'Grade', 'SSID', and 'Participation (hh:mm)'. The first row shows a student named 'AMICK, DAMON T' with a participation time of 00:30. There is a 'Save All' button in the top right corner of the table area.

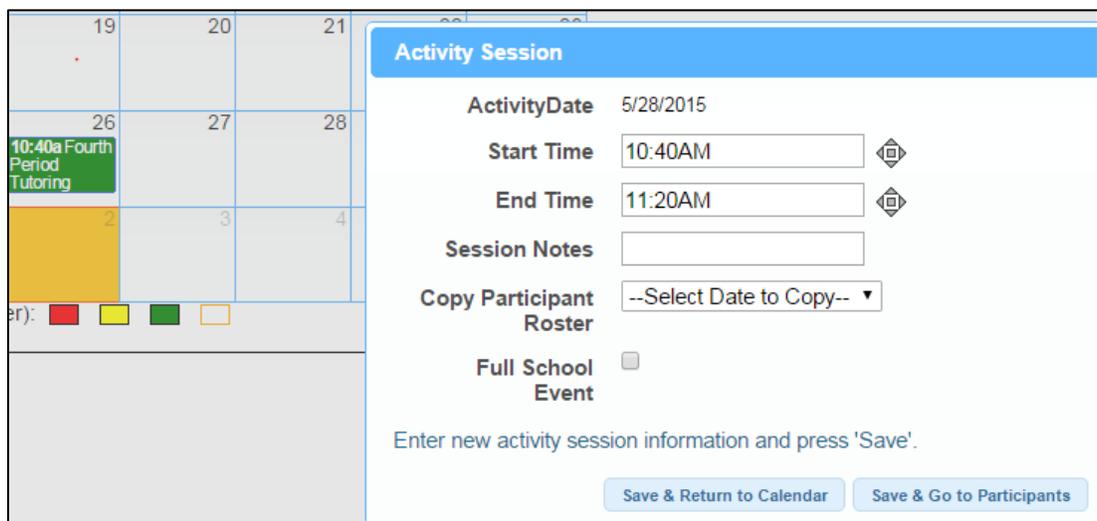
- Once the student's name appears in the drop down list, use your mouse to select the student(s) who matches your search criteria. (Note: If the student was not considered an enrolled student during the time period you are trying to add them to the activity, there will be a “**Not Enrolled**” statement next to their name.
- You can also add students by grade if necessary. This option is used mainly for Cohort schools who only serve one entire grade. If you choose use that option remember that you will need to make sure to uncheck the students who were absent from school, or the activity, that day. Make sure to save whatever changes you made.
- By using the arrow keys in the “**Participation**” column, a student's time can be changed to reflect his or her participation time. For example, if a tutoring session is one hour, but the student only attended for ½ hour, then you would need to change the student's time to reflect this. Again, make sure to save whatever changes you made.

This close-up shows the 'Participation (hh:mm)' column of the table. It features a header with an information icon and a 'Save All 1' button. Below the header, there are four rows, each with a time input field and a diamond-shaped arrow key. The times are 00:30, 00:40, 00:40, and 00:40. To the right of each time input field are 'Save' and 'remove' buttons.

Scheduling Multiple Day Activities

It's easy to schedule an activity over multiple days, such as tutoring, as long as the activity has the same name and is the same activity type. If the same students are attending you can even copy over the roster from one day to the next. If you do this you will need to remember to make sure make sure that students aren't getting counted in activities they didn't attend. You will need to go into the activity, check the box that says the student attended, and then save the activity to ensure the participation time gets accounted for.

- To add days to an already scheduled activity you'll need to start at the activity in detail screen.
- Click in the calendar on the next day/date that the activity is scheduled, for this example let's schedule the activity for Tuesdays and Thursdays of each week.
- Once you click on the date, the “**Activity Session**” box will pop up. Note that the start and end time are already pre-populated for you.
- Note that a “**Copy Participant Roster**” box is now also available. This option is not required, but it will allow you to select the student roster from a previously scheduled date to copy over to the new date.



The screenshot shows a calendar interface on the left and an 'Activity Session' form on the right. The calendar has a grid with dates 19, 20, 21, 26, 27, 28, 3, and 4. A green box labeled '10:40a Fourth Period Tutoring' is visible on the 26th. The 'Activity Session' form has a blue header and the following fields:

- ActivityDate**: 5/28/2015
- Start Time**: 10:40AM
- End Time**: 11:20AM
- Session Notes**: (empty text box)
- Copy Participant Roster**: --Select Date to Copy-- (dropdown menu)
- Full School Event**:

At the bottom of the form, there is a blue instruction: "Enter new activity session information and press 'Save'." and two buttons: "Save & Return to Calendar" and "Save & Go to Participants".

- Clicking on the “**Save & Return to Calendar**” button will take you back to the activity calendar where you can continue to set up additional dates for the activity if you choose.
- Clicking on the “**Save & Go to Participants**” button will direct you to the “Activity Participants” screen where you can add participants, or, if you have copied a previous date's participants, you can check their attendance and save them to the activity.

Each activity will have an Activity detail screen that will look something like the one below. Even if you schedule only one activity, it will still have its own, individual activity detail screen.

An example of what your "Activity Details" calendar might look like after you've scheduled a multiple day activity is pictured below-

Activity Name: Fourth Period Tutoring
Activity Type: Tutoring/HWA General
School: Wilson Creek High
Year: 2014-2015

[Edit](#) [Back to Activity Search](#)

Date	Time	Count
5/26/2015	10:40 AM (0.67 hrs)	3
5/28/2015	10:40 AM (0.67 hrs)	3
6/2/2015	10:40 AM (0.67 hrs)	3
6/4/2015	10:40 AM (0.67 hrs)	0
6/9/2015	10:40 AM (0.67 hrs)	0
6/11/2015	10:40 AM (0.67 hrs)	3
6/16/2015	10:40 AM (0.67 hrs)	0
6/18/2015	10:40 AM (0.67 hrs)	0
6/23/2015	10:40 AM (0.67 hrs)	0

Calendar: June 2015. Legend: Green (complete), Yellow (participants added), Red (no participants).

Note the color legend at the bottom of the screen. Each color represents the participation status of the activity.

- **Green**-Session roster is complete, (participants and participation have been entered).
- **Yellow**-Participants have been added but no participation time has been entered. This means either you haven't saved the participants to the activity, or that the activity hasn't taken place yet. If participants have been previously added an activity, the color of the activity will not turn green until the actual date of the activity arrives.
- **Red**-Session has no participants.

The goal is to see all the dates of the activity turn green. If the date of the activity has passed and the activity still appears as red or yellow then action needs to be taken to make sure the activity participation is up to date.

Navigating Through the Activity Detail Screen

- Use the “**Backward and Forward**” buttons at the top of the screen to scroll through the different months that you have scheduled an activity. For example, if you want to continue to set up the activity, like the one below, just use the buttons to go to the next month.



- Use the “**Month, week, and day**” buttons to see different view formats of your activity calendar.



GEARUP 3 - Activity Details [Message Center](#)

Activity Name Fourth Period Tutoring
 Activity Type Tutoring/HWA General
 School Wilson Creek High
 Year 2014-2015

[Edit](#) [Back to Activity Search](#)

Click on a day to add a session.

Show Master Calendar today June 2015 [month](#) [week](#) [day](#)

Sun	Mon	Tue	Wed	Thu	Fri	Sat
31	1	2 10:40a Fourth Period Tutoring	3	4 10:40a Fourth Period Tutoring	5	6
7	8	9 10:40a Fourth Period Tutoring	10	11 10:40a Fourth Period Tutoring	12	13
14	15	16 10:40a Fourth Period Tutoring	17	18 10:40a Fourth Period Tutoring	19	20
21	22	23 10:40a Fourth	24	25	26	27

Date	Time	Count
5/26/2015	10:40 AM (0.67 hrs)	3
5/28/2015	10:40 AM (0.67 hrs)	3
6/2/2015	10:40 AM (0.67 hrs)	3
6/4/2015	10:40 AM (0.67 hrs)	0
6/9/2015	10:40 AM (0.67 hrs)	0
6/11/2015	10:40 AM (0.67 hrs)	3
6/16/2015	10:40 AM (0.67 hrs)	0
6/18/2015	10:40 AM (0.67 hrs)	0
6/23/2015	10:40 AM (0.67 hrs)	0

- The “**Back to Activity Search**” link will take you back to the “**Activities**” screen, the same screen that you set up the activity from. The “**Activities**” screen also lists all the activities you have set up from the beginning of the academic year.
- Clicking on a “**Date**” link will take you to the activity participant screen of whatever date you chose to view.

Editing an Activity: Click on the “**Edit**” link to change the name of the activity or change the activity type. Click on the “**Save**” button to save your changes.

Activity Name

School Wilson Creek High

Year 2014-2015

Activity Type

Deleting Activities

There are a couple of steps that need to be taken in order to delete an activity. There is also a difference in process depending on if you want to just delete a single day of the activity, or the entire activity altogether.

Deleting a single day of an activity: If you've scheduled an activity and then, for example, realize later that there's no school that day, or maybe, let's say, there's an assembly. You can easily delete that single day's activity following these steps-

1. Go to your **"Activity Details"** calendar. Click in the calendar on the date that you want to delete. Once you do this, an activity session box will pop up.

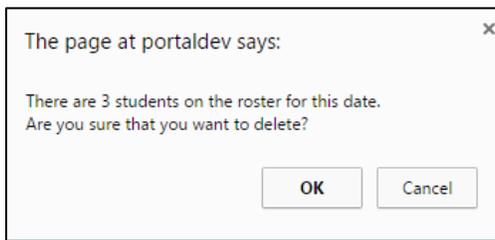


The screenshot shows a dialog box titled "Activity Session". It contains the following information:

- Activity Name: Fourth Period Tutoring
- ActivityDate: 6/2/2015
- Start Time: 10:40AM
- End Time: 11:20AM
- Session Notes: (empty text box)
- Full School Event:
- Duration: 0hr 40min (0.67 hrs)

At the bottom, there are four buttons: "Save & Return to Calendar", "Save & Go to Participants", "Cancel", and "Reset". The "Delete" button is circled in red.

2. Click on the **"Delete"** button in the bottom, right hand side of the **"Activity Session"** box.
3. At the top of the screen another pop-up box will appear asking if are sure you want to delete that day's activity. Click **"OK"**.

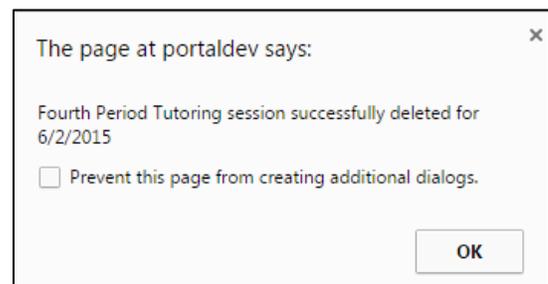


The dialog box contains the following text:

The page at portaldev says:

There are 3 students on the roster for this date.
Are you sure that you want to delete?

Buttons: OK, Cancel



The dialog box contains the following text:

The page at portaldev says:

Fourth Period Tutoring session successfully deleted for
6/2/2015

Prevent this page from creating additional dialogs.

Button: OK

4. Click **"OK"** in the next box that appears on the screen. The activity will no longer show on your activity detail screen.

Deleting an Entire Activity: To delete an entire activity, you will need to first delete every day that the activity is scheduled from the Activity Detail screen. After you have deleted all of the days of the activity the **“Delete”** link will appear next to the **“Edit”** link. Not until then will you be able to delete the whole activity and activity calendar from your list of scheduled activities.

Activity Name: Fourth Period Tutoring
 Activity Type: Tutoring/HWA General
 School: Wilson Creek High
 Year: 2014-2015

[Delete](#) [Edit](#) [Back to Activity Search](#)

Date	Time	Count

Click on a day to add a session.

Show Master Calendar

June 2015

today
month
week
day

Sun	Mon	Tue	Wed	Thu	Fri	Sat
31	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27

Please note: Just because the calendar is empty, doesn't mean the activity doesn't exist. The Activity Details calendar will still be there waiting for you to add an activity to it. The activity will still show up on your **“Activity”** screen like the snap shot below until you delete it completely-

Fourth Period Tutoring	Tutoring/HWA General	GEAR UP HS	<none scheduled>
--	----------------------	---------------	------------------

Activity Search

GEARUP 3 - Activities [Message Center](#)

Use the following Search criteria to find sessions that are currently set up for your school (fill in values as appropriate and click 'Search').
button to enter a new GEAR UP Activity Session.

[Add a new activity](#)

Activity Name Search

From Date

To Date

School

Activity Type

Academic Year

Compliance Status

From the “**Activities**” screen, you can also search for activities that you have currently set up for your school. The values you can search under are:

- **Activity Name Search:** Start filling in the name of the activity that you are searching for, the more letters you type in the search box, the narrower your search becomes. Either choose the activity you are searching for from the drop-down list, or click on the “**Search**” button to complete your search.

Activity Name Search

From Date

To Date

School

Activity Type

Academic Year

Compliance Status

9th Grade 10 Post-Secondary Career
Post Secondary Options
Post-Secondary Options/Inventory

- **“From Date”, “To Date” Search:** Click in the **“From Date”** or **“To Date”** and scroll through the pop-up calendar to find the date that you want to start and/or end your activity search

The screenshot shows a search form with the following fields: Activity Name Search, From Date (01/01/2015), To Date (mm/dd/yyyy), School, Activity Type, Academic Year, and Compliance Status. A calendar pop-up for June 2015 is displayed, with the date 9th highlighted in orange.

- **“School” search:** This search will default automatically default to the current academic year and your current GEAR UP school. If your district has more than one school, use the drop-down box to produce a list of the schools you have to choose from for the academic year you are querying.
- **“Activity Type” search:** Use the drop-down list of activity types in the “Activity Type” search box to only produce the activity type you are search for, such as “Financial Aid Counseling/Advising.”

The screenshot shows the search form with the 'Activity Type' dropdown menu open. The dropdown list includes options such as 'Financial Aid Counseling/Advising', '--Any Activity Type--', 'College Application Completed', 'College Visit/College Student Shadowing', 'Comprehensive Mentoring Services', 'Counseling/Advising/Academic Planning/Career Counseling', 'Educational Field Trip - Language Arts', 'Educational Field Trip - Mathematics', 'Educational Field Trip - Other', 'Educational Field Trip - Science', 'Educational Field Trip - Social Sciences', 'Financial Aid Counseling/Advising', 'Grant-STEM Enhancement', 'Job Site Visit/Job Shadowing', 'Other', 'Rigorous Academic Curricula', 'Student Orientation', 'Student Workshops', 'Summer Programs', 'Summer Programs - Academic Enrichment', and 'Summer Programs - Remedial Services'. Below the dropdown, a table displays search results for 'Financial Aid Counseling'.

Activity Name	Date, Hours, Attended/Registered	Year
Financial Aid Counseling	8 Dates ✓	+ 2014-2015
Financial Aid Counseling	6 Dates ✓	+ 2014-2015

- **“Academic Year” search:** This drop-down box enables you to search for activities that took place in previous years of your site's GEAR UP program. Please note, that if your program was in a different school (such as a middle school) during the year you are searching, you will also need to change the name of the school in the “School” drop-down box.
- **“Compliance Status” search:** Search for the compliant and non-compliant activities. For more information about “Compliance Status” go to page 23.

Managing your activities from the “Activities” screen

Consider the “**Activities**” screen as your “**home**” screen, or a place where you can manage all your activities in one place.

- As with the other screens, all the links at the top of the activity columns are sortable. Just by clicking on the link you want to sort by, you can sort your activities by “**Activity Name**”, “**Activity Type**,” or the date of the activity. “**School**” and “**Year**” are not applicable.

Activity Name	Activity Type	School	Date, Hours, Attended/Registered	Year
-------------------------------	-------------------------------	------------------------	--	----------------------

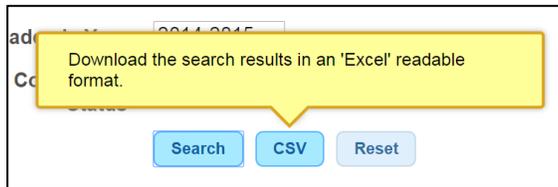
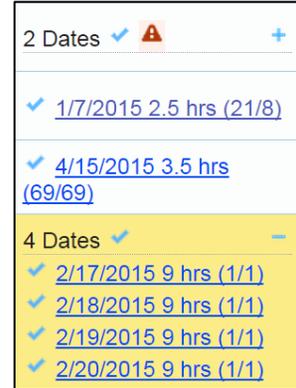
- Clicking on name of the activity in the “**Activity Name**” column will take you to that activity’s activity calendar.

The screenshot shows the 'Activity Details' page for '16 Summers'. On the left, a summary box displays: Activity Name: 16 Summers, Activity Type: Financial Aid Counseling/Advising, School: Wilson Creek High, Year: 2014-2015. Below this is a table of activity instances with columns for Date, Time, and Count. On the right, a calendar view shows the activity occurring on 9/24/2014, 10/15/2014, 11/12/2014, 11/13/2014, 11/14/2014, 1/14/2015, 2/11/2015, and 3/11/2015. A red circle highlights the '16 Summers' link in the table, with an arrow pointing to the calendar view. Another arrow points to the '16 Summers' link in the table header.

Activity Name	Activity Type
16 Summers	Financial Aid Counseling/Advising
Accounting Symposium	Educational Field Trip - Other
Ag Show	Educational Field Trip - Science
Aspirations to Action	Counseling/Advising/Academic Planning/Career Counseling
BRCC College Placement Testing	Tests/Test Prep

Date	Time	Count
9/24/2014	10:30 AM (1.75 hrs)	8
10/15/2014	8:30 AM (3.75 hrs)	9
11/12/2014	8:15 AM (2.75 hrs)	9
11/13/2014	8:15 AM (1.75 hrs)	10
11/14/2014	8:15 AM (3.75 hrs)	8
1/14/2015	8:15 AM (3.75 hrs)	10
2/11/2015	8:15 AM (3.75 hrs)	5
3/11/2015	8:15 AM (2.75 hrs)	9

- Clicking on a date of an activity in the “**Date, Hours, Attended/Registered**” column will take you to that date's “**Activity Participant**” screen.
- Note that there are different formats that the dates display. If the activity is scheduled over multiple days/months, click on the + sign to expand the view to see all of the activity dates.
- Click on a single date link to see the participants for that day's activity.

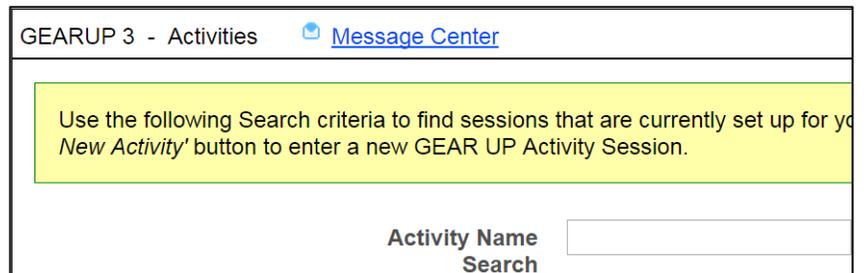


- Clicking on the “**CSV**” button will export the results of your search into a CSV report.



- Clicking on the “**Reset**” button will clear your search.

- The “**Message Center**” link – if you have messages from GEAR UP, this link will instead display: You have # new message(s).



V. Portal Compliance and Messaging System

The Portal message system acts as a conduit between a specific activity, and GEAR UP staff.

Each time an activity is entered in the Portal it is reviewed by GEAR UP staff and the activity is then marked as **"In Compliance"** or **"In Review"**. If it hasn't been reviewed, it will remain as a **"Not Reviewed"** entry.

Some examples of why an activity might be put in review are:

- The name of the activity is too general.
- The activity happened in a prior month, and no participation time has been entered.
- The parent participation hasn't been entered on a family event.
- The activity type is incorrect.
- The length of time of the activity is too long/short.
- The activity doesn't belong in the Portal.

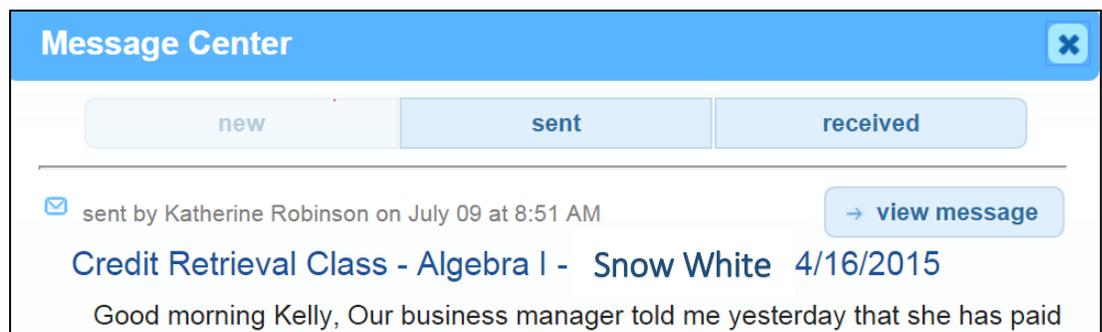
If the activity is under review, you will receive an automated email letting you know that you have a message about that specific activity. Click on the link in the email to be taken directly to the activity and the message.

You can also access your messages while in the GEAR UP Activity Portal via the **"Message Center"** link. Instead of **"Message Center"** the link will now appear with the number of messages you have available.



Any screen that you're in should display the number of messages you have waiting.

Once you click on the message link the **"Message Center"** box will open and your message, or messages, will be displayed.



To respond to the message, click on the **"View Message"** button.



VI. Activity Report Screen

Home ▾ Programs ▾ GEAR UP ▾ Activity Reports

GEARUP 3 - Activity Report [Message Center](#)

Activity Report

Select a school, academic year & report type and then press the *Run Report* button.

School Name: --Any School-- ▾

School Year: 2014-2015 ▾

Select Report Type:
Activity Summary By School ▾
Activity Summary By School
Activity List By School
Student Detail By School
Students With Completed College Apps

The Activity Report Screen allows you to run system reports based on the Portal activity data you have recorded. Currently, the reports available are:

- **Activity Summary by School:** This report will produce a student and parent count for all activity types. This report is helpful if you want to check what activity types you have not reported on, such as mentoring, or financial aid workshops.
- **Activity List by School:** This report will provide a breakdown of all the activities that have entered to date by activity type and then by activity name. Each activity will correlate with a student and family participant count, and the average hours allotted to each activity.
- **Student Detail by School:** This report provides a breakdown of each student's GEAR UP activity participation record by activity type.
- **Students with Completed College Apps:** (if applicable)-as GEAR UP students start applying to colleges, this report will track the application data after you've entered the information in the student's individual record.

As with the other portal data, the reports can also be downloaded as CSV (Excel) files.

VII. Master Calendar Screen

The master calendar screen provides a snapshot of all the different activities you have scheduled in one place.

The default view when opening the Master Calendar will always be the current month. Using the scroll arrows at the top, left-hand corner of the calendar will allow you to scroll through each month to find the one you wish to view.

The buttons on the top, right-hand side of the calendar will toggle the view from Month, Week or Day format.

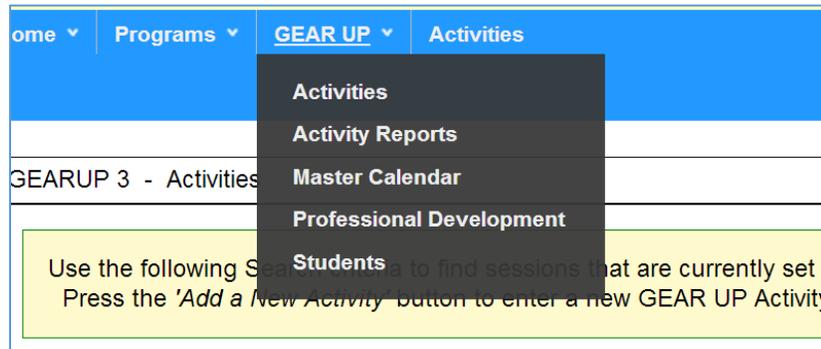
As with the “**Activity Calendar**”, the “**Master Calendar**” will also reflect if an activity has participation entered. The fact the activities in the calendar below are highlighted in green means all the activities been completed and all participation has been confirmed. If the activities below had been missing participants the activities would have reflected the associated color.

- **Green**-Session roster is complete, (participants and participation have been entered).
- **Yellow**-Participants have been added but no participation time has been entered. This means that either you haven't saved the participants to the activity or that the activity hasn't happened yet. If participants have been previously added an activity, it will not turn green until the actual date of the activity arrives.
- **Red**-Session has no participants.

February 2015						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
		8a Job Shadow—The Brew 8a Job Shadow—Grant County Sheriffs Department 8a Job Shadow—Moses Lake Library 8a Job Shadow— Hochstatter Electric 8a Job Shadow—Legacy Trails Rentals 8a Job Shadow—Case Equipment 8a Job Shadow—Moses Lake Physical Therapy	8a Job Shadow—Legacy Trails Rentals 8a Job Shadow—Case Equipment 8a Job Shadow—The Brew Lake Library 8a Job Shadow—Grant County Sheriffs Department 8a Job Shadow—Legacy Hochstatter Electric 8a Job Shadow—Moses Lake Library 8a Job Shadow—Moses Lake Physical Therapy	8a Ag Show 8-15a Aspirations to Action 8-15a Jump Start Washington 8-15a 16 Summers 8-15a Career Exploration 8-15a Career Research 8-15a College Preparation 10-30a Perry Tech	8a Job Shadow—Grant County Sheriffs Department 8a Job Shadow—The Brew Lake Library 8a Job Shadow—Moses Lake Physical Therapy 8a Job Shadow—Legacy Trails Rentals 8a Job Shadow— Hochstatter Electric 8a Job Shadow—Grant County Sheriffs Department 8a Job Shadow—Case Equipment	

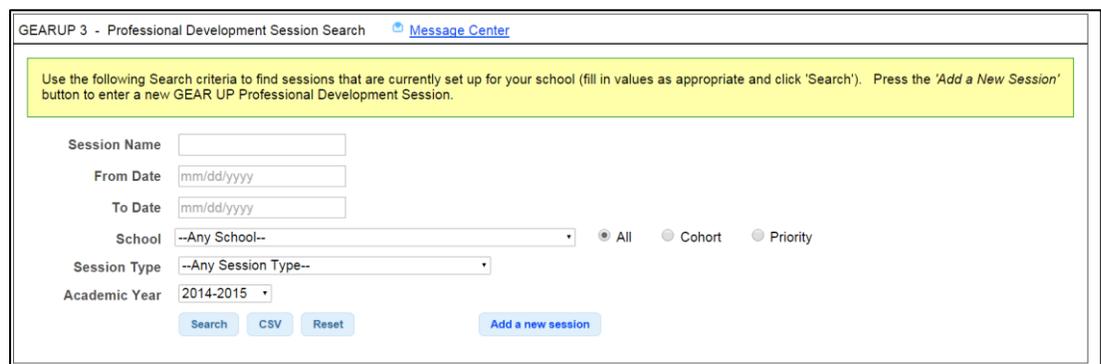
VIII. Professional Development Screen

All professional development that is provided or paid for by your GEAR UP funds needs to also be entered in the Portal. Entering your professional development entries is done much like your student activity entries and the screens look very similar. The link to your professional development screen can be found from the home page and also from any activity screen in the drop-down box format.



The professional development search screen is set up like the Activities screen and the same search criteria apply.

- Session Name.
- From Date.
- To Date.
- School.
- Session Type (instead of Activity Type).
- Academic year.



The screenshot shows the "GEARUP 3 - Professional Development Session Search" screen. At the top, there is a "Message Center" link. Below this is a yellow box with the following text: "Use the following Search criteria to find sessions that are currently set up for your school (fill in values as appropriate and click 'Search'). Press the 'Add a New Session' button to enter a new GEAR UP Professional Development Session." The search form includes the following fields and options:

- Session Name:
- From Date:
- To Date:
- School:
- Session Type:
- Academic Year:

At the bottom of the form, there are buttons for "Search", "CSV", "Reset", and "Add a new session".

Just like the “**Activities**” screen, the session types are already pre-set in a drop-down box format.

Use the following Search criteria to find sessions that are currently set up for your school (fill in values as appropriate and click 'Search'). Press the 'Add a New Session' button to enter a new GEAR UP Professional Development Session.

Session Name
 From Date
 To Date
 School All Cohort Priority
 Session Type
 Academic Year

You'll want to note that any professional development events sponsored by GEAR UP, such as Webinars; GEAR UP Professional Development workshops; or GEAR UP national or regional conferences, will already be entered in the Portal for you. However, you will need to remember to add the staff members who attended these sessions.

Session Name	Session Type	Academic Year	Date, Hours, Attended/Registered
2014 December Webinar-Cancelled	GEAR UP Sponsored Professional Development	2014-2015	<none scheduled>
2014 GEAR UP West Seattle	GEAR UP Sponsored Professional Development	2014-2015	<Multiple Dates>
2014 November Webinar-College Success Foundation Support for Washington State GEAR UP	GEAR UP Sponsored Professional Development	2014-2015	11/17/2014 1 hrs (2/2)
2014 Year 4 Implementation Update Webinar	GEAR UP Sponsored Professional Development	2014-2015	9/11/2014 1 hrs (2/2)
2015 April Webinar-FAFSA Completion Portal & 12th Year Campaign	GEAR UP Sponsored Professional Development	2014-2015	4/21/2015 1 hrs (0/0)
2015 Cohort Year 5 Planning Meeting	GEAR UP Sponsored Professional Development	2014-2015	<Multiple Dates>

Adding a New Professional Development Session

The professional development sessions that aren't GEAR UP sponsored (such as AVID, Navigation 101, or 'Other') are entered similar to how a student activity would be entered.

The screenshot shows a form with the following fields: Session Name (text input), From Date (mm/dd/yyyy), To Date (mm/dd/yyyy), School (White Pass Jr. Sr. High School), Session Type (--Any Session Type--), and Academic Year (2013-2014). Below the fields are buttons for Search, CSV, Reset, and Add a new session. A blue arrow points from the Session Type dropdown to the Add a new session button.

The screenshot shows the 'Add GEAR UP Session' modal form. The Session Type dropdown menu is open, showing options: --select Session Type--, --select Session Type--, AP Institute, AVID, GEAR UP Orientation and Match Training, GEAR UP Sponsored Professional Development, Navigation 101, Other, and Why Try. The background shows the Session Search form with a Search button and a list of session links.

Choose 'Add a new session' on the Session Search screen and select the activity type the session falls under. Don't forget to name the activity!

The screenshot shows the 'Add GEAR UP Session' modal form with the following fields filled out: Session Name (Summer AVID Conferenc), School (White Pass Jr. Sr. High School), School Year (2013-2014), and Session Type (AVID). Buttons for Add and Can are visible at the bottom right.

Adding Staff Members to a Professional Development Session

If you choose to save the activity and add your participants, adding them is similar to how you add students to an activity.

The most noticeable difference in adding a staff member is that if they have not ever participated in a GEAR UP professional development activity, they will need to be manually added to your current list of staff.

me | Programs | GEAR UP

Activities | Activity Reports | Master Calendar | Professional Development | Students

GEARUP 3 - Professional Development Session Participants

Session Name Summer AVID Conference School White Pass Jr. Sr. High School
SessionType AVID Year 2013-2014 [Session Search](#) [Return to Calendar](#) [Excel](#)

Thursday - 7/17/2014 9:00 AM (5.25 hrs)

Enter staff name (first or last) in the box below to search/add participants.
Note! Staff participation hours cannot be entered until the day of the session.

Add to list by Staff Name: [Add New Staff Member](#)

Staff Last Name	Staff First & MI	Role	Cert	Participation (hh:mm)
Foley, Maureen				
GEAR UP Staff - Classified				
Almquist, Martha				
Teacher (certificated)				
Mullins, Pretrina				
Teacher (certificated)				

Adding a New Staff Member: If a staff member doesn't appear when you start typing their name in the 'Add to list by Staff Name' box, it means you'll need to add them manually. Make sure to search for the staff member using both their first and last name, otherwise it take an email to the WSAC to get the duplicate removed from the list.

To add a staff member, click on the "Add New Staff Member" box.

Enter staff name (first or last) in the box below to search/add participants.
Note! Staff participation hours cannot be entered until the day of the session.

Add to list by Staff Name: [Add New Staff Member](#)

[Staff Last Name](#) [Staff First & MI](#)

Type in the First and Last name and then select their staff role from the drop-down box. Click on the 'Save' button.

Add GEAR UP Professional Development Staff

School White Pass Jr. Sr. High School

First Name

Last Name

Staff Role --select Staff Role--

--select Staff Role--

Teacher

Administrator

Counselor

Other Certificated Staff

GEAR UP Staff - Certificated

GEAR UP Staff - Classified

Classified Staff

Save
Cancel
Reset

Staff	Role	Cert	(hh:mm)
			

Staff Member - Jane Smith - added successfully.

Staff Last Name	Staff First & MI	Role	Cert	Participation (hh:mm)
Smith	Jane	Teacher	<input checked="" type="checkbox"/>	05:15:00

You will only need to add new staff members once. After that they will show up when you start typing their name in the "Add to list by Staff Name" box.

IX. The Student Search Screen

Use the search parameters on the '**Student Search**' screen to find and track individual GEAR UP student and family participation data.

GEARUP 3 - Search

Student Search

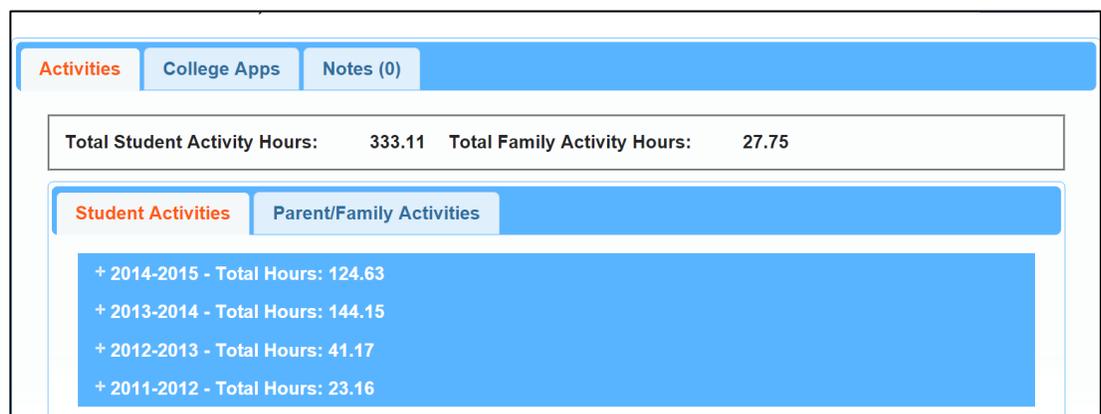
SSID	<input type="text"/>	Blaine School District ▾
First Name	<input type="text"/>	Blaine High School ▾
Last Name	<input type="text"/>	--Select a Grade-- ▾
GEAR UP Eligible Only	<input type="checkbox"/>	--Select a Withdraw Code--
Currently Enrolled Only	<input type="checkbox"/>	2013-2014 ▾

- a. **Student Identification Number**-if searching by the SSID, the search will return only the student who belongs to that I.D. number.
- b. **Student's First Name**-searching by only the first name only will return all students in the school with that first name. You can also search by partial first name. For example, instead of typing out the entire spelling of Mariana, just type the first four letters of the name and press search. This will return all students whose first four letters of their name is Mari such as Maria, Mariah, and Maribel. And, hopefully, Mariana.
- c. **Student's Last Name**-same result as above for first name.
- d. **School District**-This search parameter will return the names of all students enrolled at the high school. If you are priority school, this search will be all students in 7-12 grade.
- e. **Your GEAR UP School** - The drop-down box will always default to the name of the high school. Cohort schools have the option of pulling the data from the years the GEAR UP program was at the junior high or middle school.
- f. **Select a Grade**-Allows you see students only in the grade chosen from the drop-down box.

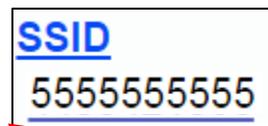
- g. Select a Withdraw Code**-selection based on current status of a student's enrollment.
- h. GEAR UP Eligible Only**-If this box is checked it will return only those students who are GEAR UP eligible.
- i. Currently Enrolled Only**-If this box is checked only students that are currently enrolled at your school will be shown.
- j. Academic Year Drop-down**-Will automatically default to the current academic year. Starting September 1, the next academic year will be the default. Please remember to choose the correct academic year for whatever activity you are entering. This will particularly be important if you start school in August. Please ask if you have questions about these entries.

Just like the Activity Screens, any query you run can be sorted by the links at the top of the list, or exported into a CSV file.

Individual Student Files



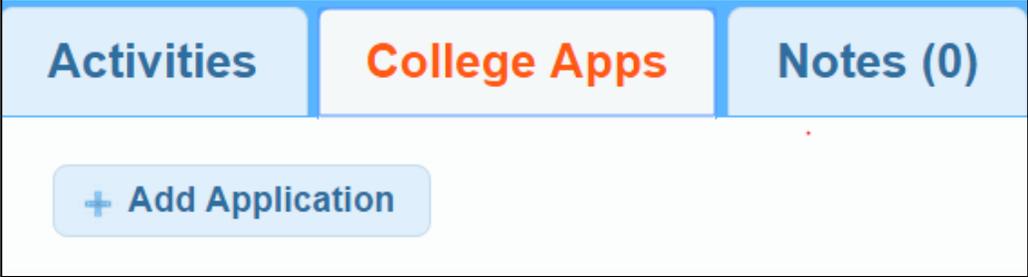
Each student also has a unique GEAR UP record that you have access to. To get to a student's GEAR UP record, click on the blue link below the student's SSID number. This will take you to the student's screen where you will have access to-



1. A list of the student's activities they have participated in every year that they've been in GEAR UP. Click on the + sign next to the academic year to expand the activity detail.
2. Parent and Family Activities.
3. A tab where you will enter the student's college application information.
4. A tab to write notes that are unique to that student's record.

The “College Apps” Tab

College application completion must be tracked by GEAR UP sites for each 12th grade GEAR UP student. This tab is where you will enter this information.

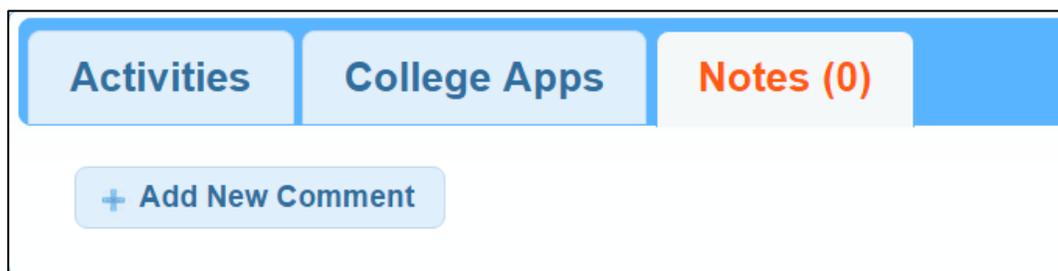


Activities	College Apps	Notes (0)
+ Add Application		

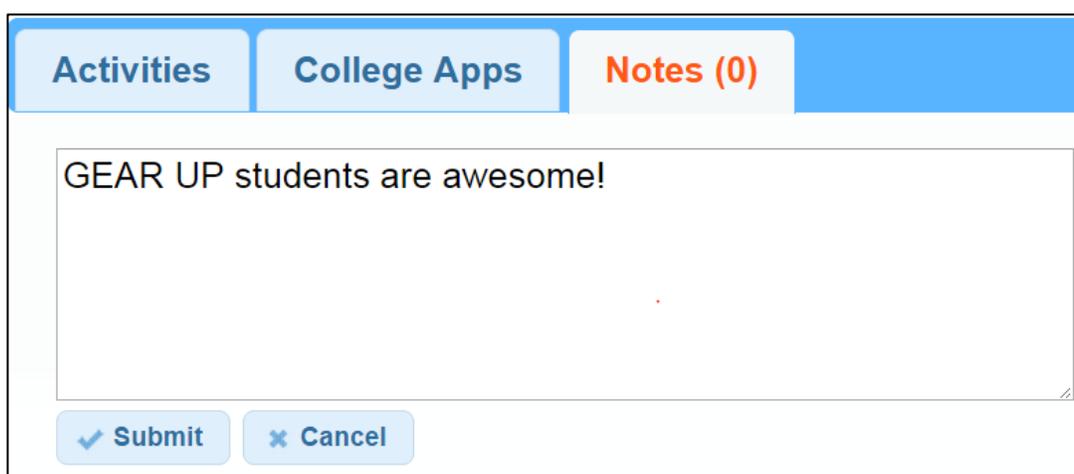
1. Click on the “**College Apps**” tab.
2. Click on the “**+ Add Application**” button.
3. Much like adding a College Visit Activity, you will add the college the student has applied to by starting to type the name of the college in the “**College**” drop-down box and then the date. Later, if the student is accepted to that college, you will put a check mark in the “**Accepted by College**” box.
4. Click on the ‘Save’ button at the bottom right hand corner of the “**College Application**” box.
5. The college the student applied to will now show up on the student’s “**College Apps**” tab.
6. From here, you can add multiple applications.
7. In addition, when you click back on the “**Activities**” tab you will have the option of viewing the student’s individual participation in activities and add follow-up notes in the “**Note**” tab.
8. **Entering College Apps for Running Start Students** – Running Start students who opt to continue in the same institution may not be required to submit a college application. However, you are still required to enter the data in the College Application section of the portal. At the point this decision is made, enter the college application for that student as if they submitted **and** were accepted on that day.

The Student “Notes” Tab

To add a note to the student’s GEAR UP click on the “**Notes**” tab and then on the “**Add New Comment**” button.



Write comments or notes in the space provided and then click on the “**Submit**” button.



The note you put in that student's record will resemble the record shown below, and the “**Notes**” tab now reads **(1)**. You can also edit and/or delete the notes.

