

10 - CYMS Training Guide - Report Key (10.3 – Updated Oct 2011)

Room and/or Sports Reports

- 1. Classroom rosters**
Go to: Reports → Activity → Activity Roster Reports → Activity Rosters
- 2. Children with birthdays in a particular month**
Go to: Reports → Activity → Activity Enrollment Reports → Birthday/Grade Report
- 3. Sign-in/out sheets for my classrooms**
Go to: Reports → Activity → Activity Instructor Reports → Class Attendance Worksheet
- 4. Who is in need of transition**
Go to: Reports → CYS → CYS Admin Reports → CYS Transition Report (we also have the new Transition Matrix process located under Daily→CYS)
- 5. Children with allergies by Room**
Go to: Reports → CYS → Health/Medical Records → Medical Conditions Report or Activity Roster Report
- 6. Children with allergies by Pass**
Go to: Reports → CYS → Health/Medical Records → Medical Conditions Report
- 7. Children with overdue shots**
Go to: Reports → CYS → Health/Medical Records → Shot Report
- 8. How many enrollment/openings in my center**
Go to: Reports → Activity → Status Reports → Activity Listing
- 9. How many children of E1's, E5's, etc in my center or on my waitlist or registered with passes**
Go to: Reports → CYS → CYS Admin Reports → CYS Demographics (Annual) Report
- 10. How many children in my center by gender/age and/or ethnicity**
Go to: Reports → CYS → CYS Admin Reports → CYS Ethnicity Report
- 11. Children with medical conditions/medications/basic care items by Room**
Go to: Reports → CYS → Health/Medical Records → Medical Conditions Report or Activity Roster Report
- 12. Children with medical conditions/medications/basic care items by Pass**
Go to: Reports → CYS → Health/Medical Records → Medical Conditions Report
- 13. Boys & Girls Club Report for Registered Members**
Go to: Reports → CYS → CYS Admin Reports → Boys & Girls Club Report
- 14. How many unique children in Before School only, After School Only and Both.**
Go to: Reports → Activity → Enrollment Reports → Unique Enrollment Report
- 15. How many children have left my program and why.**
Go to: Reports → CYS → Admin Reports → PCS Report

- 16. Report to show who is coming due or overdue for Health Assessments, Physicals, Shots, Re-Registrations or has ticklers by Room or Hourly Reservation Date Range. This report can be printed out per child and placed in the child's cubby. Bases that use this may elect to turn off swipe messages on the visit device.**

Go to: Reports → CYS → Admin Reports → Household Reminder Report

- 17. How many Sponsors, Spouses, Family Members by AFC deployment status do I have. This should effectively take the place of the Question/Answer Report.**

Go to: Reports → CYS → Admin Reports → AFC Eligible Report

Financial Reports

- 1. How many Cat I's, Cat II's, etc. in my classrooms**

Go to: Reports → CYS → CYS Admin Reports → CYS Income Category Report

- 2. How many free, reduced and paid children in my classrooms**

Go to: Reports → CYS → USDA Reports → USDA Category (Child)

- 3. A list of children who owe money at my center**

Go to: Reports → Activity → Activity Financial → Activity Trial Balance

- 4. Total revenue a particular classroom has generated (Includes children's payments in history)**

Go to: Reports → Activity → Activity Financial → Activity G/L Report

- 5. Total revenue by bill code (ability to isolate full day revenue, part day revenue, late payment revenue, camp revenue, etc)**

Go to: Reports → System → System Financial → Bill/Tran Code Revenue Report II

- 6. Anyone who owes money at any center**

Go to: Reports → Global → Global Financial → Global Trial Balance II (sa0565)

- 7. Anyone who owes money and how old the balance is**

Go to: Reports → System → Household/Family Member Reports → Household Balance Aging Report

- 8. How much an agency owes my center**

Go to: Reports → CYS → CYS Admin Reports → CYS Agency Payment/Reimbursement Report

Parent Reports

- 1. A Tax Statement for my parents**

*Go to: Reports → Global → Global Financial → Global Childcare Statement (sa0525) **NOT** the General Ledger childcare statement!*

- 2. A copy of a payment receipt or transaction**

Go to: Reports → Global → Global Financial → Global Receipt Reprint

- 3. All the transactions for a household for a given date range**

Go to: Reports → Global → Global Financial → Global HH Transaction History Listing

- 4. All the programs anyone in my household is currently enrolled in**

Go to: Reports → Activity → Activity Roster Reports → Activity Household Roster

5. A copy of all hourly reservations made for a certain household for a date range

Go to: Reports → Court → Reservation Reports → Household Hourly Reservation Report

Visit Reports

1. All visits to my building for a given date range with Age Group Stats

Go to: Reports → CYS → CYS Admin Reports → CYS Visit Report

2. Report to show who swiped out during a certain time frame. All other visit reports key on Swipe In. This report keys on Swipe Out time. For example: Who swiped out between 8:00 and 9:00 pm?

Go to: Reports → CYS → CYS Admin Report → CYS Attendance Report

3. Average daily (or weekly) attendance for a given date range

Go to: Reports → Pass → Visit Reports → Average Daily Attendance Report

4. Male and female visits to my building by sponsor status for a given date range

Go to: Reports → CYS → CYS Admin Reports → Facility Visit Usage Report

5. Hourly visits and hourly amount charged/paid for a given date range. Can also toggle to show unique households and family members that are using hourly and get age group stats and income category stats

Go to: Reports → CYS → Admin Reports → Hourly Visit Report

6. Number of children by Age swiped into my center at any given time for any given week

Go to: Reports → CYS → Admin Reports → Labor Schedule Tool

7. List of the hourly children or full time children who are using too many hours of care

Go to: Reports → CYS → Admin Reports → CYS Visit Report

9. Print a graphical listing of your hourly reservations that allows you to see how many of each age group you will have in your center at certain points in the day.

Go to: Reports → CYS → Admin Reports → CYS Reservation Grid Report

Waitlist Reports

1. Listing of children on your waitlists sorted by Age Group/Program Type

Go to: Reports → CYS → CYS Waitlist Reports → Waitlist Report

2. Statistical report listing children 'placed' from the waitlist along with average wait time, shortest/longest wait and priority stats

Go to: Reports → CYS → CYS Waitlist Reports → Waitlist Placed Statistics Report

3. To email, text or make address labels or send a letter to the people on your waitlist

Go to: Reports → CYS → CYS Waitlist Reports → Waitlist Labels/Letters

Miscellaneous Reports

1. Households that need or have a Family Care Plan

Go to: Reports → CYS → CYS Admin Reports → Family Care Plan Report

2. **Children due for re-registration. Email, text and/or create a letter.**
Go to: Reports → Pass → Pass Labels/Letters
3. **Children with Hourly Reservations and/or Attendance sheet for children with reservations**
Go to: Reports → Court → Court Reservation Report II
4. **Labels and Letters capability for children in activities by Sponsor or Spouse Unit**
Go to: Reports → CYS → CYS Admin Reports → Unit Labels and Letters

Staff Reports

1. **Staff members training records or IDP**
Go to: Reports → CYS → Staff Reports → Staff Training Record (IDP)
2. **Staff members who are coming due or overdue for training**
Go to: Reports → CYS → Staff Reports → Staff Completed/Due Report
3. **Staff members coming due for shots or entire medical histories**
Go to: Reports → CYS → Staff Reports → Staff Completed/Due Report
4. **Staff members coming due for background checks, entire background check history, or background checks that have been initiated but not completed**
Go to: Reports → CYS → Staff Reports → Staff Completed/Due Report
5. **Staff member room visits for a given date range**
Go to: Reports → CYS → Staff Reports → Staff Completed/Due Report
6. **Staff members due for an evaluation**
Go to: Reports → CYS → Staff Reports → Staff Last Evaluation Report
7. **Staff member list with customized columns providing data from any tab in the Staff module**
Go to: Reports → CYS → Staff Reports → Staff Listing II Report
8. **Staff members due or past due for Credential renewals**
Go to: Reports → CYS → Staff Reports → Staff Completed/Due Report
9. **Staff members and the Military Unit to which their Sponsor/Spouse is attached, if applicable**
Go to: Reports → CYS → Staff Reports → Staff Sponsor Unit Report

Note: Every Staff and Provider report can be run in Labels/Letters mode which gives you the ability to email your staff, make address labels and/or attach letters. Example: I want to email all the staff who are due for any shot or send a letter to any Provider whose Pet is due for an Immunization or Distemper. This is a very powerful tool.

Provider Reports

1. **Providers training records or IDP**
Go to: Reports → CYS → Provider Reports → Provider Training Record (IDP)
2. **Providers who are coming due or overdue for training**
Go to: Reports → CYS → Provider Reports → Provider Completed/Due Report

- 3. Providers coming due for shots or entire medical histories**
Go to: Reports → CYS → Provider Reports → Provider Completed/Due Report
- 4. Providers coming due for background checks, entire background check history, or background checks that have been initiated but not completed**
Go to: Reports → CYS → Provider Reports → Provider Completed/Due Report
- 5. Provider home visits for a given date range**
Go to: Reports → CYS → Provider Reports → Provider Completed/Due Report
- 6. Provider inspections coming due or entire provider inspection record**
Go to: Reports → CYS → Provider Reports → Provider Completed/Due Report
- 7. Provider referrals for a given date range**
Go to: Reports → CYS → Provider Reports → Provider Referral Report
- 8. Providers whose pets are due or overdue for annual Immunizations or Distemper shots**
Go to: Reports → CYS → Provider Reports → Provider Completed/Due Report
- 10. Provider list with customized columns providing data from any tab in the Provider module**
Go to: Reports → CYS → Provider Reports → Provider Listing II Report
- 11. Providers due or over due for Credential renewals**
Go to: Reports → CYS → Provider Reports → Provider Completed/Due Report

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The **F1 Help** contains a comprehensive list of all CYMS reports, sorted by title with description. Press **F1** on your keyboard and go to **RecTrac Reference Guide → Running Reports → CYS Report Listing**