

01 - CYMS Training Guide – Household Files

(10.3 - Updated June 2013)

Background – Registering a New Household

- 1 When a new patron comes to CYS, you must gather extensive information about the family, enter it into CYMS and process a registration before the child can start using any CYS services.

Note:

Some bases conduct desk-side interviews and the clerk enters information straight into CYMS rather than having the parent manually complete duplicative forms. There are still some external forms that might need to be completed, such as Health Assessments, Applications for Reduced DOD Fees, USDA paperwork and etc...

Installations should strive to reduce the number of registration forms that require information already stored in the CYMS database.

- 2 This “registration process” consists of three (3) key steps in CYMS. Step 1 is covered in this Training Guide. Separate Training Guides cover Step 2 and Step 3.

Step 1 – Data Intake

- Gathering **HOUSEHOLD INFORMATION**. This is information about the “family” – the sponsor, the spouse, financial information and emergency contact information.
- Gathering **CHILD INFORMATION**. This is core information about every child in the household – special needs/health; medical history and/or medications being taken; allergies, reactions and treatments; shot records and illnesses.

Step 2 – Registration (Permission to Use CYS Programs)

- Issuing a **PASS**. Issuing a pass and collecting the annual registration fee (if any) is what gives the child “permission” to start using CYS programs, such as hourly care, full day care, Middle School/Teen programs, youth sports, Provider care and etc....

Step 3 – Enrollment (Signing Up for Specific Programs)

- Enrolling the child in a **CLASS** (aka; Program), if one is available or desired.

General Rules Regarding Household (HH) Status – please note – incorrect data will distort your Annual Report.

1. The parent with the highest military rank is **ALWAYS** the Sponsor in a dual military family.
2. The military parent is **ALWAYS** the Sponsor in a **military/civilian** family.
3. **DOD Civilians** should *not* have a Service/Grade/Rank.
4. **Retired Military** should *not* have a Service/Grade/Rank, as they are considered civilians.
5. **Guard/Reserve/Coast Guard** *must* have a Service/Grade/Rank.
6. The Sponsor is **ALWAYS** Family Member #1.
7. The Spouse (or NO “Spouse”) is **ALWAYS** Family Member #2.
8. Children are **ALWAYS** Family Members #3, #4, #5 and so on.
9. There should be **no** blank family members, meaning no records that were started accidentally but never completed.
10. In a dual military household: If the Spouse is **promoted** and becomes the higher ranking parent – or if a dual military Sponsor leaves the military – you will use the Sponsor Switch Utility (cy0642) to realign the Sponsor and Spouse data. This utility automatically switches the sponsor and spouse information on the Household and Family Member screens,

including family member question data. The Relation field, however, does not get flipped. This utility **should not** be used if the sponsor and spouse are enrolled in any programs or passes, etc in the database.

11. If a **divorce** occurs: Take out all of the Spouse information, such as status, rank, etc. Do not just remove the name. The Spouse's first name would be "NO."
12. If the divorced **Spouse becomes the Sponsor**: Use the sponsor switch utility (cy0642) to move the spouse information to the sponsor screen and vice-versa. Then take out all the spouse information described in #11 above. The Spouse's first name would be "NO."

Entering Household Information (New Household)

- 1 From the Main Menu, click the **Global Sales** hot button.
- 2 Click **New Household**.
- 3 If you are set up for CYMS to automatically assign a household number go to Step 5. Otherwise, enter the Sponsor SSN (no hyphens) in the **New H/H Number** field.
- 4 Click **Add**. The **SPONSOR INFO SCREEN** will appear.

Figure 1: CYMS Household Sponsor Information screen

- 5 Enter the Sponsor's first and last name. Use mixed UPPER and lower case following the example above.
- 6 Enter the Sponsor's home address, city, ZIP code and phone numbers. If city is different than the default, overwrite it. In the **Provider** field, right click to select the Cell Phone Provider. This will allow you to text this parent during the Labels/Letters/Email process.
- 7 Select the **Housing** option choosing whether the family lives On Post or Off-Post.
- 8 Select whether you require a **Family Care Plan** from this household.

Note: This field has nothing to do with whether the household **currently** owes you a family care plan. This field indicates that this is a family that you **require** a plan from. So, whether you have one on file or not, this should be selected if this is a family you require an FCP from. Typically this means every Single Active Military and every Dual Active Military household should have this selected.

9 Reward Points: This should be selected. In the Army, this field is necessary to allow tracking of Parent Participation points.

10 Enter the **Employer/Unit**. Right click and select the proper Unit from the picklist (if applicable). Enter the **Work Phone**.

11 Enter the household's primary **Email Address**. Use commas to separate multiple email addresses. If Army, VSI recommends using the AKO email address.

12 Right click in the **Status** field to bring up the Mil Status Code picklist. Double click correct entry.

Note: This is critical annual report data. Since you are on the Sponsor screen, you should NOT select any statuses that indicate Spouse Only. Every Sponsor in the database must have a status to be counted on the annual report. Do not leave blank.

13 If the sponsor is active military (any status with M-), right-click in the **Mil Grade** field. Double click the correct entry. The **Mil Grade**, **Branch**, and **Mil Rank** fields will fill in.

Hint: You can narrow down the list by typing in the first few letters of the branch of service. Grade, Rank, and Branch should be entered only if the sponsor is Active Military, Coast Guard, Full-Time National Guard or Full-Time Reserve – any M- status. If the status is any of the civilian categories (any status that does not begin with M-), you must leave these three fields blank.

NOTE #1: Retired Military is a civilian status – do *not* add Grade/Rank and Branch!

NOTE #2: In dual military households, the parent holding this highest military rank is *always* the Sponsor. In a military/civilian family, the military parent is always the Sponsor. In a dual civilian family, the DOD-employed civilian is always the Sponsor.

14 Click **Next** to go to the **SPOUSE INFO SCREEN**.

Caution: If you press **Done** instead of **Next**, you will need to Exit from Global Sales go back into Global Sales and look up the household again by Sponsor. When the Sponsor is located, highlight the name and click the **Update HH** button on the bottom of the screen. Then click **Next** to go to the Spouse Info screen.

15 If the Sponsor is not married, there is **no** Spouse. If there is **no** Spouse, leave the Spouse Info screen exactly as it defaults. Failure to do so can cause inaccurate sponsor/spouse data on the annual report. If there is no Spouse, please skip to **Step 21**.

Figure 2: CYMS Household Spouse Information screen

- 16 If there is a Spouse, enter the Spouse's first name. If the Spouse's last name is different from the Sponsor's, overwrite it with the proper last name.
- 17 If the address is different from the Sponsor's enter it. Enter phone numbers. In the **Provider** field, right click to select the Cell Phone Provider. This will allow you to text this parent during the Labels/Letters/Email process.
- 18 Enter the **Employer/Unit** by right clicking and selecting the proper Unit in the picklist (if applicable). Enter the **Work Phone**
- 19 Right click in the **Status** field to bring up the Mil Status Code picklist. Double click the appropriate entry.

Note: This is critical annual report data. Since this is the Spouse screen, do NOT select Sponsor-specific codes.

Every valid Spouse must have a status to be counted on the annual report. Do NOT leave this field blank unless there is no Spouse.

- 20 If the Spouse is Active Duty Military, Coast Guard, Full-Time National Guard or Full-Time Reserves (any status starting with M-) right-click in the **Mil Grade** field. Double click the correct entry. The **Mil Grade**, **Branch**, and **Mil Rank** fields will fill in. If the status is any of the civilian categories, you must leave these three fields blank.
- 21 Click **Next** to go to the **DOD FINANCIAL SCREEN**.

Figure 3: CYMS Household DOD Financial screen

22 On the left side, enter any applicable admin dates.

Hint: Use the **Tab key** to move between date fields. If you make a mistake on a date, clear it using the **F8 key**, located at the top of your keyboard.

- **Sponsor Consent Date** – Typically, the registration date
- **Last USDA Update** – Typically, the date of last USDA form submitted to the state
- **Unused CYMS Date** – This field is reserved for future use.
- **FCP Due Date** – Enter the *initial* FCP Due Date. This date field should never be changed again.
- **FCP Received Date** – Typically, the date the Family Care Plan was **signed** by the Commander.
- **DEROS/PCS Date** — Can be used to record the actual (or anticipated) date the family will leave your installation.
- **Household Fee Codes** – Typically this will default to Res or blank. These are both acceptable values. If it defaults to NR, right click and select Res or leave blank and call VSI to change the default on the household device.

22 In the **Family Size** field – located in the middle of the screen – enter the family size exactly as reported on the USDA eligibility form submitted to your State.

23 In the **USDA Income Amount** field, enter the annual USDA income as reported on the USDA eligibility form submitted to your State. Press the Tab key, and make sure the correct USDA category (Free, Reduced, and Paid) displays in the **USDA Fee Catg** box.

24 In the **Family Income Amount** field, enter annual Family Income as shown on the DOD Application for Reduced Fees signed by the parent. Press the Tab key, and make sure the correct DOD income category (Cat 1, Cat 2, etc) displays in the **DoD Income Fee Category** box.

If a parent refuses to give income information, enter 999,999.00 in the income fields. The household will be charged Cat 9 rates. Entering “9’s” lets you know you didn’t forget or skip this field.

25 Click the **Next** button to go to the **EMERGENCY/MISC INFO SCREEN**.

Figure 4: CYMS Household Emergency Contact/Miscellaneous Information screen

26 Click **Add Em**.

- Enter applicable information about the emergency contact.
- Some bases use the **Relation** field to specify whether this person is a Family Care Plan designee, divorced/joint custody parent, etc.
- You can also use the **Country** field for additional information.
- **Allow Child Pickup and Take Photo Option:** If your visit device is set to Display Pickup Photos on Member Sign Outs, these fields are important. All Emergency Contacts connected to the household that have Allow Child Pickup selected will be displayed along with their photo, if one was taken. The sponsor and spouse will also potentially be displayed during the swipe out. See F1 Help for more details. Realize that while this is a nice feature it does slow down the swipe out process considerably. You may also elect to not Display Pickup Photos and instead use HH Member Update on an as needed basis.
- When finished, click **Done**.
- Repeat the process for all emergency contacts.

27 The **Household Features** section allows you to link **User Codes** to households for grouping purposes. There are numerous reports that key on household **User Codes**. For example, some bases create household user codes to specify housing areas. You can then extract demographic data on those households or target particular housing areas for mailings or emailing.

- Highlight appropriate entry in the Available column. For a description of the code, highlight it and click **Feature Desc**.
- Click **Add Feature>>** to move the code to the Linked column.

28 In the **Household Comments** field, enter comments or notes about the household that you want clerks to see. Notes entered here will be displayed here only.

29 In the **Household Tickler** field, enter comments or notes about the household that you want displayed any time the household is accessed in CYMS, including upon selection in Global Sales and during Swipe In/Swipe Out.

Remember: You should update/remove these comments/ticklers when they are no longer valid.

Note For Navy Users: SAP Account Type: Valid values are Othr (Other), COMM (Command) and SHIP (Ship). MILT or CIVL should NOT be selected.

If the SAP Account Type = Othr: The UIC Value should get populated automatically with the Installation Code (or Company Code as it is sometimes called) + C + Household ID.

Example: 1701C52000. **Do Not** delete this value. If the UIC value did not fill in automatically, please call VSI immediately.

If the SAP Account Type = COMM or SHIP: You will need to **manually delete** the system generated UIC value and replace it with the following: Unit # (COMM) or Ship Designator (SHIP).

Example: The US Naval Designator for the USS Enterprise is CVN-65. You would enter **CVN65** in the UIC field.

Navy VSI Trainer Reminder: Navy Finance requires that we set the Dynamic Parameter for Last Household Number to the existing value plus 25,000. **Example:** The Last Household Number in Dynamics is 8,301. We would add 25,000 to that and make the value 33,301. If this is a new database we would set the Last Household Number to 25,000 (this will be done automatically in the CYMS Navy Shell). ***This is a ONE TIME REQUIREMENT!***

Give Finance the range of Household numbers that they would use should they need to create a household on the SAP side. In the example above that would be 8,302 thru 33,301.

If Finance needed to create a CYMS household **on the SAP side** given the above example, they would add in the following manner:

Installation Code (or Company Code as it is sometimes called) + C + Household ID.

Example: 1701C8302

30 Click **Members** at the bottom of the screen.

31 You are now ready to start adding information about the family members.

Entering Family Member Information

Mem	First Name	Last Name	Birthday	Gender	Res	Grade	Status	Cell Phone	Email Address
1	John	Messier		Female	Yes	0.00	Active		
2	Kathy	Messier		Male	Yes	0.00	Active		

Figure 5: The Family Member Listing screen

- 1 On the **Family Member Listing** screen, highlight **FAMILY MEMBER 1** (always the **SPONSOR**) and click **Change**.
- 2 The **FAMILY MEMBER CORE SCREEN** will appear.
- 3 Right-click in the **Relation** field to bring up the Rel to Sponsor Code picklist.
 - Type S to narrow down the list.
 - Double click "Sponsor."
- 4 Right-click in the **Ethnicity** field to bring up the Ethnicity Code picklist. Double click correct ethnic choice. You should only select one when the sponsor or spouse has provided this information. **Do not** guess.
- 5 **Do not** change the **Status** field. This toggle allows you to change whether the file is active—it *does NOT refer to active duty*. Family Members should be Active.
- 6 In the **Gender** field select the appropriate option.
- 7 Click **Done**.
- 8 If there is **NO SPOUSE**, go to **Step 17**. Don't touch anything on this screen!
- 9 If there is a spouse, highlight **FAMILY MEMBER 2** on the **Family Member Listing** screen and click **Change**. **FM 2** is always the **SPOUSE** or a place holder for households with NO Spouse. **NEVER** put a child into the FM#2 slot.
- 10 The **FAMILY MEMBER CORE SCREEN** will appear.
- 11 If the spouse's last name is different than the default, overwrite it.
- 12 Right-click in the **Relation** field to bring up the Rel to Sponsor Code picklist.
 - Type S to narrow down the list.
 - Double click "Spouse."
- 13 Right-click in the **Ethnicity** box to bring up the Ethnicity Code picklist. Double click correct ethnic choice. You should only select one when the sponsor or spouse has provided this information. **Do not** guess.
- 14 **Do not** change the **Status** field. This toggle allows you to change whether the file is active—it *does NOT refer to active duty*. Family Members should be Active.

- 15 In the **Gender** field, select the appropriate option.
- 16 Click **Done**.
- 17 On the Family Member Listing Screen, click **Add**. The **FAMILY MEMBER CORE INFO SCREEN** will appear again, and you can enter information for the first child.

Figure 6: CYMS Household Family Member Core Information screen

- 18 Enter the child's first name in the first **Name** field.
- 19 If the child's last name is different than the default, overwrite it.
- 20 Enter the child's **Nick Name** (if applicable).
- 21 Right-click in the **Relation** field to bring up the Rel to Sponsor Code picklist. Select the proper relationship to the sponsor (son, daughter, foster son, etc.) and double click on it.
- 22 Enter the child's SSN if your base allows SSN tracking. *If you don't have the SSN, leave the 000-00-0000—this is critical.*
- 23 Right-click in the **Ethnicity** field to bring up the Ethnicity Code picklist. Double click correct ethnic choice. You should only select one when the sponsor or spouse has provided this information **Do not** guess.
- 24 **Alternative AFC Benefits Sponsor:** This is an **Army specific field** that has no relevance to the Marines, AF or Navy. If Army, this field is to help track AFC benefits in the event that a particular child in a household qualifies for AFC benefits but the others don't. For instance, Mom and Dad are married with one child. Dad is deployed and becomes a Fallen Warrior. Mom eventually remarries into a household with 2 other children. The biological child of the Fallen Warrior should receive Fallen Warrior benefits but the other 2 children should not. The Fallen Warrior should be linked as the biological child's Alternative AFC Benefits Sponsor. Typically, in an Army database, this field would be show as Not Linked. This field is covered in greater detail in CTG-7a.
- 25 **Do not** change the **Status** field. This toggle allows you to change whether the file is active—it **does NOT refer to active duty**. Family Members should be Active.
- 26 In the **Gender** field, select the appropriate option.
- 27 Enter the child's **Birth date**. Make sure **Age Group** and **Age** display correctly.

- 28 If the child is in Kindergarten or older, enter the **school grade** (K=.50; 1st=1.00, etc.). For Preschool-age children, leave the grade blank.
- 29 The **Features** section allows you to link user codes to family members for grouping purposes. There are many reports that key on family member user codes. For example, some bases create family member user codes to specify the school the child attends. By linking the code here, you can then extract demographic data on those family members or target children who go to particular schools for mailings or email blasts.
- Highlight appropriate entry in the Available column. (For a description of the code, highlight it and click **Desc.**)
 - Click **Add>>** to move the code to the Linked column.
- 30 Click **Next**. You will proceed to the **SPECIAL NEEDS SCREEN**.

Figure 7: CYMS Household Family Member Special Needs screen

- 31 Select the appropriate toggles if the child has special needs and/or is enrolled in the EFMP.
- 32 If applicable, enter dates for the **Special Needs Rsrc Team Init Review** and **Last SNRT Update**.
- 33 In the **Special Needs Comments** box, enter any notes for this child's special needs (e.g., "need to schedule SNRT," "contact EFMP," etc.).

Caution: Anything you enter in a comments block can be seen by other clerks/centers. Do NOT include sensitive, confidential, or derogatory information.

- 34 Enter the following dates (if applicable):
- **Health Assessment Form Date**
 - **Last Sports Physical Date**
 - **Child's Program Agreement Date**
 - **Child's Last Profile Date**

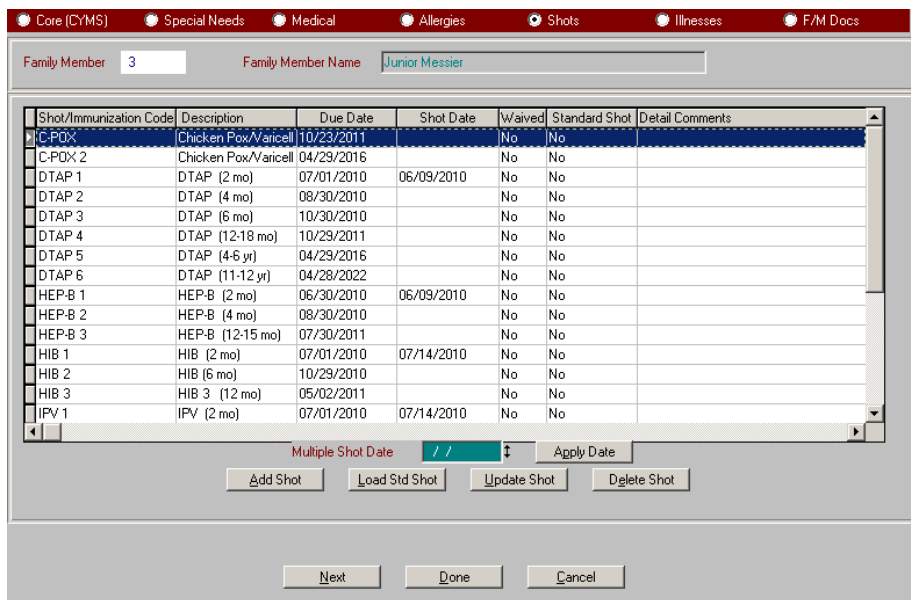


Figure 10: CYMS Household Family Member Shots screen

41 For children you wish track shots on, click **Load Std Shot** to produce a list of all shots.

Caution: Typically you would not click **Load Std Shot** for MST children unless you plan to record all of their shots back to birth.

- The computer calculates due dates based on a **Days from DOB That This Shot is to be Given** setting linked to each shot. This is done in Files→CYS→ Medical Maintenance→Shot Maintenance.

Note: If you discover an error in the birth date AFTER you load the child's shots, you must delete all of the shots and "load" them again so they are re-calculated against the new date.

- Overdue shots automatically pop up when a child swipes in. Reminders that shots are coming due can be set to pop up any number of days prior. This is done in Files→CYS→ Medical Maintenance→Shot Maintenance.
- Entering accurate data here will make the swipe process quick and easy. Take your time.

Updating shots that are due:

- Click the **Due Date** column header to sort the list by due date.
- Double click any shot you wish to update.
- In the **Shot Date** field, enter the date the shot was given, if applicable.
- If you have several shots completed on the same day, hold your CTRL key and select all of the shots you wish to update then enter the date into the **Multiple Shot Date** field and click **Apply Date**.
- If a shot was not given for a doctor/nurse verified reason, you can click the **Waive This Shot?** Toggle box and enter the reason in the **Shot Comments** box.
- If a child received a combination shot, update **Shot Dates** for all individual shots involved in the combination and enter the name of the combination shot in the **Shot Comments** box.

Caution: Be sure not to click the **Change** button or you could overwrite existing Sponsor, Spouse or Child files!

46 If you are finished adding family members, you are ready to go to the next training guide (CTG-02 Core Pass Registration) and proceed with the **Pass Registration**.

Validation -- How Do I See (or Print) the HH/FM Information I Entered?

Mem	Last Name	First Name	BirthDay	Gender	Res	Grade	Status	Cell Phone	Email Address
1	Messier	John		Female	Yes	0.00	Active		johnnm@vermontsystems.com
2	Messier	Kathy		Male	Yes	0.00	Active		johnnm@vermontsystems.com
3	Messier	Junior	05/01/2010	Male	Yes	0.00	Active	[719] -	johnnm@vermontsystems.com

Figure 12: CYMS Household Family Member Lookup screen highlighting Profile Print

- 1 You can preview or print a copy of a child’s file by using the **Profile Print** button on the **Family Member Listing** browser screen.
 - You can also access this feature through **Inquiry → Global → Global Household Inquiry** (or by clicking the **HH Inquiry** button on the Main Menu screen).
- 2 To preview or print a child’s file:
 - Highlight the child.
 - Click the **Profile Prt** button.
 - Select the items you wish to display.
 - Click **Print/Preview**

How Do I Change or Correct Household or Family Member Information?

- 1 Go to **Files → Activity → Household Maintenance** or click the **HH & Member Update** button.
- 2 Look up your family and make any necessary changes or additions.
- 3 Use the **Members** and **<<Household** buttons to move back and forth between household and family member files.

4 When you are finished, click **Done** to save your data.

Note: The **Cancel** button allows you to exit without saving your changes. It does, however, give you a warning: "Do you wish to save all changes?"