PCAPS 101 Manual

A how-to guide to the Provider Contract, Attendance, and Performance System

Public Health Management Corporation

Out of School Time Project
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A. Introduction

This manual provides instruction on how to perform a variety of tasks within the PCAPS database. PCAPS is the database used by providers and PHMC to enter and monitor data related to youth, staff, attendance, and invoices. The manual content areas include personnel management, client management, attendance, invoicing, high school incentives, and reporting. This document serves as a companion to the PCAPS 101 training workshop. Refer additional PCAPS-related questions to the Compliance Specialist for your site.

A.1 Login Information

Typically, PCAPS works best when accessed using Internet Explorer Version 8 or 9. Though it may work in other browsers, there is a higher possibility for errors. In order to successfully login to PCAPS, you need someone from your organization to enter you as a staff member in the database. Use your agency email as your username. The initial password for all users is attend99. Once you access the system, you must change your password. The website for PCAPS is: http://pcaps.phmc.org.

B. Personnel Management

PCAPS⇒Personnel

It is important that staff records are maintained and updated regularly to ensure contract compliance. Program and Compliance Specialists refer to personnel records to verify staff to youth ratios and ensure active titles in the system match personnel on site.

B.1 Creating a Personnel Record

Before creating a new personnel record, perform a search to verify the staff person was not previously enrolled. This step helps avoid staff duplication.

To perform a personnel search:
- PCAPS⇒Personnel⇒Personnel List
  - Click Personnel
  - Click Personnel List
  - The list only shows active personnel
  - Click All to view active and inactive personnel
  - If you would only like to view staff assigned to the current site, check Limit Search to Current Program Site
If the staff member is listed, then check the start and end dates for the staff to ensure the information is correct. Refer to section B.3.1 for instructions on editing dates.

If the staff member is not listed, follow the instruction below for creating a personnel record:

To create a personnel record:
- PCAPS⇒Personnel⇒Personnel List
  - If a staff person is not found after performing the above search, click New Person.
    - Enter first name, last name, and date of birth for the new staff member. Click Continue.
    - Enter all required data indicated by ** including: agency hire date, race, gender, ethnicity, resident of target community, education level, field, years of experience, and credits/hours
      - Though not marked as required, please also provide email address, phone number, and communication type
Compliance data is also on this screen

- Enter for those required to have clearance, i.e. group supervisors, assistant group supervisors, etc. Refer to section B.4 for instructions
  - This includes dates for the staff member’s health assessment, FBI clearance, confidentiality agreement, criminal check, and child abuse check

- Click Save

If at any time you wish to change the information for a staff person, you can click on their name in the Personnel List, change the information, and click Save.
• Contact the Compliance Specialist for your site if you need to change the spelling of a staff person’s name or their date of birth.

B.2 Adding a Personnel Title

By default, every staff member entered into PCAPS is listed as inactive. The staff member only becomes active when given a title. Titles distinguish direct care staff from administration. Titles include but are not limited to: Administrator, Coordinator, Director, Group Supervisor, Assistant Group Supervisor, Aide, Consultant, and Volunteer.

To add a title:
• PCAPS⇒Personnel⇒Personnel List⇒Personnel Info⇒Personnel Titles
  o Click Personnel
  o Click Personnel List
  o Select staff person from the list
  o Select the Personnel Titles tab, then click New Title
    ▪ Select title from the Staff Title dropdown menu
    ▪ Select the Program where the staff person works
      • You can select more than one site by holding down the Ctrl key and selecting the applicable sites
      • This typically applies to administration, floaters, and substitutes
    ▪ Enter the Start Date for the new title
    ▪ Select yes or no in the Requires Compliance dropdown menu
      • All staff who count toward ratio must have a yes for Requires Compliance
    ▪ Click Save
B.3 Maintaining Personnel Records

Providers are expected to keep contacts current in PCAPS, particularly working email addresses and phone numbers. OST references the information when contacting providers, so it is vital that it is up-to-date in order to receive important information.

B.3.1 End Dates

In instances of staff turnover, title changes, or employee reassignment, PCAPS will allow providers to issue an end date for the current title.

To issue an end date:
- PCAPS⇒Personnel⇒Personnel List⇒Personnel Info⇒Personnel Titles
  - Click Personnel
  - Click Personnel List
  - Select staff person from the list to update
  - Select the Personnel Titles tab
  - Click Edit next to the appropriate title
  - Select date on calendar under End Date
  - Click Update for title to save record (if staff is no longer employed repeat this step for all titles)
B.3.2 Updating Points of Contact

To update an assignment for an existing staff person:

- PCAPS⇒Personnel⇒Points of Contact
  - Click New Assignment

  - Select Contact Title from dropdown menu
  - Select contact from Existing Contact dropdown menu
  - Select site(s) to assign contact
  - Click Assign

    - New contacts cannot be added from this page- the contact list only pulls from existing staff persons
B.4 Staff Compliance

Compliance information for staff can be added during Personnel Record creation or at a later date. The following chart indicates the required compliance components for each staff person:

<table>
<thead>
<tr>
<th>Compliance Information</th>
<th>Initial Due Date (from hire date)</th>
<th>Updated</th>
</tr>
</thead>
<tbody>
<tr>
<td>Child Abuse Clearance</td>
<td>Within 30 days</td>
<td>Once upon hire</td>
</tr>
<tr>
<td>Criminal Background Check</td>
<td>Within 30 days</td>
<td>Once upon hire</td>
</tr>
<tr>
<td>FBI Check (If hired after 7/1/2008)</td>
<td>Within 30 days</td>
<td>Once upon hire</td>
</tr>
<tr>
<td>Health Assessment</td>
<td>Within 60 days</td>
<td>Every two years</td>
</tr>
<tr>
<td>Confidentiality Agreement</td>
<td>Within 30 days</td>
<td>Once upon hire</td>
</tr>
<tr>
<td>Date of Birth</td>
<td>Upon hire</td>
<td>Once upon hire</td>
</tr>
<tr>
<td>Staff Qualifications</td>
<td>Within 30 days</td>
<td>Annually</td>
</tr>
</tbody>
</table>

To enter compliance data for a staff person:
- PCAPS⇒Personnel⇒Personnel List⇒Personnel Info
  - Click on Personnel
  - Click on Personnel List
  - Select staff person
  - In the Personnel Info tab, enter dates for each applicable compliance
  - Click Save

To review and update Staff Compliance:
- PCAPS⇒Site Administration⇒Staff Compliance
  - You can search staff compliance by invoice month or active dates
    - Select Invoice from the dropdown menu OR
    - Select Active Between Dates from calendar
    - Click Search
    - The initial list will provide only those staff who are out of compliance
      - To view all staff, uncheck Show only non-Compliant
  - Items shaded yellow indicate missing items
  - Items that are blank are not due yet
To update staff compliance:
- Click Edit next to appropriate staff person's name
- Enter new compliance date
- Click Update

C. Client Management

The Client Management menu in PCAPS is where client records are created and updated. The client information is used to create attendance rosters, develop invoices, and calculate compliance. The data is also used to identify trends and plan services for the OST system.

C.1 Creating Groups

Groups allow programs to organize attendance rosters based on common factors. By grouping youth, programs can decrease the amount of time spent on sign-in procedures. Users can export attendance rosters for multiple groups. This process produces multiple sign-in sheets, therefore, decreasing the amount of time youth wait to sign-in.

To create a group:
- PCAPS⇒Client Management⇒Attendance Group Maintenance⇒Create/Edit Groups
  - Select Create/Edit Groups
On the following screen select Add New

Enter the Group Name and Start Date
  - Do not enter an end date until the end of the program period (i.e. until the end of the summer or school year)

This Group will now be an option when enrolling clients, found under Client Group on the Client Enrollment screen

C.2 Creating and Enrolling a Client

Programs need to create a client record in order to enroll youth. Before creating a client record, always search for the client first to verify the youth is not already in the system. This process avoids duplicate records, which can potentially have a negative impact on client compliance and utilization.

To create a client record:
  - PCAPS⇒Client Management⇒Client Search
    - First, type a few letters of the youth’s first name or last name and click Search Clients
    - If the youth appears in search, then proceed to the Client Enrollment portion of this section on the next page to enroll the youth
    - If the youth does not appear, then the New Enrollment button should become available, click this to enter the Client Info screen
Now, you need to enter the required information in the Client Info, Client Enrollment, Caregiver Info, Emergency Contact, MTW Info, and Get SSN Attempts tabs

- **Client Info**
  - Complete all items marked with ** including: date of birth, first name, last name, school, race, gender, address, grade, ethnicity, student ID, IEP, and primary language
  - In this screen, you can also add the dates for the forms required for compliance
  - Click Save
  - This will then move you to the **Client Enrollment** tab

- **Client Enrollment**
  - Use the calendar to select the **Start Date**
  - Select the **Activity Group** (typically after school)
  - Select the **Client Group** (if you created one previously)
  - Click **Program Enrollment** to save and move to the **Caregiver Info** tab
- **Caregiver Info**
  - Click *Add New* to create a new Caregiver Entry
  - Enter the requested information including: Caregiver first name, last name, type, address, phone number, and email
  - Click *Save* (you can add more than one caregiver contact per youth)

- **Emergency Contact**
  - Collected in the Emergency Contact Form
  - Must be updated every six months (included in compliance)
  - Select *Add New*
    - Add the requested information including first name, last name, email address, home phone, cell phone, and business phone
  - Select *Save*
**MTW Info**
- MTW Info is where you enter the information from the Means Test Worksheet completed during the intake process
- Transfer all the question responses from the form into the database
- Click Save

**Get SSN Attempts**
- Parents may or may not be willing to share their child’s social security number with providers
- The *Get SSN Attempts* tab allows providers to record their attempts to collect this information
- Enter date of request, name of who made the request, name of who signed the request, how the request was made, and the outcome
- Click Save
C.3 Discharging an Individual Client

To discharge an individual youth:

- **PCAPS⇒Client Search⇒Search and select name⇒Client Enrollment**
  - Click **Client Management**
  - Click **Client Search**
  - Enter a few letters of the youth’s first or last name and click **Search Clients**
  - Select the student’s name and then click the **Client Enrollment** tab
  - Check **Discharge** on the left-hand side
  - Select **Activity Discharge Reason** from the dropdown menu
  - Enter **End Date** using the calendar
  - Click **Program Discharge**
C.4 Bulk Enrollment and Discharge

Bulk Enrollment and Bulk Discharge are used at the beginning/end of the summer and school year. These features are used to enroll or discharge groups of youth already entered in the PCAPS system.

C.4.1 Bulk Enrollment

To bulk enroll:
- PCAPS ⇒ Client Management ⇒ Bulk Enrollment
  - You must discharge youth from their previous groups before beginning bulk enrollment
  - Click Client Management
  - Click Bulk Enrollment
  - Enter a number for Include clients discharged with the last □ month(s)
  - Select the Activity Group from the dropdown menu
  - Select Class from the dropdown menu
  - Select Client Group from the dropdown menu
  - Under Enrollment Information enter the following from the dropdown menus:
    - Fiscal Year
    - To Site
    - Start Date
    - Activity Group
    - Class
    - Client Group
  - Click Search Clients
A list of youth will appear, check all that apply and click Apply

C.4.2 Bulk Discharge

To bulk discharge:
- PCAPS⇒Client Management⇒Bulk Discharge
  - Click on Client Management
  - Click on Bulk Discharge
  - Enter the following from the dropdown menus:
    - Activity Group
    - Class
    - Client Group
  - Click Search Clients

Once the list appears check individual applicable youth or Select All
- Select Activity Discharge Reason from the dropdown menu
- Select End Date using the calendar
- Click Apply
C.5 Client Compliance

Providers must enter and update client records to maintain compliance with the contract. Programs must maintain a 90% Client Compliance rate to invoice.

<table>
<thead>
<tr>
<th>Compliance Information</th>
<th>Initial Due Date (from enrollment)</th>
<th>Updated</th>
</tr>
</thead>
<tbody>
<tr>
<td>Student Health Assessment</td>
<td>Within 60 days</td>
<td>Upon program entry and/or in Kindergarten, 6th, or 9th grades</td>
</tr>
<tr>
<td>Emergency Contact Form</td>
<td>Upon enrollment</td>
<td>Every 6 months</td>
</tr>
<tr>
<td>Student ID (7 digits- public &amp; charter school only)</td>
<td>Within 30 days</td>
<td>Once upon enrollment</td>
</tr>
<tr>
<td>OST Consent Form</td>
<td>Within 30 days</td>
<td>Annually</td>
</tr>
<tr>
<td>School District Consent Form</td>
<td>Within 30 days</td>
<td>Annually</td>
</tr>
<tr>
<td>Means Test Worksheet</td>
<td>Within 30 days</td>
<td>Annually</td>
</tr>
<tr>
<td>School</td>
<td>Upon enrollment</td>
<td>Annually</td>
</tr>
<tr>
<td>Grade</td>
<td>Upon enrollment</td>
<td>Annually</td>
</tr>
</tbody>
</table>

To review client compliance:
- PCAPS⇒Client Management⇒Client Compliance
  - Click Client Management
  - Click Client Compliance
  - Under the Search Parameter, click the Active Between Dates using the calendar
  - Click Search
The list defaults to non-compliant youth
  - If you would like to see all youth, check *Show only non-Compliant*
  - Youth with missing compliance data will have yellow shading
  - Youth with compliance data that is not due yet will be blank

To add client compliance dates (not at the time of enrollment):
  - PCAPS⇒Client Management⇒Client Compliance
    - Click on *Client Management*
    - Click on *Client Compliance*
    - Follow instructions above to determine youth to search for
    - Click *Edit* next to the youth you want to add a date for
    - Add dates using the calendars
    - Click *Update*

**D. Attendance**

Routine maintenance of program calendars ensures Compliance and Program Specialists are aware of the program's operating days.

**D.1 Calendar Maintenance**
To maintain program calendar:

- PCAPS⇒Site Administration⇒Maintain Calendar
  - At the beginning of the school year, the calendar reflects the SDP calendar
  - The legend indicate the day type options
  - Click the appropriate option from the Change Day Type dropdown menu if you would like to change a day
    - Provide a Reason in the free form box if the day type is an Unscheduled Close
  - Click on the date that you would like to change in the calendar
  - Click Save

---

![Calendar screenshot](image)

**D.2 Sign-In and Sign-Out Procedures**

Youth should sign-in for the exact time they arrive to the program. Youth in grades K-2 should sign their own names whenever possible, but personnel can sign them in. However, youth in grades 3-12 must sign themselves in daily. Youth or guardian/walker must sign-out the youth at the exact departure time. Personnel cannot sign youth out.

To print a sign-in/sign-out sheet:

- PCPAPS⇒Client Management⇒Attendance Group Maintenance
  - Click Client Management
  - Click Attendance Group Maintenance
  - Select the Activity Group and Class from the dropdown menus
  - If youth do not appear in the Groups From list, select the appropriate group from the Groups From dropdown menu
  - Enrolled youth in that group will appear in the list on the left
  - Click Print Roster
An Excel spreadsheet will appear and the following fields have to be completed by hand once printed:
- Student Signature
- Staff initials
- Time in
- Parent/Walker Signature
- Time out

The spreadsheet contains a “Rounded” column which is not required:
- PCPAS requires you enter rounded times to the nearest quarter hour
- This column helps you maintain these times on a daily basis if desired
- Refer to section D.3 Rounding for instructions on how to enter rounded times

**D.3 Entering Attendance**

To enter attendance for youth:
- PCAPS⇒Client Management⇒Daily Attendance
  - There are three boxes at the top of the screen: Choose Date to View Attendance, Choose Filter Criteria to View Attendance, and Mark Attendance (Time)/Absence (No Time)/Unscheduled
The current month and week are displayed in this screen as a default.

If you would like to enter attendance for a different date, select the appropriate month and week in the Choose Date to View Attendance calendar:

- Select the appropriate Activity Group from the dropdown menu in the Choose Filter Criteria to View Attendance box.

  - Select Grades and Groups from the dropdown menu if necessary.

  - Once this box is complete, the clients for that group and time period will appear.
In the middle of the screen above the list of youth, check the boxes of the date(s) for which you are entering attendance.

In box 3 *Mark Attendance, Present* is the default.
- Select the time In and Out from the number dropdown menus
- Select AM or PM
- Ensure you use the rounding times, refer to the table below:

<table>
<thead>
<tr>
<th>Time youth arrives to program</th>
<th>Time entered into PCAPS</th>
</tr>
</thead>
<tbody>
<tr>
<td>2:53 – 3:07</td>
<td>3:00</td>
</tr>
<tr>
<td>3:08 – 3:22</td>
<td>3:15</td>
</tr>
<tr>
<td>3:23 – 3:37</td>
<td>3:30</td>
</tr>
<tr>
<td>3:38 – 3:52</td>
<td>3:45</td>
</tr>
</tbody>
</table>

- Check the box next to the name of each youth this time in and/or time out applies to
- Click *Apply*
- Absences are marked when times are not entered for a youth
- Check *Reset to Default* to return the times to 3:00 and 6:00pm
- Repeat the process until attendance is entered for each enrolled youth

Once attendance is entered, please review it prior to completing and submitting each monthly invoice
- PCAPS⇒Client Management⇒Monthly Attendance Summary *OR*
- PCAPS⇒Invoicing⇒Invoice⇒Attendance
E. Invoicing

Invoices are submitted monthly to PHMC for reimbursement per the scope of work. The invoice review process includes the following steps in the PCAPS system:

<table>
<thead>
<tr>
<th>Invoice Action</th>
<th>Who performs the action?</th>
<th>Invoice Status After Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create</td>
<td>Provider or PCAPS automatically on the first day of invoice period</td>
<td>Entering Costs</td>
</tr>
<tr>
<td>Complete</td>
<td>Provider</td>
<td>Pending Submittal</td>
</tr>
<tr>
<td>Submit</td>
<td>Provider</td>
<td>Pending Fiscal Review</td>
</tr>
<tr>
<td>Approve</td>
<td>PHMC</td>
<td>Pending Accounting Entry</td>
</tr>
<tr>
<td>Export to Accounting</td>
<td>PHMC</td>
<td>Payment Pending</td>
</tr>
<tr>
<td>Pay</td>
<td>PHMC</td>
<td>Paid</td>
</tr>
</tbody>
</table>
E.1 Creating an Invoice

To create an invoice:
- PCAPS⇒Invoicing⇒Invoice
  - PCAPS typically creates an invoice at the beginning of the invoice period/month
  - If PCAPS did not create an invoice for the selected invoice period, select Create Invoice
  - The invoice status will change to “Entering Costs”

E.2 Completing Attendance

Before completing and submitting an invoice, attendance should be entered and reviewed.

To review attendance:
- PCAPS⇒Invoicing⇒Invoice⇒Attendance Summary tab
  - Click the Attendance tab
  - Review attendance for each youth
    - Ensure there are no youth without attendance information for the month
    - Ensure there are no youth with “I” or incomplete data
    - If errors are discovered in the review, return to PCAPS⇒Client Management⇒Daily Attendance and make corrections

To complete attendance entry:
- PCAPS⇒Invoicing⇒Invoice⇒Attendance Summary tab
  - Check Complete

E.3 Completing and Submitting Invoices

To complete and submit an invoice:
- PCAPS⇒Invoicing⇒Invoice
After you check the attendance, go to the Invoice Summary screen
  - Ensure the compliance levels are at or above 90% for staff and clients
  - Ensure the insurance compliance level is at 100%
- Select Complete from the action dropdown menu, then click Continue
- The invoice status will now change to “Pending Submittal”
  - If you need to make further changes to the invoice at this stage, select Send_Back, then click Continue
  - The invoice will now return to the “Entering Costs” stage and you can make additional changes

Once you are certain you are ready to submit, select Submit from the action dropdown menu, then click Continue
- The invoice status will now change to “Pending Fiscal Review”
- It is now at the PHMC level to review and approve

E.4 Compliance Review

Once an invoice is submitted, PHMC reviews the invoice for compliance with the contract. If the Compliance Specialist discovers changes are necessary before the invoice can be approved, it will be sent back to the provider. They select the Send to Provider action from the dropdown menu to return it to the provider. If you need an invoice sent back before it is approved, ask your Compliance Specialist to send it back to you.
To correct a returned invoice:
- PCAPS⇒Invoicing⇒Invoice
  - Click Invoicing
  - Click Invoice
  - Select Send_Back from the action dropdown menu
  - Make the requested changes
  - Select Complete, click Continue
  - Select Submit, click Continue

F. High School Incentives

The high school incentives invoice process mirrors that of the monthly invoice. However, PCAPS does not automatically create an invoice, each provider must create their own.

F.1 Creating a High School Incentives Invoice

To create a high school incentives invoice:
- PCAPS⇒Invoicing⇒Incentive Summary
  - In the Incentive Summary screen, select Create Invoice
  - Select the month by marking a check in the box next to the month
  - Select Create Invoice again
F.2 Completing Details

To enter high school incentives summary details:

- **PCAPS**⇒**Invoicing**⇒**Incentive Summary**⇒**Details**
  - Click on the *Details* tab in the Incentive Summary screen
  - Enter the *Details of Incentive Criteria* as decided by your agency and approved by PHMC
  - Select *Save Criteria*
  - A list of youth will automatically appear
Add the following components:
- Attendance Goals
- Project Goals
- Inventive Amount
- Incentive Max Amount
- Receipt Date
- Check Number
- Comment (if any)

Review for accuracy
Click Save Client Details

F.3 Submitting a High School Incentives Invoice

To submit a high school incentives invoice:
- PCAPS⇒Invoicing⇒Incentive Summary
Select Submit from the dropdown menu, click Submit

G. Agency Information

Agency information includes data about the agency’s board, personnel, clients served, and hours of operation. This information should be updated annually before submitting the proposal.

G.1 Agency Info Screens

To access and update agency information:
- PCAPS ⇒ Provider Management ⇒ Agency Info
  - When updating the information, ensure it reflects the entire agency
    - This means the demographics under Clients Served should reflect all agency programs, not just OST

- Complete all required fields marked with ** in the Agency Info tab
  - Though not marked as required, complete the Services and Clients Served sections as well
  - Click Save
- Complete staff demographics in the Staff Demographics tab
  - Click Edit to make changes to each item
  - Add or change numbers as needed
  - Click Update
Complete board member information in the Provider Board tab

- Under Add New Board Contact, complete the required fields ** for each board member
- Click Add Contact
- If you need to update board member information, click Edit next to the board member’s name
  - Make applicable changes
  - Click Update
G.2 Hours of Operation

To update hours of operation for a site:
- PCAPS⇒Site Administration⇒Site Information
  - Hours of operation must be entered individually for every OST model run by an agency
  - Click Start Time, AM/PM, End Time, and AM/PM from the dropdown menus for Summer and School Year
  - Click Save

H. Generating Reports

Report Generator offers a variety of reports that users can run to monitor and review various aspects of programming. The nine different reports cover these main topics: attendance, client demographics, utilization, numbers served, and retention.

H.1 Generating a Report

The Report Generator feature of PCAPS allows providers to export reports regarding program attendance, utilization, demographics, and retention. Refer to the PCAPS 101 presentation for greater detail about each report.

To generate a report:
- PCAPS⇒Reports⇒Report Generator
  - Click on Reports
  - Click on Report Generator
  - Select Report Class from the dropdown menu
    - Options include Attendance and Quarterly
    - Attendance report options include:
      - Attendance Hours (Middle/High)
      - Attendance Monthly Elementary Summer
Quarterly report options include:
- Client Demographics
- Client Retention

- Select Report you would like to run from the dropdown menu
- Select the Date Range you would like the report to provide
  - You can also select Custom and pick the dates from the available From and To calendars
- PCAPS automatically populates your Agency
- Select the Site(s) you would like the report to include and click the > option to move the sites to the Selected Sites list
  - If you would like a report for all sites, then you can skip this step
- Select the Program you would like the report to include and click the > option to move the programs to the Selected Programs list
  - If you would like a report for all programs, then you can skip this step
- Select the program you would like to export the report to, either PDF or Excel from the Export To dropdown menu
- Click Export