WA State GEAR UP
Portal Documentation
& Activity Types

Contents

Purpose and Frequently Asked Questions

This guide will help you understand GEAR UP (GU) documentation and reporting requirements. As part of the national College and Career Readiness Evaluation Consortium, the Washington State GEAR UP (WAGU) program complies with the recommended reporting requirements to support the longitudinal evaluation project. Following these guidelines ensures that school partners comply with these requirements.

Q. Who is a GU Student?	**A.** A GU student is any student enrolled in Grades 7-12 or a graduate from a GU partner school district through August following graduation.
Q. What are GU Services?	**A:** GU services are all activities, events, and support services provided by GU staff, which may or may not have funding attached. All services must be in the school's work plan and budget, documented, and reported in the GU Portal.
Q. How do I provide and document my Graduate Support Services?	**A.** All Graduate Support Services are entered in the Portal and documented, such as the support you provide to your 7-12 grade students. No additional documentation is required.
Q. What are Activity Types?	**A.** Activity Types are the categories of services being provided. GU staff use the Activity Types for participation documentation and portal entry. These guidelines, which align with GU reporting and evaluation requirements, must be followed.
Q. What is Box?	**A.** Box is a secure file transfer platform GU will use to collect required documentation. GU Advisors will receive an invitation to access their Box account. Documentation that will be uploaded to Box: - Field Trip Itinerary Approvals 1:1 Counseling/Advising – Student & Family Support forms - A19 Invoice and Reimbursement forms, Match Documentation - Ineligible Student Verification forms.
Q. When do I submit to Box?	**A.** Portal-related documentation must be uploaded to Box by Friday of each week. 1:1 Counseling/Advising – Student & Family Support forms 1:1 Tutoring and Homework Assistance forms). - Field Trip Itinerary Approvals must be submitted at least 10 days before the trip.
Q. What is the Portal?	**A.** The portal is the website used to document all GU activities and participation electronically. It does not replace the required backup or hard copy documentation.
Q. Who has access to the Portal?	**A.** It is up to each school to determine who will have access to the portal and who will be responsible for entering activities and participating. Please communicate with WSAC to set up access and to update any staff changes at least annually.
Q. What is entered in the Portal?	**A.** All activities planned, led, facilitated, and provided by GU and in the GU work plan are documented as GU activities.
Q. What backup documentation needs to be uploaded to the Portal?	**A.** For each activity, GU Advisors will upload: - Agenda – for group presentations, lessons, etc. - Appropriate participation documentation form for student, family, and staff/pro-dev activities.

	• The sections below detail which form(s) are required for each Activity Type.
Q. What is the Service Delivery Mode?	**A.** All activities are entered using one of the three service delivery modalities: • **Direct:** In-person services or activities. • **Virtual Synchronous:** Services or activities delivered to students and/or family members in real-time using a phone or an audio-visual technology platform (e.g., Zoom, Google Classroom, Instagram Live, Facebook Live, etc.). • **Virtual Asynchronous:** Services or activities provided to students and/or family members through a technology-mediated platform that do not occur in real-time.
Q. What information is not entered in the Portal?	**A.** If GU purchases materials for classroom use but GU-paid staff do not provide any direct service, this service is not entered in the portal. Examples include: • Classroom materials, calculators, etc. • Activities that support GU goals but are not a part of the Annual Work Plan and Budget. • Activities that are less than 5 minutes in duration.
Q. What documentation is required?	**A.** All GU activities must be documented with student/family sign-in sheets, attendance records, or the 1:1 Counseling & Advising – Student & Family Support Form. • All forms can be found at www.gearup.wa.gov in the Grant Management Manual. • Your program must retain this documentation with all other GU records for six years and are subject to audit at any time.
Q. What is a Compliance Review?	**A.** WSAC staff review portal entries at least once every four weeks. They will then send a "Compliance Review" to the lead GU staff, with questions and comments noted. • Schools are expected to complete portal entry for each week by Friday. • Lead GU staff are expected to respond to the Compliance Review within one week to resolve any questions or concerns.
Q. Who should I contact if I have questions?	**A.** Please contact Kelly Keeney @ kellyk@wsac.wa.gov or 360.485.1200. *Coming soon: Using the Portal videos.*

Student GEAR UP Activity Types

All work plan activities have been assigned an Activity Type that will be used for portal entry. The GU school staff is responsible for understanding the Activity Types and verifying that the assigned Activity Type is accurate. Please communicate any discrepancies with the WSAC Program Manager Kellyk@wsac.wa.gov.

Activity Type: College Visit

These services refer to a student's visit to a college campus facilitated/supervised/led by GU staff, teachers, other school staff, or college representatives. Features of a college visit include an official tour and presentation(s) by admissions, financial aid, academic departments, athletics, student affairs, residence life, multicultural affairs, and/or other college departments.

Examples:	Notes:	Documentation Requirements:
- College Visit – UW - College Visit – CWU - College Visit – Clark CC - College Visit - GHC Institution names will be available in a drop-down menu on the portal. If the name isn't on the list, contact kellyk@wsac.wa.gov	**Notes:** Features of a college visit include an official tour, presentation(s) by admissions, financial aid, academic departments, athletics, student affairs, residence life, multicultural affairs, and/or other college departments.	- FORM - Field Trip Participation - FORM - Field Trip Itinerary Approval - FORM - Cash Meal Allowance (if applicable). - Student signatures are required. - Do not count the travel time to and from the college as part of the college visit unless a service was provided during the travel time (e.g., mentoring, financial aid, college information, etc.). Record it as a separate service by the appropriate activity definition and time of the activity.

Activity Type: Counseling & Advising

Services include discussing personal growth issues such as decision-making, problem-solving, goal setting, attendance, behavior concerns, or family issues; helping with college and/or career choices/planning/interests, internships, or college planning; and/or providing assistance on coursework selection (secondary or postsecondary), course of study choices, college major selection, standardized and pre-college assessment advising and/or interpretation of scores. Services can be provided 1:1 or in small groups, tracked by sub-group type.

Counseling/Advising Sub-Groups:	Examples:	Documentation Requirements:
- Counseling/Advising - Academic - Counseling/Advising – Career - Counseling/Advising – College - Counseling/Advising – SEL - Counseling/Advising – Other	**Counseling/Advising – Academic** - Study skills - Advising on pre-college assessments - Reviewing assessment results. - 1:1 HSBP sessions **Counseling/Advising – Career** - Career research - Military representative visit (1:1) **Counseling/Advising – College** - College research and planning - College representative visit (1:1)	**Documentation Requirements:** - FORM - Counseling & Advising - Student & Family Support - All fields must be filled out on the form. - No student signatures are required. - All 1:1 support must be submitted via Box on Friday of each week.

	Counseling/Advising – Social-Emotional	
	• Any sessions related to personal skills, behaviors, or family concerns. **Counseling/Advising - Other** • Any sessions with content not covered in any of the above categories or a session that is a combination of any of the above (e.g., academic and SEL).	

Activity Type: Educational Field Trips

Services during which students leave their school and travel to another location include an academic component linked to classroom activities. Examples of this service include a science demonstration on a college campus (wherein the purpose of the event is the science demonstration, not a college visit); a class trip to a science or history museum linked to the curriculum; academic competitions; cultural experiences such as performing arts, museums, or similar activities; and field trips that complement and enhance existing curriculum in key content areas.

Examples:	**Note:** When entering Educational Field Trips, only enter the time spent at the location in the Portal; do not count the travel time to and from the location.	**Documentation Requirements:**
• Academic competitions, e.g., Robotics Competition • College-sponsored academic events, e.g., UW Math Day, Engineering Days, or Health Sciences Fair • Cultural events on college campuses • Other activities directly tied to classroom activity, such as Washington State History Museum, theater performances, water testing, wind farm		• FORM - Field Trip Participation • FORM - Field Trip Itinerary Approval • Cash Meal Allowance Form (if applicable. • Student signatures are required. • FORM - Field Trip Itinerary Approval is submitted via Box.

Activity Type: Financial Aid Counseling/Advising

Services assist students in understanding and navigating the complexities of financial aid, including providing hands-on assistance with the Federal Student Aid ID, FAFSA, and scholarship applications; presentations on financial aid or literacy; using financial aid or literacy curriculum; understanding and comparing financial aid award letters; and the benefits of and information on participation in college savings plans. Financial aid counseling/advising may be provided one-on-one, in small or large groups, during or outside the school day.

Examples:	**Documentation Requirements:** **1:1 Financial Aid Support:**
• Student workshops on financial aid, FSA ID, scholarships, etc. • FAFSA/WASFA information, planning, support, and completion • Scholarship information and application activities • Financial literacy curriculum or workshops • 12th Year Campaign events • Advisory lessons focused on financial literacy and/or financial aid	• FORM - Counseling & Advising - Student & Family Support • No student signatures are required for 1:1 support or classroom presentations. • 1:1 support is submitted via Box every Friday. **Group Financial Aid Support:** • FORM - Student Workshops & Financial Aid Presentations • For classroom presentations, a class attendance roster may be substituted for the sign-in

		sheet. The GU Advisor must sign the roster. • Agenda.

Activity Type: Job Site Visit/Job Shadowing

Services offer students exposure to the workplace in an occupational area of interest and reinforce the link between classroom learning, work requirements, and the need for postsecondary education. Students witness the work environment, see employability and occupational skills in practice, and gain value from professional training and potential career options.

Examples:	Note: When entering the job site visit, only the time spent on the job site is entered in the Portal; do not count the travel time to and from the site.	Documentation Requirements:
• **Job site visit:** A physical visit to a local business or work environment facilitated/supervised/led by GU staff, teachers, or other school staff. Job site visits may include visits to local businesses, employers, and agencies to explore different professions or career options and may or may not be followed by job shadowing. • **Job shadowing:** A one-on-one experience in which a student observes typical job duties at a business or work environment with an employee.		• FORM - Field Trip Participation • FORM - Field Trip Itinerary Approval • Cash Meal Allowance Form (if applicable. • Student signatures are required. • FORM - Field Trip Itinerary Approval Forms are submitted via Box.

Activity Type: Mentoring

Services refer to actions taken by GU staff, teachers, or other school staff to identify students who would benefit from an ongoing supportive relationship with a trained, caring adult or other student(s), i.e., "mentor." Mentors meet with their assigned student(s) regularly and consistently, whether on or off campus or during or outside of the school day. Typical issues addressed during mentoring meetings include academic, social, organizational, or life skill development.

Examples:	Documentation Requirements:
• Mentoring programs that match one student and one adult. • Group mentoring that links one mentor with a small group of students. • Peer or near-peer mentoring that connects students with other students. • Link Crew, Check & Connect, or Boys & Girls Club, or Big Brothers Big Sisters.	• FORM - Mentoring • Student signatures are required.

Other – Celebratory - Services that focus on celebrating or recognizing student accomplishments.

Examples:	Documentation Requirements:
• Academic or attendance recognition activities or other celebratory events. • Senior Decision Day and end-of-year celebrations • College Bound Scholarship Re-Pledge events	• FORM - Other-NGUW or Other-Celebratory Events. • Student signatures are required. • For classroom presentations, a class attendance roster may be substituted for the sign-in sheet. The GU Advisor must sign the roster. • Agenda

Activity Type: Other – National GU Week (NGUW)

Services that occur in recognition of National GU Week but do not fit into any other Activity Type are entered as such. If Student Workshops are offered as part of NGUW, they are entered as such.

Examples:
- College Gear Day
- Scavenger Hunts
- GU Bingo, College Knowledge Passports, Jeopardy, or other games that students complete independently, not as a classroom activity.
- Door Wars

Documentation Requirements:
- FORM - Other-NGUW or Other-Celebratory Events.
- Student signatures are required.
- For classroom presentations, a class attendance roster may be substituted for the sign-in sheet. The GU Advisor must sign the roster.
- Agenda

Activity Type: Student Workshops

Services that include interactive informational classroom-level or large- or small-group sessions that involve hands-on experiences for each student in the workshop. Workshops are offered to groups of students on topics including leadership development, student mentor training, career exploration, secondary school success and college awareness, and general elements of college readiness such as study skills, self-monitoring, goal setting, time management, problem-solving, etc. This may include guest speakers that motivate students and highlight careers. Workshops are informational and are not intended to provide direct counseling or guidance to individual or small groups of students. Workshops include a planned lesson or agenda; all students receive the same information.

Student Workshop Sub-Groups:
- Student Workshop - Academic
- Student Workshop – Career
- Student Workshop – College
- Student Workshop – SEL
- Student Workshop – Other

Examples:

Student Workshop – Academic
- Study skills workshops.
- Test prep workshops.
- High School and Beyond Plan

Student Workshop – Career
- Mock interviews
- Business Week
- Career-focused guest speakers
- Career fairs

Student Workshop – College
- College research/planning
- College applications
- College fairs
- College Planning Days

Student Workshop – Social-Emotional
- Seven Habits of Highly Effective Teens or similar
- Character Strong or similar

Student Workshop - Other
- College & Career Fairs (when combined)
- First Aid/CPR Class (when taught in school.)
- Adulting Class

Documentation Requirements:
- FORM - Student Workshops & Financial Aid Presentations
- Student signatures are required.
- For classroom presentations, a class attendance roster may be substituted for the sign-in sheet. The GU Advisor must sign the roster.
- Agenda

Activity Type: Student Orientation

A required annual fall event for all GU students. The orientation is provided by GU staff by October 31* of each academic year to inform students of the GU services and opportunities. In YEAR 1, the deadline is February 28.

Documentation Requirements:
- FORM – Students Workshops & Financial Aid Presentations
- Student signatures are required.
- For classroom presentations, a class attendance roster may be substituted for the sign-in sheet. The GU Advisor must sign the roster.
- Agenda

Activity Type: Summer Programs

Services or activities that include an experience over one or multiple days during the summer and can serve to bridge knowledge between school years. Summer programs could be a statewide GU summer camp, a local summer camp funded by GU, a residential GU program hosted by a college/university/community organization, or another activity a GU student attends that supports GU goals/objectives. These programs include academic enrichment, college preparatory programs, summer camp experiences, credit recovery, career technical education (CTE), and/or remediation programs.

Examples:	Documentation Requirements:

• **Summer Program – Academic Enrichment**
  o Courses that are advanced or offer students an opportunity to take courses they don't otherwise have access to during the school year.
• **Summer Program – Remedial Services**
  o Credit retrieval programs.
• **Summer Program – Other**
  o GU-sponsored camps (FOCUS, SEEDS, etc.)
  o School-sponsored/provided camps that don't meet the definition of enrichment or remedial.
• **Summer Programs – Fee Only**
  o Summer experiences paid for on behalf of a student but not provided by GU staff.
	• FORM – Summer Support
	• Student signatures are required.
	• For classroom presentations, a class attendance roster may be substituted for the sign-in sheet. The GU Advisor must sign the roster.
	• For Summer—fee-only activities, backup documentation is submitted with the A19. No sign-in sheets are required.

Activity Type: Tutoring/Homework Assistance

Tutoring/homework assistance services refer to supplementary academic instruction designed to increase students' academic achievement. They may occur one-on-one or in small groups before, during, after, during study or lunch breaks, or on weekends. They may be provided by GU staff, hired tutors, teachers, paraeducators or other school staff, trained peers, near-peers, and/or volunteers.

Tutoring Subject Areas:	Examples:	Documentation Requirements:
• Tutoring/HWA - General • Tutoring/HWA – Lang. Arts • Tutoring/HWA – Math • Tutoring/HWA – Science • Tutoring/HWA – Social Science	• In-class or pull-out support • Lunch Study Sessions • Before or after school homework centers • Peer Tutoring	• FORM - Tutoring & Homework Assistance – used for Group and 1:1 support. • Student signatures are not required. • 1:1 support is submitted via Box every Friday. • Group support is submitted via the portal by Friday each week.

Family GU Activity Types

Activity Type: Family - College Visits

A family member's visit to a college campus, with or without a student, facilitated/supervised/led by GU staff, teachers, other school staff, or college representatives. Features of a college visit include an official tour, presentation(s) by admissions, academic departments, athletics, student affairs, residence life, multicultural affairs, or other college departments.

Examples:	**Documentation Requirements:**
- College Visit – UW (Family) - College Visit – CWU (Family) - College Visit – GHC (Family)	- FORM - Family College Visits - FORM – Field Trip Itinerary Approval - Do not count the travel time to and from the college as part of the college visit. - Signatures are required.

Activity Type: Family - Counseling & Advising

Services span a spectrum of activities, including one-on-one or small group advising designed to meet the specific needs of the individuals engaged in the activity. These services include meeting with the GU staff, with or without a student, to discuss the student's academic goals and progress, college planning, career readiness, and/or other related topics.

Examples:	**Documentation Requirements:**
- Student & Family Conferences (if a GU-supported activity) 1:1 Family Contacts – Academic, Career or College 1:1 Family Contacts – Transition Support	- Form - Counseling & Advising - Student & Family Support - No signatures are required. - All 1:1 support must be submitted via Box on Friday of each week.

Activity Type: Family - Financial Aid Counseling & Advising

Services span a spectrum of activities, including one-on-one or small group advising designed to meet the specific financial aid needs of the individuals engaged in the activity.

Examples:	**Documentation Requirements:**
- Family - Financial Aid Applications & Support - Financial Aid Award Letters & Scholarships - Family Night - FSA ID/Fin Aid 101	- FORM - Counseling & Advising - Student & Family Support - No signatures are required.

Activity Type: Family Orientation or Celebratory

Orientation or Celebratory family events provide services in which the GU student's parent or guardians participate. These events recognize the role of a family's participation in student success and are not defined under a previous family event category.

The Family Orientation is a required annual event that must be offered to all families by October 31 and provide information about GU services and opportunities. *In Year 1, the deadline is February 28.

Examples:	**Documentation Requirements:**
- Family Orientation - Academic Award Banquet - College Signing and Senior Decision Days	- FORM - Family Workshops Orientation & Celebratory Events - Agenda - Signatures are required.

Activity Type: Family Workshops

Services include attendance with or without GU students at a workshop that supports academic success, helps students succeed in middle and high school, demonstrates how to navigate the K-12 education system, and assists

their students with college preparation. These services also include informational sessions focused on the college search process, college entrance requirements, career readiness, and other related topics.

Examples:	Documentation Requirements:
- College/Career Fairs (when done as family events) - Family Night events - Guest Speakers (Family-oriented)	- FORM - Family Workshops Orientation & Celebratory Events - Agenda - Signatures are required.

Activity Type: Family Workshops – Financial Aid

Services include attendance with or without GU students at a workshop that supports families in navigating paying for postsecondary education and training. Topics include the financial aid processes, FSA ID, FAFSA/WASFA completion, College Bound Scholarship, GU Scholarship, scholarship applications, and financial aid award letters.

Examples:	Documentation Requirements:
- Financial Aid Informational Nights - FAFSA/WASFA Completion Events - Scholarship Information Events - Interpreting Financial Award Letter Events	- FORM - Family Workshops Orientation & Celebratory Events - Agenda - Signatures are required.

Professional Development Activity Types

Activity Type: GU Team Meetings

All GU staff, at least one building administrator, school counselor(s), and other key staff will meet at least monthly to review the work plan and implementation.

Examples:	**Documentation Requirements:**
• GU Team Meetings	• FORM - Professional Development Participation Log • Agenda • Signatures are required.

Activity Type: GU-Led Professional Development

All GU-sponsored professional development must be entered in the portal. This includes our conference and workshops but also other professional development that GU pays for (training fees, staff travel, staff time, etc.).

Examples:	**Documentation Requirements:**
• GU West • GU In-Person Workshops • GU Webinars	• These events are pre-loaded in the Portal, and only the staff participation needs to be entered. • WSAC-GU will keep a record of all sign-in documentation for these events.

Activity Type: GU Orientation and Match Training

*Staff Orientation and match Training are required by October 31. GU staff will be present during an all-staff meeting. *In Year 1, the deadline is February 28.*

Documentation Requirements:
- FORM - Professional Development Participation Log
- Agenda
- Signatures are required.

Activity Type: Other - Professional Development

These events are provided in addition to the professional development programs facilitated by WSAC GEAR UP. They cover various topics that align with the grant's goals.

Examples:	**Documentation Requirements:**
• Fall Counselor Workshop – (WCHSCR) • AVID Summer Institute • NCCEP Study Labs, Annual Conference, and Academy • NCAN E-Learning Courses • AP Institutes • OSPI Training & Webinars • College Bound Webinars/12th Year Campaign Events	• No documentation is required other than what is needed for reimbursement purposes.

College Application & Acceptance Reporting

Schools must report for all GU seniors each postsecondary application submitted and confirm if the student is accepted into the postsecondary institution if they receive an acceptance letter.

Directions for entering college applications:	**1.** Log in to the WSAC Portal. **2.** Choose "Program" then "GU" from the blue bar menu. **3.** Choose "Students" from the blue bar menu. **4.** Search for the GU student by SSID, First Name, or Last Name. Type the student's entire first or last name. It will not self-populate. Clicking "Search" without filtering opens a roster of all students enrolled in the school. **5.** Click on the student's SSID number to open the student's record. **6.** Under the student's name are three tabs, 'Activities,' 'College Apps,' and 'Notes.' **7.** Click on the 'College Apps' tab. **8.** Click on the '+ Add Application' button. **9.** Select the College the student applied to from the drop-down "College" menu. Typing the first few letters of the college will narrow the results. **10.** Enter the date the application was submitted. **11.** Click the 'Save' button at the bottom right-hand corner of the 'College Application' box. **12.** The college the student applied to will now appear on the student's 'College Apps' tab. **13.** Repeat these steps to enter additional college applications.
Directions for entering college acceptance data:	**1.** Follow steps 1 through 7 above. **2.** All college applications that have been entered should appear for the student you're assisting. **3.** Click in the box "Accepted at College" to confirm the student's acceptance.
Directions are given to print the "Students with Completed College Applications" report from the portal.	**1.** Click on the "Activity Reports" selection from the Portal menu. **2.** Select the "Students with Completed College Apps" report. **3.** Click "Run Report" to view the report or click on the "CSV" option to export the report to an Excel file.