

02 - CYMS Training Guide - Pass Registration (10.3 – Updated July 2011)

Daily Processing Device Assumption: Global Sales Default = Pass Registration
(For guidance on *Daily Processing Device Assumption*, See CQG #01c – Daily Processing Device)

Pass Background

- A pass is what gives a child **permission** to use any CYMS program such as hourly care, regular FD/PD care in CDC/SA/FCC, sports and instructional classes. It is the CYMS equivalent of the **annual registration** where parents are asked to come in and resign their paperwork.
- To get a pass, a family must have a current household on file in CYMS and, in some cases, pay the annual registration fee.
- There are three basic kinds of **age-based passes**:
 - **Child Pass** – Normally issued to all children birth–5.99 years of age. If children in kindergarten are served in School Age facilities instead of the CDC, this pass may be adjusted to stop at 4.99 years of age.
 - **SA Pass** – Normally issued to all children 6.00–12.99 years of age. If children in kindergarten are served in School Age facilities instead of the CDC, this pass may be adjusted to start at 5.00 years of age.
 - **Youth/MST Pass** – Issued to all children 13.00-18.99 years.

Issuing Passes – Pass Registration

- 1 From **Global Sales/Pass Registration Screen**, highlight the child who needs the pass.

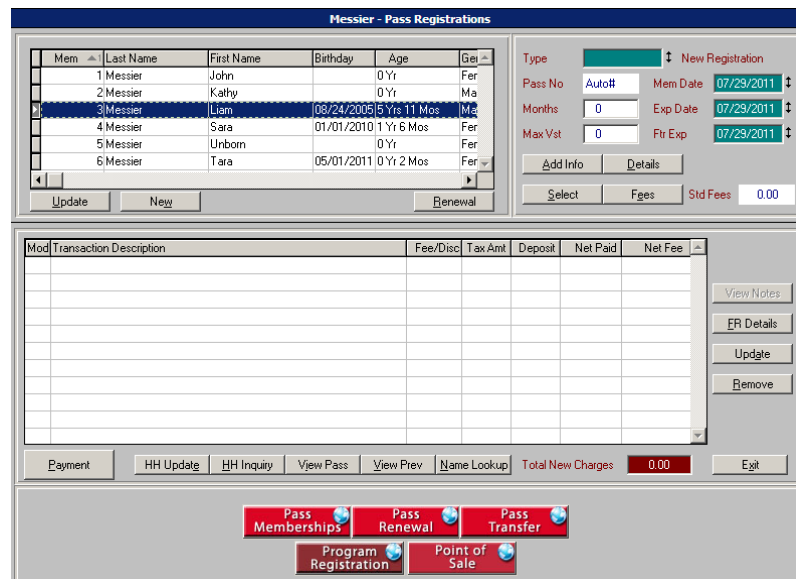


Figure 1: The Global Sales screen for Pass Registrations showing 1 child selected

- 2 If multiple children in the household require the same type of pass (e.g., two children are getting a Child pass), hold down the **<Ctrl>** key and highlight both children.
- 3 Right-click or press **F9** in the **Type** box to bring up the **Pass Type** picklist.
- 4 Double Click the age-appropriate pass.

Figure 2: The Global Sales screen for Pass Registrations showing the SA pass and the Membership/Expiration dates

Note: Checking the Dates is **CRITICAL**

- The system automatically enters “today’s” date as the **Membership Date**. This is correct if you are “live” and are issuing a new pass.
- If you are in your initial data entry process, you will have to change the **Member Date** and **Expiration Date** to be consistent with your files. The Member Date should be equal to the last time this parent re-signed their paperwork.

- 5 Enter the **actual** registration date for this family into the **Mem Date** field.
- 6 The date in the **Exp Date** field will default to the **Mem Date** plus one year. This is the date by which the family will need to come back in and renew their registration.

Note: Checking the Fees is **CRITICAL!**

- Before you “go live,” the Fee Amount should be zero.
- After you go live, the correct registration fee amount should appear in the **Std Fees** field.
- If this registration fee needs to be adjusted, click the Fees button and adjust the Fee Amount.
- If you DO NOT charge for registrations, the **Std Fees** should ALWAYS be zero.

- 7 When the dates and fees are correct, click **Select**.
- 8 Your registration will move to the **Transaction** browser located in the middle of the screen.

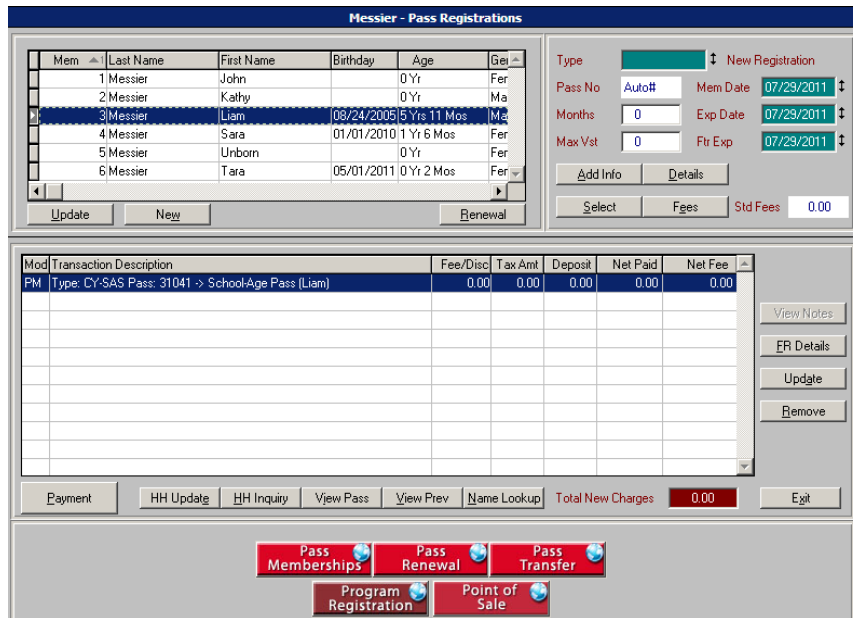


Figure 3: The Global Sales screen for Pass Registrations showing the SA pass in the Transaction browser with no fees

- 9 To issue other passes to other children in the household, repeat **Steps 1–8** above.
 - 10 When you are finished issuing passes, click the **Activity Registrations** button to process enrollments for the child/children. (See **CTG-03 Core-Activity Enrollment** for more information.)
- OR
- Click the **Payment** button to proceed to the payment screen and complete the transaction. You **MUST** click **Payment** even if there is no charge for pass registrations.
- From there you would **Print** or **No Print**.

Note: Don't confuse "passes" with "swipe cards" –
 The pass is the permission to use the program.
 The card is just a method for a child with a current pass to quickly swipe in.
 Children with no "cards" can be keyed into the system by hand if their passes are current.
 Sites that do not use cards, but rather other means of identification, still need to issue passes within the system.
 A child with no pass (or an expired pass) cannot be swiped in.

Validation - Checking for HH Passes

- 1 Go to **Inquiry → Global → Global Household Inquiry**
- 2 In the **Lookup** field, enter the first few letters of the last name and press **Enter**. Highlight the family and click **Select**.
- 3 To view for a single child:
 - Highlight the child
 - Click **Passes**.

- 5 Right click or press **F9** in the **Pass Type** field. Select the pass you want to transfer to.
- 6 You will need to change the **Member Date** and **Expiration Date**:
 - The **Expiration Date** must **exactly match** the expiration date of the old pass.
 - The **Member Date** should be **one year before** the Expiration Date. Getting the Member Date correct here is extremely important for Annual Report purposes as a child's age/age group is determined by this date!!
- 7 On the Pass Transfer screen, the amount in the **Net Fees** field should be ZERO.

VERY IMPORTANT: If the Net Fee is **NOT ZERO**, click the **Fees** button and change the **Fee Amt** appropriately to make the transaction net fees equal zero.

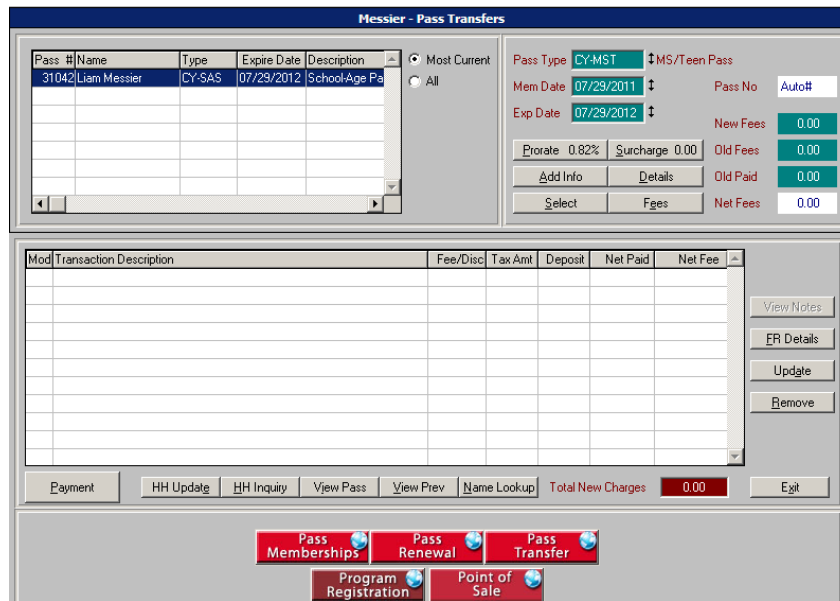


Figure 5: The Pass Transfer screen showing a SA Pass being transferred to a Youth pass and retaining the original Member and Expiration dates

- 8 Click **Select** to move the new pass into the **Transaction** browser box.

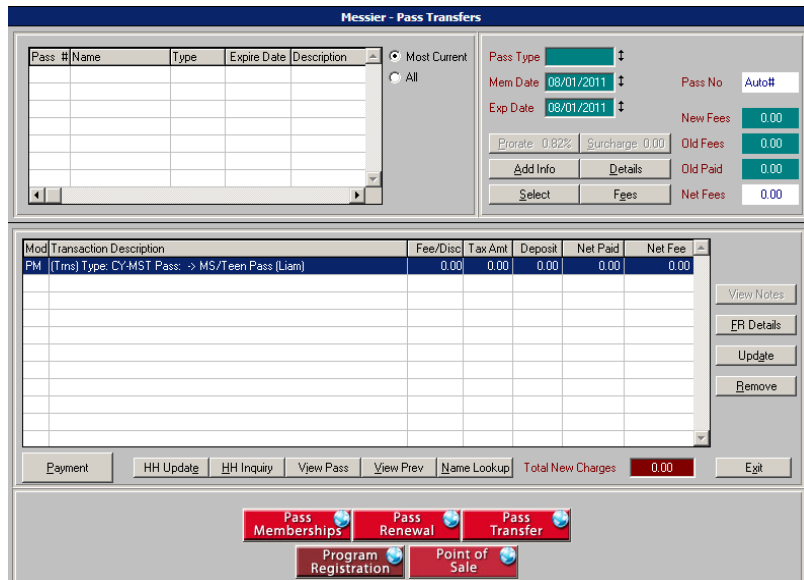


Figure 6: The Pass Transfer screen showing the new pass in the Transaction browser and \$0.00 in fees

- 9 Click **Payment** to complete the transaction. Click **OK**. On the Payment screen, click **Process** or **No Print** to finish.
- 10 Click **Skip Print** at the Pass Print screen.

Renewing a Pass:

When a family's registration year is up, they must update their data in CYMS and officially "renew" their passes:

- You **do not** want to issue new passes through Pass Registrations.
- You **do** want to keep the same **pass number** and **ID card**, if applicable.
- You **do** want to **change the dates** (to reflect one year from their old expiration date) and **charge them a new registration fee, if appropriate**

To renew a Pass:

- 1 Go to **Daily → Global → Global Sales**.
- 2 Enter and select the household.
- 3 Click the **Pass Renewal** button
- 4 Highlight the child and pass you wish to renew.
- 5 The pass type will automatically fill in based on the pass you highlighted in the previous step.
- 6 The **Member Date** will fill in with today's date and the **Expiration Date** will fill in automatically. If you are renewing early CYMS will add 365 days to the expiration date so you are not penalized for renewing early. **Example:** I am renewing my pass on 8/1/2011 even though it does not expire until 8/10/2011. CYMS will automatically make my **Expiration Date** 8/10/2012. Also, if a parent renews early, the clerk will receive a message telling them that the current pass has not expired and do you wish to continue. The clerk should click **Yes** to this message.
- 7 Check the fees. The correct registration fee amount should appear in the **Std Fees** field. If this fee needs to be adjusted, click the **Fees** button and make the adjustment.

- 8 If everything is correct, click the **Select** button to move the renewal into the browser box (shopping cart) below.

Figure 7: The Pass Renewal screen showing the Youth Pass in the transaction browser selected for renewal

- 9 Click **Payment**. Click **OK**. Then **Process** or **No Print** to finish.

Changing a Pass Expiration Date and Status:

Situations will arise that will require you to change the status of a pass and/or the expiration date of a pass. Potential scenarios include:

- A child's pass may be expiring on 15 Sep. The family is PCSing on 3 Oct. You may wish to extend the pass for a few weeks rather than make the family re-register.
- The Current Membership Date was entered incorrectly during the Pass Registration and you need to correct it

- A family has PCS'd and now you MUST Expire the pass and change the expiration date to the day they left. (This process is explained in detail in the Transitioning Guide.)
- In rare instances, you may need to temporarily “**Suspend**” a pass in order to deny a family access to your services for reasons such as non-payment, bad behavior, etc. (You will be prompted to fill a Beginning and Ending Suspension Date if you choose this status.)

- **Caution:** The Pass Member Maintenance program should NOT be used in place of the Pass Renewals program. Pass Renewals **must** be used for re-registration.

To adjust a Pass Expiration Date and Status:

- 1 Go to **Files → Pass → Pass Member Maintenance**.
- 2 Enter and select the family member.
- 3 On the **Family Member’s Pass Listing** screen, highlight the pass you wish to work with and click Select at the bottom.

Figure 8: The Pass Member Update/Pass Detail screen

- 4 Adjust the appropriate dates:
 - In most cases, the **Original Membership Date** will not be touched. This is the date on which the child's first pass was issued.
 - Change the **Current Membership Date**, if applicable. This is when the family last renewed this pass.
 - Change the **Current Expiration Date**, if applicable. Keep the *Status* and *Expiration Date* in sync, or you will have annual report problems.
 - If the *Status* is 'Active,' the Expiration date *must* be in the future.
 - If the *Status* is 'Expired,' this date *must be* 'today' or earlier. It cannot be in the future.
 - If applicable, adjust the **Current Pass Status**, located on the upper right-hand corner of the screen.(ex - Expired or Active)

- 5 You should also explain why you adjusted this person's pass. Use the **Comment** box at the bottom of the screen for this.
- 6 Click **Done** to save.