QUICK START GUIDE – COMMON TASKS AND QUESTIONS

- Web Address: [https://praed.net/orgearup/](https://praed.net/orgearup/)
- Username: If you forget your username, contact the GEAR UP office.
- Password: If you forget, lose, or need to reset your password, you can [reset your password](https://praed.net/orgearup/).
- Add an event
- Upload students or upload staff/volunteers
- Create and print your [monthly cost share report](https://praed.net/orgearup/)
- Link to current [volunteer rate](https://praed.net/orgearup/) and list of past volunteer rates for the value of volunteer time.
- If you experience any issues with the Events and Cost Share Tracker, please contact an Oregon GEAR UP staff member.
## INDEX

[control] + Click to go to one of the sections below

Quick Start Guide – Common Tasks and Questions ................................................................. 1
Introduction.................................................................................................................................. 5
  Purpose....................................................................................................................................... 5
  Definitions................................................................................................................................. 5
  Before you begin...................................................................................................................... 5
Getting Started: Log in Page........................................................................................................ 6
  RESET PASSWORD....................................................................................................................... 6
  Troubleshooting Login Issues................................................................................................. 7
Main Menu................................................................................................................................... 8
Administer Your Organization ...................................................................................................... 9
  Events and Cost Share Tracker Access Levels......................................................................... 10
Managing Users: People with Access to the ECST................................................................. 10
View/Edit Individuals in Your Organization ............................................................................. 11
  View the list of individuals in your organization................................................................. 11
  View or Edit an Individual...................................................................................................... 12
  Edit the name, title, wage rate, and benefit rate for multiple individuals at the same time..... 13
  Add an Individual ................................................................................................................... 14
  Archive, View, and Unarchive Individuals............................................................................... 17
Add Students............................................................................................................................. 18
  Add Students Manually.......................................................................................................... 18
  Upload Students ..................................................................................................................... 20
  Check the current status of students....................................................................................... 21
View/Edit Students .................................................................................................................... 22
  Navigate to the list of students in your cluster...................................................................... 22
  Download an Excel (.csv) spreadsheet of all the students in your cluster........................... 22
  Search for a specific student ................................................................................................... 22
  View or edit a student record................................................................................................. 23
  View a list of services or events in which the student participated, and edit student participation 24
(In)activate students and View Inactive Students.................................................................. 26
  Inactivate one or more students per page in the list of active students............................ 26
  View and re-activate inactive students in your cluster:......................................................... 27
View/CREATE/Edit Student Groups............................................................................................ 29
  Overview of Student Groups.................................................................................................. 29
  View Student Groups............................................................................................................ 29
  Create a Student Group........................................................................................................... 29
Delete a Student Group ..................................................................................................................... 31
Edit a Student Group .......................................................................................................................... 31
NOTES/FAQ on Students ..................................................................................................................... 32
Edit Organizational Info ....................................................................................................................... 32
Reports ...................................................................................................................................................... 33
Monthly Cost Share Report .................................................................................................................. 34
School Activity Report ......................................................................................................................... 36
Student Activity Report ........................................................................................................................ 37
Creating and sorting a student activity report: .................................................................................. 37
Individual Activity Reports ................................................................................................................... 38
Activities and Services (Includes cost Share and People Served) ............................................................ 39
View/Edit Events .................................................................................................................................. 39
View Pending Events ............................................................................................................................ 40
View/Save Pending Events ..................................................................................................................... 40
Add an Event ......................................................................................................................................... 41
Header Information ............................................................................................................................... 41
Cost Share Information ........................................................................................................................ 44
Number of Individuals SERVED by the event ....................................................................................... 44
Evaluation ........................................................................................................................................... 45
Saving your progress ............................................................................................................................. 45
Add Individuals providing cost share to the event: ............................................................................ 46
Add Students to the event: .................................................................................................................... 47
Remove Students from the Event ......................................................................................................... 49
Save the Event ..................................................................................................................................... 49
Adding an Ongoing Event ....................................................................................................................... 50
Add a Reoccurring Event ....................................................................................................................... 51
Tips for adding Events .......................................................................................................................... 51
Add/Edit Cost Share (Non-Event Cost Share) .......................................................................................... 55
View Non-Event Cost Share .................................................................................................................. 55
View Pending Non-Event Cost Share ...................................................................................................... 55
Add Non-Event Cost Share .................................................................................................................... 56
Cost Share Timesheets .......................................................................................................................... 57
General Timesheet Information ............................................................................................................ 57
Enter and edit timesheets ..................................................................................................................... 58
Cost Share Tips ................................................................................................................................... 59
Allowable and Unallowable Cost Share ............................................................................................... 60
Volunteers .......................................................................................................................................... 61

Oregon GEAR UP ECST Manual 3 Revised December 2019
INTRODUCTION

The GEAR UP Events and Cost Share Tracker (ECST) is an online program designed to help Oregon GEAR UP programs track and report on services provided to schools and cost share accumulated. In this document, we will go over some general information about the ECST, describe each section, and provide instructions on how to perform tasks within the ECST.

The coordinator’s site (http://oregongearup.org/grant/invoices-cost-share) has additional information about cost share and the ECST, including a Cost Share Tutorial Slidecast and an optional Events and Cost Share Worksheet (to assist you in planning events and collecting information to enter into the ECST).

PURPOSE

The Oregon GEAR UP Events and Cost Share Tracker was developed to collect information regarding:

- Events and Cost Share
  - Please be sure to enter all events and cost share into the ECST, including the names of all students who attended the events.
- Federal Annual Performance Report (APR)
- Student participation in GEAR UP events for evaluation purposes

DEFINITIONS

- ECST: The Events and Cost Share Tracker is also referred to as the ECST, and occasionally as the “Events and Cost Share Tracking Database”. In this manual, it is sometimes referred to simply as “the tracker”.

BEFORE YOU BEGIN

- Some of the information in the manual only applies to certain GEAR UP clusters, so look for notes in brackets for [Cohort Schools] and [Priority Schools].
GETTING STARTED: LOG IN PAGE

- The GEAR UP Events and Cost Share Tracker is available online: https://praed.net/orgearup/
- To log in, enter your Username and Password, and click the “Login” button.

RESET PASSWORD

If you forget your password, you can reset it on the main login page.

1. Go to https://praed.net/orgearup/
2. Click “Forgot Pass Phrase?” underneath the Username/Password boxes.
3. Enter your Username and email address, and then click the “Submit” button. You will receive a temporary password in your email.
   - 🔄 NOTE: The email may take some time to reach you; however, please check your junk mail if you do not receive it.
4. Go back to the main ECST login page https://praed.net/orgearup/
5. Type your Username, copy/paste the temporary password from the email, and click the “Login” button.
   - 🔄 NOTE: If the new password doesn’t work, try copying it again directly from the email.
6. When you log in, you will be asked to reset your password and verify your other information.
Troubleshooting Login Issues

- If you log in with the wrong username or password, you will get the following error message:

![Login Error Message]

- Sometimes your username and/or password may auto-populate incorrectly. If you are not able to log in, try re-entering your username and password.

- Related to that, **multiple people cannot be logged into the ECST at the same time on the same computer**. When you are done editing the ECST, please log out. If you notice someone already has the ECST open on a shared computer, please log that person out.
There are two ways to navigate through the ECST:
  o You can navigate from the Home Page using the links on the left side of the page.
  o You can navigate using the Navigation Bar, always available to you at the top of the page.

News items about the ECST and data entry are displayed in the “GEAR UP Announcements” section in the upper right corner. News items can be written by program and ECST administrators. Please contact the GEAR UP office if you would like a news item posted.

You can view and edit your personal information or your organization’s information on the right side of the page.

The ECST will log you out after 60 minutes of inactivity. To log out manually, click “LOGOUT” on the menu bar, or “Click here to Logout” beneath the GEAR UP Announcements section.
There are five keys areas for you to administer your organization:

- **Add/Edit Individuals in Your Organization** (including archiving and updating wages)
- **Add Students** (including inactivating students)
- **Upload Student Information**
- **View/Edit Students**
- **Edit Organizational Info**

In addition to these functions, you may also **add and edit users** using the admin menu at the top of the page.

Before learning about adding and editing individual, student, organization, and user information, it’s helpful to know the difference between the Events and Cost Share Tracker access levels.
EVENTS AND COST SHARE TRACKER ACCESS LEVELS

What is the difference between individuals, users, and school admins?
There are several different access levels in the ECST, each with different permissions.

- **Individual**: Anyone who contributes cost share to your organization falls into this category. The individual’s information is in the system so that organization admins/users can enter cost share for the person. The person cannot log into the ECST unless they also have a separate user or school admin login.
  - **NOTE**: When adding an individual, check that the individual is not already in the system.
- **User**: This access level will be able to log into the ECST to enter events/non-events and their own timesheets. They cannot run reports, or view/add students.
- **School Admin**: This access level is primarily for the cluster coordinator, and perhaps a few others who enter events and cost share frequently. School admins can log into the ECST and edit the organization, add/edit information including events and student records, and run reports.

MANAGING USERS: PEOPLE WITH ACCESS TO THE ECST

You can add Users to your school or cluster by going to the Navigation Bar and clicking on “Add Users”.

- “Users” are people who can log into the ECST to enter events or services as well as cost share information.
- If you add a user (with login access), you may also wish to add the person as an individual (in order to count their time for cost share). Hover over the admin menu and select “add individuals”.
  - In the upper left hand corner of the page, you will see a dropdown menu titled “Users w/o individual created”. Select the name of the user you would like to add as an individual, fill out the information, and click submit. If the person does not appear in the dropdown menu, you can fill in all of the information and click submit.

Click “View Users” to view and edit user information.
- Contact the GEAR UP office if you would like to add or delete a school admin for your school.
VIEW/EDIT INDIVIDUALS IN YOUR ORGANIZATION

This section allows you to view and edit existing members of your organization as well as add new individuals to your organization for the primary purpose of cost share.

- **How often should we update the individual and user records in the ECST, including wage rates?**
The list of individuals and users for your cluster should be updated at the beginning of the school year and at any time during the school year if there are changes. Please update the wage rates, archive individuals no longer in your organization, and add any individuals who may contribute volunteer time as cost share to your school. Add any new users. Let the GEAR UP office know if there are any users or school admins who should be deleted, or given different permissions.

**View the list of individuals in your organization**
1. Navigate to the list of individuals in your organization
   a. From the main page, click “Add/Edit Individuals in your Org” in the left side menu.
   b. OR, From the navigation bar, hover over “Admin” then click “View Individuals”.
1. You will see a list of every individual in your organization, on multiple pages, with 10-40 individuals per page.
   o Click on the arrow buttons below the list to move back and forth through the pages.
   o Click the dropdown menu below the list to change the number of individuals per page.
View or Edit an Individual

1. Click on “View/Edit” next to an individual’s name to view or edit that record.

2. Edit name, title, contact info, pay rates and benefit rates as needed.
   a. **NOTES:**
      i. Benefit rates should be entered as a percentage, not a fraction. E.g., a staff member with a 33% benefit rate should be entered as 33, not 0.33.
      ii. The new wage rate becomes effective the day you enter the wage rate. After you enter a new rate, you can edit the start and end dates to accurately reflect the dates the rate is effective. **WARNING:** Make sure the dates do not overlap, or you may see duplicate names in list of individuals when you are entering your cost share.
      iii. Changes made to wage/benefit rates for existing individuals will update automatically in events and cost share you have already entered, retroactive as of new rate start date.

3. Click “Submit” to save changes.
Edit the name, title, wage rate, and benefit rate for multiple individuals at the same time

1. From the navigation bar, hover over “Admin” then click “Edit Wages/Benefits Table”.

2. You will see a list of individuals in your organization, which may extend to several pages.
3. Make any updates to the name, title, wage, and benefit rate for the individual(s) you wish to edit, one page at a time.
   
   **NOTES:**
   - If you enter a new start date and new wage/benefit rates, the current rates will end on the new rate start date, and the new rates will begin on that date.
   - If there is no benefit rate for the individual, or the rate is 0% (for a Volunteer, for example), please enter zero in the “new benefit rate” field. If you leave this field blank, the rate will not automatically be set to 0%.

4. To save changes, click the “Update Wages” button near the top or bottom of the page.
Add an Individual

- Any person in your organization whose time will count as cost share should be added to the ECST as an individual. This includes school/district staff, non-school staff volunteers and student volunteers.
  - **WARNING**: Check the list of individuals first before adding a new individual to make sure no duplicate individuals are added.
- There are two options for adding individuals to the ECST: Manual entry and uploading a file.

### Add an Individual Manually

1. Navigate to the list of individuals.
2. Click on “Add a New Individual” to create a new individual record.
   ![Add a New Individual](image)
3. Check the list of “Users w/o individuals created” in case there is a user in your organization who also needs to be added as an individual.
   ![Individual List](image)
4. Enter information for the individual, including name, title, pay rate and benefit rate.
   a. For School/district staff, please use their actual wage and benefit rate, even if their wage rate is lower than the volunteer wage rate. Benefit rate should be a whole number.
   a. For Non-school staff (including students) who volunteer time in support of GEAR UP, please use the national volunteer wage rate. Benefit rate = 0.
5. Click “Submit” to save changes. Individual will be added to the ECST immediately.
**Batch Upload a list of Individuals**

Use this option if you have at least 5 new individuals to upload. This is also another method to update wages for multiple individuals at the same time.

1. Navigate to the Upload Individuals page.
   a. Navigate to the list of individuals, and click on “Batch Upload Individuals”.
   b. OR, hover over “Admin”, hover over “Add Individuals”, and click “Upload Individual Information”.

2. Follow the instructions to create an Excel file.

   To batch upload at least 5 individuals (staff/volunteers) for cost share...
   Create an Excel file with these columns in the exact order below:

   - School Name*
   - First name*
   - Last name*
   - Title/Position
   - Telephone
   - E-mail
   - Hourly Pay Rate*
   - Benefit Rate (%)*
   - New Rate Start Date* (in mm/dd/yyyy format)
   *required

   Save it as a CSV file; use the browse button to select and upload it.

   If the individual is not already in the tracker, the hourly pay and benefit rates will be backdated to 01-01-2000.

   Uploaded individuals will be transferred to the database after the file has been processed, and will not be available immediately to view. You will receive an email when the file has been processed.

   **Example CSV File**

   Choose a file to upload: Browse... No file selected. Upload
a. The file needs these columns in this exact order:
   i. School Name*, First name*, Last name*, Title Position, Telephone, E-mail, Hourly Pay Rate*, Benefit Rate (%)*, New Rate Start Date* (mm/dd/yyyy)
   ii. The field names marked with an asterisk are required; the others are optional.

b. **TIP**: Download the example CSV file to use as a template.

3. Save the Excel file as a CSV (Comma Separated Value) file.

4. Click the browse button to select the CSV file you created.

5. Click the “Upload” button to upload the file to the ECST.
   a. **WARNING**: The individuals will NOT be added to the ECST immediately. You will receive an email from the developer when the file has been verified, and the individuals are available to view and add to events.
Archive, View, and Unarchive Individuals

⚠️ TIP: Cost share for archived individuals will still be included in events.

Archive Individuals no longer in your organization

1. Navigate to the list of individuals in your organization.
2. Click on the “Archive” icon next to an individual’s name to archive that individual.
3. Click “OK” in the popup window to finish archiving the individual.

View/Un-archive the Archived Individuals in your organization

1. Navigate to the list of individuals in your organization.
2. Click “View Archived” to see a list of all the archived individuals.
3. Click on the un-archive button next to an individual’s name to un-archive that individual.
4. Click “OK” in the popup window to finish un-archiving the individual.
There are two options for adding students to the ECST: Manual entry and uploading an Excel file.

**NOTE:** When you upload a student who was already in the ECST, the new information will overwrite the old information, as long as the student ID is the same. Any events associated with the student will remain connected to the student, and a duplicate student record will not be created.

### Add Students Manually

1. Navigate to the “Add Students” page:
   - From the main page, click “Add Students” in the left side menu. OR,
   - From the navigation bar, hover over “Data Entry”, and then click “Add” next to Student.

2. Enter the number of students you would like to enter (up to 99) and click the “Submit” button.

3. Type in the First, Middle, Last Name, ID, DOB and grade level for each student.
   - Optionally, you may select whether the student has a photo release, or has completed their FAFSA.

4. Click the “add” button, and the students will be added to the ECST immediately.
If you try to add any students who are already in the ECST (as long as they have the same ID number), you will receive one of two error messages:

1. “Student ID Currently In Use” – student is currently active in the ECST at this school. Find the student in the list of active students at your school and make sure their information is correct.

   ![Image of the Oregon GEAR UP - Add Students form with an error message: Student ID Currently In Use At Camas Valley School.]

   - For the row with the error message, delete all the information from the text boxes, and set all the dropdown menus to “Select an Option” (including school name at the end of the row). You may see one or more “Required” error messages under that row, but you can disregard those.
   - For all other rows with student information already entered, keep the information.
   - Click the “Add” button. All the students with information will be entered into the ECST.

2. “Student ID Currently Inactive” – student is in the ECST in the list of inactive students. Find the student in the list of inactive students at your school, make/save edits as needed, then click the “Make Active” icon.

   ![Image of the Oregon GEAR UP - Add Students form with an error message: Student ID Currently Inactive. Please transfer back to active instead of duplicating.]

If you are adding multiple students, and get one of these two error messages for a student you are trying to enter:

- For the row with the error message, delete all the information from the text boxes, and set all the dropdown menus to “Select an Option” (including school name at the end of the row). You may see one or more “Required” error messages under that row, but you can disregard those.
- For all other rows with student information already entered, keep the information.
- Click the “Add” button. All the students with information will be entered into the ECST.
Upload Students
In addition to adding students to the ECST by typing information, you can upload a file with multiple students.

**NOTE:** The students will **NOT** be added to the ECST immediately; the file will be verified first.

1. Navigate to the “Upload Student Information” page.
   a. From the navigation bar at the top of the page, hover over “Data Entry”, hover over “Add” next to Student, then click on “Upload Student Information”.
   b. **OR**, from the main page, click “Upload Student Information” in the left side menu.

2. Follow the steps to upload your student file.
   a. **Create an excel file with eight columns**, in this exact order: Legal first name, Legal middle name, Legal last name, Suffix, Student ID number, Date of birth (mm/dd/yyyy), Grade, School name.
      i. **TIP:** Click “Example CSV File” to download a sample file you can use as a template.
      ii. All of the information is required for each student, except “Middle Name” and “Suffix”.
   b. Save the file as a CSV (Comma Separated Value) file.
   c. Click the browse button to select the csv file you wish to upload.
   d. Click the “Upload” button to upload the file to the ECST.

3. You will receive an email from the developer when the file has been verified.
Check the current status of students

Before uploading a list of students from your school, or as needed throughout the year, you may want to check on the current status of students at your school and whether they are already in the ECST.

1. Navigate to the “Upload Student Information” page.
2. Click on the “Pre-Upload Roster Synchronization Worksheet” link at the top of the page.
3. Select your cluster name from the dropdown menu.
4. Next, copy the student ID and Grade columns (grade is optional) from a list of students at your school to the large text field on the left titled “Paste Students Here”.
5. Then click the “Go!” button.

6. View Results.
   a. The system will add the current status of each student next to their student ID: **Existing, New, or Inactive**.
   b. The text box on the right will be populated with students who were already in the ECST, but were not included in list of student ID’s you pasted in. They will likely need to be transferred to inactive.
VIEW/EDIT STUDENTS

Once you have entered students, you can view and edit the student information as well as inactivate/ reactivate students and manage student groups.

Navigate to the list of students in your cluster
1. Click the “Download Student List (Excel)” button near the top of the page.
2. From the main page, click “View/Edit Students” in the left side menu.
   a. OR, from the navigation bar, hover over “Data Entry”, and then click on “Edit” next to Student.
3. You will see a list of every student in your cluster, on multiple pages, with 10-40 students per page.
   a. Click on the arrow buttons below the list to move back and forth through the pages.
   b. Click the dropdown menu below the list to change the number of students per page.

Download an Excel (.csv) spreadsheet of all the students in your cluster
1. Click the “Download Student List (Excel)” button near the top of the page.

Search for a specific student
1. Enter all or part of their name or student ID in the “Search by Name” box above the student list.
2. Click the “Search” button.
View or edit a student record

1. Click on “View/Edit” next to a student’s name.

2. Change information by typing into text boxes or selecting an option from the dropdown menus.
3. Click the “Save Student” button to save any changes you make to the record.
View a list of services or events in which the student participated, and edit student participation

1. Navigate to the list of students for your cluster.
2. Click on “View/Edit” next to the student’s name.
3. Click on an academic year above the student information.
4. Click on “Student Services” below the student information.

5. You will be directed to a list of events the student has been added to during that academic year. Click an event title to view details about the event and edit the student’s participation in that event.
6. You can edit the number of hours of service the student had in the event, or click “Remove Student from this service” to delete the student from this event.
   a. Click the “Submit” button if you would like to save any changes.
(IN)ACTIVATE STUDENTS AND VIEW INACTIVE STUDENTS

- You should inactivate any students who withdraw before they have graduated, whatever the reason (transferred, moved, dropped out, etc.)
  - ⚠️ WARNING: Do not inactivate students who have graduated. Students who graduate are automatically rolled forward each year into grade 13 etc., and may still be viewed.
- Students who have been inactivated will still be included in any events they have already been added to. However, they cannot be added to new events. You will not be able to add them to any other events unless they are made active again.

Inactivate one or more students per page in the list of active students

1. Navigate to the list of students for your cluster.
2. Click the “Make Inactive” checkbox next to the student name(s).
3. Click the “Inactivate Checked” button.
4. You will see a pop-up window asking, “Are you sure?” you want to inactivate. Click “OK”.
   a. ⚠️ NOTE: The students will be inactivated as of the current date.
View and re-activate inactive students in your cluster:

1. Above the list of your active students, click “View Inactive” to see the inactive students.

![Image of the Oregon GEAR UP - Active Cluster Students interface]

2. Click on the “Make Active” icon next to a student’s name to make that student active again.
   a. **Troubleshooting:** If you see a message that a student is inactive, but you are not able to find the student in your list of inactive students, please contact the GEAR UP office.

![Image of the Oregon GEAR UP - Inactive Cluster Students interface]
3. Select the school name from the Student School Status dropdown menu, change the grade level if necessary, enter the date the student returned to the school/became active again, and enter the reason for re-activation, such as “transferred back to this school”.
4. Click the “Change Status” button to save the student as active again.
VIEW/CREATE/EDIT STUDENT GROUPS

Overview of Student Groups
- If you often select the same group of students to add to events, it may be useful to use a student group, e.g., students who are all taking a specific class, or who are part of a specific club.
- The groups are a way of pre-filtering the list of students to add to events, so you don’t have to sort through all the students.
- Rather than searching for students individually or displaying an entire grade, you can select a student group, and then select which students in that group you’d like to include in an event.

View Student Groups

1. Navigate to your list of active students.
2. Above the student list, click “Manage Student Groups”.

3. You will see a list of the student groups in your cluster.

Create a Student Group

1. Navigate to the list of student groups.
2. Click “Add a New Group” near the top of the page.
3. Enter a group name.
4. Click “List Students” to add students to the group.
   a. **TIP:** You can enter a last name or check grade levels before clicking “List Students”.

![List Students]

5. There are two ways to add students to the group from this list.
   a. Check the boxes next to the students you wish to add, then click “Add Checked Students”.
   b. Paste a list of student ID’s into the large text box. Click “Select pasted”. Click “Add Checked Students”.
      i. All of the students you pasted will be added to the group, as long as they’re in the ECST.
      ii. **WARNING:** this will erase and replace any currently checked students.
6. Click “Add Students” or “Remove Students” if you need to make any changes.

![List Students]

7. Click “Save Group” at the bottom of the page to save the student group.
Delete a Student Group

1. Navigate to the list of student groups.
2. Click the red X next to a group name to delete the group.
   a. **NOTE:** You can delete any group(s), and it will **not** affect students who have already been added to events.

Edit a Student Group

1. Navigate to the list of student groups.
2. Click “View/Edit” next to a group name to make changes to the group.
3. You can edit the group name at the top of the group student list.
4. To add additional students to the group, click “Add Students”.
5. To remove students from the group, check the box in next to the student(s) you want to remove, and then click the “Remove Checked Students” button.
6. After making any changes, click the “Save Group” box at the bottom of the page.
NOTES/FAQ ON STUDENTS

- **How often should we update the student records in the ECST, and upload new students?**
  The list should be updated at the beginning of the school year and at any time during the school year if there are changes. Upload all of the students in your cluster each year (to be sure that any new or incoming students are included in the list). Then review all of your students, make any corrections to names or grade levels, and inactivate any students who are no longer enrolled.
  - **[Cohort]:** Upload all of the students in your cluster each year, to be sure that any new or incoming students are included in the list. Optionally, you may upload **all** students in the school.
  - **[Priority]:** Only add and update students who are part of the priority group, not every student in your school.

- **Can we add 6th grade students to the ECST?**
  Yes! 6th grade students can be added/uploaded to the ECST and added to events.

- **Will the students be rolled forward into the next grade every year?**
  The developer will roll students up into the next grade at the beginning of each school year. You may edit the grade level if a student repeated a grade or skipped a grade.

- **How do we view students who have graduated?**
  You may view any students that are in the ECST who have graduated; they will appear in the student list with a grade level of 13 or higher. 13 = 1 year beyond 12th grade graduation, 14 = 2 years beyond 12th grade graduation, and so on, increasing by 1 each year after graduation.

- **What if a student withdraws from the school?**
  Please remember to inactivate students who are no longer attending your school, and set their inactive date to the date they withdrew. You can re-activate them at a later date if the student attends the school again.

- **What if the information for a student changes? Will the list of events for that student be correct?**
  The system uses each student’s ID as the unique record ID for each student. Please make sure that this number is correct before you add students. As long as the student ID remains the same, if a student is added to an event, and later the student’s name or other information changes, the student will still be associated with the correct events.

- **What if we have home schooled students who attend events?**
  It’s OK to add home schooled students that come to events. Create a student record for any students you’d like to add.

- **I clicked “view/edit students” but the list of students is blank.**
  Some schools cannot view the list of students in the Events and Cost Share Tracker when using Internet Explorer 11. You may be able to see the page numbers at the bottom of the screen but no names. Internet Explorer 11 does not support some of the current code in the ECST. There are two possible workarounds:
  - You can click on the Compatibility Mode button (looks like a broken page) near the web address (https://praed.net/orggearup/). It works but may make the list of student names look funny.
  - You can use a different internet browser such as Firefox or Google Chrome.

EDIT ORGANIZATIONAL INFO

In this section, you may update the contact information for your cluster, and view the indirect rate. If you wish to add or change your indirect rate for any academic year, contact the GEAR UP office.
A variety of reports is available to you.

- **Monthly Cost Share Report**: This report shows a detailed list of cost share by category and event during a specified date range, and also allows you to print a summary report that you can sign and submit to the GEAR UP office.
- **School Activity Report**: This report shows the number of participants who received service from GEAR UP events (by event category) during a specified date range, and the average hours of service per participant.
- **Student Activity Report**: This report shows a list of all the activities in which selected students participated (either active or inactive students). This report can be used to assess which students have received service or not. The list may also be useful to seniors when documenting activities on college or scholarship applications.
- **Individual Activity Reports**: This report shows a list of all the activities for which selected individuals contributed cost share. This report could be used for tracking/appreciating volunteer time.
MONTHLY COST SHARE REPORT

This report shows a detailed list of cost share by category and event during a specified date range, and also allows you to print a summary report that you can sign and submit to the GEAR UP office.

Instructions for creating a monthly cost share report:
1. Review your events for the month to make sure they are all entered and accurate.
   - Have you entered all of the events for this time-period?
   - Have you entered all of the students who attended the events?
   - Have you entered all of the cost share into each event?
2. Click on “Monthly Cost Share Report” on the left side of the page, or at the top of the “Reports” dropdown menu at the top of the page.
3. Enter or Select the start date and end date, then click “Create Report”.
   - NOTE: When entering a date anywhere in the ECST, you can enter any year and are not limited to the years in the date picker.
4. On the screen, you will see a detailed report with subtotals in each category, actual amounts from all the different events that contributed to the subtotal, and a grand total at the bottom.
5. Review the detailed report on the screen to make sure it is complete and accurate.
   
   - **NOTE:** If you want a copy of the detailed report for your own records, copy all the text on the page and paste into a word document.

6. Click the button on the bottom of the page, “Print Summary Report for GEAR UP office” to print a one-page summary of the report or save as a PDF. Sign and return the report to the GEAR UP office.

### Report For: September 01, 2016 To: September 30, 2016

Sample School

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Wages</td>
<td>$20,757.10</td>
</tr>
<tr>
<td>Benefits</td>
<td>$12,995.67</td>
</tr>
<tr>
<td>User Timesheets</td>
<td>$0.00</td>
</tr>
<tr>
<td>Travel</td>
<td>$0.00</td>
</tr>
<tr>
<td>Materials / Supplies</td>
<td>$0.00</td>
</tr>
<tr>
<td>Consultants / Contracts</td>
<td>$0.00</td>
</tr>
<tr>
<td>Other, Specify</td>
<td>$0.00</td>
</tr>
<tr>
<td>Total Direct</td>
<td>$33,752.77</td>
</tr>
<tr>
<td>Total Indirect</td>
<td>$0.00</td>
</tr>
<tr>
<td>Equipment</td>
<td>$0.00</td>
</tr>
<tr>
<td>Scholarship / Tuition</td>
<td>$0.00</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$33,752.77</strong></td>
</tr>
</tbody>
</table>

I certify that this report is correct and complete, and that all events, cost share and students have been entered for this time period.

Printed Name: Sally Smith
Signature: ________________

Please email this report to: Ashley.Edwards@OregonState.edu

**NOTES:**

- **When are the monthly cost share reports due?**
  Please submit your signed monthly cost share reports each month by the 15th of the following month. Before you print the report, please make sure you have entered all the events and cost share for that month. You do not need to send us copies of the backup documentation for cost share. Please keep those on file at your school in case of an audit.

- **What if we have no cost share for the month?**
  If you have zero cost share for a particular month (e.g. in the summer), e-mail the GEAR UP office and let us know. You do not need to print/sign the blank form.

- **What if we have corrections/additions after we submitted our cost share report?**
  Please send us a new report any time you make a change.

- **For multi-day events, the Events and Cost Share Tracker uses the START date of the event on reports,**
  to show cost share and student services. E.g. an event from October 30 – November 1 will show up on the October 1-31 cost share report, but not on the November 1-30 cost share report.
SCHOOL ACTIVITY REPORT

This report shows the number of students, parents, community members and staff who received service from GEAR UP events (by event category) for a specific date range, and the average hours of service per participant.

- Student numbers are **unduplicated**, meaning each student is counted once, no matter how many times they receive service. If one student attends 5 meetings for 1 hour each, the number of students receiving service = 1, and the average hours = 5.
- Parent/staff/community member numbers are **duplicated**, meaning each person is counted once for each time they receive service. If one person attended 5 meetings for 1 hour each, the number of people who received service = 5, and the average hours = 1. Unduplicated participation for parents, staff and community members is not currently tracked.

Instructions for creating a school activity report:
1. Click “School Activity Report” on left side of page, or in the “Reports” dropdown menu at top of page.
2. Enter or select the start date and end date, optionally select the event category, then click “Submit”.

3. Click “Print this Report” if you would like to print the report or save a PDF copy of the report.
STUDENT ACTIVITY REPORT

This report shows a list of all the activities in which selected students participated (active or inactive students). This report can be used to assess which students have received service or not. The list may also be useful to seniors when documenting activities on college or scholarship applications.

Creating and sorting a student activity report:
1. Click on “Student Activity Report” in the menu on the left hand side of the page. (You can also access this from the top menu bar – hover the cursor over “REPORTS” and clicking “Student Activity Report”.)
2. Select whether you want to include active or inactive students (default is active students).
3. Optionally:
   o Select the grade level(s) of the students you want to include.
     ▪ **NOTE:** The student name and school ID # will display in the report, but not the grade level. If you need to know the grade level, you may want to select one grade at a time.)
   o Search by last name.
   o Select Start Date and End Date of service.
   o Select one or more Groups.
4. Click “Show student List” to show the list of students that meet the criteria you selected.

5. Select one or more students that you would like to include in the report by checking the box next to each name. You can click the checkbox above the list of students to “Select/Unselect All” the students.

6. Click the “Download EXCEL File” button. You may see a window pop up asking if you want to Open or Save the file. Click “Save File”. The file may automatically save to your “Downloads” folder.
7. Open the file using excel. The spreadsheet has columns for “Student ID”, “First Name”, “Last Name”, “Event Name”, “Date”, “Description”, “Category”, and “Area”. You can sort by any of these columns.
   o To see the names of students that attended events within a particular event category, click on “Sort” (in the “Data” tab in Excel), then sort by “Category” and “Event Name”.
   o To see a list of events each student attended, sort the list by student ID or first/last name.
If you want to view activities for just one student, you can also go to the list of students in your school, click view/edit for a certain student’s record, click the school year you’re interested in, and then click the “student services” link just below the student information. That will display a list of all the activities they participated in during that school year.

INDIVIDUAL ACTIVITY REPORTS

How do we print a list of all the events where an individual has volunteered?
This report shows a list of all the activities for which selected individuals contributed cost share. This report could be used for tracking/appreciating volunteer time.

Instructions:
1. Click on “Individual Activity Report” on the left side of the home page, or in the “Reports” dropdown menu at the top of the page. Select one or more individuals in your organization.
2. Click “View report” to see a list of events online, or “Print/save” to save a copy.

<table>
<thead>
<tr>
<th>First Name</th>
<th>Last Name</th>
<th>Position</th>
</tr>
</thead>
<tbody>
<tr>
<td>Susan</td>
<td>B --------</td>
<td>Teacher</td>
</tr>
<tr>
<td>Rosa</td>
<td>G --------</td>
<td>Teacher</td>
</tr>
<tr>
<td>Vicky</td>
<td>H --------</td>
<td>Teacher</td>
</tr>
</tbody>
</table>
In this section you can view, add, and edit pending and non-pending events.

**VIEW/EDIT EVENTS**

Allows you to view and edit existing events. See “Add an Event” section for details on each of the event fields.

⚠️ **NOTES:**

- **How can I sort the list of events?** Click on the header of any column to sort by that column.
- **Can we enter events that happened in the previous school year?** Yes. However, events will appear in the year they are entered. If it is currently the 2017-18 school year and you enter events from 2016-17, they will appear in the list of 2017-18 events. Service and cost share reports will still be calculated correctly based on the event date.
- **How do we change events and data from past years?** The ECST allows users to edit data for one previous year at a time. If users are unable to edit data for a particular year (e.g. the submit button is not visible when editing a past event), you can change the year you are viewing. Select admin from the top menu bar, then view users, then click “edit” next to the user you wish to edit. On the right side of the page under “Edit Prev Year”, select an academic year and the user will have editing access rights for that year (in addition to the current year).
- **In the ECST, we can view the cost share amounts when we view or edit an event. However, the total cost share amount does not display in the list of events for our cluster, in the cost share column.** Ask the GEAR UP office to enter your indirect rate for the year, or enter zero if you do not have an indirect rate. The cost share is not displayed in those cases where the organization’s indirect rate had not yet been established and if it was needed in the calculation of Travel, supplies and materials, consultants, and other expenses.
VIEW PENDING EVENTS

Allows you to view and edit pending events.

- Saving an event as “pending” allows you to enter partial information before submitting, or enter future events that you can save as non-pending once complete.
- You may save events as pending by checking the “Save as Pending” box at the bottom of the event before you click submit. The information you entered will be saved, but the cost share and numbers served will not be added to your school totals.
- **NOTE:** Please review your pending events and non-event cost share regularly. Either save completed events as non-pending, or delete events that did not take place.

**View/Save Pending Events**

1. From the ECST, navigate to your Pending Events:
   a. From the main page, click “View Pending Events” in the left side menu.
   b. **OR** hover over “Data Entry” in the menu bar at the top of the page, then click “View pending”.
2. If you have pending events, you will see a list of events, as well as one or more academic year links near the top left of the page. If you have pending events for more than one academic year, click on the link to the correct academic year.
3. Click the “View/Edit” link next to the event you are interested in.
4. Review the event information and make changes as necessary (e.g. adding participants or cost share).
5. Save the event.
   a. To save the event as **ACTIVE**, uncheck the “Save as Pending” checkbox and click “Submit”.
   b. To keep the event **PENDING**, check the “Save as Pending” checkbox and click “Submit”.
6. To **delete a pending event**, view the list of pending events, and click “Delete” next to the event name.
ADD AN EVENT

Allows you to enter events and cost share, including event header information, cost share hours, names of all participating students, and number of any parents, staff, or community members who received service.

- If you save the event as pending, only the Event Title, Description, and Category are required.
- If you submit the event, the Activity Number, Date(s), Hours, Number of Parents/Staff/Community Members, and Evaluation Sections are also required.

Header Information (General information about the event):

- **Event Title**: Short title including the activity number.
- **Activity Number**: Use activity number from your plan (#.# format), or 0.0 if activity is not in your plan.
- **Single-day/Multi-day/Ongoing event**: Specify the event type using the dropdown menu. Data entry options change slightly depending on the event type.
  - **Multi-day events** are consecutive day events where the same students attended the entire time. You can track actual hours of service to students.
  - **Ongoing events** occur regularly over a specific time period. Ex: classes, advisory, before/after school tutoring, mentoring, weekly events, etc. You can track actual hours of service to students.
    - We recommend you enter these events at the end of each quarter; however, you can enter them monthly if preferred (please do not allow more time to pass before entry).
    - To add students, you will assign a number of hours, rather than just selecting students.
• **Option 1:** Upload students to the event as a group, and individually assign the number of hours served to each student. This is the most efficient option, especially if the class/event has an attendance roster that will not change.

• **Option 2:** Add students to the event using a default # of service hours (e.g. attendance hours/quarter) and adjust student hours according to attendance.

• **Option 3:** Run a quarterly attendance report with the exact # of service hours per student, and enter each student. This is the most time-consuming option.

  ▪ Please note: these events will be flagged by the central office if all students in your ongoing events have the same number of service hours, as it is highly unlikely there are no absences/missed sessions throughout the course of the school year.

• **Start/End Date:** Cost share and services will be counted in reports using the event **Start Date**.

• **Hours/Minutes:**
  - For single-day and multi-day events, the total hours and minutes for the event should match the average number of hours of service each participant received. This may not be the same as total event length, and is different than entering the start time and end time of the event. (E.g. If you have a career fair from 10 am – 2 pm, but each student attended for an average of 30 minutes, you would enter 0 hours and 30 minutes.)
  - For ongoing events, you would enter the actual hours and minutes of service for each student, when adding the students to the event.

• **Place:** Location event was held.

• **Description:** One or two sentences describing the event.

• **Category:** The type of service provided. See your GEAR UP binder for a list of the “Category” definitions.

• **Areas:** Select one or more of the “5 R’s” this event covers.

### Choosing event category (Type of Service): Example events below. Full list of definitions in team binder & ECST.

<table>
<thead>
<tr>
<th>Category</th>
<th>Example Events</th>
</tr>
</thead>
</table>
| College Visit/ College Student Shadowing | • A guided physical or virtual tour of a college campus  
  • College Fair                       |
| Counseling/advising/academic planning | • Direct counseling/guidance to individuals or small group  
  • Teacher college posters; door wars; student research on colleges  
  • CIS, or a Career Fair               |
| Educational Field Trips               | • Community Service                                                           |
| GEAR UP Club/Orientation              | • GEAR UP kickoff events, or information events                               |
| Job Site Visit/Job Shadowing          | • A guided physical or virtual tour of a company/workplace.  
  • NOT career speakers, that should be under “Workshops” |
| Mentoring                             | • GU coordinators meet with college students  
  • GU school alumni come back to the HS and talk with students  
  • Beaver Hangouts, Skype with College Students  
  • Help with social/life skills/future plans. Purely academic = Tutoring. |
| Professional Development (Staff only, not Students) | • Poverty Training  
  • Workshops/classes on AP, PBIS, curriculum alignment  
  • National, Regional, and Statewide GEAR UP meetings |
| Student Peer Activities               | • Student Posters about which college they went to                           |
| Rigorous Curriculum                   | • College-level courses, or a class focused on a specific career  
  • AVID                               |
| Summer programs                       | • Summer School, or Academic/college readiness summer camp                    |
| Tutoring/HW Assistance/Academic Enrichment | • Advisory with Supportive Services/study hall  
  • Academic/Attendance awards, Attendance support |
| Workshops                             | • Guest Speakers (e.g. motivational, careers)                                 |
NOTES on Professional Development:

- **If we consistently have PD every week, or if teachers attend multiple summer PD trainings can we record it as one event and add up all the hours?**
  No, whenever possible, schools should **enter a separate event for each instance of staff PD training**, with the names staff who attended each training and the number of hours of PD for that particular training.

- **Can we count time at GEAR UP meetings as service time? If so, how do we know how many hours to count?**
  Staff time at the SUCCESS Retreat, Statewide Meetings, GEAR UP West conference, and other regional or national GEAR UP meetings should all be counted as PD and entered as events. Only count time spent in meetings as **service hours** for staff. The number of hours for **cost share** may differ from the service hours.

- **What are the rules for counting Professional Development meetings/trainings as cost share?**
  - Only count time spent in meetings and traveling as cost share for staff (as long as staff time is eligible as cost share, and the PD is GEAR UP related).
  - Teacher time can be counted as cost share if sub expenses will be covered by the Central GEAR UP Office (i.e., Winter Statewide and SUCCESS).
  - Travel expenses not covered by GEAR UP grant funds or the GEAR UP Central Office can be counted as cost share.
  - Contact your school liaison if you have questions about the number of hours.
Cost Share Information (Non-GEAR UP funds, donations, discounts, volunteer hours supporting the event):

- **Travel**: Busses or bus usage discounts for GEAR UP events can be counted here.
- **Materials and Supplies**: Discounts/waived fees for students attending GEAR UP related camps and events may be counted here; please ensure GEAR UP/the camp is not sponsoring student attendance.
- **Consultants**: Independent contractors or other professionals who offer expert knowledge or training.
- **Other**: Cost share that does not fit into the other classifications (e.g. fees)
- **Indirect rate**: Calculated automatically for your cluster. If you do not see an indirect rate for the year, and your district has one, contact the GEAR UP office.
- **Equipment**: This is for single items that exceed $5,000.
- **Scholarships**: Scholarships students receive in order to take credit-bearing college courses.

Number of Individuals SERVED by the event (Parents, Staff and Community Members receiving service):

- Being served means that people benefitted from the event or received some kind of learning/service, whether they were the primary audience or not.
  - Service is SEPARATE from any hours spent volunteering, presenting, or chaperoning at an event. You will be able to add individuals providing cost share at an event on the next page.
- The number of parents, staff, and community members served by an event are required fields. If no parents, staff, or community members were served by the event, please enter zero.
- If you want to track the names of parents attending, please enter those in the description box.
- **NOTE**: Ongoing events do not have this section. These events only track services to students.
Evaluation:

- 🔄 NOTE: All fields are required.

Saving your progress:

- There is a checkbox at the bottom of the event entry form, for the option to save the event as pending.
  - 🔄 NOTE: If an event is saved as pending, cost share and services provided will NOT be included in the monthly cost share report or activity reports. Once the pending box is unchecked and the event is saved as active, the cost share and services will be included in reports.

- Click the “Next” button at the bottom of the page, to save this information (even if you navigate away from the page), and to access the add individual/add student sections of the page.

- After you click the “Next” button, a place to add individuals to the event will appear on the page in the cost share section, and a place to enter students will appear in the Post-Event Report/Service section.
**Add Individuals providing cost share to the event:**
Add all staff and non-school staff who volunteered time that can be counted as cost share.

1. Start typing a name into the “Search” box to find individuals in your organization.
   a. **NOTE:** Use the search box first, to avoid creating duplicate individuals.
   b. If the individual is not listed, click “Add an individual to this organization” and enter the information to add the individual.

2. Click on the box labeled “Click to add hours”, in the “Hours” column, next to the person’s name.

3. Enter the # of hours each individual volunteered for the event, which may be more time (travel or prep time) or less time (staying for part of the event) than the actual event length. Click “OK”.
   a. **NOTE:** If someone volunteered for less than an hour, write the time as a decimal with a leading “0”, e.g. “0.5” for a half hour.
Add Students to the event:

1. Click “Add Students” link to add the names of all students who attended the event.

2. Click “Show student list” button to see a list of all active students in your cluster. Optional: Type a last name, or check a grade level or group checkbox to before clicking “Show Student List” to narrow list.

3. Check the box next to the students who attended, then click “Add Available Participants” button at the top or bottom of the list. If you don’t click “add available participants”, no students are added.
   a. ✅ NOTE: If you would like, you may include all students in all grade levels who attended the event, even if they are in a grade level outside of the official cohort. However, that is not required, and we don’t use information from students outside the GEAR UP served cohort in our reporting.

4. Once students are added to the event, you can add additional students by clicking the “Add Students” again, and repeating the process.
TIPS on Adding Students to Events

- **Is there an easy way to add the same group of students to different events?**
  If you have a group of students that regularly attends an event, such as tutoring, a class, or an academic team, you can create a student group to make it easier to add those students to an event. (View the student list, and then click “Manage Student Groups”.)

- **Why is it important to be accurate when entering student names into events?**
  Student names are required for all events in order to calculate an accurate number of students served and hours of service provided, and to run accurate reports that show which events particular students attended. **Having a sign in sheet for events may help track attendance.** You may wish to print out a list of all the students in the class, grade level or school, and check off those who attend.

- **In the case of a school wide event such as an assembly, can we choose “select all” and add all the students, since most of the students would be in attendance?**
  No, you should only include the students who attended the event, as we need to track actual student attendance. Since having a sign in sheet will not work well in this case, we recommend getting a printout of the students that were absent during that time for accuracy. When in the ECST, click “Select all” and then unclick those that were absent.

- **Help, I’m having trouble changing the event category to/from “Professional Development”!**
  The professional development category is JUST for events where staff received training or attended a GEAR UP event. Events where students receive service cannot use the “PD” category.

  - If you entered an event with the “PD” category, and want to add students:
    1. Change the event type to something other than “PD”.
    2. Save the event.
    3. Open the event.
    4. Add students and save the event.

  - If you entered an event and want to change the category to “PD”:
    1. Open the event.
    2. If there are students added to the event, delete them from the event.
    3. Change the event type to “PD” and save the event.
Remove Students from the Event

- You can remove students from the event by checking the box next to the student name and clicking “Save Participants/Hours”.

Save the Event

- After entering any students and individuals and making any final changes to the event, click the “Submit” button to save the event.
  - There is a checkbox at the bottom of the event entry form, for the option to save the event as pending.
  - ✩ NOTE: If an event is saved as pending, cost share and services provided will NOT be included in the monthly cost share report or activity reports. Once the pending box is unchecked and the event is saved as active, the cost share and services will be included in reports.
ADDING AN ONGOING EVENT

As you create new events in ECST, in the drop down menu where you select ‘Single’ or ‘Multi-day’ event, you will now see an option for ‘Ongoing’ events.

- These events refer to those that occur regularly such as a class, before/after school tutoring session, regularly scheduled weekly events, etc.
- It is recommended that these events are entered at the end of each quarter; however, you can enter them monthly if it is preferred (please do not allow any more time to pass before entry).

From there, everything else is entered the same until you add students. Whereas in the other event options students are added by simply selecting each student, now in order to add students, you have to assign a number of hours, and then click “Add Available Participants”.

To facilitate this process, there are a few options available to you.

- **Option 1**: Upload students to your event as a group, and then individually assign the number of hours served to each student.
  - This is the most efficient option, especially if you have a class/event with an attendance roster that will not change.
- **Option 2**: Add individual students to your event using a default number of service hours (perhaps the total number of attendance hours for the quarter) and then adjust each student’s hours according to his/her attendance records.
- **Option 3**: Before adding individual students, run an attendance report to indicate the exact number of service hours for that student during the quarter.
  - Based on our test runs, this is the most time-consuming option, but please feel free to use whatever works best for you.

Once students are added to the event, you can change the number of hours/minutes or remove students, and then click “Save Participants/Hours” to save the changes.

Please note that these events will be flagged by the central office if all students in your ongoing events are indicated as having the same number of service hours, as it is highly unlikely there are no absences/missed sessions throughout the course of the school year.
ADD A REOCCURRING EVENT

Allows you to enter a series of recurring events.

- There are three tabs, to choose which type of recurring event you would like to create:
  - Monthly on the Nth weekday: Allows you to create a meeting once a month on the same weekday. [E.g. the first Monday of the month, second Thursday, etc.]
  - Monthly on the same date: Allows you to create a meeting once a month on the same date.
  - Weekly by weekday: Allows you to create a meeting once a week on the same day of the week.

- After choosing the type of event, choose the start date and number of occurrences and click submit.
- Enter the header information, and exclude specific occurrences if needed. When you click submit, a separate event will be created for each date selected, and the event will be saved to the pending folder.
- **NOTE:** When creating reoccurring events, you are not able to add students; you will just be entering the information that applies to all dates. You will need to enter students for each individual event created.

TIPS FOR ADDING EVENTS

- **Is there a form I can use to help me collect event information, before I enter events into the ECST?**
  We have a GEAR UP Event & Cost Share Worksheet on the Grant Management website, to assist you in planning events and collecting information to enter into the ECST. This form is completely optional.

- **What events do we need to enter into the Events and Cost Share Tracker?**
  Make sure to add all events and services that are related to GEAR UP or described in your plan if they have cost share and or/services associated with it. We want to make sure to capture all cost share and all services provided to students, parents, staff, and community members.
  - Examples to remember to include: GEAR UP Week, College Application Week, Texting seniors, GEAR UP classes/clubs, dual credit classes, summer camps or other summer events, GEAR UP student leadership events, GEAR UP statewide meetings, etc.
  - Remember to add all eligible cost share for those events, including volunteers/chaperones, transportation, food, and materials not covered by GEAR UP.
  - The items also cannot be covered by other federal funds.
  - You do not have to submit a form if you are simply making a purchase using GEAR UP funds if there is no other cost share or service associated with the purchase.
• **Can we enter events that are funded by a different grant?**
  Yes, you can enter events that are funded by other grants (and indicate how many students/educators/parents attended) as long as they support the GEAR UP goals and do not come from federal funds.

• **Can we submit an event or cost share for things we have done in the past?**
  Working on the premise that GEAR UP schools can count things as match only if they could have paid for it with GEAR UP funds (which follows the federal rules for GEAR UP spending), a program that was in place prior to the first grant year could not be counted unless it is enhanced/changed enough that it is not supplanting.
  - *Example of Enhancing:* A school might have had random students help other students with their math after school, not an organized program. Through GEAR UP, the school decides to add after-school tutoring staffed by a licensed teacher. Students can come in anytime they need help. In addition, teachers will tell parents about the tutoring opportunity during conferences each quarter.
  - *Exception:* [Priority Schools] can count programs, classes and events that were added due to GEAR UP, during the 6 years of the 2008-2014 GEAR UP grant.

• **What is the difference between events and non-event cost share?**
  Events are used to track activities where students, parents, staff, or community members receive services. Events also have a place to track any associated cost share. Non-events are used for entering cost share that is not associated with an event where students, parents, staff or community members are receiving a service. *Examples:* A district/company technology donation, a GEAR UP team planning meeting, state funded grants.

• **Do we have to enter events for different grant years in different sections on the website?**
  No. All events, timesheets, etc. are listed together by date, not by grant year.

• **Is there ever a situation where we can enter just one event to record several events or activities that are related to a particular topic?**
  No, please submit separate events for each individual activity. The only exception is when you are using the alternatives for entering frequently occurring events specifically outlined in the ECST Manual.
  - *For example,* if you are doing multiple activities related to the transition from MS to HS, you might enter several separate events:
    - June 3: Assembly with all MS students and select HS students
    - June 5: Tour of the HS
    - August 1-31: Cost share for staff planning time before school starts (outside of contract)
    - August 29: Parent/Family night for incoming freshmen (including staff cost share time)

• **Can we enter activities into the ECST prior to the event? If so, what is recommend to keep track of the activities that are incomplete because we are waiting on information?**
  You may create and save an event as PENDING that would include services and/or cost share and then save it as an active event once the activity has occurred and you have recorded all of the information. Similarly, you may enter a non-event cost share item as PENDING, and then save it as active once the materials or volunteer hours have been donated. Please note that an activity or non-event cost share item that is saved as pending is not counted towards your overall cost share when running reports.
  - ✨ *NOTE:* School liaisons will be entering all plan events in September (as pending events).
• **Is there an easy way to enter frequently reoccurring events such as classes that meet daily?**
  o First, if you have an activity or group that meets weekly or daily, you will need to track the actual number of hours of service for each student.
  o Preferred Option: Add one ongoing event for the entire class or entire term, and enter the number of hours each individual student attended.
    ▪ **WARNING:** Please don’t enter a single or multi-day event, which can only record one number of hours served for all attendees - each student may have attended a different number of days, and thus received a different number of hours of service. We need the actual number of hours per student, not an average (not even an average based on the daily attendance rate).
    ▪ Multi-day events are ONLY for consecutive day events where the same students attended the entire time, such as the Student Leadership Camp.
  o Alternate options:
    ▪ **Create a reoccurring event:** Use “Add a reoccurring event” to create a separate event for each day the class/tutoring is in session, and then enter the actual student attendance for the day (only including students who were in class that day).
      • **NOTE:** When creating reoccurring events, you are not able to add students; you will just be entering the information that applies to all dates. You will need to enter students for each individual event created.
    ▪ **Create a duplicate event:** Create an event for the first day of the class or activity. Once that is saved, you can view the list of events for your cluster, and click on the “Duplicate” link to the right of the event title each time you want to duplicate it. You can then add the date, hours of service, event category, R’s, and students in attendance, and save the duplicated event.

• **How do we track college courses taken by students while in high school?**
  To enter a college class in the Events and Cost Share tracker, submit a separate multi-day event for each student, for each term. Indicate the total number of hours the student attended the college class for that term. The event title for each of these should include the student’s name and the term so that you can easily find the event if you need to (e.g. “Johnny Smith – Algebra 101 – Fall Term”). Fee waivers from colleges for students taking college classes can also be counted as match.

• **How do we record camps or trips that last several consecutive days?**
  The best way to record consecutive days of service is by using the Multi-Day Event feature as long as all participants receive the same number of hours of service.

• **How do we determine the length of time to record for an event?**
  The number of hours and/or minutes that should be recorded should correspond with the amount of time served for the people recorded on the event.

• **What is the difference between event length (hours of service) and number of volunteer hours?**
  When entering events, the number of hours of service to students/staff/community members may be different from the number of hours volunteers/staff contribute toward cost share.
  o The event hours are used to calculate hours of service provided to the participants. For field trips and overnight events, hours of service provided should not include sleep time or travel time unless you were doing preparation or debrief activities during the travel.
  o Chaperone/volunteer time CAN include travel time for match as well as any time supervising students, prepping for the event, etc. That is entered separately, in the center section labeled “Cost Share Info”.
  o For more information on counting personnel time for cost share, please see the cost share tutorial: [https://www.slideshare.net/orgearup/cost-sharing-101-8665723](https://www.slideshare.net/orgearup/cost-sharing-101-8665723)
• When should we count someone as being served and when should we count someone as cost share or match? Is there ever an instance when someone could be counted as both?
  o **COST SHARE** (Individuals **INVOLVED**): The “Cost Share Info” section in the middle of the event entry page is used to show individuals who facilitated or volunteered at an event, and how many hours they contributed toward cost share.
  o Individuals **SERVED**: The “POST-EVENT REPORT: Numbers Served” section at the bottom of the event entry page is used to show the number of individuals who were served by the event. Being served means that they benefitted from (learned something from) the event whether they were the primary audience or not.
    ▪ Make sure only people who received a benefit or learning from the event are counted. For staff or volunteers who attend events, consider whether they simply volunteered their hours to plan or help at the event, or if they received some kind of benefit/service/learning from the event as well.
    ▪ When tracking the number of parents, staff, and community members served by an event, each person who is served should only be counted in one category, based on the capacity they are filling at the time. A staff member who is also a parent might be included in the staff category for a PD session or when volunteering at an event, but included as a parent at a parent night where they are not volunteering.
  o People who attend an event or meeting might be added just to the cost share section, just to the section for individuals served, or both. **Someone could be listed in both places** if they volunteered during the event and also gained some knowledge about the topic being addressed. For example, if a teacher chaperones a college visit on a non-school day, they can be counted as being served because they would have learned from the things that the college student guide presented as well as being counted as match because they are volunteering their time.
**ADD/EDIT COST SHARE (NON-EVENT COST SHARE)**

You can:
- **View Non-Event Cost Share**: This allows you to view/edit existing and pending Non-Event Cost Share.
- **View Pending Non-Event Cost Share**
- **Add Non-Event Cost Share**: This allows you to add Non-Event Cost Share

### VIEW NON-EVENT COST SHARE

Allows you to view and edit existing non-event cost share. See the “Add non-event cost share” section for more details on each of the fields.

- **How do we change events and data from past years?** The ECST allows users to edit data for one previous year at a time. If users are unable to edit data for a particular year (e.g. the submit button is not visible when editing a past event), you can change the year you are viewing. Select admin from the top menu bar, then view users, then click “edit” next to the user you wish to edit. On the right side of the page under “Edit Prev Year”, select an academic year and the user will have editing access rights for that year in addition to the current year.

### VIEW PENDING NON-EVENT COST SHARE

If you would like to confirm pending non-event cost share as no longer pending, view the non-event cost share form, uncheck the “pending event” checkbox, and click “submit” to save.
ADD NON-EVENT COST SHARE

**NOTE:** Non-events are used for entering cost share that is not associated with an event or class where students, parents, staff, or community members are receiving services. (Examples: A district/company technology donation, a GEAR UP team planning meeting, state funded grants.) If anyone from one of these groups is receiving a service, please enter an event instead.

- Enter the entire header and cost share information. See the “Add an event” section for details on how to add individuals, as well as information on each of the cost share fields.
- Click “Submit” to save the cost share. (For pending/future cost share, check “Save as pending” before submitting.)
**COST SHARE TIMESHEETS**

You can **View Timesheets for your Org** and **Enter Your Personal Timesheets**.

**GENERAL TIMESHEET INFORMATION**

- **What are timesheets, and when do we use them?**
  Timesheets are used to track hours worked by staff, volunteers, teachers, etc. in support of GEAR UP, beyond their normal tour of duty, and **NOT** associated with an event or non-event cost share.
  - Timesheets are used to track individuals’ effort toward GEAR UP that is administrative in nature.
  - Timesheets are **NOT** where you enter time spent on an event. Be sure not to double count any match by entering time in both an event and in a timesheet.
  - Timesheets are **NOT** used to track coordinator time that is paid for with GEAR UP funds.

- **Do we need to send in a copy of the timesheets with our monthly cost share reports?**
  No, you do not need to submit a copy of the timesheets with your monthly cost share report. However, you do need to keep a copy on file. *Schools should make sure people print out and sign their timesheets each month, and keep them on file in the school with the other GEAR UP records in case of an audit.*

- **Can we enter someone else’s timesheet on their behalf?**
  No, each person will need to enter his or her own timesheet.

- **Is there a way to delete timesheets?**
  No, just enter in 0 hours for timesheets that should be deleted.
ENTER AND EDIT TIMESHEETS

Before you enter a timesheet for yourself, please make sure you have not submitted a timesheet for that month.
Select the month and year, then select “Click here to start your timesheet”

Enter the number of hours you have spent in each category, and then click the “submit” button.
COST SHARE TIPS

- Is there a tutorial to learn more about allowable cost share?
  Yes, here: https://www.slideshare.net/orgearup/cost‐sharing‐101‐8665723

- If we have reached our matching fund obligation, do we have to continue entering events into the ECST? Do we continue to send in our signed Cost Share Reports each month?
  Yes & Yes. Please continue to enter all events and cost share into the ECST and print, sign and submit the Cost Share Reports even if you have met your match obligations. Any extra cost share helps the grant as a whole to be in compliance for overall cost share. You do not need to send us copies of the backup documentation for cost share as long as you keep those on file at your school in the case of an audit.

- What grant year will summer events count toward in terms of cost share totals for the year?
  The GEAR UP office uses the date range September 1- August 31 to tally cost share for each year. To gather the cost share amounts, we will always run a report from the ECST system.

- When should we enter cost share using events, non-events, or timesheets?
  - Events are used to track services provided to students/staff/parents/community members.
    Enter any cost share (volunteer hours pre/post/during event, travel, materials) for the event on the event page.
    - Examples: College Visit, Staff Professional Development, GEAR UP Class, Parent Night.
  - Non‐event cost share entries are used for entering cost share for activities that do not involve direct service provision to students, staff, parents or community members.
    - Examples: A district/company technology donation, a GEAR UP team planning meeting, state funded grants.
  - Timesheets are used to track eligible administrative time worked by staff, volunteers, teachers, etc. that supports GEAR UP, and is not associated with an event or non-event cost share item. It is important to use the Timesheets OR the Non-Event Cost Share section. If you put the same information in both places, it will be counted twice, which is against policy.
    - Examples: Volunteers who call parents, staff members working on GEAR UP reports.

- How do we enter indirect costs?
  You do not need to enter the indirect rate – that is handled on the back end of the ECST. If your district has an approved indirect rate, it will populate the cost share section of the event and calculate indirect costs automatically. If you wish to add an indirect rate for the year, please contact your district office for a copy of the approved federal indirect rate agreement and send it to the GEAR UP office.

  - NOTE: Your district/organization must have an agreement in place for the current fiscal year in order to claim indirect. You are allowed to claim your indirect rate, up to a maximum of 8%.
ALLOWABLE AND UNALLOWABLE COST SHARE

• What are some things that CAN be counted as Cost Share?
  o See the Cost Share 101 tutorial for an overview, and contact your liaison with any questions.
  o Anything that is an allowable expense under the GEAR UP grant (see more details about allowable incentive items, food, Student Classes, Camps, College Credit)
  o School staff volunteering their time outside of their regular tour of duty
  o All administrator volunteer time (whether during the school day or not)
  o Non-school staff volunteer time (including parents, students, community members)
  o Federally approved Indirect cost rate up to 8% – contact the Oregon GEAR UP office to set up
  o [Priority] You can count GEAR UP events that were begun under the GU2 grant as match, even if you are serving non-priority students. You will only be tracking attendance from the priority students, if any. Example: La Pine’s math lab expenses paid by the district.

• What are some things that MAY POSSIBLY be counted as Cost Share?
  o Can we count substitute time, if someone covers a teacher’s class?
    If you were doing a GEAR UP event during the school day, and someone covered your class, then yes, you can count the time of the person who covered your class as cost share, as long as the district covered the sub costs.
  o If you have students that tutor other students in an organized tutoring session, both the tutors and tutees can be counted as receiving a service from the activity. The student tutor time can be counted as match, at the current volunteer rate, because the tutor is performing a duty that an adult could have been doing and that GEAR UP could have paid for. However, students acting as student aides in classes cannot count as match or a service.
  o Technology utilized by the GEAR UP coordinator – see your school liaisons about what percentage of costs you may count.
  o Gift certificates and gift cards donated from outside sources may count as cost share, but NOT gift cards/certificates purchased using school or district funds.

• As a general rule, what things CANNOT be counted as Cost Share?
  o No double dipping
    • Anything paid for by the GEAR UP grant
    • Items or staff time that other GEAR UP grants have already counted as match (for example, if you do a career fair with another GEAR UP school, make sure you split the cost share for the volunteers)
  o Anything that cannot be paid for with GEAR UP funds
    • Examples:
      • Costs associated with entertainment
      • Teacher Time in Class (generally)
      • School or District Buildings
  o Items or staff time paid from federal funds
    • Examples:
      • GEAR UP Office staff time
      • The TRIO program representative’s time cannot be counted as match because TRIO is federally funded.
      • For bus travel, only count the amount that is not federally reimbursed
Scholarships and fee waivers from colleges

- **[Priority schools]** You can count scholarships and fee waivers from colleges for both rising college freshmen and sophomores as long as the money is not from a federal source and as long as they’re NOT Oregon Opportunity Grant (OOG), Oregon Promise, or OSAC scholarships. (GEAR UP already counts the total OSAC scholarship amount for our students as match, and we cannot count it twice.)
- **[Cohort Schools]** You can count this match when your original 7th grade cohort are seniors.

**How should GEAR UP coordinators count their time as match?**

- If the coordinator puts in time over and above the 20 hours per week, it can be used as match.
- **If the GEAR UP coordinator is also teaching a GU class** and their GEAR UP money is paying for their salary for the class period(s), they cannot count that time as match. If all of the following conditions are met, they can count their time during that class as match:
  - The time the GEAR UP Coordinator takes to coordinate GEAR UP is outside of their GEAR UP class time
  - The salary for the class period(s) is not paid out of GU funds
  - The class was started because of GEAR UP (even in the last grant cycle for priority schools)

Check with your school liaison about your school’s specific situation.

**VOLUNTEERS**

Volunteer time is a great source of cost share.

**Where do we find the current volunteer pay rate?**

https://www.independentsector.org/resource/the-value-of-volunteer-time/

The rate is updated yearly. If the rate is not yet available for the current year, use the most recent rate.

**Please use the federal volunteer rate.**

- Rate for past years:
  - 2010: $21.36
  - 2011: $21.79
  - 2012: $22.14
  - 2013: $22.55
  - 2014: $23.07
  - 2015: $23.56
  - 2016: $24.14
  - 2017: $24.69
  - 2018: $25.43

**Can we use the volunteer rate for anyone who volunteers?**

Feel free to use the volunteer rate for anyone who volunteers who is not a school employee or who is not providing a specialized service, including students.

- You will need to create an individual record for volunteers. Whenever possible, please include their name and title/position. For example, if you visit a college, college staff should have a different classification than “volunteer” even if you are using the volunteer rate.
- Remember students (not including classroom aides) can be counted if they are volunteering in a capacity that an adult could have. Please ask your school liaison if you are unsure.
- **What do we enter for the benefit rate for volunteers?**
  For individuals entered into the ECST with the volunteer rate, *please use 0 for the benefit percentage.*

- **How do you calculate the pay rate for a professional who is speaking or demonstrating at a career fair/college fair, or doing other volunteer work?**
  You must use the volunteer rate. *Only use the actual wage rate if the professional is actually acting in their professional capacity* regardless of whether they are missing work to be there.
  - **Example:** If a veterinarian is doing an exam on an animal in their office while a student is observing for a job shadow, you may count the time at their rate of pay and benefit percentage. If they are talking about what they do as a veterinarian at a career fair, you would use the volunteer rate.

- **If we have a large number of volunteers at an event, can we lump all of their hours together under a generic “volunteer” record for our school?**
  Yes, if you have an event, such as a career fair, with a large number of volunteers, you can lump their hours together. Add a generic individual to your organization called “Volunteer group”, and list all the hours served by multiple people under that individual.
  - **NOTE:** You need to have a record on file of the actual names of each volunteer and how many hours they served. Whenever possible, please add individuals to the ECST and include their name and position.

- **Are we allowed to report volunteer cost share at other organizations’ college/career fairs?**
  You are allowed to report the volunteers’ hours as cost share at college and career fairs held at organizations other than your school, with the following provisions:
  - You can only report the hours that your students actually attend the event. If the college/career fair ran for 5 hours but you were only there for 2 hours you can only report 2 hours per volunteer for match.
  - The college/career fair cannot be funded with federal money.
  - In the unlikely event that there are overlapping claims to the presenters’ time as cost share, the GEAR UP office will contact you.
SCHOOL SURVEY

This section formerly allowed the federally funded GEAR UP schools to enter data for questions on the Annual Performance Report such as Advanced Course Enrollment, Education Progress, and Course Completion. [Priority Schools] may view the school survey reports.

SCHOOL PROFILE REPORT

The school profile report is not currently available on the ECST website. Please see the Key Data Report for your cluster, in the Vocalize Data Dashboard: https://login.qualtrics.com/vocalize/login

DOCUMENTS/RESOURCES

At the bottom of the main page are links to:

- Event sign in sheets for participants and volunteers
- Cost share information on the coordinator website
- Definitions of the different service types used when entering an event
- The current volunteer rate
The **Missing Data report** highlights the missing data for individual students and allows you to enter the missing data directly into the report rather than going to the individual pages for each student.

The **Summary Profile** provides a quick summary snapshot of how much data you have entered on individual student fields in the ECST.