

# #11 - CYMS Training Guide – Reports (System)

(10.3 – Updated Oct 2011)

## INDEX – Reports Included

### Global Reports

- Global Child Care Statement
- Global HH Trial Balance II
- Global HH Transaction History
- Global Receipt Reprint

### Pass Reports

- Pass Type Membership Report
- Pass History Analysis
- Average Daily Attendance Report
- Pass RecConnect

### Activity Reports

- Activity Listing
- Activity Roster
- Class Attendance Worksheet
- Activity RecConnect

### System Reports

- HH Balance Aging Report
- HH Pay Code Audit

## Basic Concepts

This guide contains a **sampling** of reports found under the Menu Bar headers for **Global, Activity, Pass, Court** and **System**. A separate guide (**CTG-12 CORE Reports – CYS**) covers reports found under the **CYS** Menu Bar. This is by no means a comprehensive list of reports that CYMS can produce.

All reports in CYMS can be run multiple ways. Selection criteria include different locations, dates, times, sorts, detail/summary, ages/grades etc. The best way to “learn” about reports is to jump in and experiment with them. You can’t hurt anything in the database by running a report. Start with a small selection of data where you can validate the results – try different settings and views until you find the look you need for the task at hand!

You can press **F1** from any screen in CYMS to obtain field level help.

Before running a report it is extremely important to understand the concept of **Range and Browser vs. Browser Only**. Refer to CTG-15-CORE-Reports Range and Browser for more information.

## Global Reports

### **Global Childcare Statement – Tax Statement for Parents (sa0525)**

**Path to:** Reports → Global → Global Financial Reports → Global Childcare Statement

This report provides parents with a record of payments made toward balances in Programs flagged as “child care” activities. The ‘Child Care Activity’ toggle is located on the **Core 2** screen of **Activity Section Maintenance**. The Global Child Care Statement:

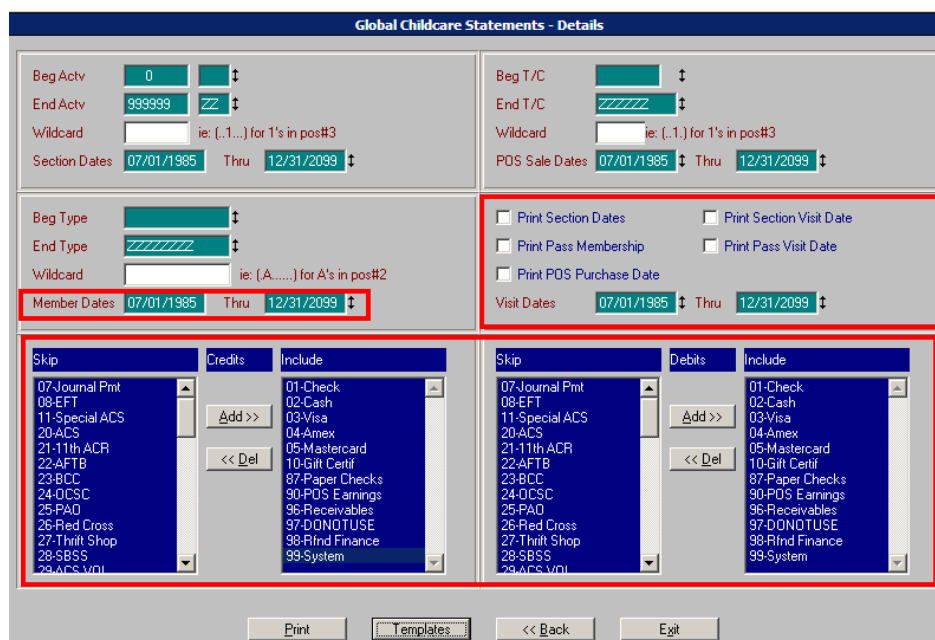
- Can be run to include money paid against Activities, Pass Registrations (Annual Registrations) and/or Pass Visits (Hourly Care/Late Pickups).
- Can be run for any date range. This is helpful if you have a parent that is PCSing in the middle of a calendar year.
- Right-click into the **Cmnt Code** field to select the “Childcare Report/Tax Statement/IRS” comment code, if your branch uses one.
- Can be run in email ‘mode’.
- Can be run to Sub-Total Payments by the Month and Totals by Family Member.

#### **First Screen:**

- If printing childcare statements one person at a time, select **Browser Only** and **Add** the household into the Browser.
- Select **Date Range**
- Include at a minimum, **Actv Reg. If you wish to include payments made against Hourly and Pass Registration Fees** you would toggle to include **Pass Reg** and **Pass Visits**.
- Determine whether you wish to print the **Statement as a Mailer**, whether you wish to see **Monthly Totals** and/or whether you wish to see Family Member payment totals.
-

**Figure 5: Global Child Care Statement Main screen, showing one household and 'Browser Only' selected**

- On the **Details** screen:
  - The **Member Dates** and **Visit Dates** should be 7/1/1985 thru 12/31/2099.
  - VSI recommends that you **do not** toggle to print section dates, membership dates, POS Dates or visit dates
  - Use the **Pay Code** dual selection list to **Include** or **Skip** pay codes.
  - Include pay codes for **Check, Cash** and **Credit Cards**. Also include **Pay Codes 90 and above (including Pay Code 99)**. **Pay Code 99** shows system movements of advance payments parents have made *from* the advance payment Control Account to the Revenue account. You may have other valid pay codes that should be included. **NOTE:** If you are operating in a Receivables database you would skip pay code 96 – it shouldn't change the parent's payment total, but the report will be smaller and easier to read.
  - **SKIP** all pay codes in both columns that reflect **Discounts, Agency Payments, Vacation Credits, Journal Payments** or other methods of payment where **no money is exchanged**. Failure to skip these types of codes may overstate the parent's Net Payment amount.



**Figure 6: Global Child Care Statement Details screen with Check, Cash, Credit Card and Pay Codes 90 and above (including 99) selected**

**Note:** This report can also be run by classroom. On the Main screen, toggle the Range and Browser option. Leave the name range as <blank> thru ZZZZZZZZ.

On the Details screen, enter a Beginning and Ending Activity.

## **Global Household Trial Balance II (sa0565)**

**Path to:** Reports → Global → Global Financial Reports → Global HH Trial Balance II

This report lists households that owe money and/or have a credit balance. This can now be scheduled on the app server.

This report lists the *Household Name*, the *Module-By-Module Balances* and *Total Balance Due* or *Total Credits for the Household* for the ranges selected.

Global Trial Balance II should be run at periodic intervals throughout the month:

- On the last business day of the month after all payments have been entered and before billing for credit balances. This will give you an accurate Month End Control Account balance. If you run the report too late or too early, you cannot use the report to balance your Control Account. Recommend scheduling the report on the app server to ensure a 'clean, dark of night' look.
- At times of the month when parents should not have a balance – for instance, if semi-monthly billing, on the 8<sup>th</sup> and 23<sup>rd</sup> of the month.
- Some bases elect to print this before and after every installment billing.

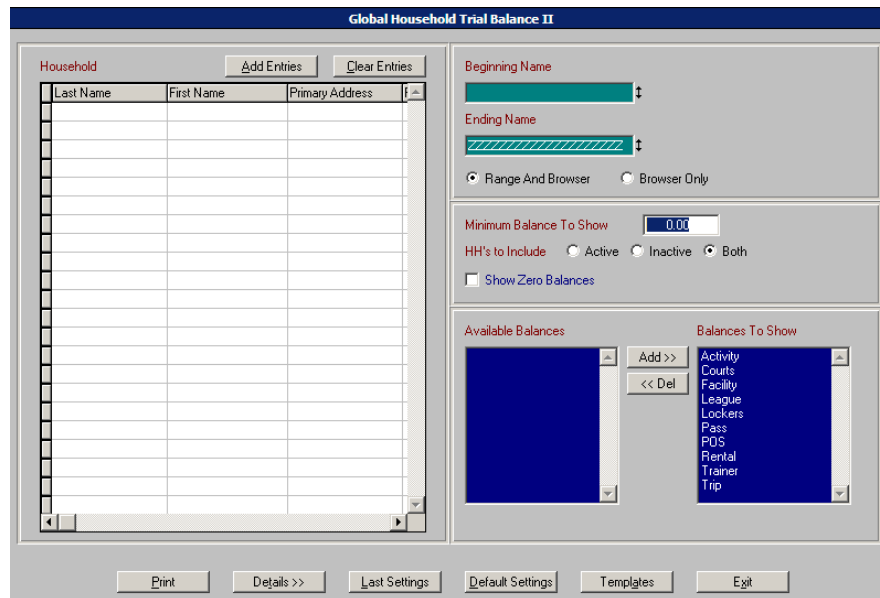
### **Notes:**

- Finance (Army only) wants a copy of this report for credit balances only, *before* and *after* every Installment Billing run.
- Finance (all branches) also wants copies of this report, one for debits only AND one for credits only on the last business day of *every* month after all payments and transactions have been processed and **before** Installment billing for the 1<sup>st</sup> of the next month.

- This report is typically run for your entire database using a name range of <blank> thru ZZZZZ with **Range and Browser** toggled.
- **Minimum Balance To Show** field:
  - Enter .01 to view households with a **balance due** of at least \$0.01 or more in any module.
  - Enter .01- to view households with a **credit** of at least \$0.01 or more in any module.
  - Enter 0.00 to view all households with **credits and/or balances** of any amount in any module.

**Note:** Using 0.00 in **Minimum Balance To Show** is a good way to find households with offsetting debit/credit balances (such as a \$20 balance in Activity and a \$20 credit in Facility) but whose overall balance displays as \$0.00

- Other dollar amounts can be substituted. If you want to see people with a balance of \$100 or more, enter in 100.00 in **Minimum Balance to Show** field.
- **Households to Include:** Select the Both option.
- Do not select to **Show Zero Balances** unless you want to view households with a zero balance in all modules. Households with offsetting debit/credit balances, as in the example above, will be displayed regardless of your selection here.
- Use the Balances dual selection list to **Include** the modules you wish to display. For best results, include *all* modules.
- **Note:** If Navy you may elect to filter by **HH Feature** on the **Details** screen.



**Figure 7: Global Trial Balance II Report screen showing selections for all households with a debit or credit in any module**

### Global HH Transaction History Listing

**Path to:** Reports → Global → Global Financial Report → Global HH Transaction History Listing

This report lists all transactions for a household, including registrations, payments, payment reversals, cancellations, fee adjustments (increases and/or decreases), billings, etc....



Txn Date	Txn #	Txn Type	Rcpt Num	Transaction Description and Details	Begin Bal	Net Fee	Paid Amt	End Bal	Fee Amt
01/22/2009	818631	Fee	172470	Pass# 16410 Type - TEST (John)	0.00	0.00	0.00	0.00	0.00
01/22/2009	818633	PRenew	172471	Pass# 16410 Type - TEST	0.00	0.00	0.00	0.00	0.00
01/22/2009	818634	PRenew	172472	Pass# 16410 Type - TEST	0.00	0.00	0.00	0.00	0.00
01/30/2009	818638	Fee	172487	Pass# 16411 Type - TEST (Liam)	0.00	0.00	0.00	0.00	0.00
03/09/2009	818830	Fee	172561	Pass# 16414 Type - CY-CHILD (Junior)	38.00	0.00	0.00	38.00	0.00
03/09/2009	818831	Fee	172561	Actv# 920100-01 (E) (Liam)	0.00	20.00	0.00	20.00	20.00
03/09/2009	818832	Fee	172561	Actv# 920100-01 (E) (Junior)	20.00	18.00	0.00	38.00	20.00
03/09/2009	818831	Canc	172562	Actv# 920100-01 (Liam)	38.00	20.00	0.00	18.00	20.00
03/09/2009	818832	Canc	172562	Actv# 920100-01 (Junior)	18.00	18.00	0.00	0.00	20.00
03/11/2009	818870	Fee	172569	Actv# 920145-01 (E) (Junior)	0.00	30.00	0.00	30.00	30.00
03/11/2009	818871	Fee	172570	Actv# 920145-01 (E) (Liam)	30.00	0.00	0.00	30.00	0.00
03/11/2009	0	Canc	172571	Actv# 920145-01 (Liam)	30.00	0.00	0.00	30.00	0.00
03/11/2009	0	Canc	172571	Actv# 920145-01 (Junior)	30.00	30.00	0.00	0.00	30.00
03/11/2009	818872	Fee	172572	Actv# 920145-01 (E) (Liam)	0.00	30.00	0.00	30.00	30.00
03/11/2009	818873	Fee	172572	Actv# 920145-01 (E) (Junior)	30.00	20.00	0.00	50.00	20.00
06/11/2009	818873	Detail Chang	172593	920145:01	50.00	0.00	0.00		0.00
06/11/2009	818634	Detail Chang	172594	16410	50.00	0.00	0.00		0.00
06/17/2009	0	Canc	172595	Pass# 16410 Type - TEST (John)	50.00	0.00	0.00	50.00	0.00
06/17/2009	0	Canc	172595	Pass# 16411 Type - TEST (Liam)	50.00	0.00	0.00	50.00	0.00
06/17/2009	818926	PRenew	172596	Pass# 16414 Type - CY-CHILD	50.00	0.00	0.00	50.00	0.00
06/17/2009	818927	Fee	172596	Pass# 16415 Type - CY-CHILD (Liam)	50.00	0.00	0.00	50.00	0.00
06/17/2009	0	Pmt	172597	Cash	50.00	0.00	50.00	0.00	0.00

Figure 9: The Household Inquiry/Txn History screen

## Activity Reports

### Activity Listing

Path to: Reports → Activity → Status Reports → Activity Listing

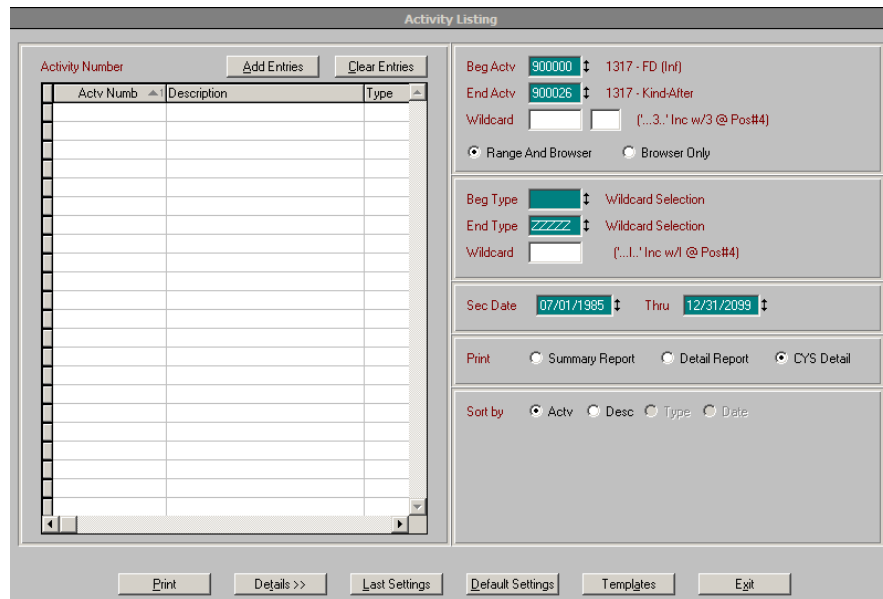
This report is used to show which of your Programs and Rooms are at capacity. It includes the Maximum Count, Enrolled Count, PCS Count, Slots Available and Future Count for each activity in the range selected.

- Prior to running this report, verify that your enrollment counts are valid.
- Go to **Period End → CYS → Future to Enrolled Status Change.**
  - Select your center's **Beginning and Ending** class range.
  - Enter an **As Of Date** of today.
  - Click **Process.**
- Go to **Period End → CYS → PCS Bulk Transfer to History.**
  - Select your center's **Beginning and Ending** class range.
  - Enter an **As Of Date** of today.
  - Click **Process.**
- Go to **Utilities → Activity → Roster Utilities → Roster Resequence.**
  - Select your center's **Beginning and Ending** class range.
  - Select to **Recalculate Enrollment Count Totals for Range.**
  - All other toggle boxes should **NOT** be selected.
  - Click **Recalc** when ready and **Yes** at the challenge message.

Failure to run these processes PRIOR to running the Activity Listing may distort your results.

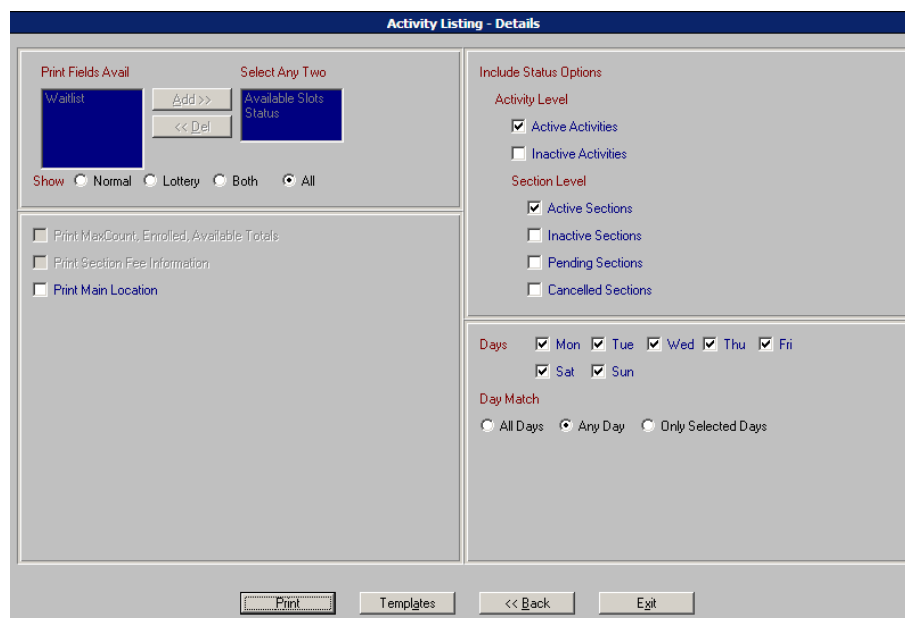
- Go to **Reports → Activity → Status Reports → Activity Listing**

- o Enter your center's **Beginning and Ending** Activity Range and select **Range and Browser**
- o Leave the **Type** range <blank> to ZZZZ
- o Enter 7/1/1985 thru 12/31/2099 in the **Sec Date** range.
- o Select **CYS Detail** as the Print Option.



**Figure 10: The Activity Listing screen with settings for one (1) center**

- On the **Details Screen:**
  - o Ensure that **Active Activities and Active Sections** is selected
  - o Ensure that all **Days of the Week** are toggled and the **Day Match** is **Any Day**.
  - o Some of the fields on the Details screen are grayed out – this is by design.



**Figure 11: The Activity Listing Details screen**

## Activity Roster

**Path to:** Reports → Activity → Roster Reports → Activity Rosters

This report lists the children enrolled in your programs including clubs, camps, homes, classrooms, sports, instructional, etc.

It is run by Activity (classroom, sport, Provider home, etc) and has over **120** options available for print and several ways to sort. This allows you to custom-design the report to your needs.

Among the many fields available for print: **names of the children, emergency contact information, addresses, birthdays, ages, grades, amounts paid, amounts due, allergies, income categories, USDA categories, sponsor grade, rank and status, HH ticklers, sponsor email address, last sports physical, allergies, medical conditions, medications, and much, much more.**

- Select your range of activities using **Range and Browser** or **Browser Only**
- Accept the default for the **Age Range, Grade Range** and **Date Range** fields (0 thru 99.99, 0 thru 19.00 and 07/01/1985 thru 12/31/2099, respectively).
  - Most problems running this report result from changing those ranges.
- Select *Use Section Date* for your **Date Option**.
- **Enroll Status:** When making selections here be sure to enable *Enroll* and be sure to consider the *PCS* and *Future* statuses.
  - Children statused as *PCS* are still in your program but are due to leave shortly. *PCS* dates can be printed on this report by including the *CYS Vacancy Date* option. Children obtain *PCS* status as a result of running the **PCS Prorate for Installment Bill** program.
  - Those with *Future* status are not yet in your program but will be starting soon. *Future* start dates can be printed on this report by including the *Enrollment Date*. Children obtain *Future* status as a result of the Program Registration process.
  - To see whether someone is *PCS* or *Future* Statuses you may elect to include *Enrollment Status* on the *Details* screen.
- Make a selection in the **Sort By** field.

Actv No	Sec	Description	Type	Sub1
---------	-----	-------------	------	------

**Activity Rosters**

Activity/Section: Add Entries Clear Entries

Beg Actv/Sec: 900000 01 1317-Belugas FD INF  
End Actv/Sec: 900007 05 1317-6 FD (PT1 A)  
Wildcard: [...] Codes w/3 @ Pos#4  
 Range And Browser  Browser Only

Age Range: 0.00 Through 99.99  
 Exclude Family Members With Blank Birthdays?

Grade Range: 00.00 Through 99.00

Date Range: 07/01/1985 Through 12/31/2099  
Date Option:  Use Section Date  Use Enrollment Date

Res Option:  Resident  Non-Res  Both

Gender Opt:  Male  Female  Both

Roster Option:  All Rosters  Changed Rosters

Sect Status:  Active  Inactive  Canc  Pend  
Enroll Status:  Enroll  W/List  Lotto  Canc  
 Future  PCS

Reg Source:  Rec  Web  Tele  Batch

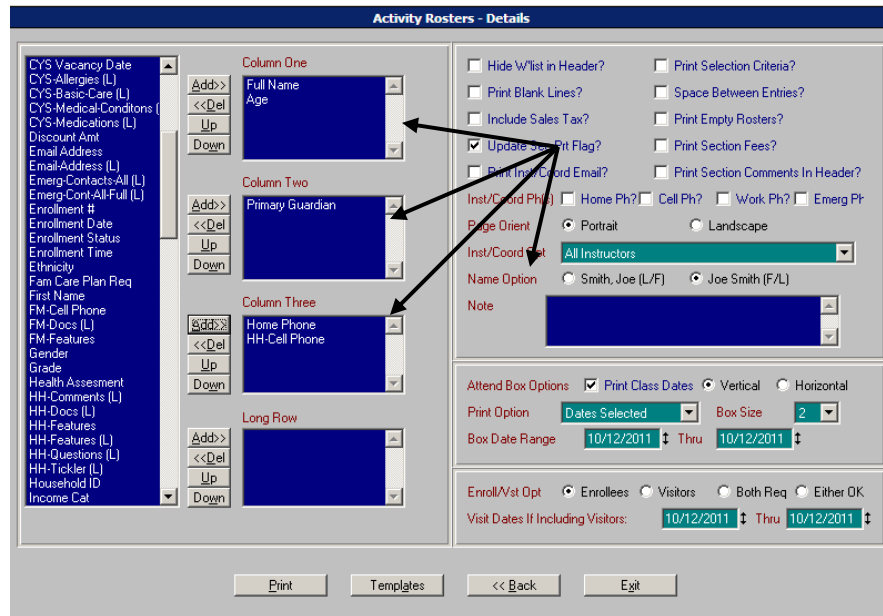
Coordinator(s):

Print Option:  Standard  Master List  Unique Master List  
Sort Option: Name

Print Details >> Last Settings Default Settings Templates Exit

**Figure 12: The Activity Roster report main selection screen sorting by Name and including Enrolled and PCS status enrollees.**

- Click the **Details>>** button.
- Use the items in the Selection List to “custom design” the report.
  - Add or remove print fields from the left selection list that you want to appear in the **first, second and third column of your report**.
  - Print fields that end in (L) may be added to the **Long Row** only.
  - The more items you add, the “busier” the report becomes.
  - Test different combinations to “design” easy-to-read reports that meet your specific purposes.
- Select a **Name Option**, either *Last*, *First* or *First Last*
- Determine whether you want to print **Attendance Boxes**.
  - If yes, you must include *Attendance-Boxes (L)* in the Long Row.
- Press **F1** for an explanation of the remaining fields or other help as needed.
- On the Details screen sample, we selected:
  - The child’s Full name (in *First Last* format) and Age
  - Sponsor (Primary Guardian)
  - Home phone and Cell Phone
  - We left the Long Row blank



**Figure 13: The Activity Roster Details selection screen**

**Note:** The **Activity History Roster Report** contains similar information for children/rosters that have been transferred to history. Go to **Reports → Activity → Roster Reports → Activity History Rosters**.

### Class Attendance Worksheet

**Path to:** Reports → Activity → Instructor Reports → Class Attendance Worksheet

This report allows you to print Sign In/Out sheets for your classrooms.

- If you select the **CYMS Sign In/Out Roster Checklist Option**, the **Week Starting** date should be a Monday. This will print 1 week’s worth of attendance boxes.

- If using the **CYMS One Day** option, you will be required to select a date range. Be careful not to select too large a range, as this option prints sign-in/out sheets for **each** day. The One Day option is formatted to allow 2 sign in/out and 4 signature lines per day for each child.
- Both options print in Landscape format.
- **Master List** allows you to print multiple sections on the same page – for instance some bases have pre-tod1 and pre-tod2 set up as separate activities but they take place in the same physical classroom.
- **Caregiver In/Out Sheet:** If this is toggled, any staff member linked to this activity in the Staff Module (Assignments Tab) will be printed on the report along with individual sign in/out time and signature lines.
- **Extra Caregiver Lines:** If you enter a number something here it will print that many extra sign in/out time and signature lines – in addition to the staff members that are linked to this activity in the Staff module.
- **Print Additional Space and Number of Extra Spaces:** If you enter a number here it will print that many blank spaces with sign in/out time and signatures lines.
- **Extra Column Label:** Some Roster Checklist Options allow the Extra Column to print. If you choose one of these options you would want to label the column accordingly. Many bases elect to use this to count their meals and enter something like this: BR | SN | LN | SN. Other might use for things like Screen Initials, etc.
- **Enroll Statuses:** Decide which statuses you wish to include.
- **Filter PCS and Future:** If this is selected we will show the Future enrollees on the sheet as of the child's start date and stop showing the PCS status child the day after their PCS date.
- On the **Details>>** screen you can select to include Home, Work or Cell or allow patrons to Fill In.
- **Header Comment Code:** You may elect to use this as a way of communicating to your parents about upcoming events or simply to remind them to provide their emergency phone for the day.
- Experiment with all options to meet multiple needs within your program: Instructional Class Daily Attendance Sheets, Transportation Rosters, etc...

This document conforms to the privacy act of 1974: 10 USC 30 31\*

Johoffield CDC (DS) CYMS Page: 1

Run Date: 07/29/05 **CLASS ATTENDANCE WORKSHEET**

Run Time: 10:12 **Actv/Sec: 900100-01 1783- Gir FD Inf** User: CYS

Room: 1783 Giraffe  
Date: 07/25/2005

Child's Name	IN	Signature	OUT	Signature	IN	Signature	OUT	Signature
AlEzra Robinson								
Brandon Hall								
Kayla Rodriguez								
Lauren Mestas								
Miranda Mestas								

**Sample 1: Class Attendance Worksheet, CYMS One Day Option Output**

**CLASS ATTENDANCE WORKSHEET**

**Actv/Sec: 900100-01 1783- Gir FD Inf**

Room: 1783 Giraffe  
Week of: 07/25/2005 - 07/29/2005

Enrollee Name	MON		TUE		WED		THU		FRI	
	IN	OUT	IN	OUT	IN	OUT	IN	OUT	IN	OUT
Al'Ezra Robinson										
Brandon Hall										
Kayla Rodriguez										
Lauren Mestas										
Miranda Mestas										

**Sample 2: Class Attendance Worksheet, CYMS Sign In/Out Option Output**

**Sample 3: Class Attendance Worksheet, CYMS One Day w/Extra Column and Caregiver Slots**



**CLASS ATTENDANCE WORKSHEET**

**Actv/Sec: 900000-01 1317-Belugas FD INF**

Room: 1317 Belugas FD Inf  
Date: 10/17/2011

Child's Name	IN	Signature	OUT	Signature	IN	Signature	OUT	Signature	BR   SN   LN   SN
Achoo AhChing (Enrolled) Ph:									
Junior Messier (Enrolled) Ph:									
Junior Weigel (Enrolled) Ph:									
Kara Messier (Future) Ph:									
Lee Ibarra (PCS) Ph:									
Liam Messier (Enrolled) Ph:									
<b>CAREGIVER</b>	<b>IN</b>	<b>Signature</b>	<b>OUT</b>	<b>Signature</b>	<b>IN</b>	<b>Signature</b>	<b>OUT</b>	<b>Signature</b>	<b>BR   SN   LN   SN</b>
Addison, Co () Ph:									
Ziegler, Caren () Ph:									

**Activity RecConnect**

**Path to:** Reports → Activity → RecConnect → Activity RecConnect

There are a variety of RecConnect reports in CYMS. Depending on which RecConnect flavor you are running will determine what demographic you are looking at. For instance, the Activity flavor allows you to target children in your programs – this includes clubs, sports, provider homes, fullday, partday, instructional, camps, etc. Court RecConnect would allow you to report on children who have made hourly reservations. There are even RecConnect modes on certain Staff and Provider reports essentially giving you the ability to email your staff and providers who are coming due or overdue for certain trainings, shots, etc.

**Every** RecConnect report allows you to do any or all of the following:

- **Process Labels** – For instance, you may elect to send a letter to your Soccer parents and wish to print name/address labels to stick on the envelope.

- **Process Report** – For instance, you may elect to see a listing of all the children who enrolled in Baseball last year.
- **Process an Email and/or Text** - For instance, you may elect to send an email and/or text to parents enrolled in your center about an upcoming meeting or event. This feature also allows you to link a doc created outside of CYMS.
- **Process Letters** – For instance, you may elect to send /create a letter to parents who are overdue for payment. (See the Pass RecConnect section of this guide for help on creating letters).
- **Process an Export** – For instance, you may elect to create an excel file showing sponsor name, child's name, sponsor status and rank.

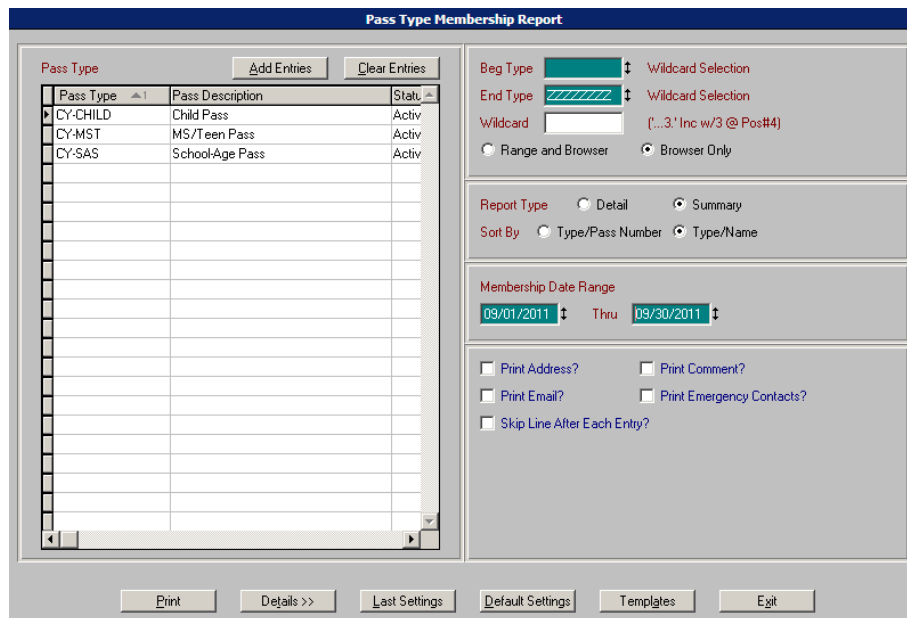
The RecConnect capability is an incredibly powerful marketing/management tool. If you are not using this feature regularly please contact VSI for assistance. We even have some bases using this vehicle to send their monthly newsletter!

## Pass / Visit Reports

### Pass Type Membership Report

**Path to:** Reports → Pass → Membership Reports → Pass Type Membership Report

This report is used to show the number of registrations/re-registrations as one number that were processed over a certain date range.



**Figure 14:** The Pass Type Membership report main selection screen

- Run using Browser Only and select your Child, School Age and Middle school/Teen pass types.
  - Run in Summary mode to see how many passes were issued or renewed.
  - Run in Detail mode to see the names of the children.

- Membership Date Range: This range keys on the member date on the passes. Example: To see all the registrations/re-registrations done last month, put last month's date range here.

## Pass History Analysis Report

**Path to:** Reports → Pass → Membership Reports → Pass History Analysis Report

This report will provide a breakdown of how many new passes vs renewals you had as two separate numbers.

- Select the Child, SA and MST pass.
- De-Select Print Details unless you want to see names.
- Select to Print Subtotals by Pass Type.
- Toggle to include New Members and Renewed Members – if you want to see more, select accordingly.
- Select the History Date Range you wish to report on – for instance if you wish to see how many new registrations and renewals you did last month, enter last month's date range here.
- On the Details screen leave your member and expiration date ranges as 7/1/1985-12/31/2099

**Figure 15: The Pass History Analysis report main selection screen**

## Average Daily Attendance

**Path to:** Reports → Pass → Visit Reports → Average Daily Attendance Report

You can use this report to view average attendance figures for a date range. Most bases run this on a weekly basis, but it can be done for a larger date range.

You can run this report for visits to your center or a range of locations and/or pass types.

- To run this report for one Center
  - Select the **Pass Range** you wish to report on.
  - Select the **Location Range** and Browser, and enter a single location in both fields.
  - Enter the **Date Range** over which you want to search.
  - Enter a **Time Range** over which you want to search (recommend using a time of 1 hour before you open thru 1 hour after you close).

- Select which **Days of the Week** you are open and which stats you wish to print.
- **Unique Visits Only** (Date/Member/Location): Typically this should be selected. If this is left de-selected and a child has two swipe in/out in a given day the system will count them as having two visits causing your average number to be inflated. From a SA perspective this can be controlled by restricting your time range (what is the average before school attendance vs after school attendance), but from a Youth perspective you should definitely consider selecting the Unique Visits Only toggle.

Figure 16: The Average Daily Attendance Report selection screen

## Pass RecConnect

**Path to:** Reports → Pass → Pass RecConnect

There are a variety of RecConnect reports in CYMS. Depending on which RecConnect flavor you are running will determine what demographic you are looking at.

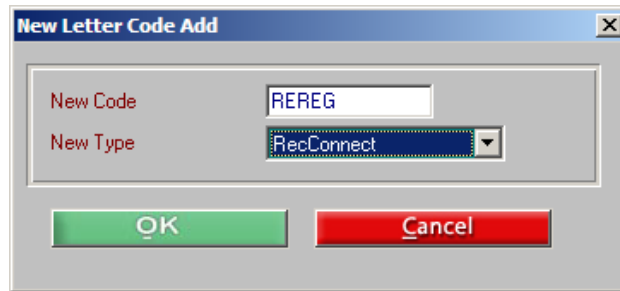
For instance, the Pass flavor allows you to target children who are registered. You may elect to target children who are registered in general or for a specific pass type or target children who are overdue or coming due for re-registration.

**Every** RecConnect report allows you to do any or all of the following:

- **Process Labels** – For instance, you may elect to send a letter to your registered members about changes in your hourly program.
- **Process Report** – For instance, you may elect to see who is due for re-registration or how many children are registered for the CDC.
- **Process an Email and/or Text** - For instance, you may elect to email and/or text parents who are due for re-registration. This feature also allows you to link a doc created outside of CYMS.
- **Process Letters** – For instance, you may elect to send /create a letter to parents due for re-registration. See below on how to create a letter in CYMS.
- **Process an Export** – For instance, you may elect to create an excel file showing sponsor name, child's name, sponsor status and rank.

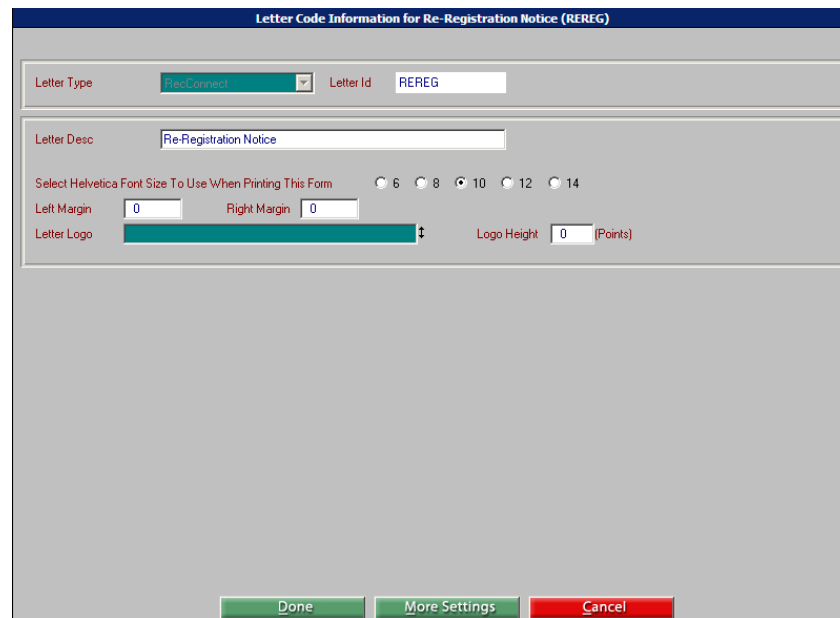
The RecConnect capability is an incredibly powerful marketing/management tool. If you are not using this feature regularly please contact VSI for assistance. We even have some bases using this vehicle to send their monthly newsletter!

- To Create a Letter:
  - Go to **Files → System → Other File Maintenance → Letter/Waiver/Rules Maintenance**.
  - Click **Add**



**Figure 17: The Letter Code Add screen**

- In the **New Code** field enter *Rereg* and select **RecConnect** as the **New Type**. Then click **OK**.
- Enter a description for this letter (e.g., *Re-registration Notice*).

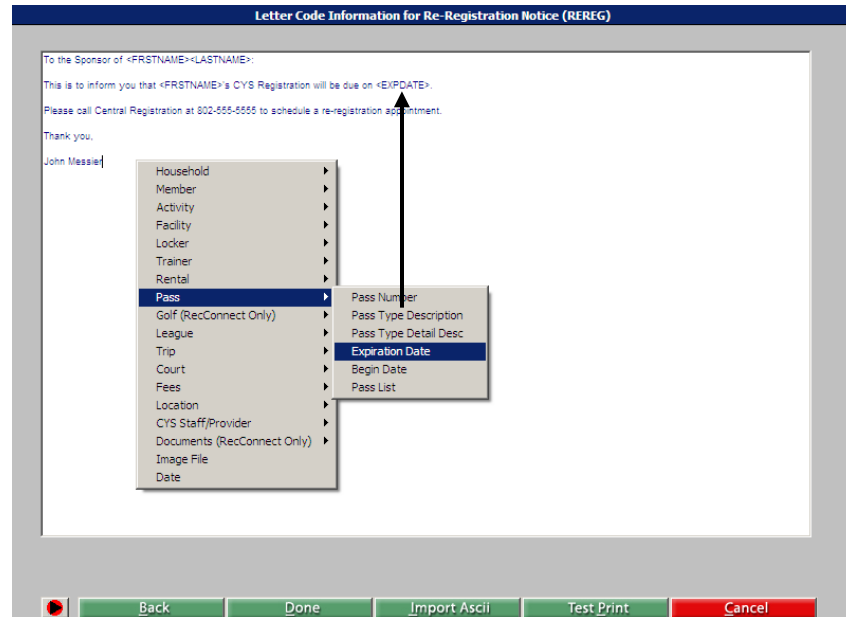


**Figure 18: The Letter Maintenance, Core Information screen**

- Click **More Settings**
- Type the body of the letter.
- You can insert fields into the letter by right clicking in the white area and selecting the field. For instance, you may wish to include the child's name and expiration date. At the point in the letter where you wish to tell the parent the expiration date, right click, go to Pass and select Expiration

Date. If you are sending this letter to 100 children with different expirations the system will insert only the proper child's expiration accordingly.

- Inserted/Auto Fill fields are denoted by <Brackets>
- You can also have the system print the pass holder's name and address and an alternate salutation, ("Dear \_\_\_\_\_"), if desired.
- Lastly, you can cut and paste a pre-drafted letter from Microsoft Word, Notepad or etc, into the letter field.



**Figure 19: Letter Maintenance, Letter Body screen showing field selections for Passes**

- Using Pass Labels and Letters to Process Letters, Emails or Reports for passes due to expire:
  - Go to **Reports → Pass → Pass RecConnect**.
  - Select the **Pass Types** you wish to target.
  - Enter a **Date Range** – in this case we will target people expiring in Nov 2011.
  - In **Date Option**, select *Expiration*
  - Select Pass Statuses to include.
    - At a minimum, toggle *Actv-New* and *Actv-Renew*
  - Select the Unique Pass # Based on Selected Statuses option.
  - In the **Minimum Pass Balance To Show** field enter 0.00
  - Consider the **Match Option**:
    - **All**: If you include all passes in your selection criteria and a Household has three (3) children and all have a pass set to expire, the household would receive 3 letters.
    - **Unique H/H**: This option will generate one letter per household pulled regardless of how many total matches were accumulated. Using the above criterion, the report would generate one (1) letter for that household
    - **Unique F/M**: This option will generate one letter per child pulled regardless of how many total matches the child accumulates. Example, if a household had 3 children, each with 2 passes expiring the system would generate three (3) letters.

- Visit the **Details** and **Additional Options** screen to make other selections, such as Age and Grade restrictions.
  - Press **F1** for field level help as needed.

**Figure 20: The Pass RecConnect main selection screen targeting unique Family Members holding a CHILD, SA or MST pass that are due to expire in November 2011**

- When you click **Print**, the system will process your selections and bring you to the **Options** screen.

**Figure 21: The Pass RecConnect options screen.**

- Select the options you wish to **Process**, such as **Report**, **Email/Text**, etc.
- Regardless of which option you selected you should click on the corresponding **Options** button for more detailed selections. **Example** – if you picked to process labels, you should select **Label Options**. If you picked to process email/text you should click **Email Options**.
- Since we are sending emails and we will click **Email Options**.

Figure 22: The Pass RecConnect Email Options screen.

- Enter an **Email Subject**
- Select the **Process Option** – in our example we will select **Process Email**.
- Enter the **Email Body**. If you created a letter that you planned on linking, simply refer to it here as the Letter will actually be an attachment on the email.
- **Optional Attachment Letter:** Right click and select the **REREG** letter that we created.
- **Email Attachments:** You might also wish to add another attachment – for instance something that shows the operating hours of central registration or what parents should bring, etc.

- Click **Back**
- **Click to Create RecConnect History Record.** This will make an entry at the household level that allows you to see what emails they have received or been a part of.
- Enter a **History Description** and **History Category** – again this will help identify what emails/texts they received.

**IMPORTANT: BEFORE clicking Process Selections – be sure you wish to continue.**

Once you click **Process Selections** the system will try to process your request.

If you didn't really want to email people you may find that it is too late. So, be sure of your settings, etc.

- Other RecConnect Reports
  - To find other **RecConnect Reports**, check these Menu Bar selections:
    - **Global (Household Features and Family Member Features)**
    - **Activity**
    - **Pass**
    - **Court** (for Hourly Care)
    - **POS**
    - **Rental** (for Instructor/Provider Lending Library)
    - **CYS (Special Needs, Shots/Health Assessments, Waitlist and Unit).**
    - **Every Staff and Provider Report has a RecConnect option**
  - The same basic concepts outlined above apply to the other RecConnect reports.



**CAUTION:** You can see ALL the payments a household has made, BUT you should not use this in place of the Global Childcare Statement (General Ledger) – Tax Statement because it shows **all** payments, not just childcare payments.

**Figure 24** The HH Pay Code Audit Report main selection screen set to search for any household with three (3) or more Journal payments during the 2010 calendar year

**Figure 25** The HH Pay Code Audit Report Details selection screen