

03 - CYMS Training Guide - Program/Activity Registrations (10.3 – Updated July 2011)

Activity Background Information:

- For initial data input, it is critical to enroll all regularly scheduled full day and part day children (e.g., PDPS, B/A school, etc) into their correct activity/classroom.
- Regularly scheduled children in Provider homes must also be enrolled. All Providers must be set up as “activities” in the system.
- Children signed up for youth sports, instructional classes, clubs, etc. will be placed into their proper activities based on rosters that are current just before the “go-live” date.
- **Hourly children do not get enrolled into an activity.** The pass gives them permission to use any CYS program. When families want to use hourly care, they make a reservation or just drop in.

Enrolling in an Activity:

- 1 Click the **Global Sales** hot button, lookup your household and select it.

Note: Global Sales allows you to process Pass Memberships and Program Registrations in one transaction. To switch between Pass Memberships/Registrations and Program Registrations, leave the child highlighted in the Family Member browser and click the **Program Registration** hot button located on the bottom of the screen. See **CTG-02 – Pass Registrations** for more pass information.

- 2 Highlight the child you want to enroll into an activity/classroom.
 - 3 Right-click in the **Actv No** field to bring up the **Section** picklist.
 - 4 Highlight the class and double-click to select
- OR.

If the child is enrolling in more than one activity, such as Before School and After School, hold down the <Ctrl> key and highlight any additional classes. Then click **Select**.

The screenshot shows the 'Global Sales' interface for activity registrations. At the top, there's a table of family members with columns for Member ID, Last Name, First Name, Birthday, Age, and Gender. Member 6, Tara Messier, is selected. To the right, the 'Actv No' is set to 900000 and '01'. Below this are buttons for 'Details', 'Roster', and 'Search'. A section for 'Add Roster Information' includes a 'Select' button and 'Fees' and 'Std Fees' fields, both showing 0.00. Below the member table is a transaction table with columns for Mod, Transaction Description, Fee/Disc, Tax Amt, Deposit, Net Paid, and Net Fee. The first transaction is 'PM Type: CY-CHILD Pass: 31044 -> Child Pass (Tara)'. At the bottom, there are buttons for 'Payment', 'HH Update', 'HH Inquiry', 'View Pass', 'View Prev', 'Name Lookup', and 'Total New Charges' (0.00). A row of hot buttons at the very bottom includes 'Pass Memberships', 'Pass Renewal', 'Pass Transfer', 'Program Registration', and 'Point of Sale'.

Figure 1: The Global Sales screen for Activity/Program Registrations

- 5 On the Activity Registrations screen, click **Select**. If this is a “standard” CYMS Fullday/Partday program enrollment, a pop up box will ask you for the child’s **Enrollment Start Date**. Enrollments into Summer Camps, Instructional classes, sports activities and Provider enrollments will not pop this message box.

Note: Bases that allow customers to pick their billing frequency will also see the **Billing Choice** option. This is controlled at the class level on the CYMS Info screen. Most bases do not allow parents to pick how often they wish to be billed.



Figure 2: The CYM Program Enrollment Start Date Message Box.

NOTES: Enrollment Start Date

Prior to being ‘live’ in CYMS, this will be your projected ‘live’ date. During the initial setup process no fees should be incurred.

Once you are ‘live’ in CYMS, this will be the actual date the child is starting in the program. Fees would be incurred as follows:

- **Monthly Billing:** The system will prorate the child’s fees thru the end of the month and the first installment billing record will be setup to start the 1st of the following month.

Semi-Monthly Billing: The system will prorate the child’s fee thru the 14th of the month or thru the end of the month depending on start date and the first installment billing record will be setup to start on the next logical semi-monthly schedule. Example:

If child’s start date is 8/14 or less, the prorated amount will be thru the 14th and the installment bill will begin on 8/15.

If child’s start date is 8/15 or greater, the prorated amount will be thru the end of the month and the first installment bill will begin on 9/1.

If the child’s start date is 8/1 or 8/15 there will be **no initial prorate** and the child’s first bill will be set up for 8/1 or 8/15 accordingly.

- **Weekly Billing:** The system will prorate the child’s fees for the rest of the week and the first installment billing record will be setup to start the following Monday.

Example of How the Monthly Prorate is Determined: If the monthly rate is \$200 per month and the child’s Start Date is August 3, 2011 here is how the prorated amount is determined.

First we find the daily rate. There are 23 business days (including holidays) in August 2011. Be careful here because we use the exact number for the month being enrolled in. So the number of business days could vary from month to month. $\$200/23 \text{ business days} = \$8.69565217391 \text{ per day}$.

Since the child is starting on August 3, they should be charged for 21 business days. $21 \text{ times } \$8.69565217391 = \182.6086 . We then always round up to the nearest dollar, or \$183. During the initial enrollment/prorate on a monthly billing cycle, we will always charge the patron through the end of the month of their Start Date.

Example of How the Semi-Monthly Prorate is Determined: If the semi-monthly rate is \$100 and the child's Start Date is August 3, 2011 here is how the prorated amount is determined.

First we find the daily rate. There are 10 business days (including holidays) from August 1-14. $\$100/10$ business days = \$10 per day.

Since the child is starting on August 3, they should be charged for 8 business days. 8 times \$10 = \$80. If appropriate we always round up to the nearest Dollar. The first installment bill will be setup to start on 8/15!

In the above semi-monthly example, if the child started on 8/18/2011 the math would be as follows: $\$100/13$ days (bus days from 15th-31st) = \$7.69230769 per day. They should be charged for 10 business days. 10 times \$7.69230769 = \$76.923 rounded up to the nearest dollar = \$77. The first installment bill will be setup to start on 9/1.

General Notes:

- When an Enrollment Start Date is entered that is greater than today's date, the child's status on the roster will be **Future**.
- Once you are live, you will be expected to run a process each day called the **Future to Enrolled Status Change**. This will help keep your rosters more accurate by giving those Future stuated children an Enrolled status as soon as their enrollment date arrives. This process can and usually is scheduled to run daily on the app server.

Activity Error Messages

- If a child does not have a current pass, you will not be able to enroll the child into any activity that requires a current pass membership. All activities should have been set up to require a current pass.
 - If you see the following message: "No rate category has been created for this criteria..." you cannot complete this registration. Either no DOD income is listed on the household Financial Info screen, or you didn't link your activity to a program type on the CYMS screen during activity setup. You must find and fix the source of the problem before making this registration.
 - If you don't have a family member selected when you select an activity, you will get the following message: "No Family Member Selected." Go back and highlight a family member you are entering into the activity.
 - If a child is outside the age or grade range for a class, you will get a message telling you this. You can override this message with proper permissions.
 - If a class is full (the number of children enrolled equals the listed maximum count) you will get a warning message. You cannot override this message – you must run Search for Care.
 - If the child is already enrolled in another activity that has a date or time conflict with the new class, you will get a warning message. You can override this message with proper permissions.
- 7 When the Enrollment Date is entered, click **OK**. The registration will move into the Transaction browser located in the middle of the screen.

Mem	Last Name	First Name	Birthday	Age	Gen
1	Messier	John		0 Yr	Fer
2	Messier	Kathy		0 Yr	Ma
3	Messier	Liam	08/24/2005	5 Yrs 11 Mos	Ma
4	Messier	Sara	01/01/2010	1 Yr 7 Mos	Fer
5	Messier	Unborn		0 Yr	Fer
6	Messier	Tara	05/01/2011	0 Yr 3 Mos	Fer

Mod	Transaction Description	Fee/Disc	Tax Amt	Deposit	Net Paid	Net Fee
AR	Class: 900000-01 -> East/Yell FD (Int) (Tara) Enrolled	0.00	0.00	0.00	0.00	0.00
PM	Type: CY-CHILD Pass: 31048 -> Child Pass (Tara)	0.00	0.00	0.00	0.00	0.00

Total New Charges: 0.00

Figure 3: The Global Sales screen showing the Pass and Class enrollment and \$0.00 in fees.

- 8 Check the Total New Charges field:
 - **During initial data input**, there should be **NO** New Charges for these transactions. If there is, do NOT finish this enrollment. Highlight the program in the browser that has the balance, click the **Update** button located on the right-hand side of the Transaction Browser and re-select the activity. You probably entered an invalid start date.
 - **After you go live**, the **correct pro-rated amount** will automatically be charged and show as a **Net Fee** in the browser.
- 9 Repeat the steps above for any additional enrollments for this household.
- 10 When everything is correct, click the **Payment** button to complete the transaction. You will proceed to a detailed payment screen
 - **During initial data input**, there should be no money owed. If this is correct, click **OK** and **No Print**. You will see a Change Due screen. You may also be asked if you want to print a pass. Click **Skip Print** or **Skip All**. Your transaction is complete.
 - **After you go live**, the **total amount due** for any passes or activity enrollments will appear. Process payments and print passes as appropriate. See CTG-21 (Processing Payments) for additional information on processing payments.

Validation -- Viewing Household Enrollments

- 1 Go to **Inquiry** → **Global** → **Global Household Inquiry**
- 2 Find the household and **Select**.
- 3 **To view activity/program enrollments for a single child:**
 - Highlight the child and click **Actv Reg**.

