OPTIMA and CESF Educational Advocacy TIP Sheet

CESF Grant Report

1.To run the IL CESF data report, you need to add "IL CESF Grant" to your Eligible Status table.

☐ Please add "IL CESF Grant" to your Eligible Status table. To do this, please do the following:

☐ In LOOKUP TABLES Go to CASES
☐ Go to Eligible Status
☐ Select the green ADD button and enter "ILCESF GRANT"
☐ SAVE

This is the first step in ensuring all the youth you serve are counted in the grant report. All children served by a CASA or staff are eligible including educational cases. Please ensure all your children in Optima have this eligibility status assigned to them. If you need additional assistance with this, please contact Optima for additional training or help.

2. You will then need to add the appropriate drop-down activity types that will be pulled by the grant report:

In your Look up Tables---Cases----Volunteer Activity Types ensure you have the following drop downs:

1. *Education/Learning Advocacy – This is the drop down that your staff/advocates will need to select for most of the educational advocacy being conducted for this grant.*
   o Subjects/Service Type (Examples)

     ▪ *Connected child to Early Childhood Education Assessment*
     ▪ *Teacher Conference*
     ▪ *IEP's*
2. *Tutoring*
   o Subjects/Service Type (Examples)

     ▪ *Provided private tutoring*
     ▪ *Informal tutoring or homework help*

3. ***Child/Visit Plus Educational Advocacy***

   - o   Subjects/Service Type (Examples)
       - ▪ *Home Visit and completed a puzzle with the child*
       - ▪ *This will be a catch all for any other educational advocacy type of activities*

   4. ***Post-Secondary Support Advocacy***
      - o   Subjects/Service Type (Examples)

           - ▪ *College/Trade School Applications*
           - ▪ *Military Recruitment*
           - ▪ *Job Skills Training*

3. The other major component that this grant is tracking is training attended by your staff. In order to have this data pulled into the report, please ensure the following:

Go to Lookup Tables----Training---Training Topic: please add a topic titled "CESF Training."

All staff who attend any training offered by the State Office or collaborate with other entities for educational topics should enter this training under the CESF Training category. This includes the Optima training held on 10/22/2020, 10/27/2020, and 10/28/2020.

5. The above steps are the major components that you need to take to ensure all contacts and activities your program performs are accounted for in the quarterly report that Optima is generating for the State Office. Once the report is completed and available, it will be available for you to view under the Custom Reports—IL CESF Grant. It will be imperative of you to ensure you run this report periodically to ensure data is being pulled accurately.

If you have any challenges with this process, please submit a help desk ticket to Optima.

Active Children School Summary Report:

1. To run the Active Children School Summary Report, please ensure staff and advocates input the child's school and grade information accurately. It is advised that you run an exceptions report before running the Active Children School Summary Report and clean up any inaccurate data.

2. To run the Exception Report Go To – Reports -- Exception Reports: Cases/Children -- Active Children No School History). Note, this exception report shows any children without school history. It will not show any outdated school history that is currently listed under a child. Each staff and advocate should still check each child for accurate school data. You will need to input the school information shown in the picture below in #3. If you have children attending school outside of your county, please identify the child's school as "Outside of County"

3. To add school information to a child, go to the child details page, click on the school tab, click "Edit" then "Yes" if the child has an IEP and add the renewal date if known, then hit "Save." Then click the green "Add" button to add the school history. Fill out as much of the information as possible.

4. "*School Types*" - Only the "School Types" listed should be utilized for purposes of state-wide standardization. Prior to updating the school history for each child, you may need to update some of your Lookup Tables. Please update your school type dropdown menu (Lookup Tables – Demographics – School Types) to include the following *School Types:*

Early Head Start
Head Start
Preschool for All
Early Childhood Center
Elementary
Middle School
High School
On-Line
Private
ALOP – Alternative Learning Opportunities Program
RSSP – Regional Safe Schools Program
TAOP – Truant Alternative and Optional Education Program
TS - Therapeutic School
Vocational and Technical School
Undergraduate Postsecondary Education
Military

5. "*School Grade Types*" - Only the "School Grade Types" listed should be utilized for purposes of state-wide standardization. The following "Grade" levels are used by the Illinois State Board of Education and the Illinois Student Information System (SIS) when identifying a child's grade. *Optima does not have a drop down for grade level and therefore the ISBE grade levels should only be used:

School Grade Types:

00 - Too young for school/early childhood
PK - Pre-Kindergarten
K - Kindergarten
01 – Grade 1
02 – Grade 2
03 – Grade 3
04 – Grade 4
05 – Grade 5
06 – Grade 6
07 – Grade 7
08 – Grade 8
09 – Grade 9
10 – Grade 10
11 – Grade 11
12 – Grade 12
 Freshman
Sophomore
Junior
Senior

7. Be sure to update the school drop-down menu to include all schools within the county/districts your program serves. *__If a school is not currently included, you will need to add it in the LOOKUP TABLE__*.

8. To add schools to your Look Up Table:

Go to Lookup Tables—Go to Demographics—Schools. Click the green "Add" button, then input the school name, school type, phone, address and zip Select the school's county from the drop down. Click the green "Create" button.

To add an "Outside of County" option:

Go to Lookup Tables—Go to Demographics—Schools. Click the green "Add" button, then input "Outside of County" as the school name, select (Select a School Type for your Outside of County Option) as the school type, then hit "Create."

9.To run the Active Children School Summary Report:

*Go to Reports---**Custom Reports** -- Select Active Children - School Summary--**Annual**- Select the grant date range---Start Date: 10/1/2020 ---End Date 9/30/2021*
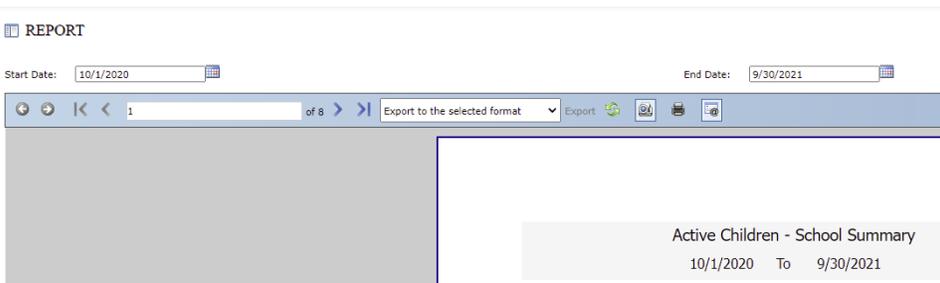
Optima School Summary Report output:
- # High School Graduates
- # of Students with IEP/504
- # Students by Grade Level
- # of Students by School
- # of Students by School County

It will be imperative for you to run this report periodically to ensure data is being pulled accurately.