

#35 - CYMS Training Guide - Waitlist Processing

(10.3 – Updated June 2011)

Search for Care

The Search for Care process is used to:

- Gather initial household information on new or incoming families.
- Determine a Household's specific child care needs.
- Search for matching vacancies and give FCC Provider Referrals
- Place children on the waitlist for Center and/or Provider openings.

Search for Care also allows you to renew waitlist entries, update waitlist information (status, age group, dates, priorities, etc...) and delete a waitlist record.

To Put Someone on the Waitlist and Give Provider Referrals:

- 1 Go to **Daily** → **CYS** → **CR Search For Care**.
- 2 Lookup the household and select it. Select/Highlight the child you want to add to a waitlist.
- 3 Select to **Include Center Based Options in Search** and select to **Include Providers In Search**
- 4 When you highlight the child, the **Age Group** you are searching for will fill in automatically. If the child is unborn, the **Age Group** will default to Infant.
- 5 If your base has multiple CDCs or School Age care facilities, the parent might have a **Location** preference.
 - If so, use the **Location** dual selection list to **Include** those locations. Click on the preferred Location(s) in the Available column and click **Add>>**.
 - If no location preference is added, the search will include ALL locations, and the child will be waitlisted for any Center or Provider that offers the **Program Type(s)** for which you are searching.
- 6 Use the **Prog Type** dual selection list, located in the bottom right-hand corner of the screen, to **Include** the **Program Types** for which you want to search. Click on the appropriate Program Type(s) in the Available column and click **Add>>**.
 - You can select multiple Program Types, such as BEF-SCH and AFT-SCH.
 - If you add one by mistake, select it in the Include column and click **<<Del**.

Search For Care ==> John Messier Household

Family Member Selection

Mem	Name	Birthdate	Age Group	Description	Gender	Grade	Soc Sec Numb	Partial Features
1	John Messier		0 Yrs 0 Mos	Beyond CYS	Female		0.00 000-93-3401	
2	Kathy Messier		0 Yrs 0 Mos	Beyond CYS	Male		0.00 000-00-0000	
3	Junior Messier	05/01/2010	2-PTOD1	Pre-Toddler (12	Male		0.00 000-00-0000	

Include Providers In Search?
 Include Center Based Options In Search?

Age Group: 2-PTOD1 (Pre-Toddler (12 Mo - 18))
 Only Include In List If Vacancy Exists?

Available	Location	Include
5510C	Add >>	6058
5510D	<< Del	
5510S	Desc	
5350		
6058M		

Available	Prog Type	Include
EXT-HRS	Add >>	FULLDAY
FT-SHIFT	<< Del	
HOURLY	Desc	
KIND		
LONGTERM		

Figure 1: The CYS Search for Care Screen with Location and Program Type selections

7 Click Search.

Provider Search For Care ==> Junior Messier - Screen 1 of 2

Available	Military Bases	Include
CARSON	Add >>	
	<< Del	
	Desc	

Available	School Districts	Include
DIST02	Add >>	
DIST03	<< Del	
DIST08	Desc	
DIST11		
DIST12		
DIST20		
DIST49		

Available	Housing Areas	Include
H-APA	Add >>	
H-ARA	<< Del	
H-BLK	Desc	
H-CHE		
H-CHO		
H-COM		
H-CYN		

Include Providers Located ON Post?
 Include Providers Located OFF Post?

Figure 2: The CYS Search for Care, Provider Options screen 1

- 8 If parents have specific requests for Providers in certain **Military Bases** (more relevant for Navy) or **Housing Areas** or **School Districts**, add those requests to the appropriate Include column. Otherwise, if the Include column is blank, the search will include any provider in any school district or housing area.
- 9 Decide whether the search should include **ON Post** or **OFF Post** providers or both.
- 10 Click **More Opt**

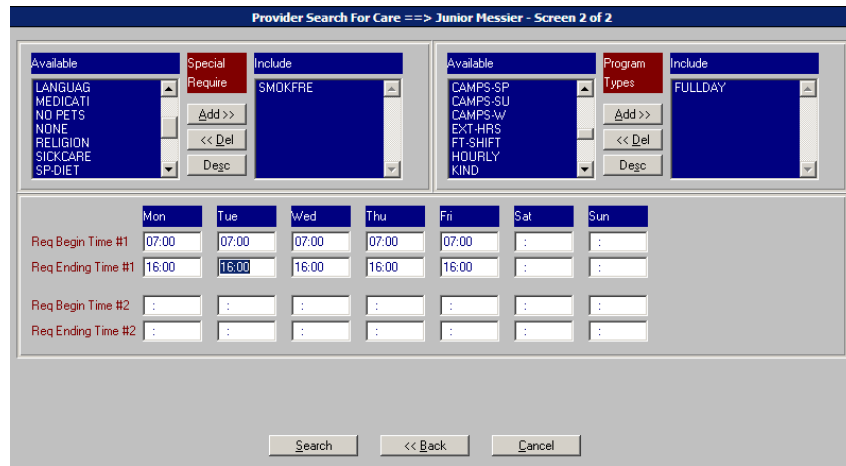


Figure 3: The CYS Search for Care, Provider Options screen 2

11 Add any **Special Requirements** a Provider must offer in order to be a viable match for this parent.

- Providers must match *all* Special Requirements listed in the **Include** column to be a valid match, so be careful how many you add. Special Requirements are linked to Providers in the **Provider Module**.
- If you are unsure what a particular code stands for, select the code and then click **Desc**.

12 The **Program Type** should carry over from the first screen.

13 Fill in the appropriate days of the week and times of day for which this parent requires care.

Note: For parents who require Before and After School care, use Begin/End Time #1 for the Before School hours and Begin/End Time #2 for the After School hours.

14 Click **Search**.

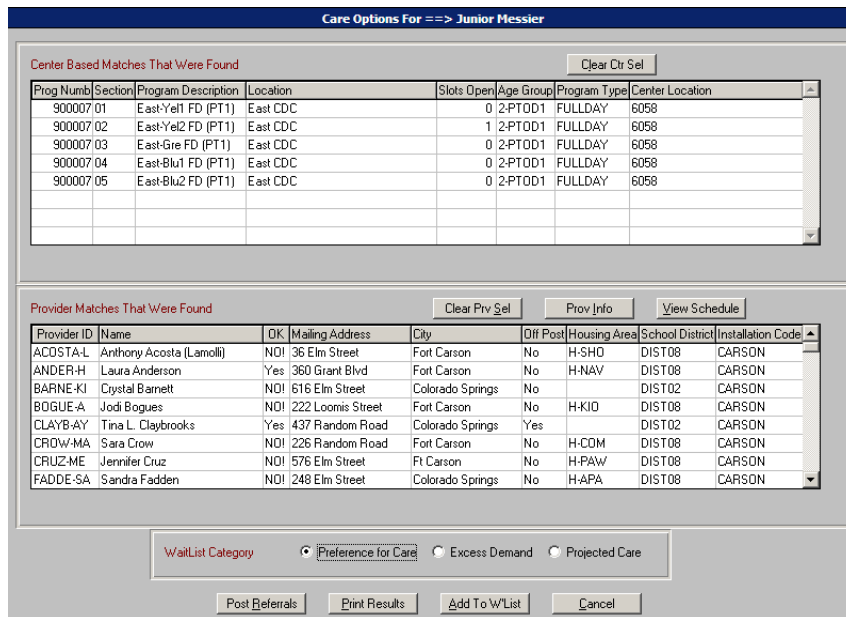


Figure 4: The CYS Search for Care, Care Options screen

15 The Care Options screen displays all Centers and Providers that match the care types and criteria for which you searched.

- Providers with **Yes** in the **OK** column are providers who match all the codes/criteria that were selected during the search and have no schedule conflicts.
- Providers with **No** in the **OK** column match all the codes/criteria that were selected during the search but have schedule conflicts. This could mean they are not available during some or all of the Days and Hours the parent requested or simply that they have too many children in their home at the time this parent needs care. To view the schedule conflicts, highlight the Provider and click **View Schedule**.
- To let parents view professional and biographical information about a Provider, highlight the Provider and click **Prov Info**. The resulting screen will list any Biographical codes linked to the provider along with comments written by the provider. To view the entire detail and potentially any linked images, highlight the code and click **Show Photo/Detail**.
- To post referrals for the Providers listed, click **Post Referrals**. If you select to **Post Only 100% OK** (recommended), only those Providers with “Yes” in the **OK** column will get a referral. If you select **Post All Referrals**, all Providers in the browser will all get a referral, regardless of whether the **OK** column says Yes or No. Referrals can be viewed in the **Provider Module** or on the **Provider Referral** report.
- To print a list of eligible Providers for the parent, click **Print Results**. Select the information you want printed on the list and click **Print**. The list will print randomly rather than in an alphabetical sort – this is by design.

Note: The **Print Schedule Details For Providers On List** option is not recommended, since it lists each Provider’s schedule in half hour blocks, Monday–Friday.

The **Print Only Provider Matches That Are ‘OK’** option will list only the **OK Yes’s**.

16 To put this child on the waitlist for a Center or Provider, select the proper **Wait List Category** and click **Add To W’list**.

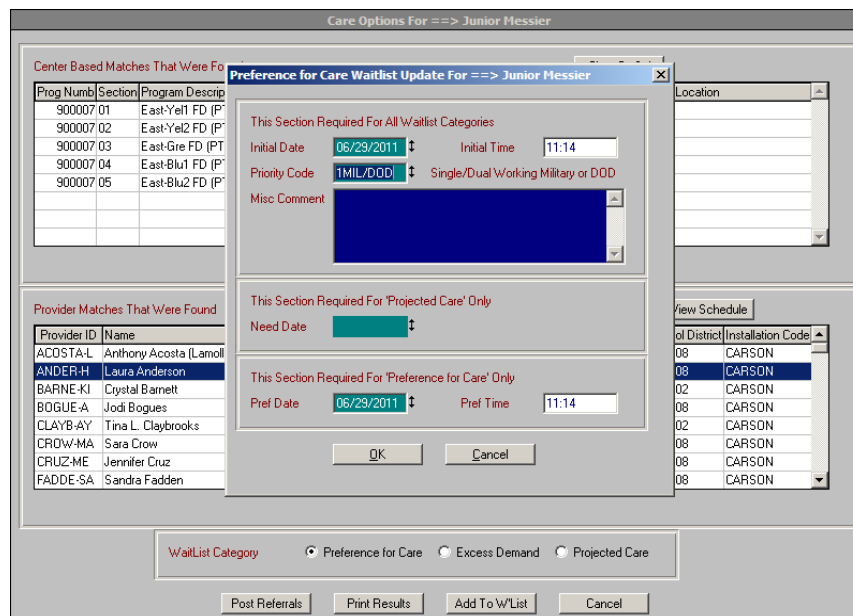


Figure 5: The Preference for Care Waitlist Update screen

17 If you selected **Projected Care**, complete the **Initial Date**, **Initial Time**, **Priority Code**, **Misc Comment** (if applicable), and **Need Date** fields.

If you selected **Excess Demand**, complete the **Initial Date**, **Initial Time**, **Priority Code**, and **Misc Comments** (if applicable) fields.

If you selected **Preference for Care**, complete the **Initial Date**, **Initial Time**, **Priority Code**, **Misc Comments** (if applicable), **Pref Date**, and **Pref Time** fields.

Notes: The Excess Demand list is sorted by Priority Code and then by Initial Date by Initial Time. The Preference For Care list is sorted by Preference Date and Preference Time.

18 Click **OK** and **Yes** to add the person to the waitlist. If you chose the wrong waitlist category in **Step 16**, click **No** and re-add the individual.

To Renew A Waitlist Entry:

If you require waitlisted parents to contact you periodically and verify their need for care still exists, you can easily track this through CYMS. Parents can also do this online.

- 1 Go to **Daily → CYS → CR Search For Care**.
- 2 Lookup the household and select it.
- 3 Click **HH Waitlist**. This will display all children in the household who are on the waitlist.
- 4 Select the child whose waitlist entry you wish to renew and click **Renewal**.
 - The current date will be added to the **Last Renewal** field.
 - The Last Renewal date is used for comparison when you run the **Waitlist Status Change** or **Waitlist Purge** programs. These will be discussed later in this guide.

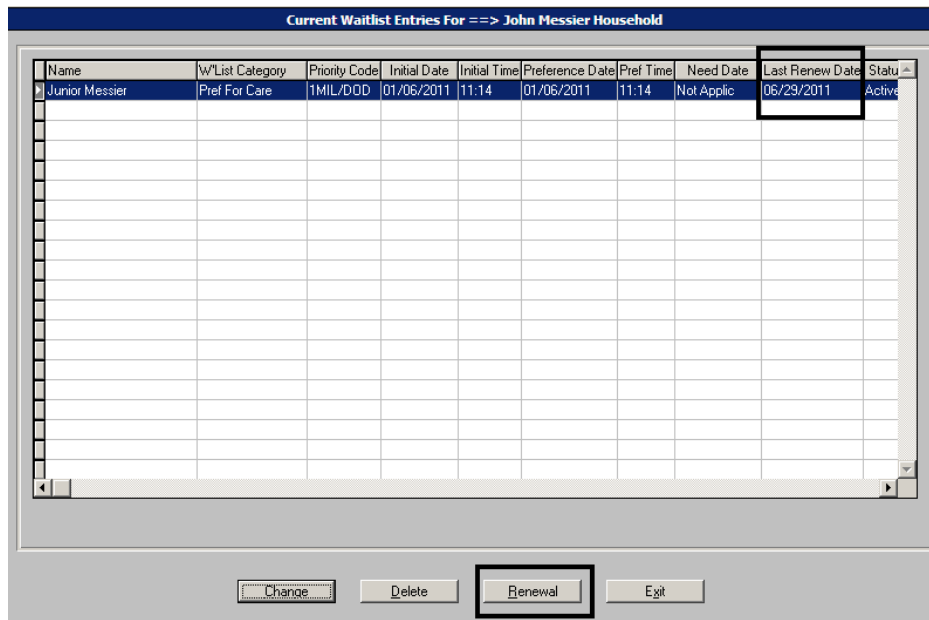


Figure 6: The Current Waitlist Entries for a household screen, Waitlist Renewal

To Make Someone Active or Inactive on the Waitlist:

- 1 Go to **Daily** → **CYS** → **CR Search For Care**.
- 2 Lookup the household and select it.
- 3 Click **HH Waitlist**. This will display all children in the household who are on the waitlist.
- 4 Select the child you wish to make active or inactive and click **Change**.

Available	Locations	Include
5950	Add >>	6058
6058M	<< Del	
6060	Deqc	
7790		
9CIV		
9MWR		
9POST		

Figure 7: The Waitlist Update screen for a Family Member

- 5 Change the **Waitlist Status** as applicable, make a note in the Miscellaneous Comments field, and click **OK**. Children with a waitlist status of Inactive **do not** appear on the waitlist. When a child is Inactive on the waitlist, Miscellaneous Comments tied to the waitlist record are still accessible.

Note: Use the **CYS Waitlist Status Change** program to make multiple waitlist entries Active or Inactive based on the Last Renewal Date linked to each record. That program is discussed in the **HH Waitlist Status Change** section of this guide.

Changing or Updating Information on an Existing Waitlist Record:

This is the process you use to update or change an existing waitlist record, either to add new information or to correct an error in data entry.

- 1 Go to **Daily** → **CYS** → **CR Search For Care**.
- 2 Lookup the household and select it.
- 3 Click **HH Waitlist**. This will display all children in the household who are on the waitlist.
- 4 Select the child you wish to update and click **Change**.

Figure 8: The Waitlist Update screen for a Family Member

5 This is the entire waitlist record. You can change information on this screen or on the subsequent **More Details** and **More Opt** screens. Make your changes and any appropriate Comments, click **OK** or **Process** to save.

Notes: Be careful. Changing data on these screens can potentially change the position of the person on the waitlist.

Changing a Waitlist Status to ‘Placed’:

When a child is placed into a Center program or Provider home from the waitlist, you should update that child’s waitlist status *from Active to Placed*. Doing this will:

- Help keep your waitlist accurate by removing children who have been placed
- Allow you to run the **CYS Waitlist Placed Statistics Report** (Reports → CYS → Central Reg/Waitlist Reports → Waitlist Placed Statistics Report) which:
 - Provides statistics related to the number of days family members spend on a waitlist prior to being placed in a program or Provider home.
 - Allows you to see how many people were placed into programs/homes within a selected date range.
 - Allows you to see priority and age group stats along with Average Wait, Longest Wait and Shortest Wait.

To Change a Waitlist Status to ‘Placed’:

- 1** Go to **Daily → CYS → CR Search For Care**.
- 2** Lookup the household and select it.
- 3** Click **HH Waitlist**. This will display all children in the household who are on the waitlist.
- 4** Select the child you wish to update and click **Change**.
- 5** Toggle the **Placed** radio button located on the *W/list Status* line. Note the immediate appearance of the **Placed Date** field below.
- 6** Enter a date in the **Placed Date** field and add **Miscellaneous Comments** as required.

- Click **OK** to save your changes.

Figure 9: The Waitlist Update screen for a Family Member showing 'Placed' status and date

Waitlist Inquiry

The Waitlist Inquiry allows you to view each waitlist: Projected, Excess Demand and Preference for Care.

- Go to **Inquiry → CYS → CYS Waitlist Inquiry**. When you first go in to this program, everyone on the waitlist is displayed, Infants are mixed with Pre-Toddlers and etc.
 - The Waitlist Inquiry browser contains 22 data columns for each entry. Scroll to the right using the scroll bar located on the bottom of the browser to view this information.
 - If you need to change any information, refer to the **Changing or Updating Information on an Existing Waitlist Record** section of this document.

Note: The age category in the **Current Age Group** column reflects how old the child is today.

The **Req. Age Group** is the type of care the child is currently waiting for and ultimately controls what list the child will show on when using the Class Restriction option.

Waitlist Inquiry

Projected Care
 Excess Demand
 Preference for Care

WList	Name	Spon Soc Sec	F/M Age	Current Age Group	Req. Age Group	Priority Code	Priority	Initial D
1	Riana Burda		03 Yrs 5 Mos	PreschoolAge (3 - 4)	4-PS	2NONDDD	2	12/04/07
2	Hunter Hill		09 Yrs 10 Mos	SchoolAge (1st - 5t)	6-SA	2NONDDD	2	02/11/08
3	Jacob Jones		06 Yrs 9 Mos	SchoolAge (1st - 5t)	6-SA	3LOCAL	5	01/15/08
4	Drayton Thomas		04 Yrs 2 Mos	PreschoolAge (3 - 4)	4-PS	2NONDDD	2	01/16/08
5	Amber Rosner		06 Yrs 2 Mos	SchoolAge (1st - 5t)	6-SA	1MIL/DOD	1	01/22/08
6	James Palmer		08 Yrs 2 Mos	SchoolAge (1st - 5t)	6-SA	2NONDDD	2	03/05/08
7	Jerysis Culley		08 Yrs 0 Mos	SchoolAge (1st - 5t)	6-SA	3LOCAL	5	01/22/08
8	Samantha Bell		07 Yrs 9 Mos	SchoolAge (1st - 5t)	6-SA	1MIL/DOD	1	01/23/08
9	Kyle Bell		06 Yrs 2 Mos	SchoolAge (1st - 5t)	6-SA	1MIL/DOD	1	01/23/08
10	Kaley Flores		05 Yrs 9 Mos	Kindergarten-Age (Ki	5-KIND	1MIL/DOD	1	01/23/08
11	Joseph Franco		07 Yrs 9 Mos	SchoolAge (1st - 5t)	6-SA	3LOCAL	5	01/24/08
12	Shannon Ransom		05 Yrs 10 Mos	Kindergarten-Age (Ki	5-KIND	2NONDDD	2	01/25/08
13	Allie Bedoya		06 Yrs 6 Mos	SchoolAge (1st - 5t)	6-SA	3LOCAL	5	01/28/08
14	Jaylon Ferdinand-Bessant		07 Yrs 9 Mos	SchoolAge (1st - 5t)	6-SA	3LOCAL	5	02/28/08
15	Aaron Taylor		04 Yrs 8 Mos	PreschoolAge (3 - 4)	4-PS	3LOCAL	5	01/29/08
16	Justin Taylor		08 Yrs 2 Mos	SchoolAge (1st - 5t)	6-SA	3LOCAL	5	01/29/08
17	Termaine Fisher		06 Yrs 4 Mos	SchoolAge (1st - 5t)	6-SA	3LOCAL	5	01/29/08
18	Tristan Handstorf		07 Yrs 5 Mos	SchoolAge (1st - 5t)	6-SA	1MIL/DOD	1	01/29/08
19	Unborn Duclos		06 Yrs 3 Mos	SchoolAge (1st - 5t)	6-SA	1MIL/DOD	1	01/29/08
20	Navia Winona Drake		07 Yrs 10 Mos	SchoolAge (1st - 5t)	6-SA	3LOCAL	5	01/31/08
21	Evan Willaford		07 Yrs 3 Mos	SchoolAge (1st - 5t)	6-SA	3LOCAL	5	02/01/08
22	Henry Lynn		07 Yrs 1 Mos	SchoolAge (1st - 5t)	6-SA	3LOCAL	5	02/03/08

Figure 10: The Waitlist Inquiry screen

2 The **Class Restrict** option allows you to narrow the list to children waiting for a certain type of care.

- For example, if you select any full day Pre-School classroom and click **OK**, the list will show only those children who are waiting for a full day Pre-School opening at that center/location.

CYMS Wait List Enrollment - Activity Selection

Activity Section 1783-A109 FD (Tod)

Figure 11: The Waitlist Inquiry screen, Class Restriction selection

Waitlist Inquiry

Projected Care
 Excess Demand
 Preference for Care

WList	Name	Spon Soc Sec	F/M Age	Current Age Group	Req. Age Group	Priority Code	Priority	Initial D
1	Riana Burda		03 Yrs 5 Mos	PreschoolAge (3 - 4)	4-PS	2NONDDD	2	12/04/07
2	Drayton Thomas		04 Yrs 2 Mos	PreschoolAge (3 - 4)	4-PS	2NONDDD	2	01/16/08
3	Aaron Taylor		04 Yrs 8 Mos	PreschoolAge (3 - 4)	4-PS	3LOCAL	5	01/29/08
4	James Taranto		03 Yrs 9 Mos	PreschoolAge (3 - 4)	4-PS	2NONDDD	2	02/04/08
5	Amarion Brown		04 Yrs 3 Mos	PreschoolAge (3 - 4)	4-PS	3LOCAL	5	02/04/08
6	Kirk Li Charley		04 Yrs 11 Mos	PreschoolAge (3 - 4)	4-PS	1MIL/DOD	1	01/08/08
7	Caleb Gieger		04 Yrs 5 Mos	PreschoolAge (3 - 4)	4-PS	1MIL/DOD	1	02/11/08
8	Samantha Lockett		04 Yrs 10 Mos	PreschoolAge (3 - 4)	4-PS	1MIL/DOD	1	02/12/08
9	Jared Cousins		04 Yrs 3 Mos	PreschoolAge (3 - 4)	4-PS	2NONDDD	2	02/12/08
10	Chelsey Gillespie		03 Yrs 6 Mos	PreschoolAge (3 - 4)	4-PS	3LOCAL	5	02/13/08
11	Lydia Isom		04 Yrs 3 Mos	PreschoolAge (3 - 4)	4-PS	3LOCAL	5	01/15/08
12	Thomas Lopez		03 Yrs 6 Mos	PreschoolAge (3 - 4)	4-PS	2NONDDD	2	02/15/08
13	Lashonda Baca		03 Yrs 5 Mos	PreschoolAge (3 - 4)	4-PS	2NONDDD	2	02/19/08
14	Dayvon Dunwoody		04 Yrs 10 Mos	PreschoolAge (3 - 4)	4-PS	1MIL/DOD	1	02/19/08
15	Ryley Cranford		03 Yrs 10 Mos	PreschoolAge (3 - 4)	4-PS	3LOCAL	5	02/19/08
16	Rochell Hart		03 Yrs 7 Mos	PreschoolAge (3 - 4)	4-PS	3LOCAL	5	02/19/08
17	Javier Hart		03 Yrs 7 Mos	PreschoolAge (3 - 4)	4-PS	3LOCAL	5	02/19/08
18	Isabelle Guzman		03 Yrs 7 Mos	PreschoolAge (3 - 4)	4-PS	1MIL/DOD	1	02/19/08
19	Mackenzie Lepie		03 Yrs 5 Mos	PreschoolAge (3 - 4)	4-PS	2NONDDD	2	10/05/07
20	Patricia Dikes		04 Yrs 4 Mos	PreschoolAge (3 - 4)	4-PS	3LOCAL	5	12/12/07
21	Angelina Lozoya		03 Yrs 9 Mos	PreschoolAge (3 - 4)	4-PS	3LOCAL	5	02/21/08
22	RaeKwon Canty		03 Yrs 4 Mos	PreschoolAge (3 - 4)	4-PS	1MIL/DOD	1	07/26/07

Figure 12: The Waitlist Inquiry screen after Class Restriction

- 3 The **Loc Restriction** option can be used to show the number of children who are waiting for care at a particular location. The **H/H Information** option can be used to show basic household information, such as sponsor/spouse name, phone numbers, address email, etc... for whatever name is highlighted in the browser.

Waitlist Processing

Waitlist Processing is the recommended program to use when calling parents on the waitlist to fill a space in your classroom. It can also be used to move someone from one waitlist to another, to inactivate or delete someone from the waitlist or change any other piece of information connected to the child's waitlist record.

- 1 Go to **Daily → CYS → CR Waitlist Processing**.
- 2 Select an activity – typically you'll select one that has an opening – and click **OK**. You will then be shown a list of people waiting for that type of care.

Mem#	Name	W/List Category	Cur Age	Cur Age Group	Req. Age Group	Priority Code	Priority	Initials
3	Drayton Thomas	Pref For Care	4 Yrs 2 Mos	Preschool-Age (3 - 4	4-PS	2NONDOD		2/01/11
3	Aaron Taylor	Pref For Care	4 Yrs 8 Mos	Preschool-Age (3 - 4	4-PS	3LOCAL		5/01/25
5	Amarion Brown	Pref For Care	4 Yrs 3 Mos	Preschool-Age (3 - 4	4-PS	3LOCAL		5/02/04
3	James Taranto	Pref For Care	3 Yrs 9 Mos	Preschool-Age (3 - 4	4-PS	2NONDOD		2/02/04
3	Kirk Li Charley	Pref For Care	4 Yrs 11 Mos	Preschool-Age (3 - 4	4-PS	1MIL/DOD		1/01/08
4	Caleb Gieger	Pref For Care	4 Yrs 5 Mos	Preschool-Age (3 - 4	4-PS	1MIL/DOD		1/02/11
3	Jared Cousins	Pref For Care	4 Yrs 3 Mos	Preschool-Age (3 - 4	4-PS	2NONDOD		2/02/11
3	Samantha Lockett	Pref For Care	4 Yrs 10 Mos	Preschool-Age (3 - 4	4-PS	1MIL/DOD		1/02/11
3	Chelsey Gillespie	Pref For Care	3 Yrs 6 Mos	Preschool-Age (3 - 4	4-PS	3LOCAL		5/02/11
4	Lydia Isom	Pref For Care	4 Yrs 3 Mos	Preschool-Age (3 - 4	4-PS	3LOCAL		5/01/11
5	Thomas Lopez	Pref For Care	3 Yrs 6 Mos	Preschool-Age (3 - 4	4-PS	2NONDOD		2/02/11
3	Javier Hart	Pref For Care	3 Yrs 7 Mos	Preschool-Age (3 - 4	4-PS	3LOCAL		5/02/11
3	Ryley Cranford	Pref For Care	3 Yrs 10 Mos	Preschool-Age (3 - 4	4-PS	3LOCAL		5/02/11
4	Rochell Hart	Pref For Care	3 Yrs 7 Mos	Preschool-Age (3 - 4	4-PS	3LOCAL		5/02/11
3	Isabelle Guzman	Pref For Care	3 Yrs 7 Mos	Preschool-Age (3 - 4	4-PS	1MIL/DOD		1/02/11
3	Dayvon Dunwoody	Pref For Care	4 Yrs 10 Mos	Preschool-Age (3 - 4	4-PS	1MIL/DOD		1/02/11
3	Lashonda Baca	Pref For Care	3 Yrs 5 Mos	Preschool-Age (3 - 4	4-PS	2NONDOD		2/02/11

Figure 13: The Waitlist Processing screen

- 3 Choose which waitlist you want to work with: Policy dictates that you work from the **Preference for Care** list first. The idea being, if they accept, it is likely that they would be leaving a center or provider since these are individuals who were given viable options at one time. You can then offer the slot they are vacating to an Excess Demand family.
- 4 Select the child and click on **Enrollee Information** to see basic household information, such as sponsor/spouse name, phone numbers, address, email, income category, DOB, etc. Or click HH Inquiry for access to other household information.
- 5 Select a child and click **Waitlist Update** to update or change waitlist information based on your conversation with the parent. At the very least VSI recommends that you make Miscellaneous Comments to 'log' your discussion with the parent. If the parent accepts the vacancy, they are typically expected to register and pay a deposit. VSI recommends that you wait until the parent shows up to officially accept the vacancy to enroll the child, status them as Placed and enter a Placed Date.

- 6 To delete the selected child from the waitlist highlight the name and click **Remove From Waitlist**. This will **remove the entire waitlist record**, including Waitlist Comments (for this reason, this option is rarely used).
- 7 Highlight a child and click **Transfer to New Waitlist** to move the selected child from Projected to Excess or from Excess to Preference.
 - This option would be used when Projected Care patrons have arrived and are no longer considered future care. They are now either Excess or Preference. Technically a new Search for Care should be run for these individuals in order to place them on the proper list, as circumstances may have changed and viable options may now be available. If you re-do your search for this child, it is recommended that you inactivate the old Projected Care entry in Search for Care/HH Waitlist and copy any Comments to the new Excess or Preference for Care record.

Waitlist Age Group Advance

As children age (Infants become Pre-Toddlers, Pre-Toddlers become Toddlers and etc...), the Waitlist Age Group Advance program will shift children automatically to insure they are waiting for the proper program.

For example: An Infant who comes in “today” will be waitlisted for an Infant opening. Six months from now they may turn into a pre-tod. Running the **Waitlist Age Group Advance** program will shift that child from waiting for an infant opening to waiting for a pre-tod opening.

This process can be scheduled to run.

- 1 Go to **Period End → CYS → CYS Waitlist Processes → CYS Waitlist Age Group Advance**.

Figure 14: The CYS Waitlist Age Group Advance program selection screen

- 1 **Aging Date:** Generally you will use “today’s” date. This will shift children based on how old they are “today.”
- 2 **Beginning/Ending Age Group:**
 - Run this program **weekly** for Age Groups Infant through Toddler OR Infant the Pre-School. To determine what age range your base should use, consider the following:
 - If you wish for the children who have recently become Pre-Schoolers to continue waiting for Toddler care, use Infant through Toddler.

- If, however, you wish for those Pre-Schoolers to shift to waiting for PS care, use Infant through Pre-School.
 - Run this program **once per year** for all Age Groups. Typically this should be done either at the end of a school year or just prior to the beginning of a school year.
- 3 **No DOB Option:** Your selection here tells CYMS how to waitlist children with no birth date on their **Family Member Core Information** screen.
 - As long as Infant was chosen during the initial search, **Leave As Is** should suffice.
 - 4 **Print Group Advance Log:** If selected, this will print a list of the children whose Age Group was shifted. The report will show only those children who moved to a new Age Group. We recommend you print this report.
 - 5 Click **OK** to run the Age Group Advance program.

Notes: For children that moved from PS to Kinder or Kinder to SA or SA to MST you will need to update their waitlist record with the proper program type(s). For instance, a child who was waiting for Kinder care probably had Program Types linked to their waitlist record of Bef-Kind and/or Aft-Kind. Once they are officially a School Ager, the Program Types on their waitlist record should be updated to Bef-Sch and/or Aft-Sch or whatever is appropriate for your database. Failure to do this will cause these children to not appear on their proper waitlist. This can be done through Search for Care/HH Waitlist.

HH Waitlist Status Change

This program allows you to change waitlist statuses from Active to Inactive in bulk. This program:

- Inactivates waitlist entries that have not been renewed within a specified period of time.
- Ensures that your waitlist stays current and clean.

This process should be run **monthly** using an **Inactive Cutoff Date of** 3-6 months ago depending on how often your parents are required to renew their waitlist entries.

Notes:

- Inactive waitlist records do not show in **Waitlist Inquiry** or in **Waitlist Processing**.
- Making children Inactive **does not** delete comments or dates, etc. tied to their waitlist record.
- You can still go into Search For Care, click **HH Waitlist**, click **Change**, and see details of the entry and manually make it Active again.

- 1 Go to **Period End → CYS → CYS Waitlist Processes → CYS HH Waitlist Status Change**.

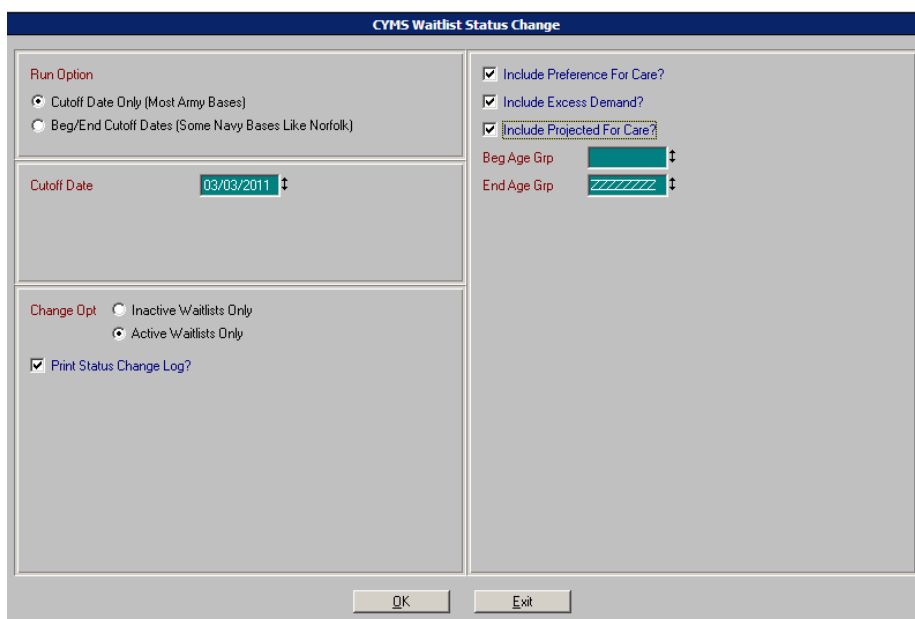


Figure 16: The CYS Waitlist Status Change program selection screen

- 2 Select Cutoff Date Only for your run option.

Note: Norfolk Naval Base uses the **Beg/End Cutoff Dates** option. Norfolk is the only known exception to **Step 2** above.

- 3 Select **Active Waitlists Only** and make the **Inactive Cutoff Date** some time between three (3) and six (6) months ago. If you require your parents to call every 90 days to renew, VSI recommends using a date of 120 days ago to be extra generous.

*****CAUTION*****
Do **NOT** use “today’s” date as the **Inactive Cutoff Date**. Doing so will *inactivate everyone* on your waitlist.

- When running for **Active Waitlists Only**, the program compares the **Inactive Cutoff Date** to the child’s **Last Renewal Date**. If there is no **Last Renewal Date**, the program will use the **Initial Date**.
 - If the **Last Renewal Date** or if that is not present, the **Initial Date**, falls *before* the **Inactive Cutoff Date** the person is made Inactive on the waitlist.
- 4 Select which Waitlists you wish to include: Preference for Care, Excess Demand and/or Projected Care
 - For instance: If you don’t require your Projected Care parents to call in and renew, you would not want to include them here. However, for Annual Report/Demographic Statistics purposes, VSI recommends that *all* waitlisted patrons be required to renew.

Note: The **Inactive Waitlists Only** option is used to **activate** children on your waitlist. It is used only if you ran the program for **Active Waitlists Only** using “today’s” date by mistake, thus causing all waitlist entries to become Inactive.

- In that event, (when running for Inactive Waitlists Only), the system compares the Inactive Cutoff Date to the waitlist record’s Last Renewal Date or (if that is absent) to the Initial Date

- If the Renewal Date or Initial Date is *greater* than the Inactive Cutoff Date, the record is made Active again.

Waitlist Purge

The Waitlist Purge program permanently removes children from the waitlist. Everything associated with the waitlist record is removed from the system including Waitlist comments.

- To get a 'purged' person back on the waitlist, you would have to re-run Search for Care.
- The frequency with which you run this program depends on how long you are required to maintain Waitlist records for Inactive entries. Typically VSI encourages bases to keep records for at least 3 years.

1 Go to **Period End → CY5 → CY5 Waitlist Processes → CY5 Waitlist Purge.**

Figure 17: The CY5 Waitlist Purge program selection screen

- Enter a **Renewal Cutoff Date** of **at least 3 years ago**, or more depending on your local policies.
 - Do not run this program with the “today’s” date as the Renewal Cutoff Date
- Select **“Include Inactive Waitlist Records”** and **“Include Placed Waitlist Records”** only.
 - Do **not** run with the **“Include Active Waitlist Records”** option selected unless directed by VSI.
- Enable the **Print Purge Log** to print a report detailing the names deleted.
- Use the **Program Type Option** dual select list to **Skip** or **Include** certain **Program Types**.
 - Leaving all entries in the **Skip** column will run for **all** Program Types.

You can also delete names from your waitlist by using **Search for Care**, clicking **HH Waitlist** and using the Delete option

Missing HH Waitlist Purge

This program should be run only to remove Waitlist entries that have a ? in the Household or Name field. This would be visible in Waitlist Inquiry.

- 1** Go to **Utilities** → **CYS** → **Waitlist Missing HH Purge**.
- 2** Select the **Purge CYMS Waitlist Records Without Households?** option.
- 3** Click **Process**.