SF DEPARTMENT OF CHILDREN YOUTH & THEIR FAMILIES

CMS Handbook

HOW TO USE DCYF'S CONTRACT MANAGEMENT SYSTEM

2024-2029 Funding Cycle

Last Modified: 4/22/2024

TABLE OF CONTENTS

Overview 2
- Organization of the CMS 2
- Navigating the CMS 3
  - Logging into the CMS 3
  - CMS Interface 3
  - Forms and Modules 4
  - Buttons and Icons 5

User Accounts 6
- Creating New Accounts 6
  - What You'll Need 6
- Removing Accounts 7
- Retrieving Account Credentials 8

Workplan 9
- Completing a Workplan 9
- Service Sites and Projected Services 15
  - Service Types 15
  - Activity Reporting 16
- Workplan Revisions 17

OVERVIEW

The Contract Management System (CMS) is an online system used by DCYF staff and grantees for grants management, reporting, and invoicing. DCYF contracts with Cityspan, a cloud-based provider of data management systems for social services programs, to manage and administer the CMS. DCYF grantees are provided with accounts to the CMS and are expected to use the system to complete administrative functions, such as submitting workplans, invoices, and reports. The CMS helps DCYF monitor grants and provide regular updates to department stakeholders.

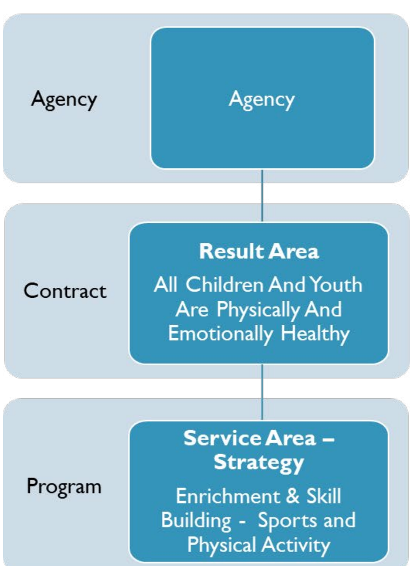
> The CMS is updated periodically as needs and circumstances change. DCYF communicates system changes and upcoming deadlines through grantee newsletters and updates on the CMS login page.

Organization of the CMS

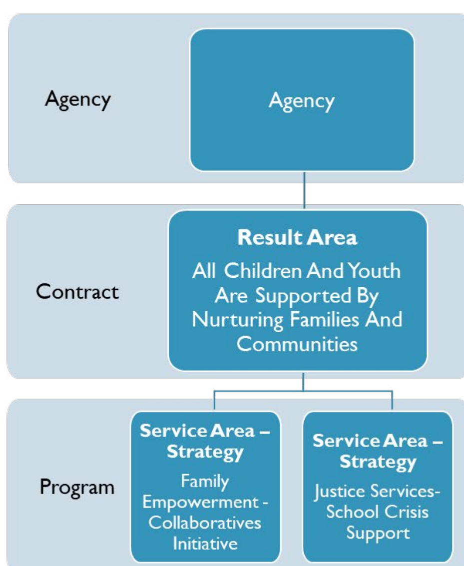
The CMS is organized by fiscal year and program. Grantees may receive a single contract (also referred to as a Grant Agreement) to operate one program, a single contract to operate multiple programs, or multiple contracts to operate multiple programs. Upon logging into the system, grantee users see a list of programs funded for the selected fiscal year. Navigating to a specific program gives users access to CMS functions related to the program, such as submitting invoices and entering activity data.

Grantees complete and submit workplans for each funded program on an annual basis. For example, a grantee that receives a single grant to operate two programs will complete and submit two workplans each year. The grantee will submit invoices and report on participants and activities separately for each program. Additionally, each program is assigned a DCYF Program Specialist. Program Specialists are grantees' primary points of contact at the department.

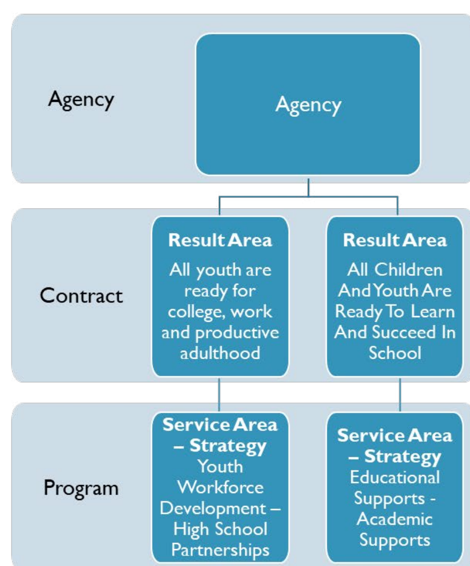
Single Contract to Operate 1 Program



Single Contract to Operate Multiple Programs



Multiple Contracts to Operate Multiple Programs



Navigating the CMS

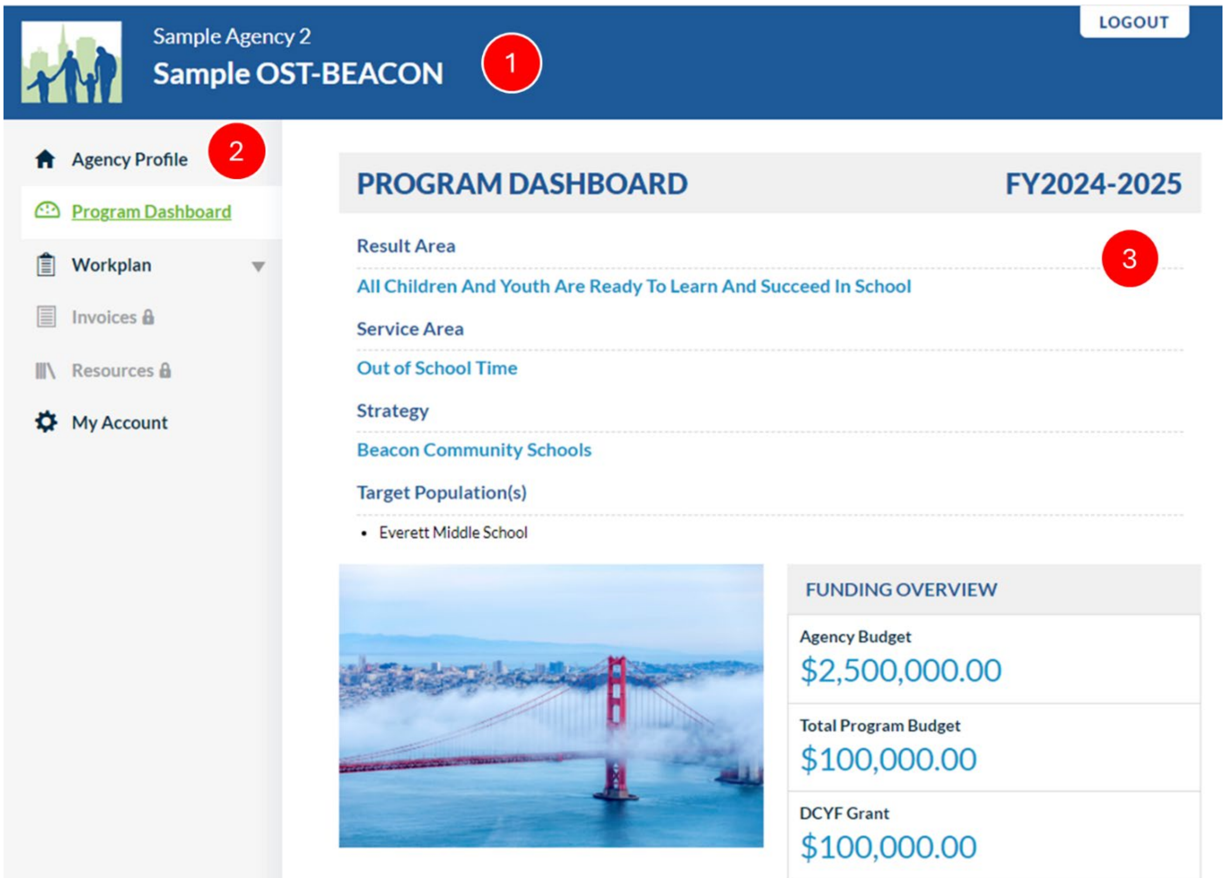
This section provides an overview of the CMS user interface and describes how to navigate the system. The system is best viewed on a device with a large screen, such as a desktop or laptop computer, but it may also be accessed on a mobile device in landscape mode.

Logging into the CMS

Access the CMS at https://contracts.dcyf.org. You must have a CMS user account to access the system. Contact your agency's primary Agency Account holder for access. For more information, see the [*User Accounts*]() section.

CMS Interface

The CMS user interface is made up of three sections: (1) a top header, (2) a lefthand navigation menu, and (3) a main section with page content.



The *top header* provides information on the page context. There are two primary page contexts in the CMS: (1) an agency context for pages relevant to multiple programs (e.g., *Agency Profile*) and (2) a program context for pages specific to a single program (e.g., *Program Dashboard*, *Workplan*). The agency context shows the name of the grantee agency in the top header, while the program context shows the name of the currently selected program in addition to the name of the grantee agency in the top header.

The *lefthand navigation menu* presents links to different pages and modules depending on the current page context. The next section provides an overview of the various forms and modules in CMS. Access to certain pages and modules may be limited based on the role of the user.

The *main section* shows page content and may contain additional navigation elements at the top, such as links or dropdown filters.

Forms and Modules

The CMS is made up of various forms, modules, and reports. The list below provides a brief description of the main pages and functions of the system. These are described in more detail throughout the handbook. Some CMS modules are still in development and are planned for release in June 2024.

Agency Programs. The *Agency Programs* page is the first page users see after logging into the CMS. This page presents a list of programs accessible to the user for the fiscal year that is currently selected.

> Use the Fiscal Year dropdown filter at the top of the *Agency Programs* page to change the fiscal year and view programs funded under a different fiscal year.

Agency Profile. The *Agency Profile* is a form that captures agency-level details. It is part of the workplan and shared across all programs each fiscal year.

Agency Accounts. The *Agency Accounts* page allows Agency Account users to view and manage CMS user accounts. For more information, see the *User Accounts* section.

Program Dashboard. The *Program Dashboard* is the first page users see after selecting a program from the *Agency Programs* page. The dashboard presents program-level summary data and indicators.

Workplan. The *Workplan* module is a series of forms used to complete annual workplans. An Agency Account is required to edit Workplan forms. For more information, see the *Workplan* section.

Invoices. The *Invoices* module is used to complete and submit monthly invoices. The module is only accessible when the program workplan is in an Approved state.

Participants & Staff. The *Participants & Staff* module is used to register program participants and staff and record their demographic information. Participants must have complete registrations in the Participants & Staff module prior to being enrolled into activities.

Activities. The *Activities* module is used to report grant-funded activities, enroll participants, and submit participation and attendance information.

PQA. The *PQA* module is used to view and edit Program Quality Assessments. An Agency Account is required to view program self-assessments.

Upload Tool. The *Upload Tool* provides an interface for uploading participant, activity, and attendance information in bulk using spreadsheet templates populated by the user. The tool can be used to assist in importing data into CMS from other administrative systems.

Resources. The *Resources* module is a repository where DCYF staff and grantees may upload grant-related documents and resources. Files uploaded by grantees are specific to a program and fiscal year.

Back to Table of Contents

Buttons and Icons

Buttons and icons are found throughout the CMS where data is entered or submitted. The following list provides a brief description of their functionality.

PDF
Downloads a PDF copy of the current page or selected item.

Back/Return
Returns to the previous page in CMS.

Save
Saves your work or progress on the current form.

Submit
Validates data entered on the current form and submits the form.

Unlock
Unlocks the current form for edits. Submitted forms may require special permissions for unlocking. For example, submitted workplan forms may only be unlocked by the Program Specialist.

Top
Scrolls your browser window back to the top of the current page.

Collapse
Collapses bounded sections within CMS forms.

Expand
Expands bounded sections within CMS forms.

Add
Creates additional instances of data items, such as activities, program quality assessments, and budget line items.

Delete
Deletes instances of data items, such as activities, program quality assessments and budget line items.

Info
Presents a short description or additional information about the current field or section.

USER ACCOUNTS

Access to the CMS is limited to individuals with CMS user accounts. Two types of accounts are available to DCYF grantees: (1) Agency Accounts and (2) Program Staff Accounts. Each grantee is also provided with one primary Agency Account that can create and manage all accounts. Agency Accounts have full access to view and submit information in CMS for all programs. Program Staff Accounts have access to view and submit information for a limited set of programs specified in the Agency Accounts module. The table below describes how permissions differ between Agency Accounts and Program Staff Accounts in more detail.

Module	Agency Accounts	Program Staff Accounts
Programs	All Programs	Limited to Specified Programs
Workplan	Full Access	Limited Access – read-only permissions and no access to the Budget form
Activities	Full Access	Full Access
Participants & Staff	Full Access	Full Access
Invoices	Full Access	Limited Access – can edit narratives and view progress reports; no access to invoice expenses
PQA	Full Access	Limited Access – can only create/view own assessments
Extracts/Reports	Full Access	Full Access
User Accounts	Primary Agency Account can create and manage all accounts; Other Agency Accounts can create and manage Program Staff Accounts	No Access

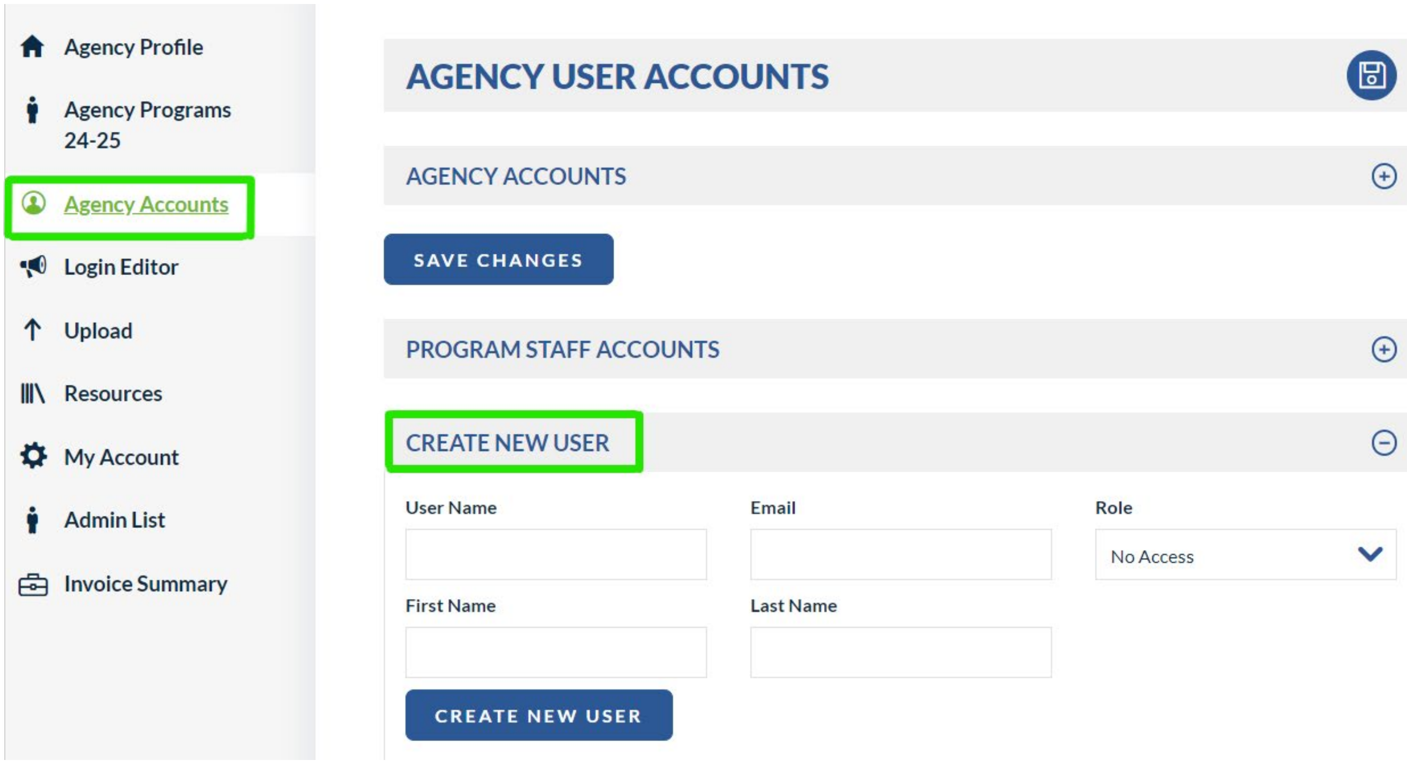
Creating New Accounts

Grantees are expected to create and manage CMS accounts as needed. Each grantee is provided with one primary Agency Account, which is generally assigned to the grantee's Executive Director. This account can create both Agency Accounts and Program Staff Accounts. Other Agency Accounts can create Program Staff Accounts but not other Agency Accounts.

> To change the Executive Director Agency Account, contact your DCYF Program Specialist.

What You'll Need

- **Creating Agency Accounts**
  - Primary Agency Account
  - New Account Details: First Name, Last Name, Email Address, unique username (can be the user's email address)
- **Creating Program Staff Accounts**
  - Agency Account
  - New Account Details: First Name, Last Name, Email Address, unique username (can be the user's email address)



Step 1: Log into CMS using an Agency Account.

Step 2: Click on the *Agency Accounts* link in the lefthand navigation menu.

Step 3: Scroll to the *Create New User* section at the bottom of the *Agency Accounts* page.

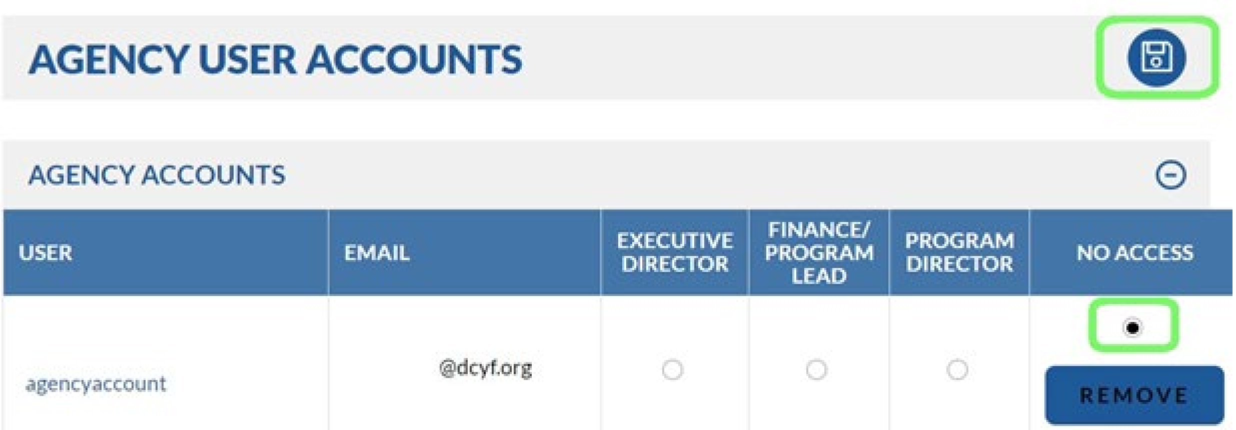
Step 4: Enter account details: first name, last name, email address, and a unique username.

Step 5: Select a *Role* for the account. When creating new Agency Accounts, select "No Access" if you are unsure. You may update the role at a later point in time.

Step 6: Click on the *Create a New User* button to create the account. An email with instructions for accessing the account will be sent to the email address provided. Advise the new user to check their spam/junk folder for this message if they do not see it in their inbox.

Step 7: *(Applicable only to Program Staff Accounts)* Navigate back to the *Agency Accounts* page and grant Program Staff Accounts access to one or more programs in CMS by clicking on the edit icon under *Add/Remove Access*.

Removing Accounts



The *Agency Accounts* module may also be used to remove or deactivate CMS accounts. To deactivate an Agency Account, select *No Access* as the role type for the account and then click on the save icon at the top of the page. To deactivate/remove a Program Staff Account, click on the edit icon under *Add/Remove Access* and remove access to all programs.

Retrieving Account Credentials

The CMS login page includes a function for retrieving lost or forgotten account credentials. Click on the *Forgot your username or password?* link in the login box. On the next page, enter the email address associated with the user account and click on the *Lookup* button. Identify your username and click on the *Reset* button. Follow the steps in the email sent to the email address associated with your account. Check your spam or junk mail for this message if you do not see it in your inbox.

WORKPLAN

Grantees complete workplans for each of their programs on an annual basis. The workplan consists of the *Contact & Program Info* form, the *Services & Projections* form, the *Performance Measures* form, the *Budget* form, and the *Agency Profile* form. Information from the workplan is integrated directly into Grant Agreements. Additionally, the information is used by DCYF to help administer and monitor grants. For example, DCYF staff refer to contact information entered in the *Contact & Program Info* form when sending out grant communications.

Workplan forms may be pre-populated with information from the original proposal submitted for the program or from the prior year's workplan (in the case of a multi-year grant). After a workplan has been completed and submitted by a grantee, it is reviewed and approved by the Program Specialist. A workplan may undergo several rounds of changes before it is approved. Workplans must be approved by DCYF before access to invoices and activity setup is granted.

Completing a Workplan

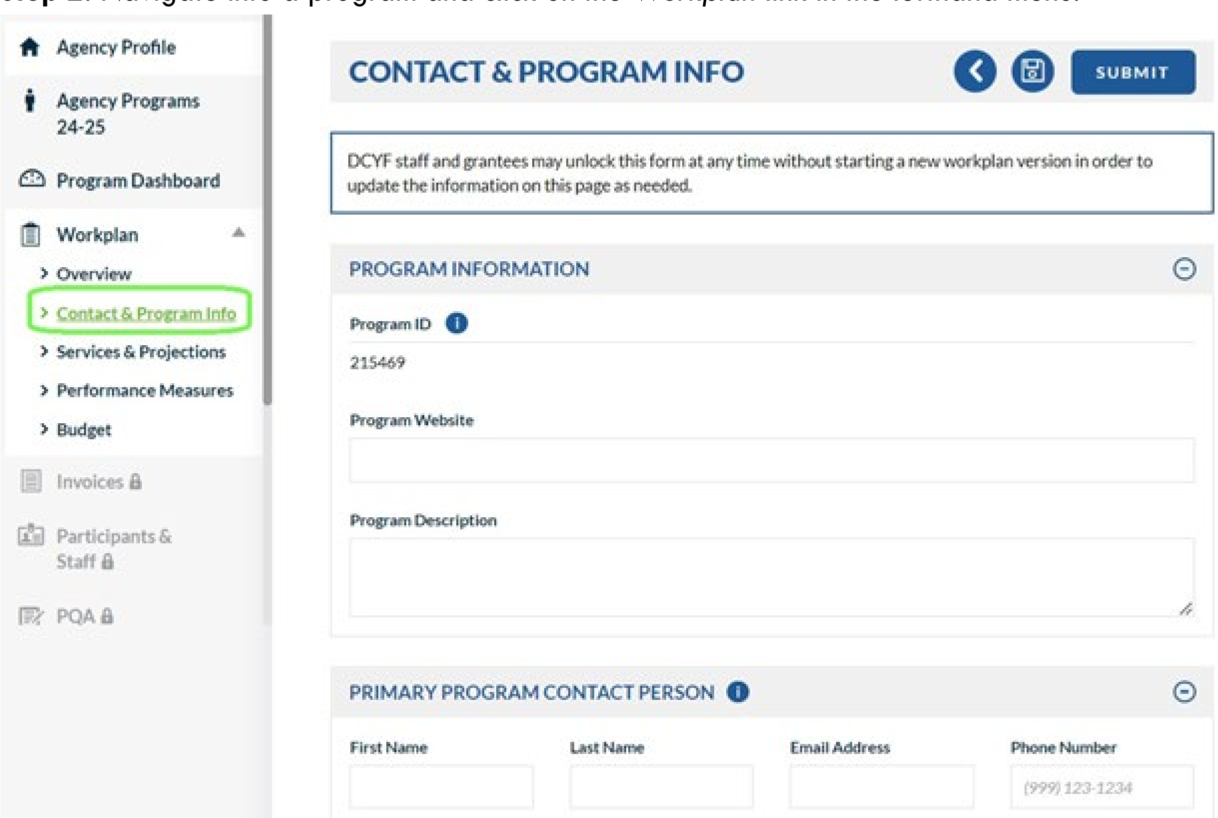
Completing your workplan by specified deadlines is the first step to ensuring timely processing of your Grant Agreement and access to monthly invoices and data reporting. This section describes how to complete and submit your workplan.

What You'll Need

- Agency Account
- DCYF 2024-2029 Request for Proposals or DCYF Result Area Guides
- Your Proposal
- Doing Business with DCYF

Step 1: Log into CMS using an Agency Account.

Step 2: Navigate into a program and click on the *Workplan* link in the lefthand menu.



Step 3: Complete and submit the *Contact & Program Info* form. This form consists of general program information such as the program website, description, and contacts.

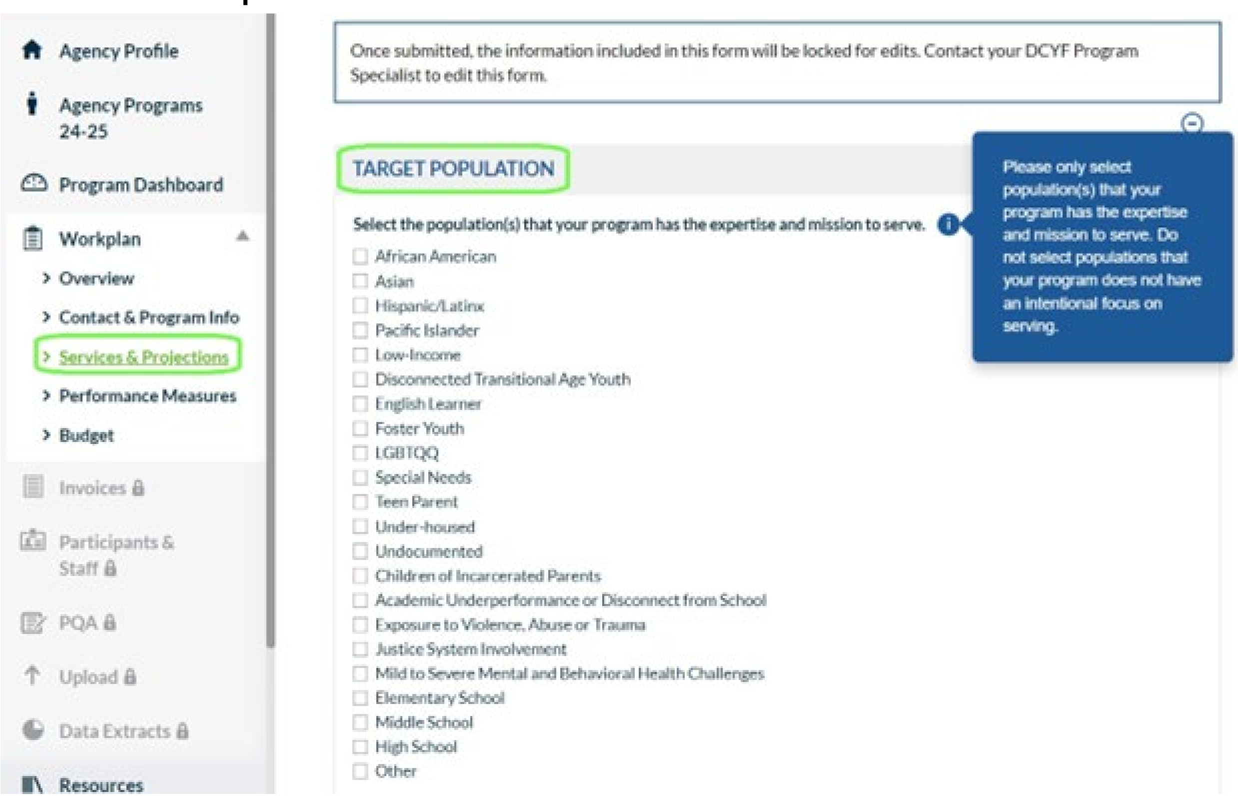
Contact & Program Info - Additional Guidance

Program Description. Your program description should describe your program services, service-delivery methods (e.g., virtual/remote services, in-person, hybrid), and any relevant information that would be useful for someone unfamiliar with your program. DCYF includes grantee program descriptions in public-facing documents and other materials for department stakeholders.

Primary Program Contact. Grantee communications, including workplan and invoicing updates, will be sent to the Primary Program Contact listed on the *Contact & Program Info* form. Keep this information up to date to ensure you receives communications from DCYF.

Step 4: Complete and submit the *Services and Projections* form. This form consists of program operation dates, participant projections, target population(s), service site locations, and projected services. Refer to the DCYF 2024-2029 Request for Proposals when completing this form to ensure that your program's services and projections align with the guidance and requirements described for the Strategy under which your program is funded. Review your program's proposal or the *Program Dashboard* to identify your program's DCYF Result Area, Service Area, and Strategy.

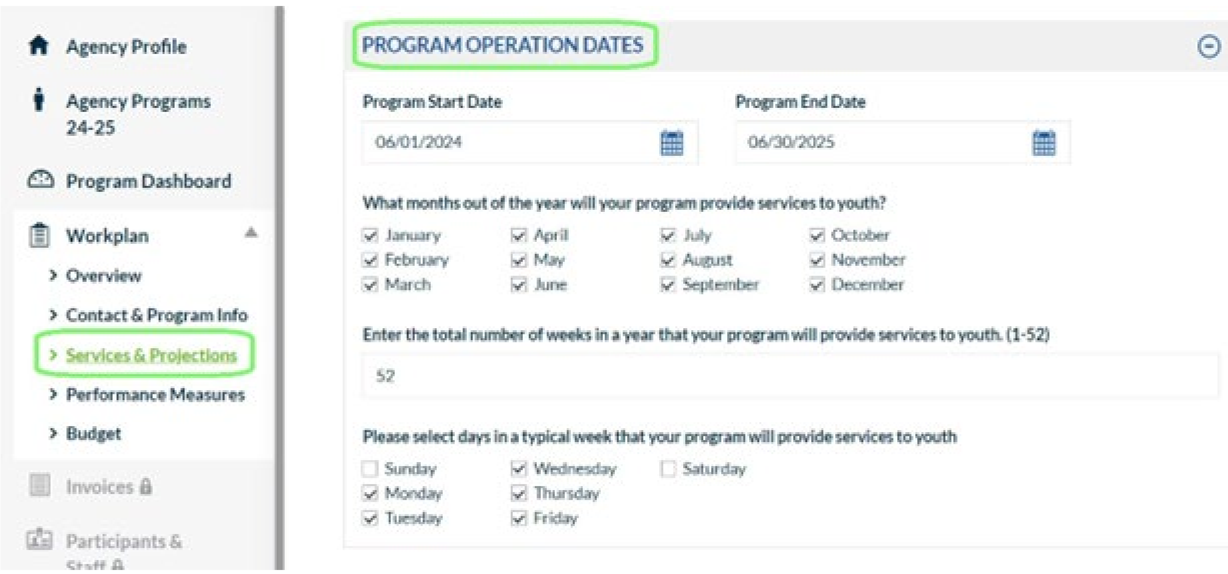
Services & Projections - Additional Guidance



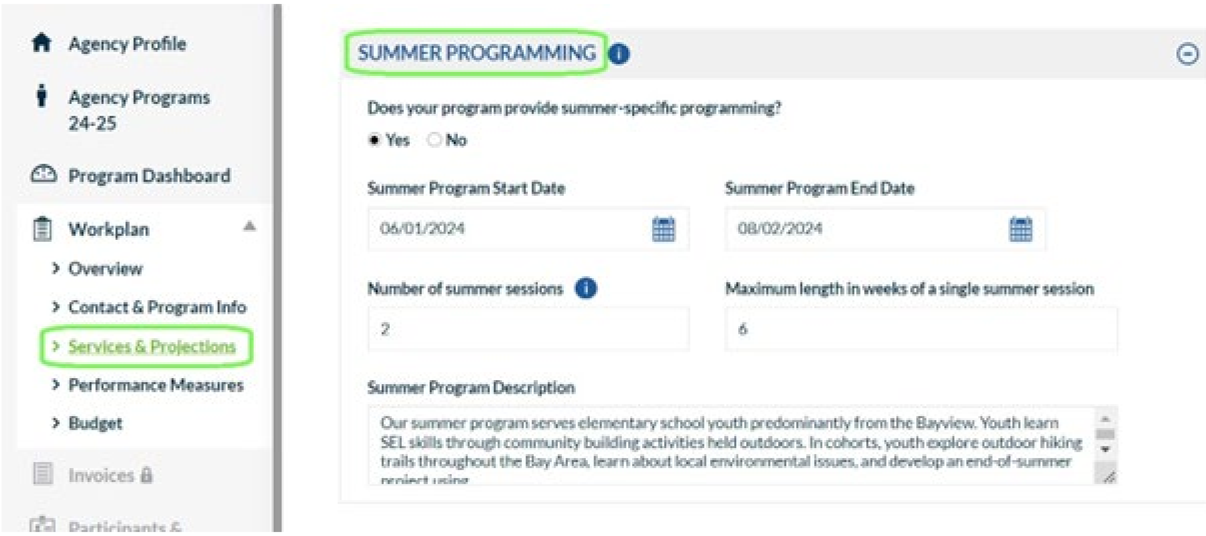
Target Population. Select the population(s) that your program has the expertise and mission to serve. Take the time to reflect on the population(s) that your program has an intentional focus on serving. DCYF refers to responses when responding to requests for information from department stakeholders. For example, responses have been used to respond to requests for information on programs with expertise in serving disconnected transitional age youth and youth with disabilities. Refer to the guiding questions below to support your selection.

- Location: Is your program strategically located in a specific neighborhood in San Francisco that would make your services more accessible to your target population?
- Supports: What intentional supports are provided by your program to better serve your target population(s)? Examples include, but are not limited to: language supports, specific legal services, skillsets required by your program staff to fulfill service delivery, wellness resources tailored to specific population(s).
- Outreach: Consider your programs' outreach methods. Are your outreach methods designed to target a specific population(s)?
- Participation: Would your program be able to speak to best practices for serving specific population(s)?

Target Population selections represent your program's expertise and population(s) of focus rather than population(s) served by your program coincidentally.



Program Operation Dates. The City's fiscal year begins on July 1 and ends on June 30 the following year. Although CMS is organized by fiscal year, to simplify activity reporting for summer programming, which typically falls in two fiscal years (e.g., the activities begin in June and end in August), DCYF requires grantees that offer summer programming to report on the activities in one fiscal year in CMS—the fiscal year in which the summer ends. For example, Summer 2024 activities should be reported into FY2024-2025 in CMS, and Summer 2025 activities should be reported into FY2025-2026. The *Program Start Date* must be on or after June 1 of the calendar year in which the fiscal year begins (e.g., June 1, 2024 for FY2024-2025), and the *Program End Date* must be on or before June 30 in which the fiscal year ends (e.g., June 30, 2025 for FY2024-2025). If your program offers summer services that are funded by your DCYF grant, your Program Start Date should be the first date of summer programming, and your Program End Date should be the last date of school year programming.



Summer Programming. If your program offers summer specific programming, please enter a description of your summer program, a start date, an end date, the number of summer sessions, and the length of a typical session.

Summer-specific programming takes place during the summer and is different, or separate, from programming offered throughout the rest of the year. For example, summer-specific programming may have a different enrollment process, extended hours, a different curriculum, or may be offered to a cohort that starts and ends during the summer months. Programs that operate year-round and do not make any significant changes during the summer months are not considered to have summer-specific programming.

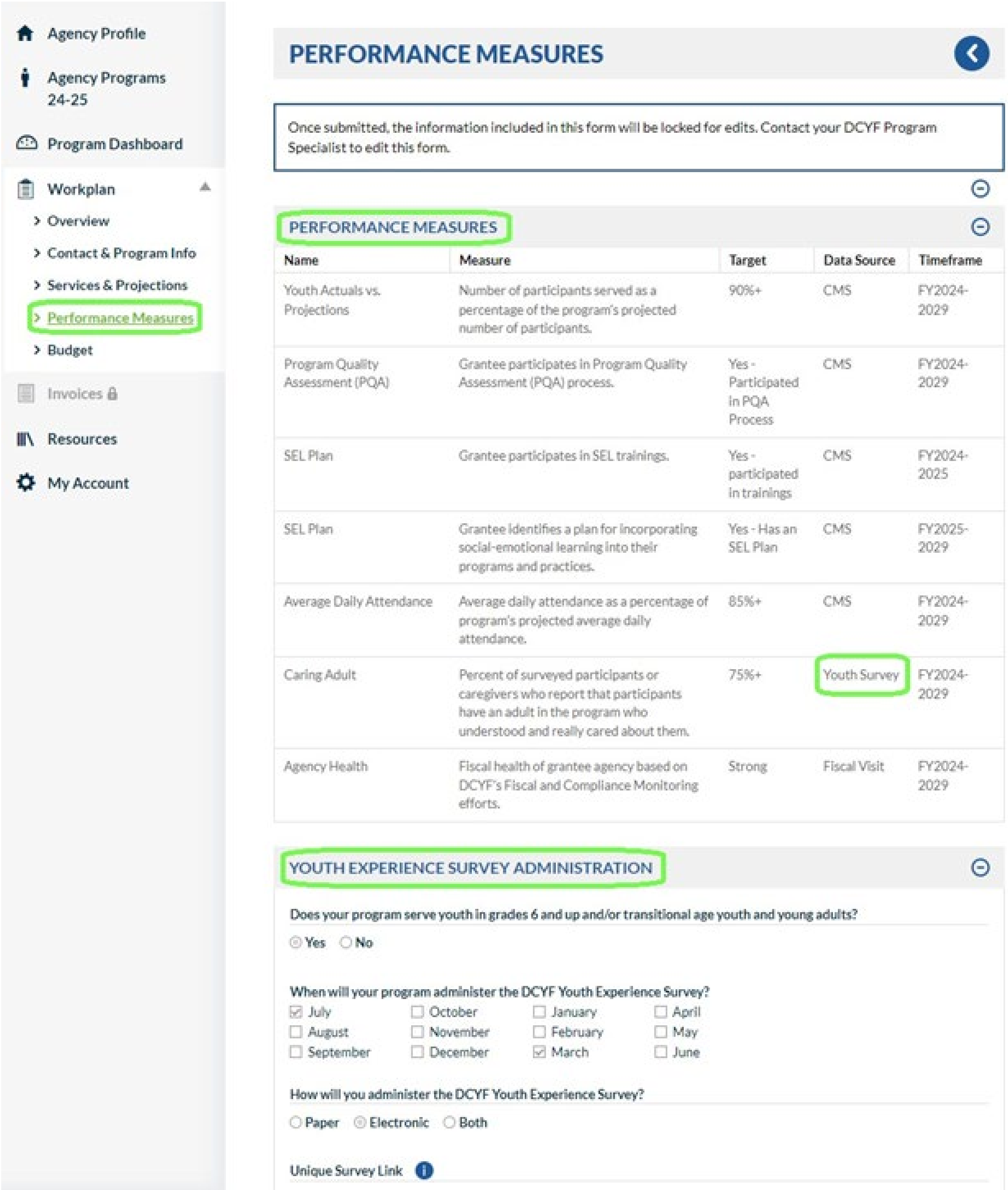
Services Sites. Closely review the program Service Site Locations and Projected Services. The *Services and Projections* form should only include site locations and services planned during the *Program Start* and *Program End Dates* listed in the *Program Operation Dates* section.

Projected Services. For each Projected Service, indicate a *Service Name, Service Type, Description,* and other service implementation details. Review the *Service Sites and Projected Services* section below for information on Service Types.

Step 5: Complete and submit the *Performance Measures* form. This form presents the performance measures applicable to your program based on the Strategy under which it is funded.

Performance Measures - Additional Guidance

Youth Experience Survey Administration - If your program is required to administer the DCYF Youth Experience Survey, please indicate your proposed survey administration method (paper, electronic, or both) and timeframe for administering the survey. Youth Experience Surveys must be administered each year to participants in grades 6+ towards the end of their program experience that year. Contact your Program Specialist if you have questions about the Youth Experience Survey.



Agency Profile
Agency Programs 24-25
Program Dashboard
Workplan
> Overview
> Contact & Program Info
> Services & Projections
> Performance Measures
> Budget
Invoices
Resources
My Account

PERFORMANCE MEASURES

Once submitted, the information included in this form will be locked for edits. Contact your DCYF Program Specialist to edit this form.

PERFORMANCE MEASURES

Name	Measure	Target	Data Source	Timeframe
Youth Actuals vs. Projections	Number of participants served as a percentage of the program's projected number of participants.	90%+	CMS	FY2024-2029
Program Quality Assessment (PQA)	Grantee participates in Program Quality Assessment (PQA) process.	Yes - Participated in PQA Process	CMS	FY2024-2029
SEL Plan	Grantee participates in SEL trainings.	Yes - participated in trainings	CMS	FY2024-2025
SEL Plan	Grantee identifies a plan for incorporating social-emotional learning into their programs and practices.	Yes - Has an SEL Plan	CMS	FY2025-2029
Average Daily Attendance	Average daily attendance as a percentage of program's projected average daily attendance.	85%+	CMS	FY2024-2029
Caring Adult	Percent of surveyed participants or caregivers who report that participants have an adult in the program who understood and really cared about them.	75%+	Youth Survey	FY2024-2029
Agency Health	Fiscal health of grantee agency based on DCYF's Fiscal and Compliance Monitoring efforts.	Strong	Fiscal Visit	FY2024-2029

YOUTH EXPERIENCE SURVEY ADMINISTRATION

Does your program serve youth in grades 6 and up and/or transitional age youth and young adults?

Yes No

When will your program administer the DCYF Youth Experience Survey?

July, October, January, April, August, November, February, May, September, December, March, June

How will you administer the DCYF Youth Experience Survey?

Paper Electronic Both

Unique Survey Link

Step 6: Complete and submit the *Budget* form. Refer to the *Doing Business with DCYF* guide for information about the budget categories and line items included on this form.

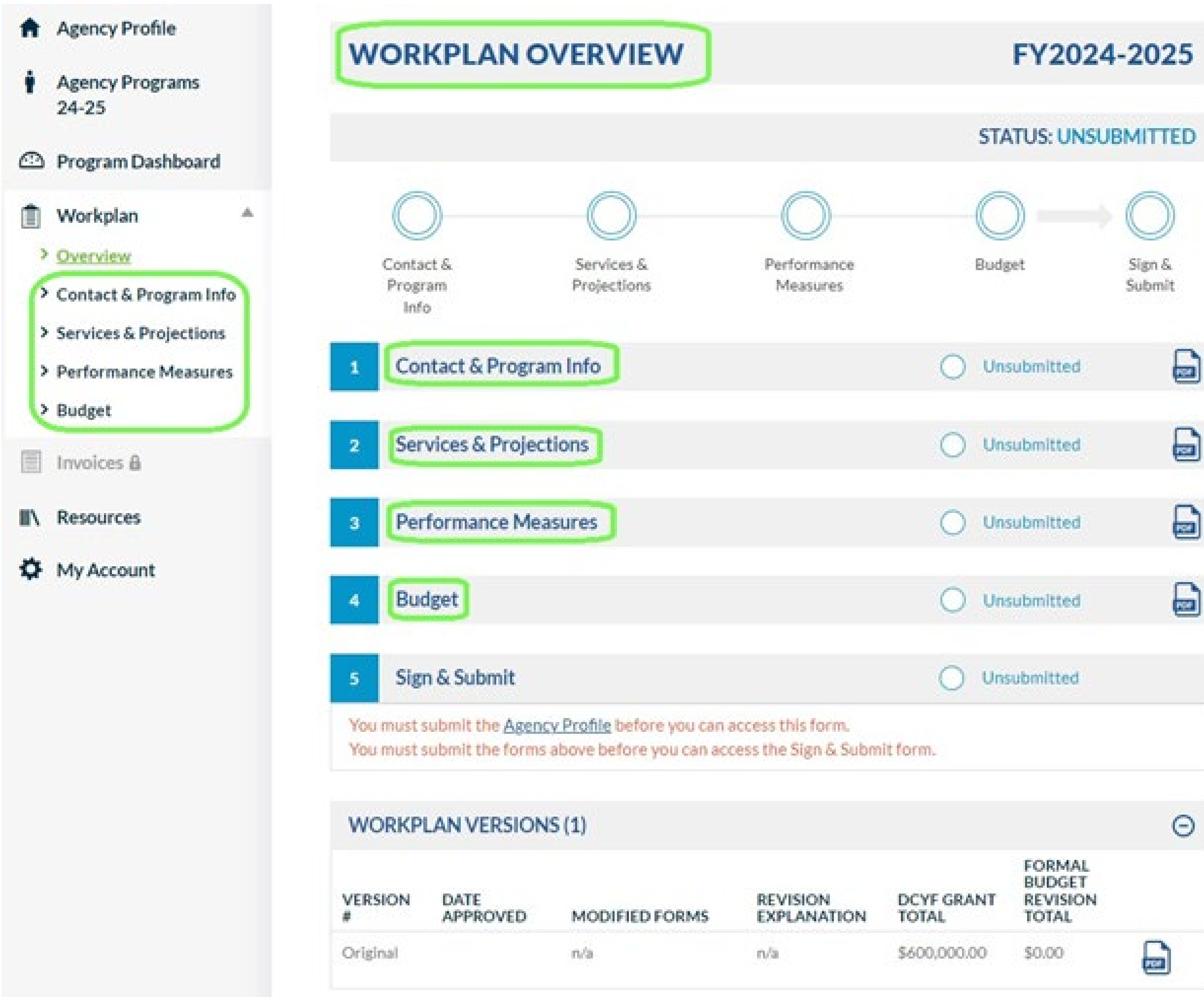
Step 7: Complete and submit the *Agency Profile* form. If the Agency Profile has already been submitted, review the responses for accuracy. The Agency Profile form is shared across all programs listed on the *Agency Programs* page.

Step 8: Submit your workplan for approval by completing and submitting the *Sign & Submit* form. The *Agency Profile* and all workplan forms must be submitted before accessing the *Sign & Submit* form. CMS will send an email to the Primary Program Contact listed in the *Contact & Program Info* form confirming your submission.

Next Steps: Your DCYF Program Specialist will review your submitted Workplan. CMS will send an email to the Primary Program Contact when your DCYF Program Specialist has approved or denied the workplan submission. If your submission is not approved, review the explanation submitted by your Program Specialist by navigating to the Workplan *Overview* form. Make necessary changes and resubmit the workplan for review and approval.

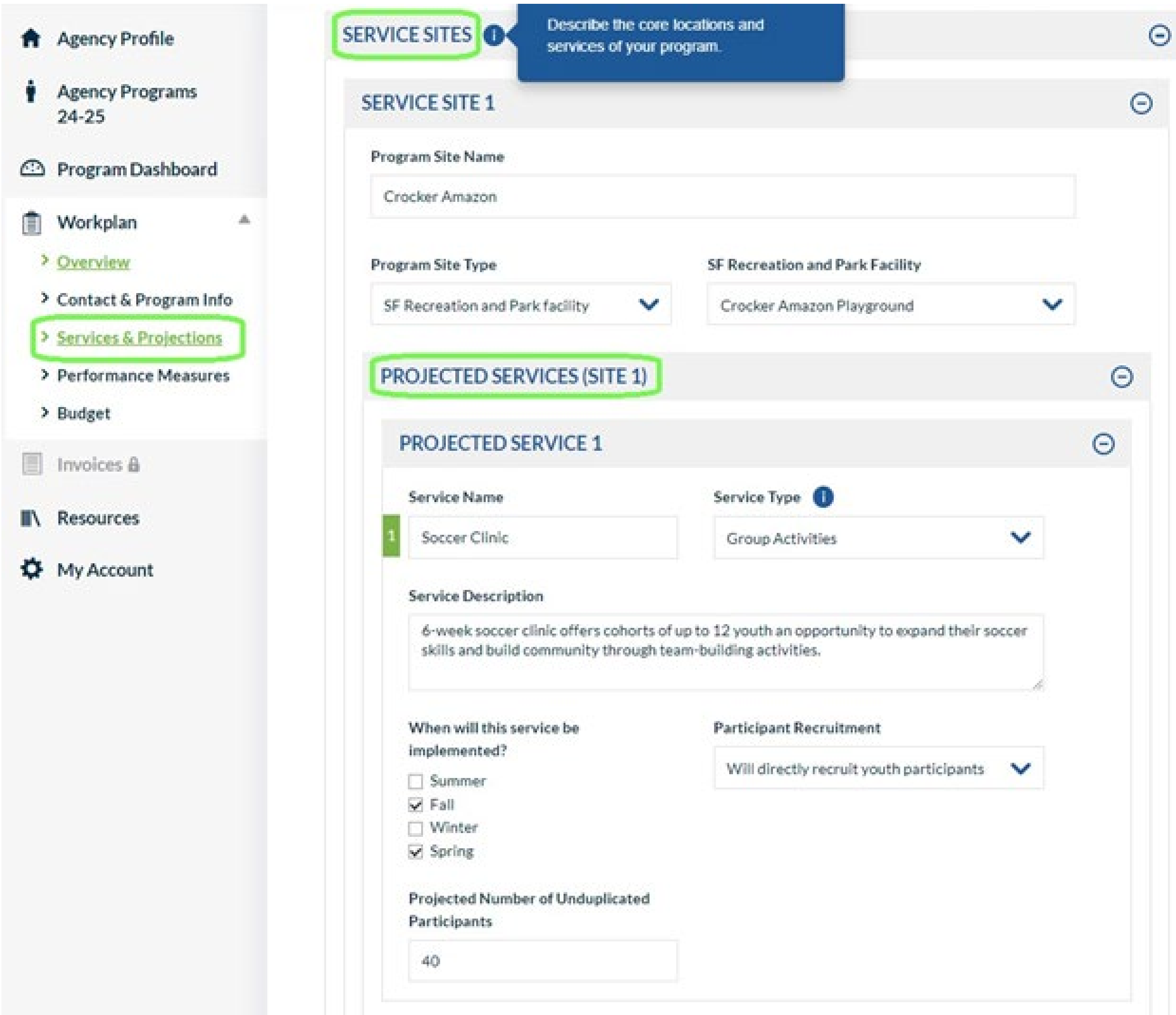
Tips

- Access workplan forms from one of two places in the CMS: the *Workplan* link in the lefthand navigation menu or the Workplan *Overview* page.



- CMS will log you out after 90 minutes of inactivity and you may lose any unsaved work! Save your progress regularly and continue later by clicking on the Save button, located at the top and righthand side of each form.
- Workplan forms that have been submitted may only be unlocked by the Program Specialist. Contact your Program Specialist if you need assistance unlocking a workplan form that has been submitted.
- Don't risk missing important DCYF communications! Keep your Primary Program Contact up to date in the *Contact & Program Info* form. The Program Primary Contact will receive an email notification when a Workplan is submitted, approved, or unlocked for edits.
- CMS email notifications sent by Cityspan. Check your spam or junk mail for CMS notifications sent from the email domain, *@cityspan.com*

Service Sites and Projected Services



This section provides additional guidance on completing the Service Sites and Projected Services sections of the *Services & Projections* form. Describing funded programming and services with the appropriate level of detail on this form is key as this section of the workplan provides a template for activity reporting throughout the year. Describing dozens of detailed services at each site location on the workplan will require very detailed activity reporting throughout the year. At the same time, services must not be described ambiguously or omitted from the workplan altogether. Program Specialists will review your submissions to this section to ensure that projected services are described appropriately for the Strategy under which the program is funded.

Service Types

Each Projected Service must be categorized as one of the following Service Types: Group Activities, Individual Activities, Job Placements, or Activities without Personal Information. These types are described in more detail below.

Group Activities. Activities that serve enrolled participants in group settings on a set schedule. Programs are required to track individual attendance records for all participants in Group Activities. Examples include group-based afterschool activities, job skills trainings, parent/caregiver courses, and youth discussion groups.

Individual Activities. Activities that serve enrolled participants in individual or one-on-one settings. Programs are required to track and record individual meeting dates and duration for all participants in Individual Activities. Examples include case management, mentorship, individual tutoring, and one-on-one follow-up support services.

Activities without Personal Information. Activities for which individual-level attendance records cannot be tracked, such as outreach activities to children, youth, and/or families not registered in the program. Programs are instead required to track and record the dates and total number of attendees. Examples include outreach activities for disconnected transitional age youth and special events such as “Lights on Afterschool” and “Summer Learning Day”. DCYF expects programs to only project Events that are (1) key to meeting DCYF requirements and/or (2) essential to the delivery of DCYF-funded services.

Job Placements. Placements of youth into internships, job shadows, or work experiences. Programs are expected to track and record placement start and end dates, as well as specific details related to the individual placement, such as the type of organization into which the youth was placed. Reference the Job Placement activity type category definitions below when completing Workplan Job Placement Projected Activities:

Job Placement Type	Definition
Internship	A paid, or unpaid, career preparation activity in which youth are placed in a business for a defined period of time to participate in and observe work firsthand within a given industry. Internships should include a formal learning contract between the youth, program, and the employer. Internships are intended to be highly structured, time-limited experiences that occur at a workplace.
Job Shadow	A career exploration activity in which youth observe the workday of a professional, interact with clients or customers, and attend meetings and other appointments. Job shadows are designed to help youth explore a field of interest while developing research skills and building occupational knowledge through a facilitated, active learning process.
Work Experience	A paid career preparation activity in which participants execute real work and are held to the same expectations as all employees at the workplace. Evaluations based on workplace expectations and performance should be provided by the worksite supervisor. Could be regular, paid employment, subsidized employment and/or learning-rich work experience.

Activity Reporting

Throughout the year, grantees are expected to report data related to each service site and projected service described on the workplan. Once your program’s workplan has been approved, you may begin to set up activities for recording participation and attendance. Each activity is associated with a Projected Service described on the workplan. Multiple activities can be connected to a single Projected Service.

The examples presented below demonstrate the relationship between Projected Services, Service Types, and Activities. Reference the examples below when describing Projected Services in the *Services & Projections* form.

Example – Workplan Projected Service Types and Activity Attendance

Projected Service	Service Type	Activities*	Attendance Details
Soccer Clinic	Group Activity	Fall Soccer	Schedule, Participant Enrollment, Present/Absent attendance for each scheduled date
		Spring Soccer	Schedule, Participant Enrollment, Present/Absent attendance for each scheduled date
Case Management	Individual Activity	1-1 Support Sessions	Participant enrollment, Date of Attendance, # of minutes, notes, referral details
Internships	Job Placement Activity – *Internship*	Internships at local CBOs	Participant enrollment, Placement Dates, type (virtual/in-person), compensation, subsidies, job type, reason for ending
Events	Activity without Personal Information	Book Fair	Date of Service, # of minutes, counts of participants, notes
		Lights on Afterschool	Date of Service, # of minutes, counts of participants, notes

*Set up in the CMS *Activities* form after Workplan Approval

Workplan Revisions

After a workplan has been approved, edits to the workplan in most cases require a formal workplan revision. To request a workplan revision, contact your DCYF Program Specialist and provide justification. If your Program Specialist agrees, they will start a new version of the workplan and unlock forms that require edits.

In some cases, revisions to the workplan may be limited by system rules and validations. For example, during the revision process, CMS will not allow budget category totals to be reduced below the amount invoiced for that category year-to-date. Additionally, it is important to note that CMS will lock access to the *Invoices* module if the *Budget* form has been unlocked or changed during the revision process.

Workplan revisions are reviewed and approved by the Program Specialist. Prior versions of the workplan are accessible in PDF form at the bottom of the Workplan *Overview* page after a new workplan version has been initiated.

> Edits to the *Agency Profile* and *Contact & Program Info* forms are the exception. These forms may be unlocked and edited by grantees at any time without going through the workplan revision process. The CMS notes this at the top of these forms.