

52 - CYMS Training Guide - Provider Daily Processes (10.3 – Updated Oct 2011)

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

Enrolling Children Into Provider Homes:

- It is critical for all regularly scheduled full day, part day and before/after school children to be enrolled into the proper Provider's home in a timely manner. Hourly/drop-in children do not need to be enrolled into Provider's home **unless** the children have a recurring schedule. For example: The child is in the home every Wednesday from 3:00-5:30.
- Immediately upon notification from a Provider, a new child should be officially enrolled into the home through CYMS. Accurate recording of placements/withdrawals is vital for program accountability, for prompt identification and filling of Provider vacancies and for maintaining accurate DOD Annual Report data.
 - Click **Global Sales**.
 - Lookup the Sponsor or child and select.
 - Click the **Program Registration** hot button located at the bottom of the screen. The selection criteria on the upper right of the screen will change to display **Actv No**.
 - Select the child to be enrolled in the Family Member Selection browser.
 - Right-click in the **Actv No** field to bring up the activity listing.

Figure 1: The Global Sales Screen for Activity (Program) Registrations

- Click the Description header to sort by description. Type the first few letters of the Provider's **last** name. Double click to select the Provider.
- Click **Select**. A window will prompt you for the days and times the child will be attending the home. If you know the child's schedule, enter the information here. These times are extremely important, since they are one of several factors that determine which Providers should receive referrals.

Note: When you click **Select** if you get an error message that says the child does not have an active pass **DO NOT** continue with the enrollment. Either the child has never been registered or, more likely, the child's registration has expired. This needs to be fixed *before* you can continue.

Day of Week	Arrival Time	Departure Time	Include
Monday	06:30	07:45	
Monday	15:30	17:00	
Tuesday	06:30	07:45	
Tuesday	15:30	17:00	
Wednesday	06:30	07:45	
Wednesday	15:30	17:00	
Thursday	06:30	07:45	
Thursday	15:30	17:00	
Friday	06:30	07:45	
Friday	15:30	17:00	

Monday Tuesday Wednesday
 Thursday Friday Saturday Sunday

Arrival Time: Departure Time:

Figure 2: The Attendance Times screen for Registrations into Provider Homes

- 8 To add the child's schedule in this provider's home, enter the scheduled attendance times and toggle on the appropriate days of the week. Click **Add**.
 - o For before and after school care, you will need to enter two sets of times. **See Figure 2.**
 - o If the child will attend the home at different times on different days, select the day(s) of the week, enter the times, click **Add**.
 - o Repeat for each different day/time combination.
- 9 Click **OK**. This will move the registration to the Transaction browser box (aka, "shopping cart") on the middle of the screen. There should be **NO TOTAL CHARGES due**.

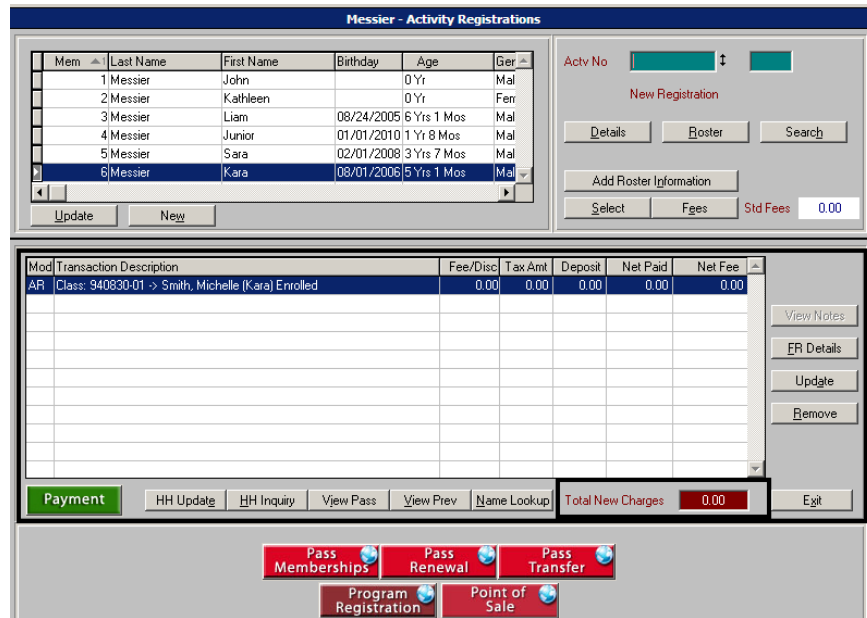


Figure 3: The Global Sales screen with the Provider Home selected and no charges due

- 9 Click **Payment**. You will proceed to the **Global Payment Update** screen.
- 10 Click **OK** to continue to the **Global Payment** screen.
- 11 Click **Process** or **No Print** to finish the enrollment.

Adding or Updating Enrollment Times After the Child is Registered:

- 1 Go to **Files** → **Activity** → **Roster Update**.
- 2 Right-click in the **Activity Number** field, click the **description** header, then type the first few letters of the Provider's last name.
- 3 **Select** the Provider from the picklist and click **Next**. This will take you to a screen with a roster for that Provider.
- 4 Highlight the child and click **Provider Times** at the bottom of the screen. Here you can add new times or update/delete existing times. (See Figure 2 above for help with adding times.)

Transferring a Child From One Home to Another Home

- 1 Go to **Period End** → **CYS** → **CYS Roster Reassignment**.
- 2 In the **Lookup** field, enter the last name of the **CHILD**. Press Enter.
- 3 Highlight the **CHILD** you are transferring and click **Select**.
- 4 The **CYS Roster Reassignment** screen will appear, listing all of the program registrations for the child.
- 5 Look in the **Description** column. Be sure to highlight the Provider that you want to transfer the child **from**.
- 6 Right-click in the **New Actv/Sec** field. Click on the Description header to sort this list by description. Type the first few letters of the last name of the Provider you want to transfer the child **to**. **Select** this Provider.
- 7 Click **Reassign**. A box will appear describing the transaction you are about to complete – please take the time to verify this is correct before you click **YES** to continue.

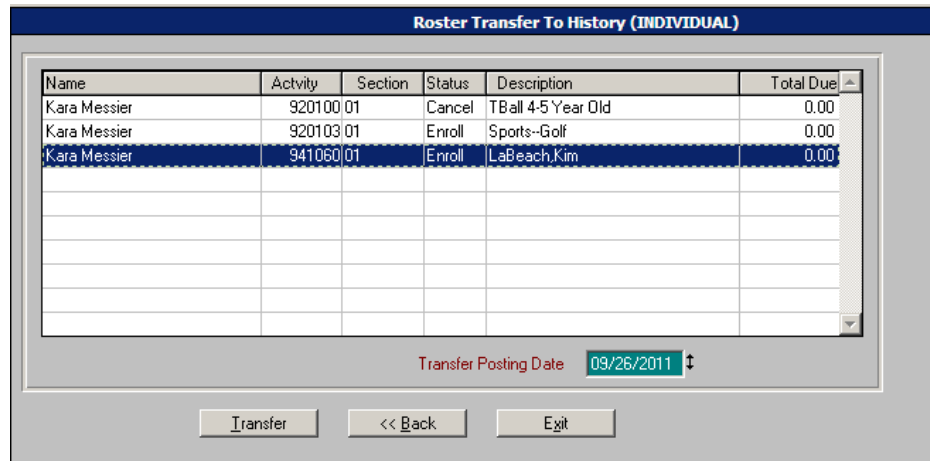


Figure 5: The Roster Transfer to History (Individual) screen.

Note: This method should be used if the child is permanently leaving the home, meaning the child is leaving the installation, moving to the CDC, School Age building or no longer needs care.

- 7 Click **Transfer**. Click **Yes**.
- 8 Click **Exit** to return to the Main Menu.

Attendance Posting

- Attendance posting must be done to **record actual attendance for fullday, partday and hourly children – anyone who visited the Provider’s home**.
- Attendance posting is necessary **prior** to USDA meal reimbursement posting. Failure to post attendance prior to meal posting will cause zero meal counts and zero dollar reimbursement totals.
- Opens up a wide variety of visit reporting/demographic data.
- Gives you the opportunity to check the **status of passes** (are they current or expired) and **shot records** (are they current) for children enrolled in or using Provider homes. If passes are expired, you will not be able to post attendance until the pass has been renewed in CYMS.

- 1 Go to **Daily → CYS → Provider Attendance Posting**.

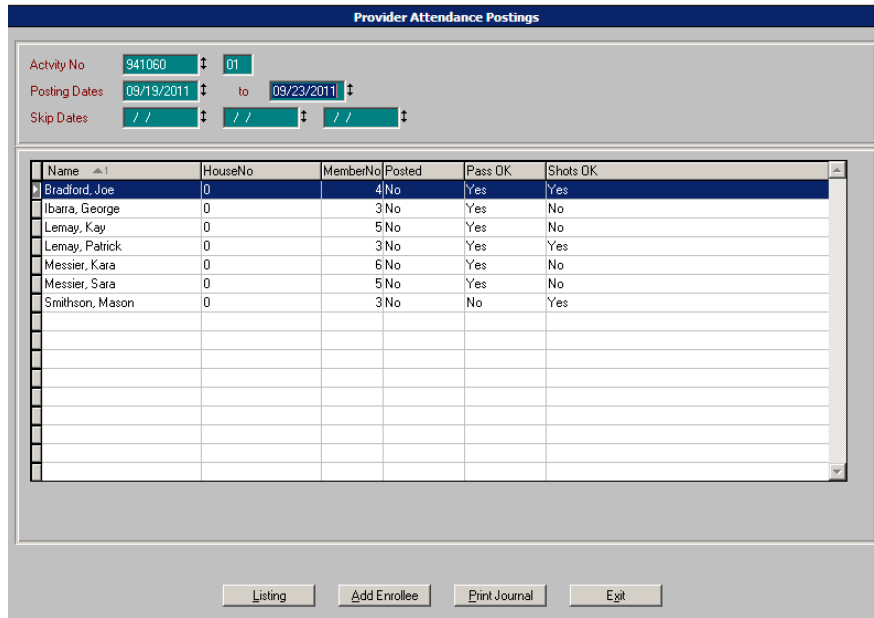


Figure 6: The Provider Attendance Posting screen

- 2 Right-click in the **Activity No** field. Select the Provider whose attendance you want to post.
- 3 In the Posting Dates Range, enter the date range you wish to post attendance for.
- 4 In the **Skip Dates** field, enter any dates the Provider was closed for any reason.

Note: Once you select the Provider, the roster for that Provider will populate the browser. Check the registration and shots for each child in the **Pass OK** and **Shots OK** columns.

- 5 Highlight the child whose attendance you want to post. Click **Listing**. The screen that appears shows the attendance for the selected child based on the contract times that were entered during the enrollment process.
- 6 If you need to make any changes:
 - If the child was **not in attendance**, double-click the day(s) and click **No Show**.
 - If the child's **arrival/departure times** were significantly different than the ones shown, double-click the day in the browser. Change the times at the bottom of the screen accordingly and click **Record in List**.
 - Be sure the date located at the bottom left-hand side of the screen (in red) is the date you want to update.
 - Simply highlighting the date in the list does NOT select it. **You MUST double-click** the entry and be sure it changes the date below.
- 7 When you are finished making changes for this child, click **Post Attendance**. You will be returned to the main screen.
- 8 Repeat **Steps 5–7** for **each regularly enrolled child** in the Provider's home.

Rosters for ==> Kara Messier

Activity	Section	Description	Type	Last Name	First Name	Enroll Date	Age	Total Due	Resident	Status	Total
920103	01	Sports-Golf	YSF	Messier	Kara	09/09/2011	5.16	0.00	Yes	Enroll	
941060	01	Lemay, Kim	FCC	Messier	Kara	09/26/2011	5.16	0.00	Yes	Enroll	

Year Opt: Current Year Prev Year Show Cancelled Rosters

Figure 8: The Household Inquiry, Activity Rosters screen

Viewing Provider Rosters

- 1 Go to **Inquiry → Activity → Section Inquiry**.
- 2 Highlight your Provider and click the **Roster** button. You will see a list of all children currently enrolled in the home.
- 3 If you click the **Previous Year** button, you will see a listing of all children were previously enrolled in this home (children who have been transferred to history).

Printing Provider Rosters

(for detailed instructions, see the Reports Training Guide)

- 1 Go to **Reports → Activity → Roster Reports → Activity Rosters**.
- 2 Define your selection criteria on the main screen and the **Details screen**. You can add many, many fields to your Provider's roster report including household income category; family member ages and birthdays; Sponsor's status, grade, branch and rank; allergies, medical conditions and much, much more.
- 3 Select **Print** and **Preview** (to view on screen) or **Print** (to send to the printer) or even **Email** to the Provider.

When a Provider Leaves

- When a Provider makes the decision to leave CY5, there are several steps that should be taken. First, you will track why the Provider is leaving and when they are leaving. Second, you need to make the Provider's record inactive in the database. There is no need to delete the Provider at this time.

Step One

- 1 Go to **Files → CY5 → CY5 Provider Module**.
- 2 Highlight the Provider and click the **Admin Action** button.
- 3 Click **Add**. Select the appropriate **Admin Action Code** from the browser and enter the **Effective Date** and **Through Date**.

- 4 Right click in the **Action Reason** field and select one.
- 5 Make **Comments** if needed.

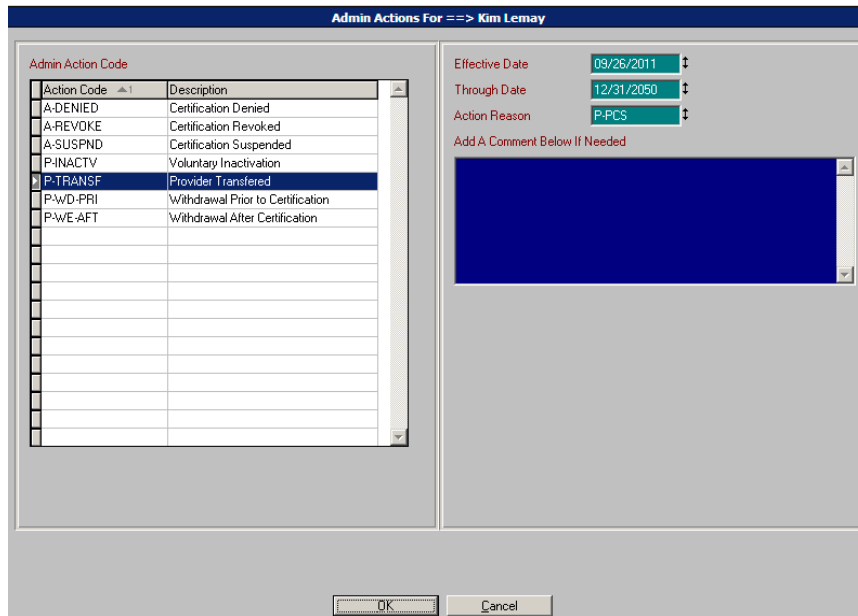


Figure 9: The Provider Maintenance, Administrative Action screen

- 7 Click **OK**.
- 8 Click **Provider** to get back to the **Provider Maintenance** screen.

While you are in the Provider Module:

- 1 Highlight the Provider and click **Change**.
- 2 On the **Core Info** screen, go to the **Status** field and make the Provider **Perm Inactive** or **Temp Inactive**
- 3 Then enter a **Resignation/Termination Date**. Steps 2 and 3 are necessary for accurate results on the DOD Annual Report.
- 4 Click **Done**.

Figure 10: The Provider Maintenance, Core Info screen

Step Two – This will prevent the Provider’s Activity from showing on the registration screen and keep them from getting referrals.

- 1 Go to **Files → CYS → Provider Module**.
- 2 Highlight the Provider whose Program/Activity you wish to make inactive.
NOTE: You may have to enable the **Perm Inactive** toggle in order to find the Provider if you’ve already changed the employment status to “Perm Inactive” The **Perm Inactive** toggle can be found on the Show Browser row, located just below the Provider browser in the middle of the screen.
- 3 With the Provider highlighted in the browser, click **Program Links**.
- 4 Double click the Provider’s program or single-click and select **Change**. This will bring the program information into the lower half of the screen.
- 5 On the **Status** row, change the toggle from **Active** to **Inactive**.

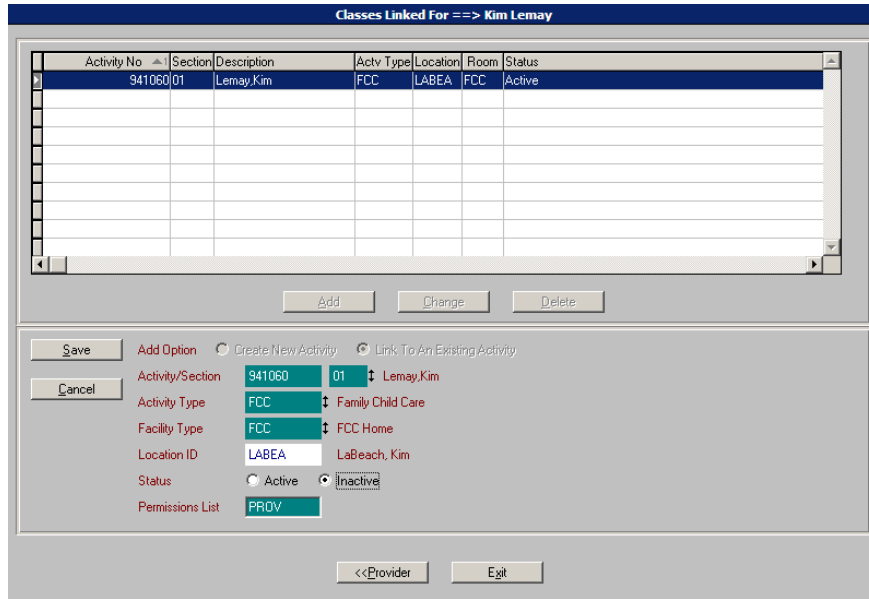


Figure 11: The Provider Program Links screen highlighting making an Activity inactive

6 Click **Save** and then click **<<Provider**.