FIELD DATA COLLECTION · THE WHOLE TASK

Who Needs Support? Connect Attendance and Case Notes With AI

> **A phone check-in and a later observation should lead to one reviewed support answer.**



Photo: Jsme MILA / Pexels · illustrative

WHY JOIN THE SOPACT COMMUNITY

Join us to learn how field data becomes a useful decision.

Short demos show how a quick field check-in and later notes can support one reviewed decision.

PRACTICAL DEMOS · DATA COLLECTION · AI ANALYSIS

SUBSCRIBE

Mentors, caregivers and field teams face the same split.



Afterschool mentoring



Adult day programs



Field activities

Photos: Max Fischer, Jsme MILA, Ron Lach / Pexels · illustrative

THE USER PROBLEM

Paper check-ins and later notes split a person’s story.

In the field

Paper or a long form

→

Later

Notes in another place

→

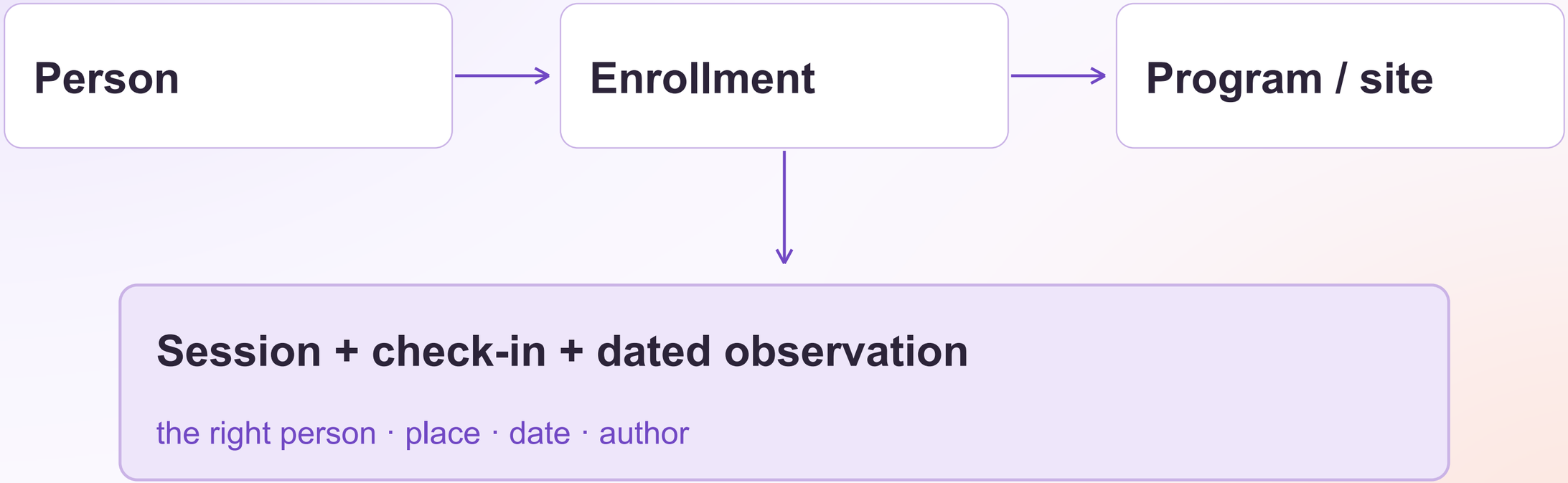
To decide

Rebuild the story

People, programs, dates and observations can lose their connection.

Concept graphic

Every check-in needs the right person, program and session.



Concept graphic

THE CONFIGURATION PROBLEM

The coordinator should decide who appears on the phone.

PROGRAM COORDINATOR

“Show this program’s enrolled youth on a phone.”

THE SETUP MUST CONNECT

- People
- Programs
- Phone view
- Analysis

Concept graphic

Enrollment filters the roster before attendance begins.

Sopact Sense · Attendance configuration

CONTACTS

People

Programs

Enrollment

Attendance

Program	**Programs**
Enrolled learner	**Enrollment · filtered by Program**
Save entries to	**Attendance**

One full form per person slows a group check-in.

Full form · one person at a time

Repeats for each person.

- Session date
- School and program
- Enrolled person
- Attendance status
- Reason, when known

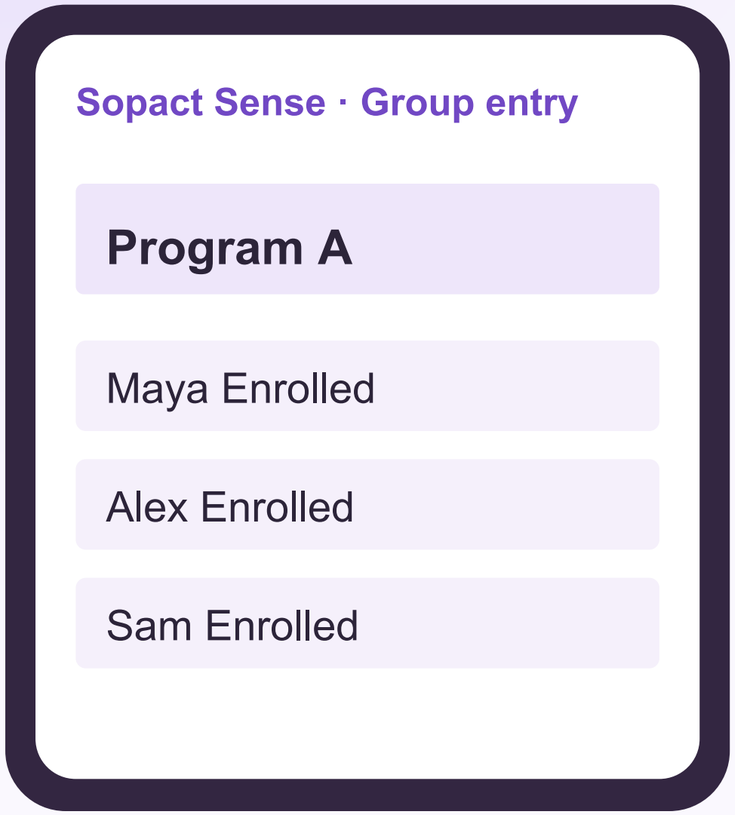
Phone check-in

Enter shared details once.

- Program + session · once
- Enrolled people · ready to mark
- Present / absent · each person

Saves to the same Attendance records

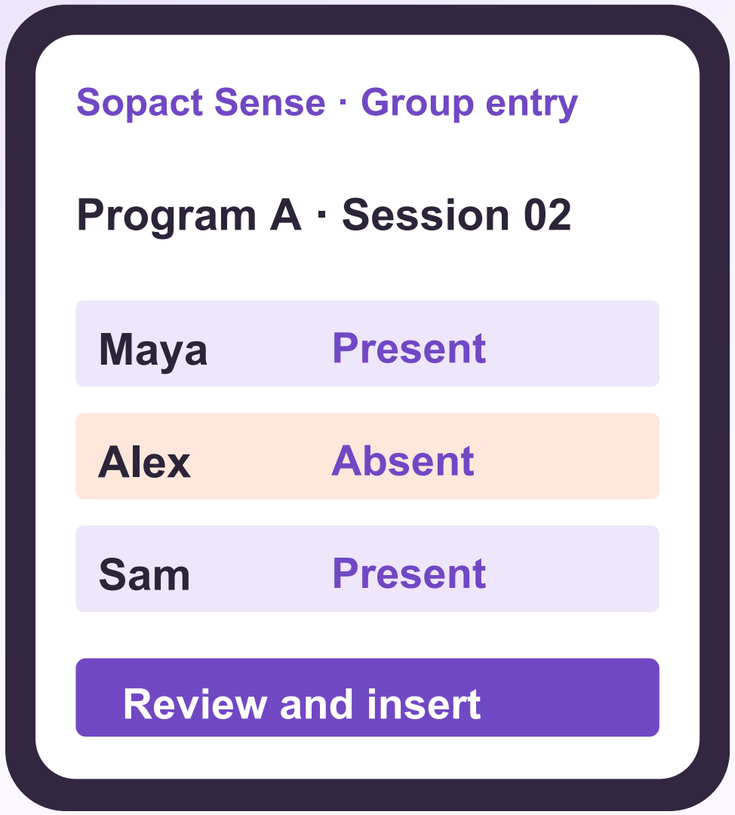
Choose a program to show only its enrolled people.



The roster changes with the program.

No all-contact search during the session.

Enter session details once, then mark each person.



No paper-to-sheet re-entry.

Review each status before saving.

Each check-in keeps its person, program and session.

Sopact Sense · Attendance responses

Person	Program	Session	Status
Maya	Program A	02	Present
Alex	Program A	02	Absent
Sam	Program A	02	Present

One person · one dated event · one source record

A later observation should stay with the same person.

Attendance · Session 02

Person	**Alex**
Status	**Absent**
Reason	**Not recorded**

→

Staff observation · Later

Person	**Alex**
Focus	**Engagement / coaching**
Date	**Next day**

Same person

Ask which absent people also have a staff concern.

Sopact Sense · Assistant

Attendance Enrollment Observations

Who was absent or late, and what did staff observe?

EVIDENCE TO REVIEW

Recorded
Status and dated source

Observed
Only what staff wrote

Unknown
Missing reason stays visible

Staff choose the follow-up

THE HUMAN DECISION

Use attendance and observations to choose the next support step

ATTENDANCE

See the pattern

Which sessions did the person miss?

→

STAFF OBSERVATION

Add the context

What was observed, by whom and when?

→

PROGRAM LEAD

Choose the follow-up

Review the evidence with staff before deciding.

KEEP LEARNING WITH US

Join for practical field collection and AI walkthroughs.

See practical ways to collect on a phone, keep observations connected, and check AI answers.

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