

61a - CYMS Training Guide – Staff Training (Navy Specific)

(10.3 – Updated Jan 2014)

Examples and training codes in this guide are Navy specific.

CYMS provides the following functionality for maintaining Staff 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, 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 staff members.

HINTS FOR WORKING WITH DATES IN CYMS:

- **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.
- **Double-click** on a date in the calendar to select it.
- 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.
- If you make a mistake on a date, click anywhere in the field and hit your **F8** key to clear the date.
- 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 10/10/2014)
 - For future years, you only need to type in the **last two year digits**
(For example: Typing **101015 Enter** will give you **10/10/2015**)
- 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 Staff Training Requirements

The following section shows you how to document and complete **training requirements for one Staff Member at a time** using the ‘Training Button’ in the Staff Module.

1. From the **Staff Module Main Menu** screen:

- Highlight the Staff Member’s name
- Click the **Training** button to go into the Staff Member’s training record

Important Note: Throughout the different job titles you will find required 'CY' codes – the 'CY' code represents any training that is required by more than just one job title; other codes like 'FS' or 'DC' are job title specific. ONLY 'CY'-**Orientation** codes are for all CYP professionals.

- The **second part** of the code identifies what kind of training level it is:
 - **6MT** = Initial Training
 - **AN** = Annual Training
 - **AT** = Additional Training
 - **LIR** = Local Training
 - **MIT** = Infant/Pre-toddler/Toddler Modules
 - **MPS** = Pre-school Modules
 - **MS** = School Age Modules
 - **MY** = Youth Modules
 - **MYS** = Youth Sports Modules
 - **ORI** = Orientation Training Requirements

Please note:

Additional Training and **Local Installation Training** are **standard codes**. The description of the particular training taken is typed into the blue Comments block manually. If any CYP training is taken "outside" the required training for a staff's job title/position, the Additional Training code should be used to document this training; and training taken and/or training title will have to be added in the comment box.

The '**CYMEDADM**' for Medication Administration code is also a **standard code**.

3. To load the required training 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. Please refer to the **Excel file 'Training by Job Title'** which is available on the E-Library. For our example, we are going to load requirements for the Orientation training coded ORI. If you were loading Initial training, you would use code 6MT, for Annual Training code AN, etc.

- Select all of the applicable training requirements for Orientation.

(To select several codes **in sequence**, click on the first code, press and hold the **<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 the **<Ctrl>** key and click (highlight) each requirement to be added to the training record)

- Assign a **Due Date** to all selections.

Orientation training needs to be completed within 48 hours of the date of hire, continuing with our example, right-click in the **Due Date** field to launch the Calendar then double-click on the applicable date, or type in the date.

Training Requirements For ==> Christine Jones

Training Code	Description	Cred Hours	Clock Hours
CY-ORI00	Orientation Complete	0.00	0.00
CY-ORI01	Local CYP Orientation, Prof Handbook	0.00	0.00
CY-ORI02	Position Descripts and Performance Stds	0.00	0.00
CY-ORI03	Tour of CYP Facilities	0.00	0.00
CY-ORI04	Navy Regulations / Local Instructions	0.00	0.00
CY-ORI05	Standard Operating Procedures	0.00	0.00
CY-ORI06	Child Health	0.00	0.00
CY-ORI07	Child Safety	0.00	0.00
CY-ORI08	Fire Prevention and Protection	0.00	0.00
CY-ORI09	EmergEvac/SafetyProc-Indoor/Out/Vehicl	0.00	0.00
CY-ORI10	Child Abuse+Neglect Ident/Report/Preve	0.00	0.00
CY-ORI11	Positive Guidance	0.00	0.00
CY-ORI12	Touch Policy	0.00	0.00
CY-ORI13	Visitor Requirements	0.00	0.00
CY-ORI14	Child Sign-In and Sign-Out Procedures	0.00	0.00
CY-ORI15	Facility Control	0.00	0.00
CY-ORI16	Supervised Work Experience	0.00	0.00
CY-ORI17	HlthSan,PersHygSan,BackInjPrvt (60days)	0.00	0.00
CY-ORI18	BloodBornePath/HIV Awareness (60 days)	0.00	0.00
CY-ORI19	Material Safety Data Sheet (60 days)	0.00	0.00
CY-ORI20	Local Safety Training Reqmts (60 days)	0.00	0.00
CY-ORI21	Personal Protective Equipment (60 days)	0.00	0.00
CY-ORI22	DoD Child Abuse Modules	0.00	0.00
CY-ORI23	KIT Modules (60 days)	0.00	0.00

Due Date: 03/01/2014
 Completed Date:
 Credit Hours: 0.00
 Clock Hours: 0.00
 Logged By: SSA
 Document:
 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 ==> Christine Jones

Training Code	Description	Due Date	Date Completed	Logged By	Credit Hrs	Clock Hrs	Document Link
CY-ORI01	Local CYP Orientation, Prof Handbook	03/01/2014		SSA	0.00	0.00	
CY-ORI02	Position Descripts and Performance Stds	03/01/2014		SSA	0.00	0.00	
CY-ORI03	Tour of CYP Facilities	03/01/2014		SSA	0.00	0.00	
CY-ORI04	Navy Regulations / Local Instr	03/01/2014		SSA	0.00	0.00	
CY-ORI05	Standard Operating Procedures	03/01/2014		SSA	0.00	0.00	
CY-ORI06	Child Health	03/01/2014		SSA	0.00	0.00	
CY-ORI07	Child Safety	03/01/2014		SSA	0.00	0.00	
CY-ORI08	Fire Prevention and Protection	03/01/2014		SSA	0.00	0.00	
CY-ORI09	EmergEvac/SafetyProc-Indoor/	03/01/2014		SSA	0.00	0.00	
CY-ORI10	Child Abuse+Neglect Ident/Rep	03/01/2014		SSA	0.00	0.00	
CY-ORI11	Positive Guidance	03/01/2014		SSA	0.00	0.00	

Missing Completed Dates Only Add Change Delete View Document Print Document

Save Cancel Training Code Due Date Date Completed Credit Hours Clock Hours Logged By Document Remove Document

<<Staff Exit

- The same process is used to add all required training for this job title/position.

To Print a copy of the training plan (IDP) for you or the staff member:

- Click the **Staff Training Report** button (Path: Files > CYS > Staff Reports > Staff Training Report (IDP).
- Click on **Add Entries** and find your staff member. **Highlight** your staff member and click **Add/Exit**.
- Click **Skip Training Date Range Restriction** (unless report is only for a specific time period, i.e., "last month").
- Click **Details** to select specific training codes, if needed.
- 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 staff member 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.

Please note: See CYMS Training Guide #62 – Staff 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 Staff Training Requirements

Training Requirements For ==> Christine Jones

Training Code	Description	Due Date	Date Completed	Logged By	Credit Hrs	Clock Hrs	Document Link
CY-ORI01	Local CYP Orientation, Prof Ha	03/01/2014	02/27/2014	SSA	0.00	0.00	
CY-ORI02	Position Descriptns and Perform	03/01/2014	02/27/2014	SSA	0.00	0.00	
CY-ORI03	Tour of CYP Facilities	03/01/2014	02/27/2014	SSA	0.00	0.00	
CY-ORI04	Navy Regulations / Local Instr	03/01/2014		SSA	0.00	0.00	
CY-ORI05	Standard Operating Procedures	03/01/2014		SSA	0.00	0.00	
CY-ORI06	Child Health	03/01/2014		SSA	0.00	0.00	
CY-ORI07	Child Safety	03/01/2014		SSA	0.00	0.00	
CY-ORI08	Fire Prevention and Protection	03/01/2014		SSA	0.00	0.00	
CY-ORI09	EmergEvac/SafetyProc-Indoor/	03/01/2014		SSA	0.00	0.00	
CY-ORI10	Child Abuse+Neglect Ident/Rep	03/01/2014		SSA	0.00	0.00	
CY-ORI11	Positive Guidance	03/01/2014		SSA	0.00	0.00	

Missing Completed Dates Only

Training Code: CY-ORI04

Due Date: 03/01/2014

Date Completed: 02/28/2014

Credit Hours: 0.00

Clock Hours: 0.00

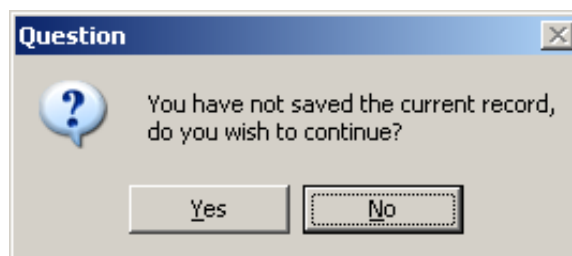
Logged By: SSA

Document:

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**.

- Add **Clock Hours** for this training.
- Be sure to click **Save**.

CAREFUL! If you forget to click **Save** and click <<**Staff** 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 Staff Member completes a requirement that will be **due again**, such as Blood Borne Pathogens/HIV Awareness or Back Injury Prevention, you can go to the **CY Annual Training** requirements part of the list and load the new requirement and the new due date. 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 short notes or explanations (as appropriate) in the **Comments** box.
- Click **Save**.

4. If a Staff Member completes a **unique one time training** that is not on the code list, and/or not required under their job title/position, such as attending a special workshop or taking a college course:

- Find the "Additional Training" code (CY-AT01) and double click it.

- Enter the description of the unique/extra training in the **Comments** box.
- Assign **Clock Hours** as applicable.
- Click **Save**.

5. If a Staff Member completes a **Local training requirement** that is not on the code list, such as attending a special training requested on Installation level:

Find the "Local Training" code (CY-LIR) and double click it.

- Enter the **description** of the local/extra training requirement in the **Comments** box.
- Assign **Clock Hours** as applicable.
- Click **Save**.

Bulk Training Update-Staff

- The **Bulk Training Update** program allows you to complete or link one or more trainings to one or more staff members.

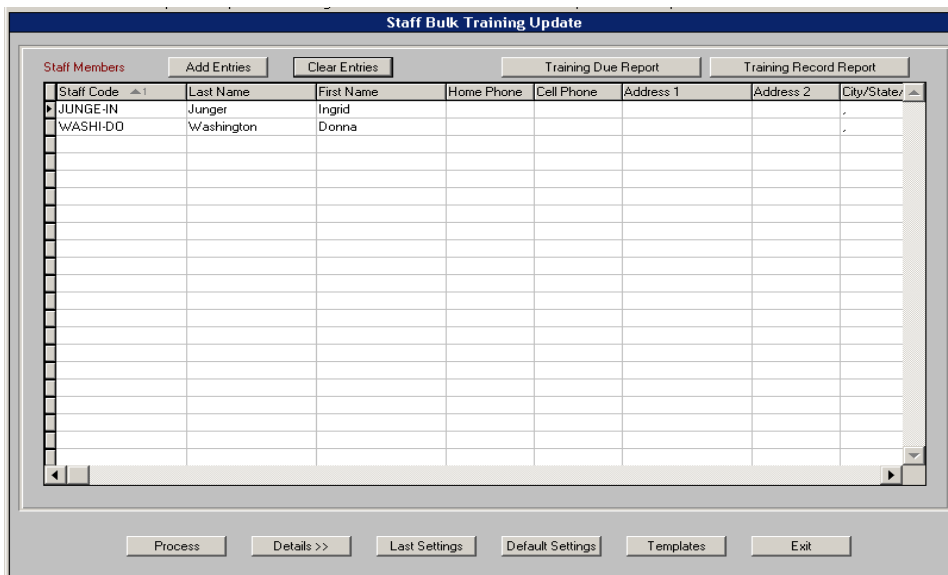
- It is generally used to enter **Completed Dates** for training codes that have existing due dates in your Staff records.

- However, it can also be used to **add new** training codes to Staff records. This feature is useful especially when you have several new Staff Members starting at the same time.

1. Click the **Bulk Training Update-Staff** button (Path: **Period End > CYMS > Bulk Training Update (Staff)**).

2. Click **Add Entries** and select the **Staff Member(s)** you wish to work with.

- **Be careful:** If the class attendees are in more than one training level (Initial training Level, Annual Level, etc), you may have to do two bulk updates, one for each level, since there are different codes for each.
- You will need to know which Staff is completing which level.
- You can print the **Training Due Report** or the **Training Record (IDP)** right from this screen! See details on Page 9 of this document.
- **IMPORTANT:** It is imperative to note that if you have 10 staff members 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 in the browser, they will be included. If you need to **Remove** certain staff members from the browser, select them and click **Clear Entries**.



3. Click Details

4. Click Add Entries again and this time select the **Training code(s)** you wish to link/complete for the Staff 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 Staff Members are completing which level.
- Note that you can print the **Training Due Report** or the **Training Record (IDP)** right from this screen! See details on Page 9 of this document.
- **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 all the staff 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 in the browser, they will be included.
- If you need to **Remove** certain codes from the browser, select them and click **Clear Entries**.

5. Leave the Due Date field blank and the **Allow Mult Due Dates** field should be **de-selected**. Some bases pre-load multiple instances of the same code to a staff member's record. **Example:** Abuse due on 3/1/2012 and again on 3/1/2013 and again on 3/1/2014, etc.

- However, CYP will only have one of the same codes due on each of their staff members so it must be **de-selected**.
- Refer to **Examples** on page 9 of this document for more information on how the **Due Date** works.

6. Enter the appropriate Completed Date.

7. Enter the appropriate Clock Hours by clicking into the Clock Hours field in the Clock Hours column. Add clock hours for each training that is being bulk added.

- Click **Process**. This will link the **CY-AN06** training code to each of the staff members in the browser on the prior screen.
- This process just updated next year's training requirement for all of those staff members!

10. Repeat **Steps 2-9** for any other classes that were given.

Examples on how the due date works

- **Several Staff Members on an annual training plan have just completed Back Injury Prevention training.**
- **You want to use Bulk Training Update to update their records using the CY-AN06 (annual Back Injury Prevention training) code.**
- **The Date Completed = 1/10/2014**

(The example assumes the trainer is **not** entering a Due Date and the **Allow Mult Due Dates** option is **not** selected)

Scenario 1: A Staff Member **doesn't have** a **CY-AN06** (Back Injury Prevention) code linked.

Result: A **CY-AN06** code gets **added** to the Staff Member record with a Date Completed of 1/10/2014.

Scenario 2: A Staff Member has **one CY-AN06** code linked with a Due Date of 1/15/2014.

Result: The existing CY-AN06 code gets updated with a Date Completed of 1/10/2014.

Scenario 3: A Staff Member has **two** CY-AN06 codes linked. One record contains both a **Due Date** and **Completed Date**. The other only has a Due Date linked.

Result: The **existing** CY-AN06 code **without** a Completed Date will get updated.

Training Reports (built into the Bulk Training Update)

Two training reports can be printed right from the **Bulk Training Update (Staff)** screen. This will help you ascertain which staff members are at a common training level and should be included in the bulk update.

Staff Training Due (from within Bulk Training Update program)

This report is used to identify Staff Members who are coming due or overdue for training.

- Click the Training Due Report button.
- Select the Staff Members on whom you wish to report – individuals, all, or by location
- Select Statuses to include – typically 'Active' only.
- Select the Training Date Range.
- Click Details.
- Select the training code(s) you just finished updating to employee files.
- Click Print and select the appropriate Output Selection (Preview allows flexibility of a quick look or printing the results if needed) and click Finish.

The report will pop up as a .pdf file, displaying staff with a due date but no complete date for the selected training during the selected date range.

Staff Training Record (IDP) (within the Bulk Training Update program and on the menu under Reports > CYMS > Staff Reports)

This report is used to print a Staff Member's complete training record or requirements completed within a particular date range. The report also prints Credit and Clock Hour totals (if used) and training comments.

- Click the 'Training Record Report' button.
- Select the Staff Members on whom you wish to report – individuals, all, or by location.
- Select Statuses to include – typically 'Active' only.
- Select the Training Date Range – specify a date range if you want to report on a specific period or choose the Skip Training Date Range Restriction if you want the whole training record regardless of training due or completed dates.
- Click Details.
- Select the training code(s) on which you wish to report.
- Select 'Print Subtotals Based On Prefix' if you want credit and clock hours tallied.
- Select 'New Page Per Person'.
- Select 'Comment code' if applicable
- Click Print and select the appropriate Output Selection (Preview allows flexibility of a quick look or printing the results if needed) and click Finish.

The report will pop up as a .pdf file, displaying staff training records according to your selection criteria.