

Family Member Level Attachments Report

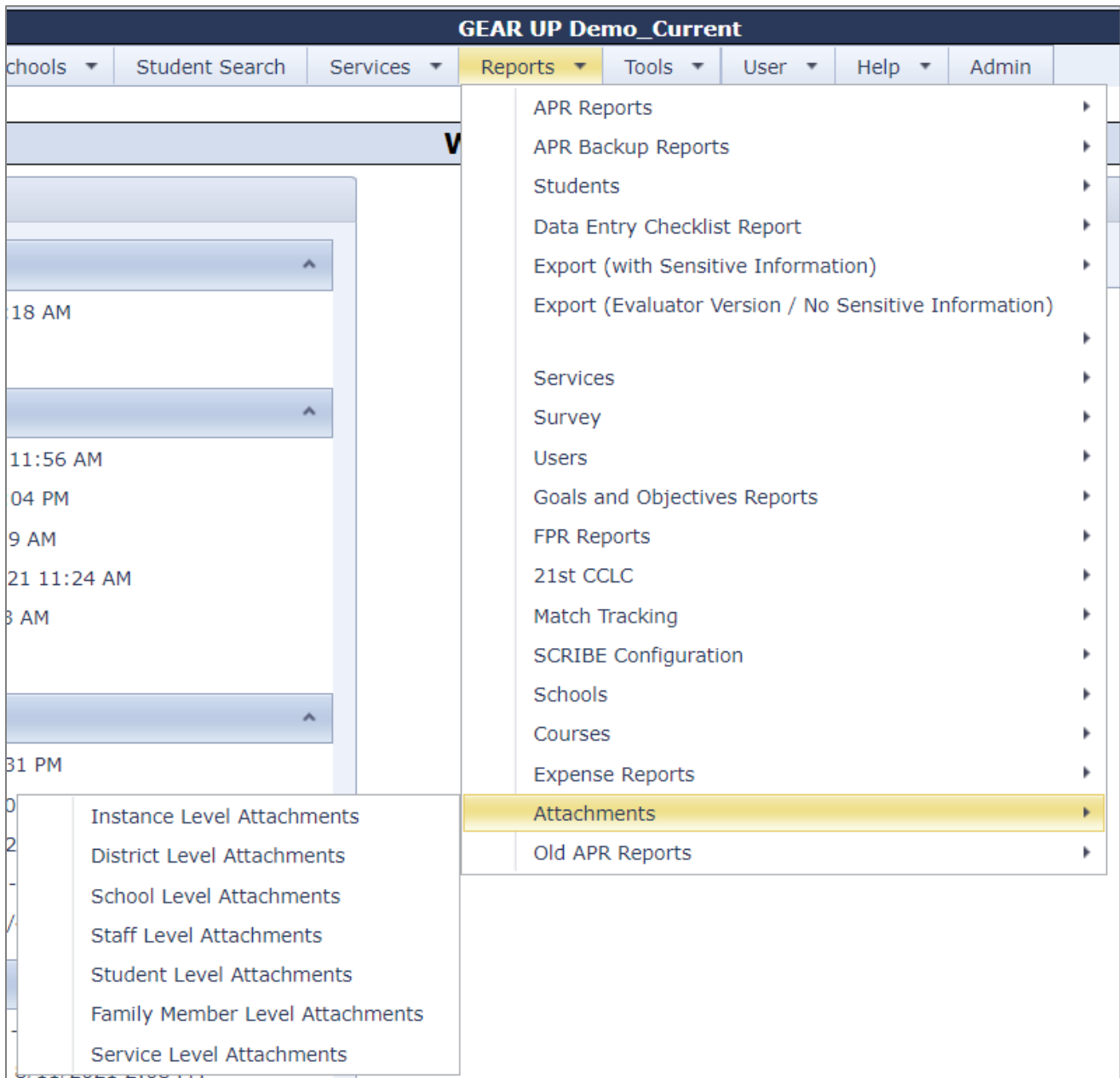
This tutorial details the family member-level attachments report. For more information on the other levels of attachments reports, go to the [Attachment Reports folder](#) in the Help Desk.

There are several new reports in SCRIBE that list attachment details like attachment name, file type and tags for the seven different levels at which you can attach documents. These new reports are an easy way to see where attachments have been uploaded, when, and what types of documents they are.

Family Member Level Attachments Report

All attachment reports are in SCRIBE under the Reports tab. If you do not see the Attachment option, submit a [Help Desk ticket](#) so they can be added to your SCRIBE student.

1. In SCRIBE, click **Reports > Attachments > Family Member Level Attachments**



Family Member Level Attachments Report

2. Select the Report Filters:

- a. **Participants By Program(s):** Check the box next to the Program(s) students are assigned to, if applicable. Only students assigned to the selected Program(s) whose family member(s) have attachments will be displayed in the report.

Note: This checkbox pertains to Student Programs. All students assigned to the selected Program(s) whose family member(s) have attachments will be displayed in the report, regardless of whether the family member attachments have been associated with a program. To filter the attachments' program(s), see Programs filter at the bottom of the report filter page (details below).

- b. **School Year(s):** Select the school year(s) to display the schools that were active during those years. There may have been different schools active earlier in your grant cycle (e.g., middle schools) than schools active in the later years (e.g., high schools or post-secondary institutions). As you select different school year(s) you may see the School(s) displayed change.

Note: School Year(s) filter does not pertain to the school year during which the attachments were uploaded to SCRIBE. The report will display all attachments that have been attached at the family member-level for whichever school(s) you select under School(s). To filter the attachments displayed on the report by the date they were attached in SCRIBE, use the Attachment Date filter (details below).

- c. **School(s):** Select which school(s) whose family member-level attachments you would like displayed on the report. Only those schools that were active in SCRIBE during the School Year(s) selected will be available to select in the School(s) filter.

SCRIBE Home > Student Level Attachments

Student Level Attachments

Report Filters

Participants By Program(s):

- ☐ GEAR UP ☐ Talent Search ☐ EIP
☐ Upward Bound ☐ Not In Any Internally Tracked Program ☐ Not In Any Program

School Year: * 2020 - 2021 ▼

School(s): *

- ☐ Instance - GEAR UP Demo_Current
☒ District - Portland Public Schools
 ☐ Jefferson High School
 ☐ Madison High School
 ☐ Roosevelt High School
☒ District - Training District
 ☐ Bayside Middle-High School
 ☐ DeGrassi Junior High
 ☐ West Beverly High School

Family Member Level Attachments Report

| | |
|--------------------------|--|
| Grade Level(s): | <input type="checkbox"/> Select All <input type="checkbox"/> 4 <input type="checkbox"/> 6 <input type="checkbox"/> 8 <input type="checkbox"/> 10 <input type="checkbox"/> 11 <input type="checkbox"/> 12 <input type="checkbox"/> Post-Secondary - Freshman <input type="checkbox"/> 5 <input type="checkbox"/> 7 <input type="checkbox"/> 9 |
| Entry Code: | <input type="checkbox"/> Select All <input type="checkbox"/> Enrolled <input type="checkbox"/> No Entry Code <input type="checkbox"/> Enrolled From Same School District |
| Entry Date: | <input type="text"/> To <input type="text"/> |
| Exit Code: | <input type="checkbox"/> Select All <input type="checkbox"/> Transferred Out Of State <input type="checkbox"/> Dropped Out <input type="checkbox"/> Transferred In State <input type="checkbox"/> No Longer In Program (Enter Reason) <input type="checkbox"/> Home School <input type="checkbox"/> Promoted End of School Year <input type="checkbox"/> Graduated Early <input type="checkbox"/> Retained End of School Year <input type="checkbox"/> Deceased <input type="checkbox"/> No Exit Code |
| Exit Date: | <input type="text"/> To <input type="text"/> |
| Attachment Date: | Custom ▾ <input type="text"/> To <input type="text"/> |
| Attachment Types: | <input type="checkbox"/> Select All <input type="checkbox"/> .csv <input type="checkbox"/> .doc <input type="checkbox"/> .docx <input type="checkbox"/> .gif <input type="checkbox"/> .jpg <input type="checkbox"/> .pdf <input type="checkbox"/> .png <input type="checkbox"/> .rtf <input type="checkbox"/> .txt <input type="checkbox"/> .xls <input type="checkbox"/> .xlsm <input type="checkbox"/> .xlsx |
| Attachment Tags: | <input type="checkbox"/> Select All <div style="display: grid; grid-template-columns: 1fr 1fr 1fr; gap: 5px;"> <div><input type="checkbox"/> Attendance Record</div> <div><input type="checkbox"/> Backup Documentation</div> <div><input type="checkbox"/> College Acceptance Letter</div> <div><input type="checkbox"/> College Application</div> <div><input type="checkbox"/> Counselor Notes</div> <div><input type="checkbox"/> Course Related Documentation</div> <div><input type="checkbox"/> Event/Service Documentation</div> <div><input type="checkbox"/> Food/Dining</div> <div><input type="checkbox"/> From Parents</div> <div><input type="checkbox"/> Health Related Documentation</div> <div><input type="checkbox"/> Hospitality</div> <div><input type="checkbox"/> Invoice</div> <div><input type="checkbox"/> Matching</div> <div><input type="checkbox"/> Parent Submitted Documentation</div> <div><input type="checkbox"/> Permission Form</div> <div><input type="checkbox"/> Photo</div> <div><input type="checkbox"/> Resume</div> <div><input type="checkbox"/> Sign-in Sheet</div> <div><input type="checkbox"/> Standardized Test Results</div> <div><input type="checkbox"/> Student Release Form</div> <div><input type="checkbox"/> Survey</div> <div><input type="checkbox"/> To Parents</div> <div><input type="checkbox"/> Transcript/Report Card</div> <div><input type="checkbox"/> Transportation</div> </div> |
| Programs: | <input type="checkbox"/> Select All <input type="checkbox"/> EIP <input type="checkbox"/> GEAR UP <input type="checkbox"/> Talent Search <input type="checkbox"/> Upward Bound |
| Uploaded By: | --- Select One --- ▾ |
| Report Format: * | <input checked="" type="radio"/> EXCEL <input type="radio"/> PDF |

- d. **Grade Level(s):** Select the grade level(s) of students whose family member's attachments you would like displayed on the list. The grade level(s) will correspond to the selected School Year (for example, if the 2020-2021 School Year is selected and 8th Grade Level is selected, any student with an attachment who was in 8th grade in the 2020-2021 school year, who attended the selected school(s) will be displayed in the report).

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- e. **Entry Code:** If selected, only those students with the selected Entry Code(s) whose family member(s) have family member-level attachments will be displayed in the report.
- f. **Entry Date:** If dates are entered, only students whose entry dates fall between the dates entered whose family member(s) have family member-level attachments will be displayed in the report.
- g. **Exit Code:** If selected, only those students with the selected Exit Code(s) whose family member(s) have family member-level attachments will be displayed in the report.
- h. **Exit Date:** If dates are entered, only students whose exit dates fall between the dates entered whose family member(s) have family member-level attachments will be displayed in the report.
- i. **Attachment Date:** Select **Custom** from the dropdown menu and enter a custom date range. Only attachments that were attached at the family member-level between the date range will be displayed on the report.

Select **Month** from the dropdown menu. Then select the month and year from the dropdown menus that will appear. Only attachments that were attached at the family member-level during the month selected will be displayed on the report.

If no Attachment Date is specified, the report will display all attachments that have ever been attached to family member-level attachments.

- j. **Attachment Types:** Select which type(s) of files you would like displayed on the report.

If no Attachment Type is specified, the report will display all attachment types that have been attached to family member-level attachments.

- k. **Attachment Tags:** Any family member-level attachments that have been tagged with the selected tags will be displayed on the report. Tags are added when the file is uploaded to family member-level attachments. You can check the tag boxes any time after the attachment is uploaded by editing the attachment. Find additional information about tags in [Attachments](#) on the Help Desk.

If no Attachment Tag is specified, the report will display all attachments that have been attached to family member-level attachments, whether they have tags or not.

- l. **Programs:** Any family member-level attachments that have been associated with the selected Program(s) will be displayed on the report. You can associate an attachment with the program when the file is uploaded to family member-level attachments. You can associate the file to a

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program any time after the attachment is uploaded by editing the attachment. Find additional information about programs in [Attachments](#) on the Help Desk.

Note: The Programs filter is specific to whether the attachment has been associated with any program. This does not have anything to do with whether students are associated with any programs.

If no Program is specified, the report will display all attachments that have been attached to family member-level attachments, whether they are associated with a program or not.

- m. **Uploaded By:** Select a person from the dropdown menu. Only attachments that were attached at the family member-level by that person will be displayed on the report.

If no Uploaded By person is specified, the report will display all attachment types that have been attached to family member-level attachments.

- n. **Report Format:** Select EXCEL or PDF. Best practice is to run the report as an **Excel** file (spreadsheet) so you can sort, filter, rearrange, and otherwise manipulate the report if desired, whereas a PDF is a fixed file that cannot be edited.

3. Click **Generate Report**.

| | A | B | C | D | E | F | G | H | I |
|----|---------------------------------------|------------|-----------|-------------------|------------------|--------------------------|-------------|-------------|------------------------------|
| 1 | Family Member Level Attachments | | | | | | | | |
| 2 | School(s): Training District District | | | | | | | | |
| 3 | School Year: 2020 - 2021 | | | | | | | | |
| 12 | Student ID | First Name | Last Name | Parent First Name | Parent Last Name | School | School Year | Grade Level | Attachment Name |
| 13 | 1234 | Kelli | Kapowski | Steve | Kapowski | West Beverly High School | 2020 | 10 | GEAR UP Parent Contract |
| 14 | 4567 | AC | Slater | Allison Claire | Slater | West Beverly High School | 2020 | 11 | Notes from parent conference |
| 15 | 7890 | Jessie | Spano | Jess | Spano | West Beverly High School | 2020 | 12 | pic from college visit |

| | J | K | L | M | N | O |
|----|------------------------------|----------------|---------------|---------------|------------|----------------------|
| ts | | | | | | |
| | | | | | | |
| | | | | | | |
| | File Name | File Extension | Date Uploaded | Uploaded By | Program(s) | Tag(s) |
| e | GEAR UP Parent Contract | .pdf | 9/1/2020 | Allie Sheldon | | From Parents |
| | Notes from parent conference | .doc | 9/1/2020 | Allie Sheldon | GEAR UP | |
| | pic from college visit | .png | 9/1/2020 | Allie Sheldon | | Backup Documentation |

Additional resources

Attachments – a detailed PDF for how to access all 7 types of attachments and other notes on naming, sorting, permissions

Town Hall from 6/5/2020 where attendees discussed attachments – recording, slides and notes