

53 - CYMS Training Guide – Provider Training (Army Specific)

(10.3 – Updated Nov 2011)

Examples and training codes in this guide are Army specific. Each branch has its own set of training codes, so results will vary. The basic mechanics of the software, however, is relevant to all branches.

CYMS provides the following functionality for maintaining Provider training records

- **Records** training requirements, due dates and completion dates.
- **Produces** a report equivalent to the **Individual Development Plan (IDP)**, which provides a listing of all training requirements for each level of training along with due dates, completion dates, credit hours and clock hours.
- **Generates** reports to **track** training coming due or overdue.
- The **Bulk Training Update** program allows you to complete or link one or more trainings to one or more providers.

HINTS FOR WORKING WITH DATES IN CYMS:

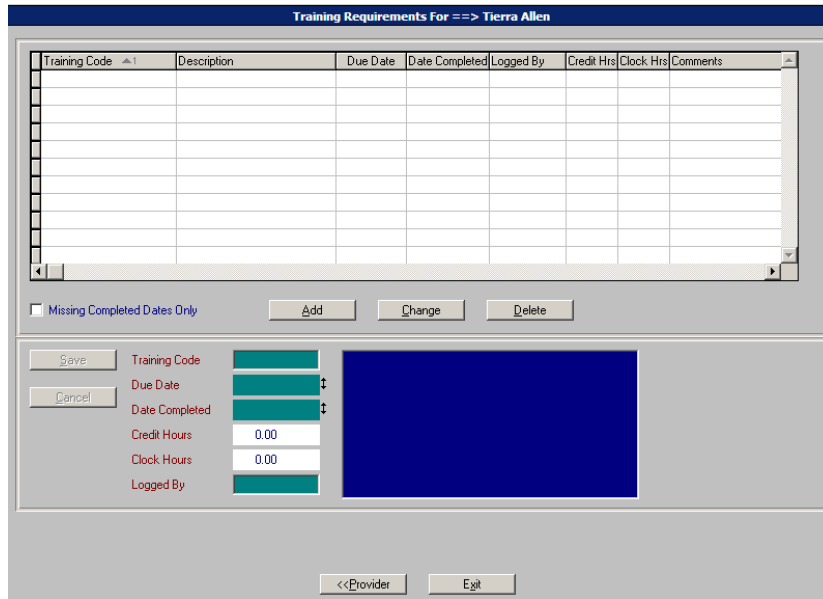
- Hint: **Right-click** in the green **Date** field to make a calendar appear! You can also click anywhere in the green Date field and then press your **F9** key to get the calendar.
- Hint: **Double-click** on a date in the calendar to select it.
- Hint: Using your **Tab** key, instead of the mouse, to move into a date field puts you in exactly the right place to start typing. When you see the **blue highlight**, just start typing in your numbers.
- Hint: If you make a mistake on a date, click anywhere in the field and hit your **F8** key to clear the date.
- Hint: If you prefer to type the date, you can also use some shortcuts:
 - For dates in the current year, you do not need to type the year.
(For example: Typing **1010 Enter** will give you 10/10/2011)
 - For future years, you only need to type in the **last two year digits**
(For example: Typing **101012 Enter** will give you **10/10/2012**)
- Hint: To copy a date from one field to another:
 - To copy: Highlight the date, press and hold the **<Ctrl>** key and hit the **“C”** key.
 - To paste: Tab to or click in the new **Date** field, then press and hold the **<Ctrl>** key and press **“V.”** The date will remain on your clipboard allowing you to use it again.

Loading Provider Training Requirements

We will show you the “basic mechanics” of loading and completing **training requirements for one Provider at a time** using the Training Button in the Provider Module first. Later, as you become more proficient, you can make use of the **Bulk Training Update** program to update both individual and multiple Provider records. The **Bulk Training Update** program is described near the end of this guide.

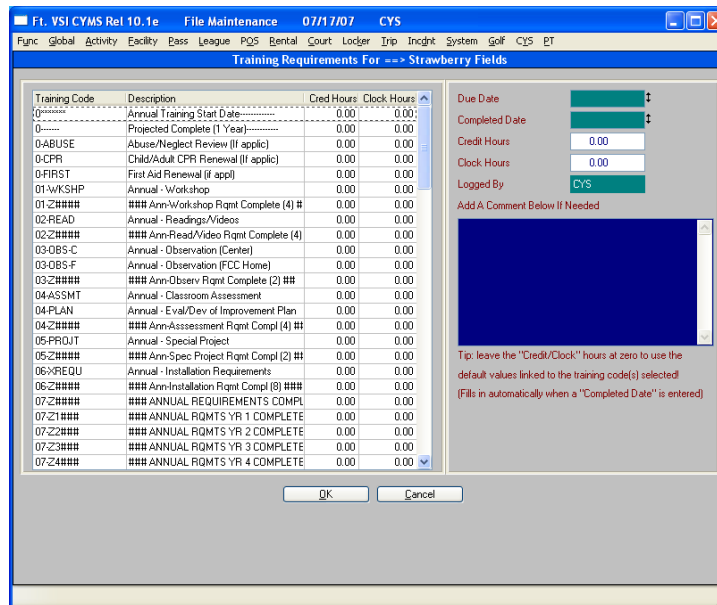
1 From the **Provider Module Main Menu** screen:

- Highlight a Provider.
- Click the **Training** button to proceed to the Provider’s training record.



The example below shows the process for a new employee. Depending on your coding system, you may not get the same results as displayed in the example, but it should help you understand the process.

- 2 Click **Add**. You will proceed to the **Training Requirements for <Selected Provider>** screen, which displays the list of all training codes available in the system.



- The picklist contains the training requirements grouped by Training Code sequence. For the Army, these codes represent the following training levels:

0 Annual Training Requirements

- 1 Orientation Brief
- 2 Orientation Training
- 3 Entry Level, Part I
- 4 Entry Level, Part II
- 5 Skill Level
- 6 Target Level

3 To load the requirements and start building an Individual Training Plan (IDP), you first need to narrow down the list to find the level or type of training you want to record.

- The training displayed at the top of our sample picklist is Annual Training (Coded 0).
- For our example, we are going to load the Orientation Brief (Coded 1) first.

This example demonstrates how you will update a Provider's training record with a single, completed requirement, meaning something you want to incorporate into the training record rather than track by a future due date. Examples include: Orientation Training, Work Experience, completion of a college course, etc.

- Click into the Training Code column and press “1” on your keyboard. You will proceed to the first picklist entry starting with “1”.
- Highlight the *Orientation Brief* code.
- Enter the date on which the Provider completed the *Orientation Brief* code in both the **Date Due** and **Date Completed** fields. This sounds a little strange, but filling in both dates “anchors” this code and tells CYMS this requirement is 100% complete.

Note: If Credit Hours and Clock Hours are associated with this code, they will NOT show up on this screen, but they will show up on the Training Code line item and be recorded once you click ‘OK.’ The Training Code used in our example does not have Credit/Clock hours associated.

- Then click **OK**. You will be returned to the **Training Requirements for <Selected Provider>** screen. Note the inclusion of the *Orientation Brief* training code in the browser.

- **Step 2 – Adding the requirements** for this block of training.

- Click **Add** one more time.
- Press **2** on your keyboard to return to the *Orientation Training* codes.
- Select all of the applicable training requirements from this group.
 - To select several codes **in sequence**, click on the first code, press and hold your **<Shift>** key and click on the last code. Everything between the two codes will be highlighted.
 - To select several **randomly spaced** codes, press and hold your **<Ctrl>** key and click (highlight) each requirement you wish to add to the training record.
- Assign a **Due Date** to your selections.

Remember you can right-click in the **Due Date** field to launch the Calendar. Click the **Next Mo>>** as needed and then double-click on the applicable date.

Training Code	Description	Cred Hours	Hours
2:GROW	Child Growth and Development	1.00	0.00
2:HSN-FD	Food Handlers	1.00	0.00
2:HSN-NU	Child Health/Sanitation/Nutrition	1.00	0.00
2:PR	Parent and Public Relations	1.00	0.00
2:REGS	Regulations and SOP's	2.00	0.00
2:SAFETY	Child Safety/Emergency Procedures	3.00	0.00
2:SPECA	Special Needs Awareness	1.00	0.00
2:ACTSP	Activity Spaces	1.00	0.00
2:CCOUN	Character Counts	1.00	0.00
2:CCDBBP	Communicable Disease/Bloodborne Path	2.00	0.00
2:CURRI	Curriculum	1.00	0.00
2:FDCRS	Family Day Care Rating Scale	1.00	0.00
2:FIRE	Fire and Earthquake	1.00	0.00
2:GUIDA	Guidance	1.00	0.00
2:INFAN	Infant Feeding	1.00	0.00
2:INSTA	Installation Requirements	0.00	0.00
2:LEND	Lending Library/SPS	2.00	0.00
2:MENUS	Menus	1.00	0.00
2:PORTF	Portfolios	1.00	0.00
2:SDEF	Serious Deficiency(USDA)	1.00	0.00
2:TAX	Tax Class	1.00	0.00
2:TIERI	Tiering	1.00	0.00
2:USDA	USDA	1.00	0.00
2:#####	### ORIENTATION TRNG (Bel Prov) ##	0.00	0.00

Due Date: 05/14/2012
 Completed Date:
 Credit Hours: 0.00
 Clock Hours: 0.00
 Logged By: CYS
 Add A Comment Below If Needed

Tip: leave the "Credit/Clock" hours at zero to use the default values linked to the training code(s) selected!
 (Fills in automatically when a "Completed Date" is entered)

OK Cancel

- Click **OK** to add the selected training codes. You will be returned to the **Training Requirements** screen. The block of training will display in the browser.

Training Requirements For ==> Tierra Allen

Training Code	Description	Due Date	Date Completed	Logged By	Credit Hrs	Clock Hrs	Comments
1X#####	### ORIENTATION BRIEF (Be	11/01/2011	11/01/2011	CYS	0.00	0.00	
2-----	Orientation Training Start Dat	11/08/2011	11/08/2011	CYS	0.00	0.00	
2-ABUSE	Child Abuse ID, Reporting, Pre	05/14/2012		CYS	0.00	0.00	
2-DEVEL	Child Development	05/14/2012		CYS	0.00	0.00	
2-GROW/	Child Growth and Development	05/14/2012		CYS	0.00	0.00	
2-HSN-FD	Food Handlers	05/14/2012		CYS	0.00	0.00	
2-HSN-NU	Child Health/Sanitation/Nutrit	05/14/2012		CYS	0.00	0.00	
2-PR	Parent and Public Relations	05/14/2012		CYS	0.00	0.00	
2-XFIRE	Fire and Earthquake	05/14/2012		CYS	0.00	0.00	
2-XNFAN	Infant Feeding	05/14/2012		CYS	0.00	0.00	
2X#####	### ORIENTATION TRNG (Be	05/14/2012		CYS	0.00	0.00	

Missing Completed Dates Only

Training Code:
 Due Date:
 Date Completed:
 Credit Hours:
 Clock Hours:
 Logged By:

Note: One of the codes in our sample series above is **2-XINSTA**.

- This code represents an “X-tra” **unique one-time requirement** that you want your Providers to complete during this training level.
 - Choose this code only if the Provider completes (or is required to complete) training not already specified on the list.
 - Enter the specific description of the training in the **Comment Box**.
 - These unique one time requirements are usually added as they are completed rather than loaded in advance.
- **Recurring local “X-tra” requirements** that all Providers will need to complete at a certain level, can also be added to the master training list by your system administrator. For example, see **2-XFire** above.
 - It is important to follow the standardized coding pattern when adding these extra codes. This makes them easier to find by allowing them to sort into the correct sequence on the list.
 - All additional local codes should follow the -X codes sequence. Remember: there is only room for 8 characters.

Other ‘recurring extra’ requirement examples:

 - For Level 2 (Orientation Training): 2-XASTHM (for Asthma), 2-XFOOD (for Food Handlers), etc
 - For Level 3 (Entry Level Training): 3-XCUSTO (for Customer Service), 2-XBLOOD (for Blood-Borne Pathogens), etc.
 - For Annual Training: 6-XASTHM (for Asthma), 6-XFOOD (for Food Handlers), 6-XBLOOD (for Blood-Borne Pathogens), etc.
 - There is no limit to the number of extra codes that can be added.
 - When building the Provider training plan, you should load only the codes that apply specifically to this individual.

- **Step 3 – Print a copy of the training plan (IDP)** for you or the provider.
 - Go to Files → CYS → Provider Reports → Provider Training Report (IDP).
 - Find your Provider in the Range or add to the Browser and click Browser Only.
 - Click **Skip Training Date Range Restriction** unless you only want to see a specific time period, such as “last month.”
 - On the **Details** screen, check the **Print Sub-Totals** box and put the number **“2” in the white box**. This tells CYMS to do the math for you and sub-total every training level.
 - **NOTE:** For annual training plans, you may want to put a “1” in this block.
 - You may elect to link a **Comment Code**. The contents of the comment code will print on the report. It can be useful to print information you want the provider to understand or agree to. It can have signature lines and dates, etc. Right click and select one that you have created or call VSI for assistance in setting up a new one.
 - **See CTG #54 – Provider Reports** for a detailed description of this report
OR
Press **F1** from the report screen in CYMS for field level help, including a sample report.

Completing Provider Training Requirements

Training Code	Description	Due Date	Date Completed	Logged By	Credit Hrs	Clock Hrs	Comments
1X#####	### ORIENTATION BRIEF (Be	11/01/2011	11/01/2011	CYS	0.00	0.00	
2-----	Orientation Training Start Dat	11/08/2011	11/08/2011	CYS	0.00	0.00	
2-ABUSE	Child Abuse ID, Reporting, Pre	05/14/2012		CYS	0.00	0.00	
2-DEVEL	Child Development	05/14/2012		CYS	0.00	0.00	
2-GROW	Child Growth and Development	05/14/2012		CYS	0.00	0.00	
2-HSN-FD	Food Handlers	05/14/2012		CYS	0.00	0.00	
2-HSN-NU	Child Health/Sanitation/Nutrit	05/14/2012		CYS	0.00	0.00	
2-PR	Parent and Public Relations	05/14/2012		CYS	0.00	0.00	
2-FIRE	Fire and Earthquake	05/14/2012		CYS	0.00	0.00	
2-INFAN	Infant Feeding	05/14/2012		CYS	0.00	0.00	
2X#####	### ORIENTATION TRNG (Be	05/14/2012		CYS	0.00	0.00	

Missing Completed Dates Only

Training Code: 2-DEVEL

Due Date: 05/14/2012

Date Completed: 11/12/2011

Credit Hours: 3.00

Clock Hours: 1.00

Logged By: CYS

As soon as you enter a **Date Completed** and tab through the field you will see the **Credit and Clock Hours** fill in!! But don't forget to click **Save**!!

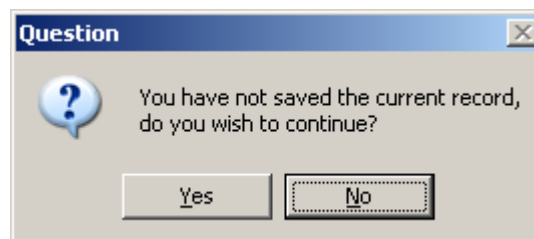
- 1 As individual training items are completed, you can acknowledge this on the **Training Requirements** screen by double-clicking the training code, entering a **Date Completed** and clicking **Save**.
 - Any default **Credit Hours** and/or **Clock Hours** will fill in automatically.

- You can overwrite the default hours.
 - If default hours need to be permanently changed or adjusted, your system administrator can do this through Provider Maintenance.
- Be sure to click **Save**.

Training Requirements For ==> Tierra Allen							
Training Code	Description	Due Date	Date Completed	Logged By	Credit Hrs	Clock Hrs	Comments
2-DEVEL	Child Development	05/14/2012	11/12/2011	CYS	3.00	1.00	

CAREFUL!

If you forget to click **Save** and click << **Provider** or **Exit** instead, you will get this message.



Click **NO** to return to the Training Requirements update and **SAVE** your changes.

Click **YES ONLY** if you want to exit **WITHOUT** saving your changes.

- 2 If a Provider completes a requirement that will be due again, such as First Aid or CPR training, you should go to the Annual Training requirements part of the list and load the new requirement and the new date even if it is 3 years in the future! This is an excellent way to capture and track these future recurring requirements.
- 3 If due dates for training requirements need to be changed (shortened or extended):
 - Double click the training code and change the **Due Date**.
 - Add notes or explanations (as appropriate) in the **Comments** box.
 - Click **Save**.
- 4 If a Provider completes a **unique one time requirement** that is *not* on the code list, such as attending a special workshop or taking a college course:
 - Find the “extra installation requirement code” near the bottom of your list (in our Level 2 example this code is **2-XINSTA**) and double click it.
 - Enter the description of the extra requirement in the **Comments** box.
 - Assign **Credit Hours** and **Clock Hours** as applicable.
 - Click **Save**.
- 5 When all training for a specific level has been completed, you need to close off the block of training in CYMS. Using our example, *Level 2 Orientation Training*, you would do this:
 - Highlight the last code in your level (2X##### **###ORIENTATION TRNG (Bef Prov)###** for our example) and double click or press **Change**.
 - Enter the **completion date** for this block of training in BOTH the **Due Date** and **Date Completed**, just as you did with the “header” code signifying the Start Date of the training.

- By doing this you are anchoring this as the footer for this block on your IDP. The CYMS IDP report will automatically total the hours for the individual training requirements for you.
- Click **Save**.

- **Once a block of training is complete – you will repeat the entire process for the next training block to be assigned:**
- Anchor the new header. In our sample, this would be #3 Entry Level Part I.
- Load the individual elements and enter due dates.
- Enter **Completion Dates** as requirements are completed or adjust dates as requirements change.

Annual Training Plan

The Annual Training Plan is handled in a slightly different manner than the more structured Orientation, Entry, Skill and Target Level training blocks.

- 1 Once a Provider completes all Foundation Training requirements:
 - **Load** the 7X-##### ###FOUNDATION TRAINING COMPLETE### code.
 - **PRINT** out copies of the final IDP report for the Provider and for your records.
 - Then “**DELETE**” all of the old training information **except** the FOUNDATION TRAINING COMPLETE code.
 - This gives you a **clean slate** to begin building an annual plan.

- 2 The “mechanics” of loading the codes is the same as the guidance above. The choices are just more open:
 - First, enter and “anchor” the 0***** **Annual Training Start Date******* code. Put the date the Provider starts the current year annual training in BOTH the **Date Due** and **Date Completed** fields so this can serve as a header on your IDP report.
 - You may already have some codes loaded for annual requirements due this year or future years, such as First Aid, CPR, Abuse/Neglect Training, etc....
 - Go through the list of annual requirements and load only those items that you will be requiring this year.
 - You should have an extensive listing of locally added “choices” for your annual listing (6-XASTHM, 6-XFOOD, 6-XBLOOD, etc)

- 3 Guidance for **completing** annual requirements is also the same as the guidance above:
 - **Note:** Many of the annual requirements may be added “on demand” as they are completed rather than being entered in advance with a due date.
 - When a Provider completes all requirements for the year, you must close out the year in CYMS.
 - **Load** the appropriate annual completion code (07-Z1### ##ANNUAL RQMTS YR 1 COMPLETE##, 07-Z2### ##ANNUAL RQMTS YR 2 COMPLETE##, etc...)

- **Anchor** the “footer” for your IDP by entering the date the annual plan was completed in both the **Due Date** and **Completed Date** fields.
- Do not enter any hours with this code. CYMS will total the hours from each of the individual requirements in the plan for you.
- **PRINT** out copies of the final IDP report for the Provider and for your records
- Then **DELETE** all of the old training information except the ##ANNUAL RQMTS YR 1 COMPLETE## code.
- This gives you a **clean slate** to begin building the next year’s annual plan. You do not need to keep records of multiple annual plans in CYMS. Managing one year at a time is the most efficient way to use this tool.

- Use CYMS for tracking the CURRENT annual plan. Do not use it as a “forever” filing cabinet. This makes it far too difficult to manage what is being displayed on screen and in the reports, especially with long-term employees.
- Once a year is complete, print out hard copies for yourself and the Staff Member. Put it in the file (this is what you have with your hand-written system right now). Then delete all of the completed codes.
- Remember, you will have some recurring requirements – those that are due next year or in three (3) years, for example – that you do not want to delete!

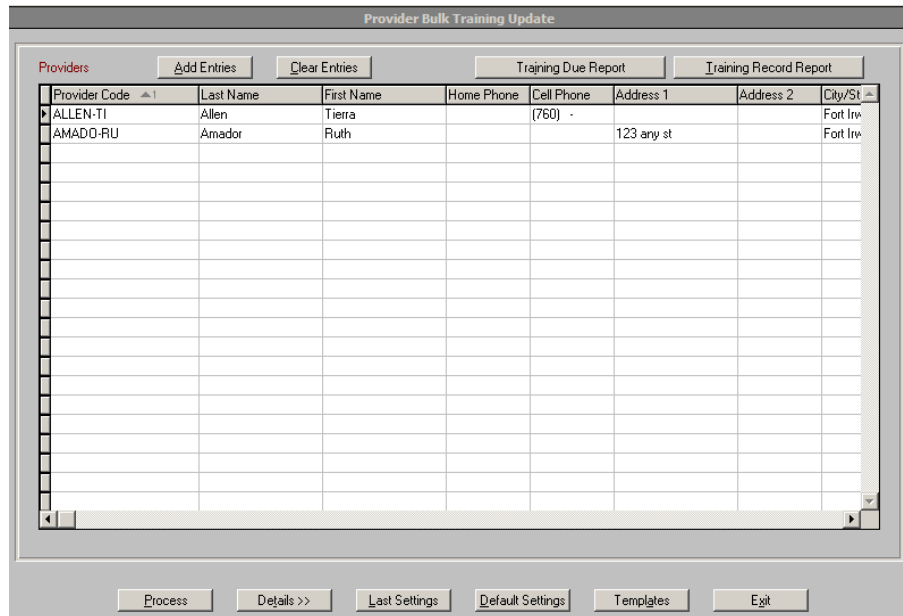
Bulk Training Update (Prov)

- The **Bulk Training Update** program allows you to complete or link one or more trainings to one or more providers.
- It is generally used to enter **Completed Dates** for training codes that have existing due dates in your Provider records.
- However, it can also be used to **add new** training codes that are coming due to Provider records. This feature is useful especially when you have several new Providers starting at the same time.

Bulk Training Update

- 1 Go to **Period End → CYS → Bulk Training Update (Prov)**
- 2 Click **Add Entries** and select the Provider(s) you wish to work with.
Be careful: If the class attendees are in more than one training level (Entry Level, Annual Level, etc), you may have to do two bulk updates, one for each level.
 You will need to know which Providers are completing which level.
 You can print the Training Due Report or the Training Record (IDP) right from this screen!

IMPORTANT: It is imperative to note that if you have 10 providers showing in the browser **all of them** will be affected by the changes you make on the following screen – EVEN IF THEY ARE NOT HIGHLIGHTED. This Browser works like the new report browser logic. If they appear, they will be included. See **CTG-15 Reports-Range and Browser** for more details.
 If you need to **Remove** certain providers from the browser, select them and click **Clear Entries**.



3 Click **Details**

4 Click **Add Entries** again and select the training code(s) you wish to link/complete on the Providers in the browser on screen 1.

Be careful: If the class attendees are in more than one training level (Entry Level, Annual Level, etc), you may have to do two bulk updates, one for each level.

You will need to know which Providers are completing which level.

Note that you can print the Training Due Report or the Training Record (IDP) right from the screen!

IMPORTANT: It is imperative to note that if you have 10 codes showing in the browser **all of them** will be updated and/or added to the providers showing in the browser on the prior screen - EVEN IF THE CODES ARE NOT HIGHLIGHTED. This Browser works like the new report browser logic. If they appear, they will be included.

If you need to **Remove** certain codes from the browser, select them and click **Clear Entries**.

5 Typically the **Due Date** field is left blank and the **Allow Mult Due Dates** field should be **de-selected**. Some bases pre-load multiple instances of the same code to a provider's record. **Example:** Abuse due on 3/1/2011 and again on 3/1/2012 and again on 3/1/2013, etc. If this is how you manage your codes, you would select the toggle.

However, most bases only have one of the same code due on each of their providers so it is typically **de-selected**.

Refer to the following sections at the end of this document for more information on how the **Due Date** works and how the **Allow Mult Due Dates** option works:

Examples.

When Allow Mult Due Dates Is Not Selected.

When Allow Mult Due Dates is Selected

6 Enter the appropriate **Completed Date**

When completing training, the Credit and Clock hours fill in automatically.

When “Allow Multiple Due Dates” is NOT toggled:

- o If you put a **Due Date** and a **Completed Date** on the Bulk Update screen:
 - 1 The system will look for the specific code(s) being updated.
 - 2 If it doesn't find one with the exact due date you entered, it will create a new record.

Example:

A provider member has the following information linked:

Training Code	Description	Due Date	Date Completed	Logged By	Credit Hrs	Clock Hrs	Comments
0-ABUSE	Abuse/Neglect Review (If appli	10/15/2010		CYS	0.00	0.00	

- 1 The clerk uses Bulk Training Update and enters the following information:

Due Date: 10/01/2010 Allow Mult Due Date?

Comp Date: 11/11/2010

Logged By: CYS

- 2 The Provider record will be changed as follows. CYMS will add a new record because the due date the clerk entered is different than the due date in the Provider file.

Training Code	Description	Due Date	Date Completed	Logged By	Credit Hrs	Clock Hrs	Comments
0-ABUSE	Abuse/Neglect Review (If appli	10/15/2010		CYS	0.00	0.00	
0-ABUSE	Abuse/Neglect Review (If appli	10/01/2010	11/11/2010	CYS	2.00	0.00	these are comments

- 3 If the clerk used a **Due Date of 10/15/2010 on the Bulk Training Screen** CYMS will add a completion date to the existing record.

Training Code	Description	Due Date	Date Completed	Logged By	Credit Hrs	Clock Hrs	Comments
0-ABUSE	Abuse/Neglect Review (If appli	10/15/2010	11/11/2010	CYS	2.00	0.00	

When “Allow Mult Due Dates” Is Selected:

- o If the Allow Mult Due Dates Option is selected, the system will **always** create a new record **except** when the **Due Date** in **Bulk Training Update** is **empty** and the **Completed Date** is **entered**.
- o In all the other scenarios, (due date completed/completed date empty, due date empty/completed date empty, etc) it will create a new code and **NOT** look for one to update.
- o See the table below for more details. This shows what the Bulk Training Update program does when certain data is entered **on the Bulk Training screen**.

If Training Due Date Is	And Training Completed Date Is	Multiple Due Dates Selected Is:	Bulk Training Update Program Will
Entered	Entered	Not Selected	Match First Record Based on Due Date
Entered	Entered	Selected	Create a New Record
Entered	Empty	Not Selected	Match First Record Based on Due Date
Entered	Empty	Selected	Create a New Record
Empty	Empty	Not Selected	Match First Record Based on Due Date
Empty	Empty	Selected	Create a New Record
Empty	Entered	Not Selected	Match First Record Based on Due Date
Empty	Entered	Selected	Match First Record Based on Due Date

Table 1

Training Reports

The two training reports can be printed right from the **Bulk Training Update (Prov)** screen. This will help you determine which providers are at the same training level. Detailed instructions on using these reports are included in the **Provider Reports Guide (#54)**.

1 Provider Training Record (IDP)

- o Go to **Reports → CYS → Provider Reports → Provider Training Record (IDP)**
- o This report is used to print a Provider's complete training record or requirements completed within a particular date range. The report also prints Credit and Clock Hour totals and training comments.

2 Provider Training Due Report

- o Go to **Reports → CYS → Provider Reports → Provider Completed-Due Report**
- o This report is used to identify Providers who are coming due or overdue for training.

SPACING PAGE FOR DOUBLE-SIDED PRINTING