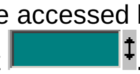
60 - CYMS Training Guide - Staff Records

(10.3y03 Forward – Updated Dec 2016)

Background

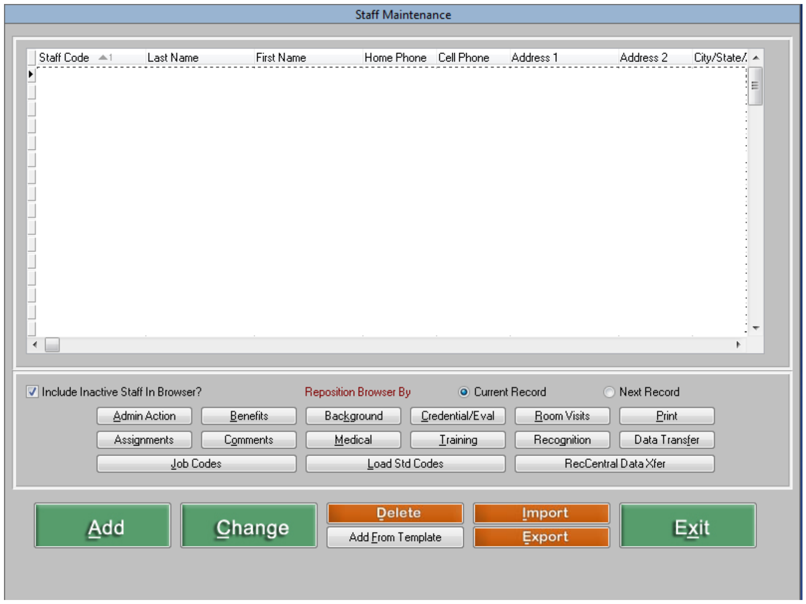
1. This module is to be used by **Managers, Admin Staff, Program Operations Staff, Training Personnel** – all individuals responsible for personnel actions, administrative actions and training and recognition for **Staff Members, Volunteers** and **Contractors.**
2. The expectation is that the CYMS Staff Module is being used as a centralized recording and tracking system for **all administrative actions** related to **Staff Members, Volunteers** and **Contractors.**
   - The first step is **adding a new record** whenever a new employee is hired. A record can be established with as little as a name. We recommend key information from the official Personnel Action be transferred into CYMS.
   - The second step is completing and validating the **four (4) basic information screens** (Core Information, Background/History, Emergency Info and the **Job Codes** 'button screen' during a desk-side orientation, if possible. Much of this basic information (grade, title, appointment, funding source, previous experience, etc…) will be consolidated into future automated annual and periodic reports.
   - Administrative, Management and Training personnel should be using the other **"Button Screens" for tracking recurring staff requirements** (background checks, medical requirements, training, etc) and **management/staff interactions** (room visits, evaluations, recognition, etc) regularly. CYMS provides one centralized location for a summary of all key administrative actions. Detailed and sensitive information should be kept outside of CYMS in a secure location.
   - Note: Don't make "double work!" Phase out old systems and replace them with CYMS.
   - **Multiple reports** are available to facilitate tracking staff requirements and for providing demographic data for local or higher headquarters use.
   - It is now possible for Staff Member files to be electronically exchanged between installations. See CTG-63 Staff-CYMS Global Data Transfer guide for more details.
   - In order to have accurate reporting data, it is critical that Administrative personnel keep Staff Member information in CYMS current.

Hints and Tips Before You Begin

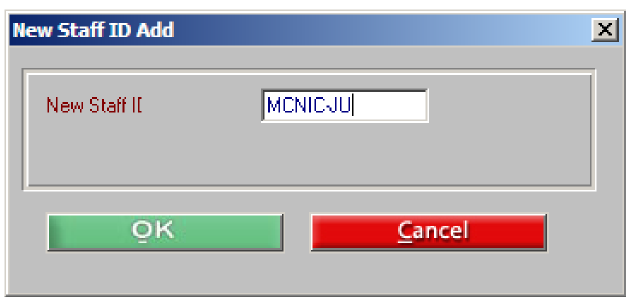
1. When entering information into your CYMS database, use proper capitalization. This makes the data easier to read and cleaner looking.
2. Picklists can be accessed by right-clicking or pressing **F9** from within any field with a dual arrow next to it . To select an item on a picklist, double click on it.
3. Use the **Tab** key to advance to the next field instead of the mouse. If you tab too far, you can use **Shift + Tab** to go to the previous field.
4. To clear the contents of a date field, use the **F8** key to start again.
5. You can press **F1** from any screen in CYMS to obtain field-level help with the task you're performing.

Adding a Staff Member (Core Information Screen)

1 Go to **Files → CYS → CYS Staff Module**.



2 On the browser screen, click the **Add** button.



3 In the **New Staff ID** field, type the first five letters of the Staff Member's last name and a dash (-) followed by the first two letters of the Staff Member's first name, with no spaces. (E.g., Mary Smith = *SMITH-MA*.). If you have more than one Staff Member with similar names (Mary Smith and Martha Smith), you may have to get creative with middle names or numbers (SMITH-MA and SMITH-MJ). Click **Ok.**

4 **Social Security Number**. Disregard this field.

5 Enter the Staff Member's name, address, email address, home and cell phone. CYMS has the ability to email reports and other information to your staff members.

6 Select the **Cell Phone Provider** if applicable. Entering this information will give you the ability to text important information to your staff members. Example: Sprint, Verizon, etc.

7 Select the ***Status** of this employee. The status at this level is used by the *Staff Purge* program (along with Inactive Date) to determine whether an employee should be purged. So, this will be an important field to maintain and keep accurate.

- **Active** = a current employee.
- **Inactive =** the employee no longer works for CYP.

*Be aware that each Job at the Job Code level has a status as well.

8 **Inactive Date**: Select the date this employee became inactive**.** This field should only be completed if the Status of the employee is *Inactive*. The *Staff Purge* program uses this field (along with the Status field) to determine whether an employee should be purged.

9 **Service Computation Date** This field signifies the employee's original hire date within Government Service. It should be on the Staff Member's official paperwork.

10 **Staff Person Date of Birth**

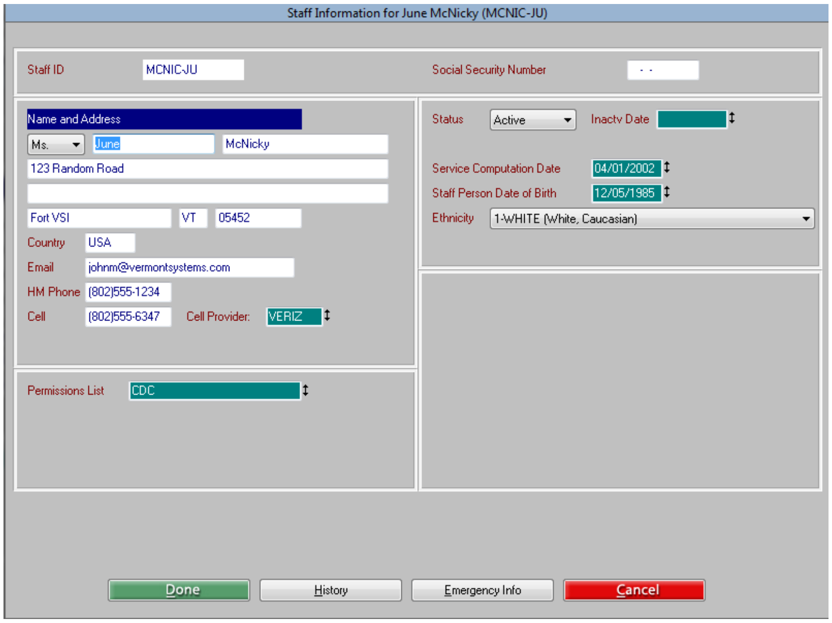
11 Select the Staff Member's **Ethnicity** from the drop-down menu. **Note:** Summary ethnicity statistics for Staff Members and patrons are often required when completing requests for grants and outside funding for our programs. Partnership agencies, such as the Boys & Girls Clubs of America also require garrisons to regularly report this information. The picklist is derived from the 2000 U.S. Census form.

- The list contains some common ethnic choices and then a general "other" for each category (e.g. Cuban, Mexican, Puerto Rican, Other Spanish/Hispanic/Latin).
- Also note ethnicity code 7-XOther "Other Race (Not Listed Above)" which may apply in many situations and 9-ZDEC – Declined to State if the staff member refuses to provide the information.

12 **Permissions List** – Right-click in the Permissions List field and select the appropriate Permissions Code(s) for this Staff Member.

- Permission Codes help control who can see and report on which Staff Members
- You can attach multiple Permission Codes to a single Staff Member.
- **Example A:** You have 100 Staff Members at your base and two (2) TACS (TAC A and TAC B). 50 Staff Members are assigned to each TAC. If you make two (2) Permission Codes ('TAC1' for TAC A and 'TAC2' for TAC B) and link each Staff Member to his or her TAC, then TAC A will see only those Staff Members linked to the TAC1 code and TAC B will see only those linked to the TAC2 code.
- **Example B:** Of those 100 Staff Members, 25 work at Main CDC. If you create a third Permission Code (MCDC) and link it to the 25 Staff Members who work at Main CDC, then the Main CDC director will see only her Staff Members.
- The 25 Staff Members would be linked to two (2) Permission Codes, MCDC and either TAC1 or TAC2 depending on the TAC to whom they're assigned.
- If you have questions or need assistance with Staff Permission codes, contact VSI.

Your Screen should look similar to the following:

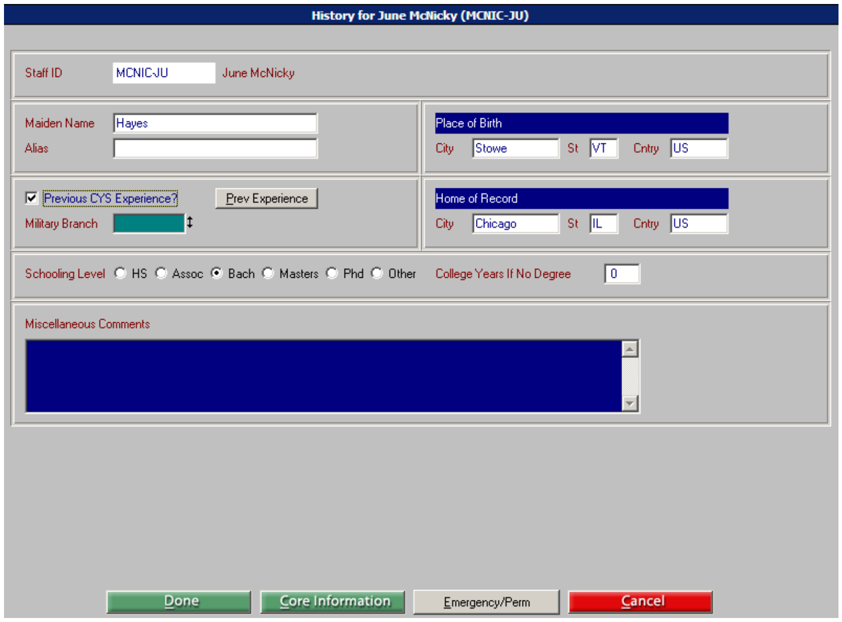


Staff Core Information Screen

Adding a Staff Member (History Screen)

1 Some of the information on this screen is used to gather **common information for conducting background checks**. If the Civilian Personnel Office initiates staff background checks, you may not need to use these fields for initial tracking in CYMS. However, we recommend logging the completion date so you can "remind" CPO when new checks are due. If you log both the date initiated and the date completed, you can track how long it took for checks to be completed. This screen is also useful for gathering information for volunteer background checks. The key fields include:

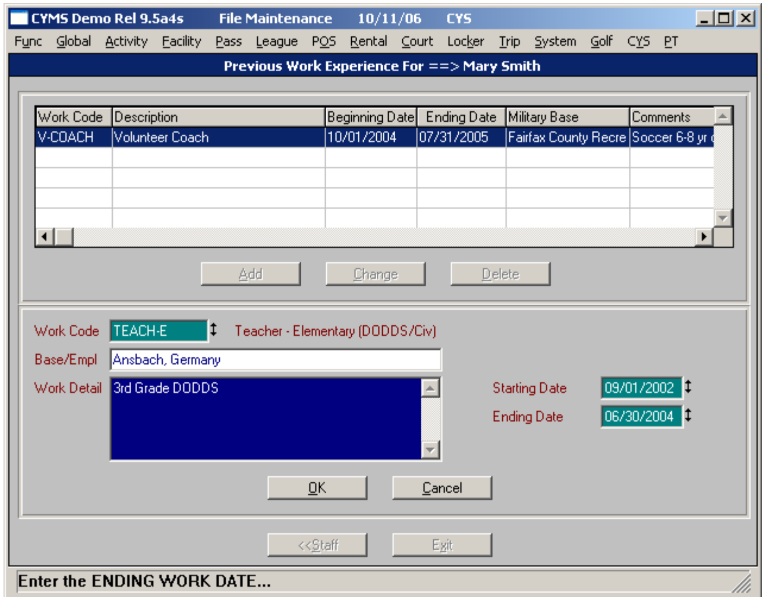
- **Maiden Name.**
- **Alias.** Any other name this person was known by.
- **Place of Birth.**
- **Home of Record** – The Home of Record is where this person pays taxes and/or is registered to vote (most applicable for overseas patrons).
- **Military Branch** – Fill out this field ONLY if the Staff Member is a veteran, having served on active duty.
- **Miscellaneous Comments** – Use this box to log any additional note or background check data that you feel is pertinent.



Staff History Screen

2 The next two fields on this screen relate to Staff Member **experience**. They contain key reporting data and should be completed for all Staff Members.

- **Previous CYS Experience? –** Enable this toggle if the Staff Member has previous experience with **military child development or youth programs** (Army, Navy, Air Force or Marine Corps) and may have received some **standard Department of Defense training**.
- **Previous Experience** – Click this button to enter more detailed information about any kind of relevant previous jobs or volunteer work performed by this employee. When you click this button, the **Previous Work Experience** screen will appear. Don't enter an entire résumé here. Limit your entries to directly related work experience and other information which managers and training personnel may find helpful when working with this individual.
  - To enter the experience, click **Add**.
  - Right-click in the **Work Code** field and select the appropriate experience code.
  - Enter the base or employer for whom the employee worked.
  - Enter the employment date range in the fields on the right.
  - Enter any applicable notes in the **Work Detail** section.
  - Click **OK** when finished.
  - Repeat this process to add additional records or click **<<Staff** to return to the **History** screen.



Staff Previous Work Experience screen

3 Next, choose the **Schooling Level**. Enter the highest level of schooling for this individual. Use the blue Miscellaneous Comments block for additional explanation, if applicable. (Note: CDA information is recorded in the Credentials section).

4 Click **Emergency Info** to go to the **Emergency Information** screen.

Adding a Staff Member (Emergency/Permissions Screen)

1 The left side of this screen stores the Staff Member's **Emergency Contact Information**. Enter this information as completely as possible.

- Enter the Staff Member's emergency contact. Typically this is the spouse, however, if they are deployed or not married you would enter a local contact to be used in the case of emergency.
- Fill in the Employer, Address, Phone Number and Relationship fields as completely as possible.

2 The upper right-hand side of this screen tracks whether the Staff Member has any **military affiliation**. Fill in this section as completely as possible:

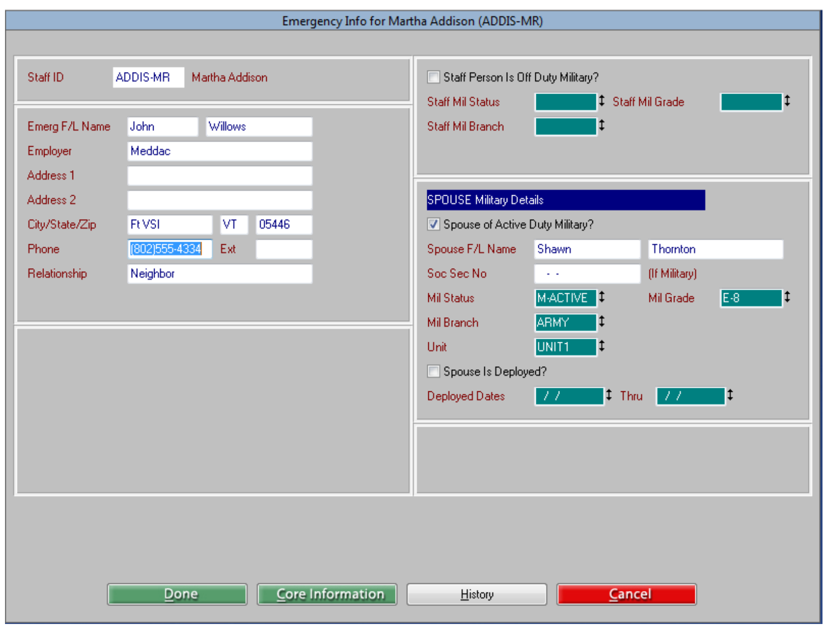
- **Staff Person Is Off Duty Military?** Select this toggle ONLY if the **Staff Member** is on Off Duty Military. This is most often applicable for volunteers, coaches, contractors or part-time employees.
- **If the Staff person is Off Duty Military**, then you **MUST** fill in the **Staff Mil Status, Staff Mil Branch, Staff Mil Grade** and **Staff Mil Rank** fields.

3. The middle right-hand side of the screen tracks whether the Staff Member's **SPOUSE** has any **military affiliation**. Fill in this section as completely as possible.

- **Spouse of Active Duty Military? –** Select this toggle ONLY if the Staff member is the Spouse of an individual on **active military duty.**
  - o This is an Annual Report item.
  - o Do NOT select this toggle if the Staff Member is the spouse of an individual who is DOD Civilian, Retired Military or "Other" Civilian category.

- **Spouse F/L Name –** Enter the Spouse's first and last name in these fields.
- **Soc Sec No –** Disregard this field.
- **Military Details –** If the Spouse of Active Duty Military is selected, then you **MUST** complete the **Military/DoD Details** section.
    - o Select the appropriate information from the pick lists on Military Status, Military Branch, Military Grade and Military Rank. The Social Security Number field is optional.
- **Unit** – Right-click or press **F9** from within the field to select a Unit from the **Unit Code Picklist**.
    - o For optimal results, insure that ALL Sponsors/Spouses/ Emergency Contacts are associated with a Unit selected from the **Unit Code Picklist**, if applicable.
    - o Picklist items for the Unit/Employer field are maintained in **Unit Maintenance**. (Files → CYS → CYS HH/Program Maintenance → CYS Unit Maintenance.
- **Spouse is Deployed?** If the Spouse is deployed, toggle the box and enter the **Deployment Dates.**

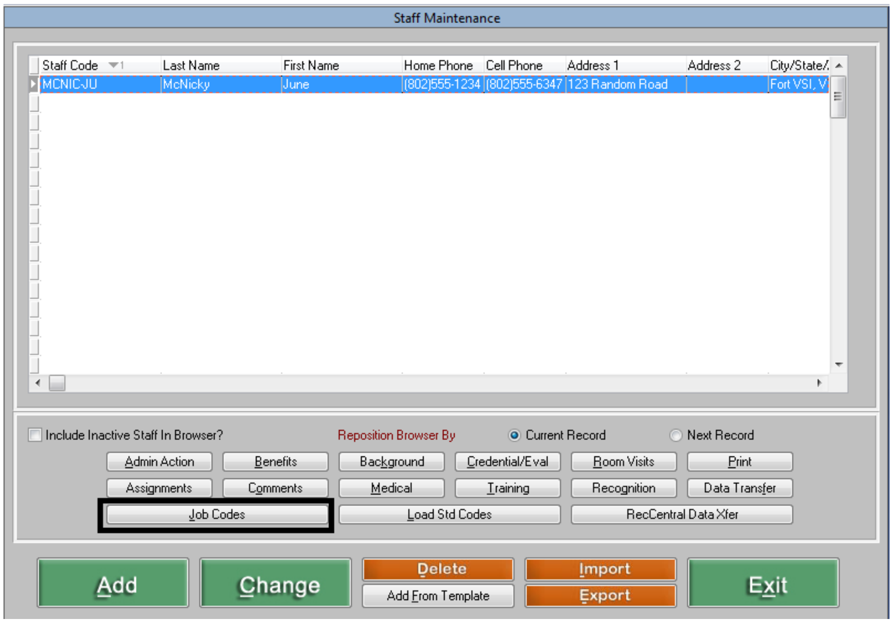
> **Note:** The information you enter in the *Spouse's Unit/Employer* fields will be pulled for the **CYS Staff Sponsor Unit Report** (Reports → CYS → Staff Reports → Staff Sponsor Unit Report, See CTG #62 – Staff Reports for details).



Staff Emergency Information screen

5 Click **Done** to save your changes and return to the **Staff Module.**

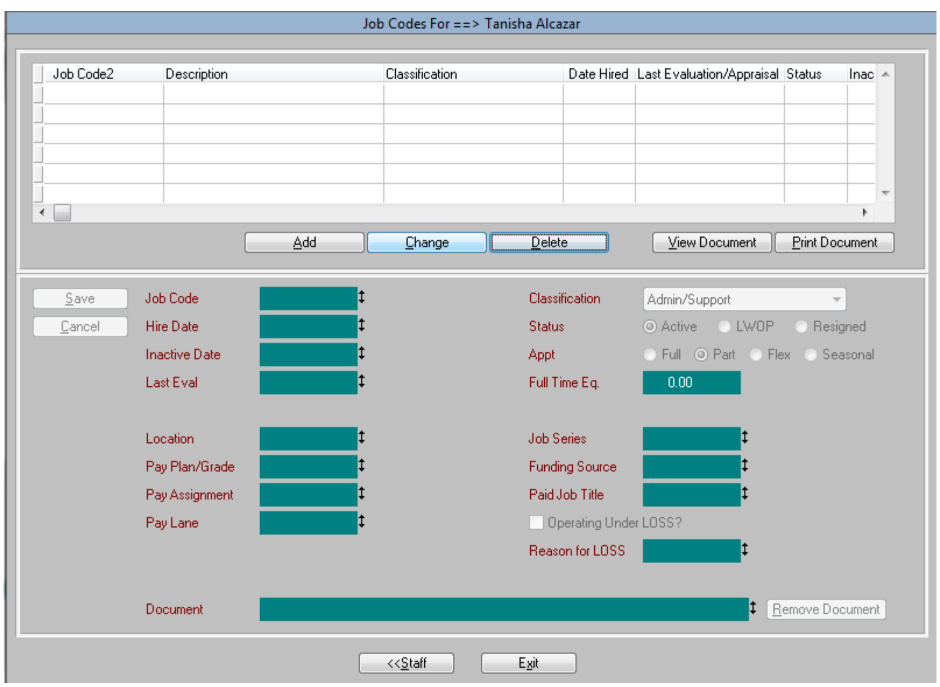
Adding a Staff Member (Job Codes - Button Screen)



Staff Module Main Screen: Job Codes Button

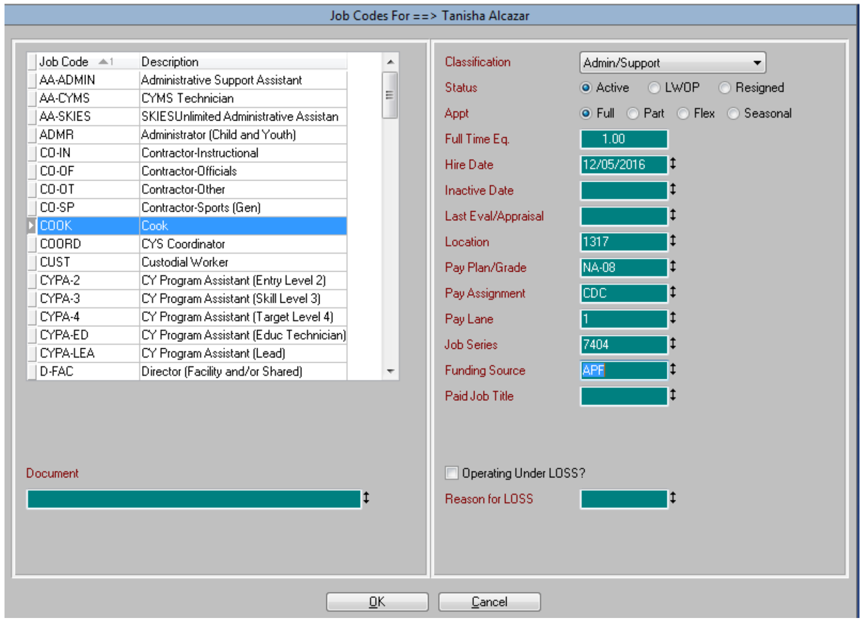
Steps:

- Highlight the Staff Member you wish to work and click **Job Codes.**



Staff Job Codes Screen

- If there is no Job Code linked to this Staff Member or you would like to link an additional Job Code to this person, click **Add**.



Staff Job Codes Data Screen

- On the left side of the screen, highlight the Job Code you wish to link to this person. This is the ***CYP* Position** that the person is filling.
- Select a ***Classification*** from the drop-down list as it relates to the *Job Code/CYP Position they are filling.*

  With Navy records we will leave the following fields blank (default): **Full time Equivalent, Pay Lane, and Funding Source**

  If adding a ***Contractor*** you should leave the following fields blank: **Full time Equivalent, Pay Lane and Job Series.**

  If adding a ***Volunteer*** you should leave the following fields blank: **Full time Equivalent, Pay Plan/Grade, Pay Lane, Job Series and Funding Source.**
- Select a **Status** as it relates to the *Job Code/CYP Position they are filling:*
  - **Active** = employee is currently filling this position.
  - **LWOP** (Leave Without Pay) = the employee is still employed, but is on an extended absence (maternity leave, terminal leave, detailed outside your organization, etc).
  - **Resigned** = the individual is no longer filling this position.

    If the person has *Resigned* from this position you should also complete the *Inactive Date* field on the *Job Code.*
- Select an **Appt (Appointment Type)** as it relates to the *Job Code/CYP Position they are filling.*
- The **Full Time Eq. *is not required at this time*.** It is based on a standard 40 hour week. **Example:** If you hire someone to work 40 hours enter 1.00. If you are hiring someone for 20 hours, enter .50. This should be done as it relates to the *Job Code/CYP Position they are filling.*
- Enter the **Hire Date** indicating when this person will start filling this position.

- Leave the **Inactive Date** field. This field is only necessary if the person is Resigned or LWOP from this position.
- Enter the **Last Eval/Appraisal** date.
- Select the **Location** that this person will be working at in this position *as it relates to the Job Code/CYP Position they are filling.*
- Select the **Pay Plan/Grade** *as it relates to the Paid Job Title.*

  Note: If the employee filling this position is a Foreign National Employee, link the Local National Employee Pay Plan/Grade to this individual.

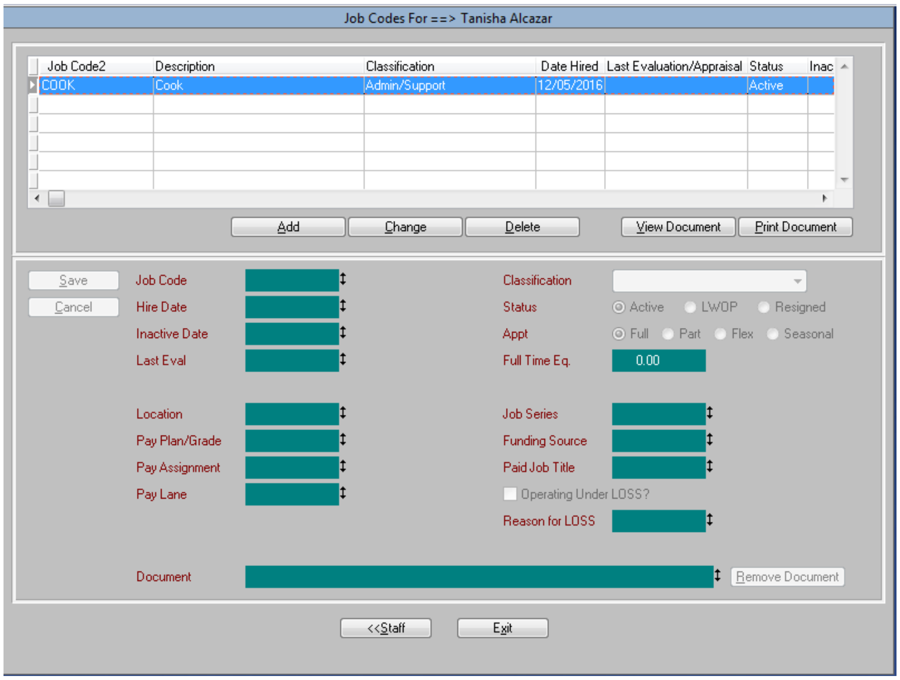
- Select the **Pay Lane - *not used at this time*** *as it relates to the Paid Job Title*.

- Select the **Job Series** *as it relates to the Paid Job Title*.

  Note: If the Paid Job Title = Other Non-Standard Position as defined in **Scenario 2** below, please select the **Z-Other Non Standard Job Series.**

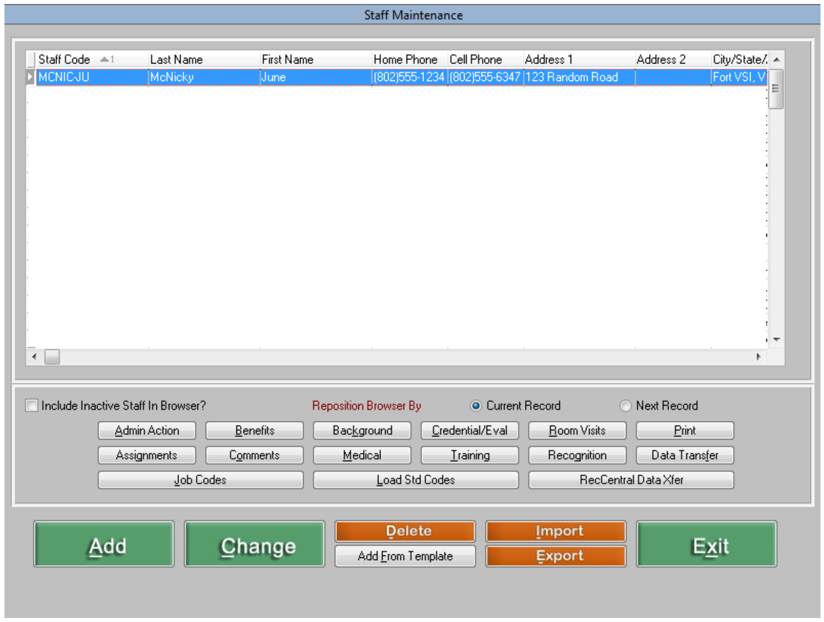
- Select the **Funding Source *not used at this time*** *as it relates to the Paid Job Title.*
- Select the **Paid Job Title**.
  - o **Scenario 1 - Most Common:** If left blank, when you click OK the field will automatically be filled in with the Job Code that is selected on the left side of the screen. In most cases, the role the person is filling coincides with the position they are being paid for. However, this is not always the case.
  - o **Scenario 2 – Rare (Not required at this time):** If the position this staff member is filling (the Job Code selected on the left side of the screen) is *different* than the position they are being paid for, please select the **Z-Other Non Standard Position** code.
- **Operating Under Loss:** This is a new field! Decide whether this person is Under Loss as it relates to the selected *Job Code/CYP Position this person is filling.* Check Box = yes - under loss. Blank = not under loss.
- **Reason For Loss:** This is a new field! If this person is operating under loss as it relates to the selected *Job Code/CYP Position this person is filling*, right click and select the proper reason.
- Click **OK** to return to the **Job Codes** screen for this Staff Member.
- If a person has more than one Job or is also a Volunteer and/or Contractor, click **Add** and repeat the above steps.

Updating a Staff Member (Job Codes - Button Screen)



- To Update a Job Code click on the line item and then click Change
- Update the fields as needed
- If the person started out in one position and then gets hired for another, VSI recommends that you update the **Status** the first Job Code as **Resigned** and enter an **Inactive Date**.
- If the person has Resigned from this position and has been hired for another, perform the steps above then **ADD** a new Job Code with a new Hire Date, Appt, Location, Pay Plan, etc.
- If the person has *Resigned* and will no longer work for CYP, complete the *Inactive Date* field on the *Job Code* **and** *Inactivate* the Staff Member on the *Staff Module Core Information* screen **and** complete the *Inactive Date* field on the *Staff Member Core Information* screen.

Maintaining Staff Member Records (Other Button Screens)



Staff Module Main screen

GENERAL NOTES:

- When you have a **Staff Member highlighted** in the browser, you have access to **multiple buttons** below the browser.
- Each of these buttons is part of a **TOTAL records management system** for your Staff Members, Coaches, Volunteers and Contractors.
- This system should replace (not be done in addition to) existing spreadsheets, charts and notebooks used for tracking completion dates and due dates.
- The goal is for CYMS to save you work, not create additional work!

ADDITIONAL NOTE – LOAD STANDARD CODES BUTTON
When entering a new Staff Member, you can highlight the name and click the "**Load Std Codes**" button. This will put many of the key requirements (Medical Requirements, standard Background Checks, Credentials/Evaluations, etc.) into the Staff Member's file.
o It will still be necessary for you to visit each of the button screens to verify and adjust what has been pre-loaded.
o There will be no dates associated with these pre-loaded requirements. Due Dates/ Completion Dates must be added.
o Some of these pre-loaded requirements may not be required at your installation and may have to be deleted.
o Codes identified as Standard Load are followed by an asterisk (*) on the picklists. They are flagged in the setup tables with a check mark in the "Standard Staff Code?" box (your system administrator can add or remove these check marks and the asterisk from the title to more closely match your local requirements.)

Most of the button screens work the same way:

- Click on the button. When the screen appears, click **Add**.
- Select the appropriate item(s) from the browser.
- Enter any additional information (dates, comments, etc.).   PLEASE NOTE: If a completed requirement is **due again in the future,** enter the completed date on the first code, then add a new code and give it a **Due Date.** This will give you a history of that code – one was due and completed and one is coming due.
- Click **OK**. Repeat to link other codes.
- Click **<<Staff** to return to the previous screen.

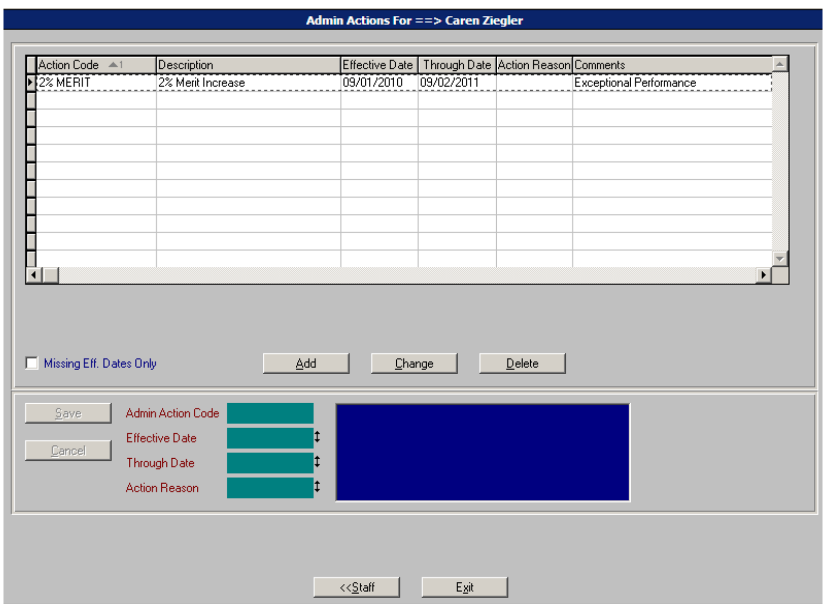
Screen shots of all key buttons appear below. **Detailed instructions are provided only if they vary from the general steps above.**

ADMIN ACTIONS BUTTON

This screen allows you to track effective dates for a wide range of administrative actions (and reasons for the actions) – inactivation, transfer, withdrawal, etc.

1 Click the **Add** button.

2 Select the appropriate **Admin Action Code** from the browser.



Staff Module Admin Actions screen

3 Enter a **Date(s) and Comments** as appropriate.

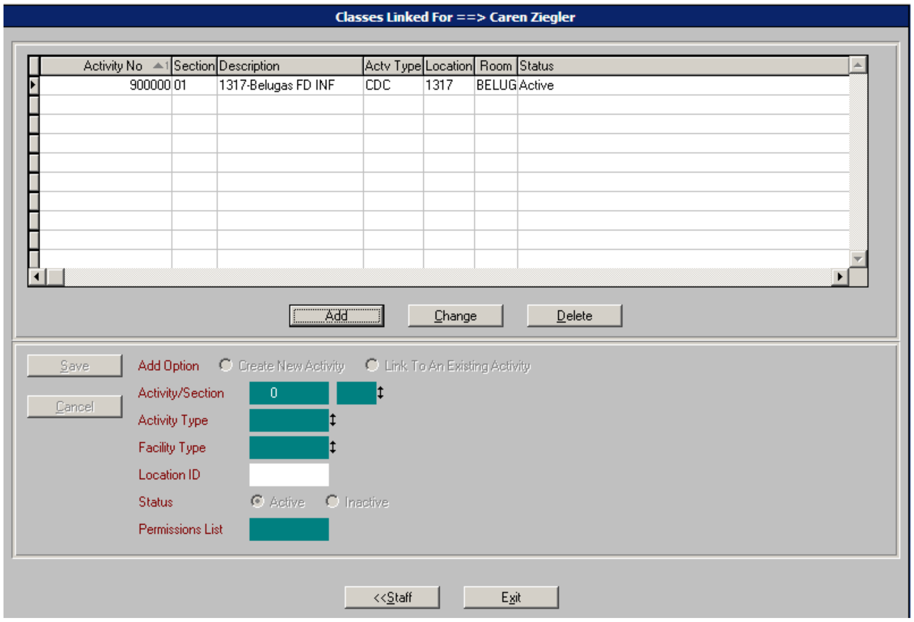
4 Right click in the **Action Reason** field (if appropriate) and select a reason for the action.

5 Use the blue **Comments** box for additional information.

6 Click **OK**.

ASSIGNMENTS BUTTON

This screen allows you to link the Staff Member to the classroom to which he or she is assigned. Staff Members who are linked to rooms will appear as Instructors on Roster Reports and can be printed on the Class Attendance Worksheet with Sign In/Out lines.



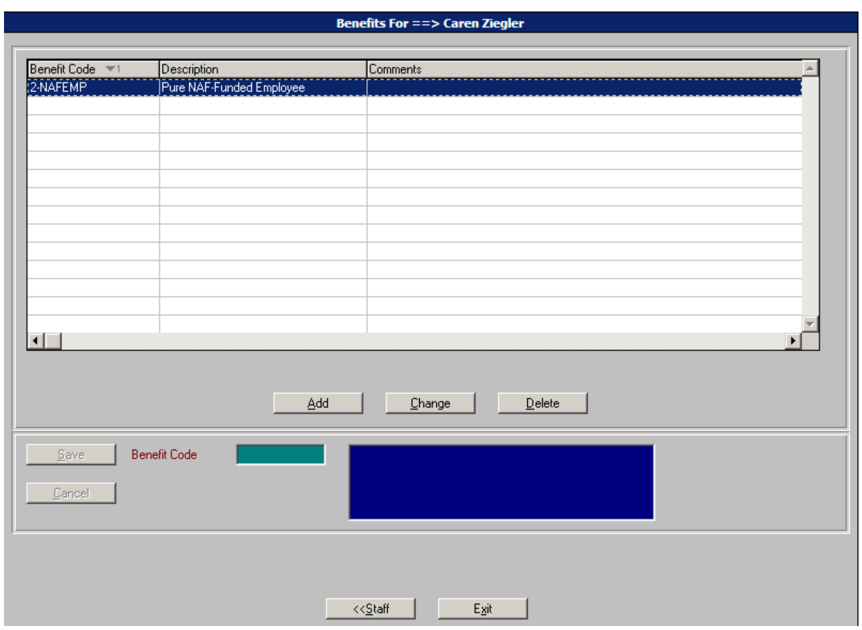
Staff Module Classes Linked screen

BENEFITS BUTTON

This screen allows you to link a Funding/Benefit Code to a Staff Member. Information on this screen provides data for the Annual Report.

NOTE: Please link ONLY ONE **funding** status (APF, NAF, MWRUSA, etc) per employee.

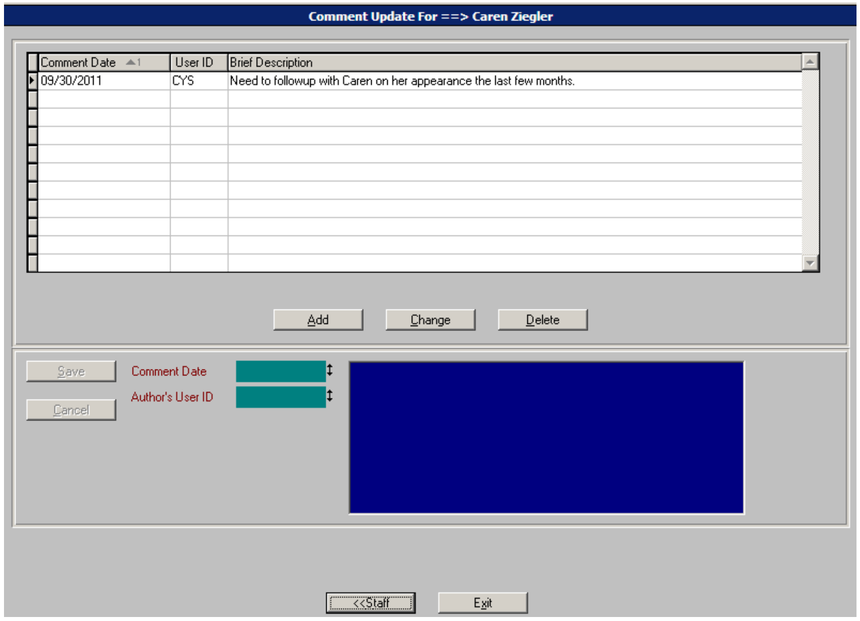
The **benefits** portion of this list is for local installation use.



Staff Module Funding/Benefits screen

COMMENTS BUTTON

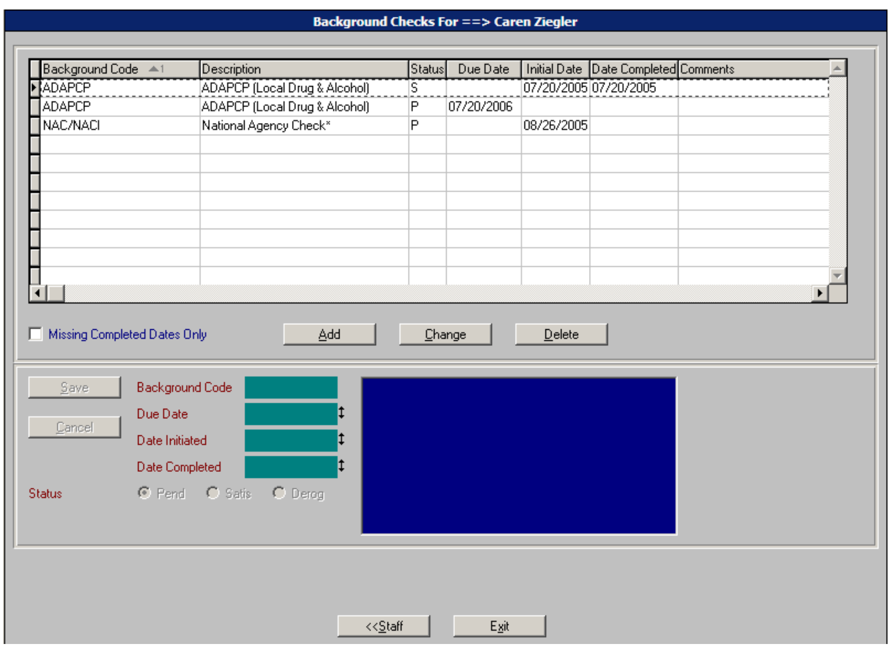
This screen provides space for any general “notes” to the file – things that don’t quite fit anywhere else.



Staff Module Comments screen

BACKGROUND CHECK BUTTON

This screen allows you to track pending and completed background checks for your Staff Members. Information on this screen will also allow you to run the Background Check Report to find out when background checks are coming due for renewal.



Staff Module Background Checks screen

1 Click **Add**. To add multiple background checks, highlight the background checks to be added (press and hold the <**Ctrl>** key and click on the ones you want to select), then continue with step 3.

- If you only need to add one background check, highlight it, click **OK** and you will return to the previous screen where you can continue with Step 3.

2 Add a **Date Initiated** and a status of **Pending**.

3 **<u>When you receive the completed background checks</u>**:

- Double-click the background check and enter the **Date Completed**
- Change status to **Satisfactory** or **Derogatory** and click **Save**.
- If this is a background check that is **due again in the future:**
    - o Add the same code again and give it a **Due Date** and a **Pending Status.**
    - o **In regards to Background Checks only, you will never have a Due Date and a Completion Date linked to the same code.**

4 When it comes time to **Initiate** a background check that has a **Due Date:**

- Double-click the background code
- **Remove** the **Due Date** (since it is no longer due)
- Give it a **Date Initiated** and a status of **Pending**. Then click **Save**.

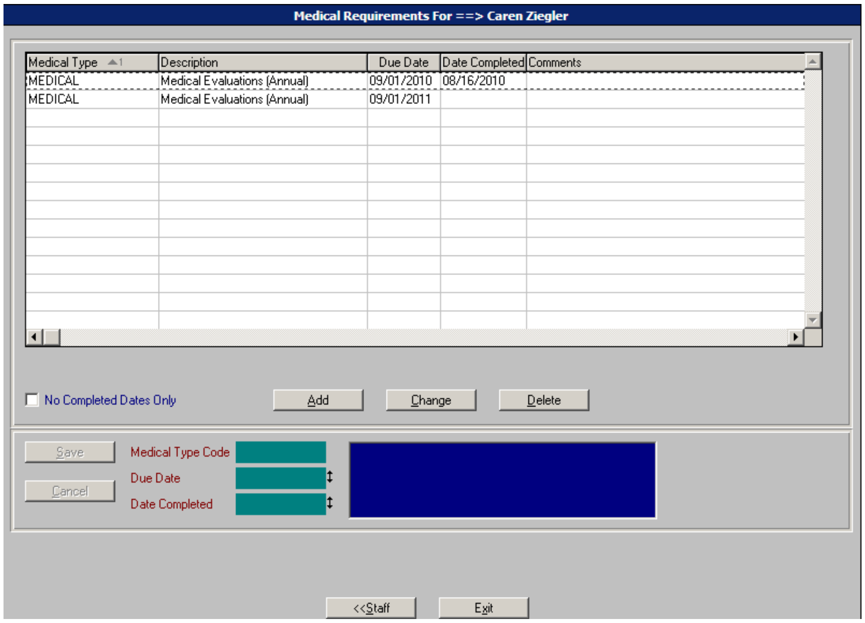
Note: Filling out the information will allow you to keep track of your pending and completed background checks. It will also allow you to run the Background Check Report to find out when background checks are coming due for renewal.

Refer to the screen shot above for how your Background Checks should look.

<u>MEDICAL BUTTON</u>

This screen allows you to track due dates and completion dates for basic Staff Member health requirements. Your system administrator can add additional codes into the setup files if you wish to track shots or other medical-related requirements in a more finite manner.

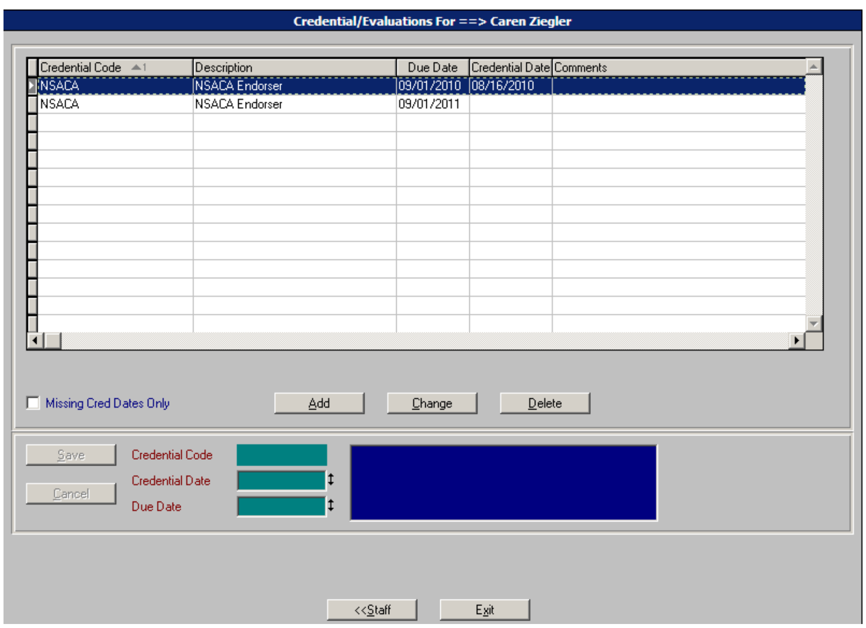
- After you mark a requirement as “completed,” you must load a new code if you wish to track the next time it is due. If you have a **Due Date and a Completed Date** on the same line, the code will **not** show as an outstanding requirement on the Medical Report. The screen shot below shows the correct pattern.



Staff Module Medical screen

CREDENTIALS/EVALUATIONS BUTTON

This screen allows you to track due dates and completion dates for the major evaluation tools (CARAT, FDCRS, etc) and special credentials (CDA, etc.).

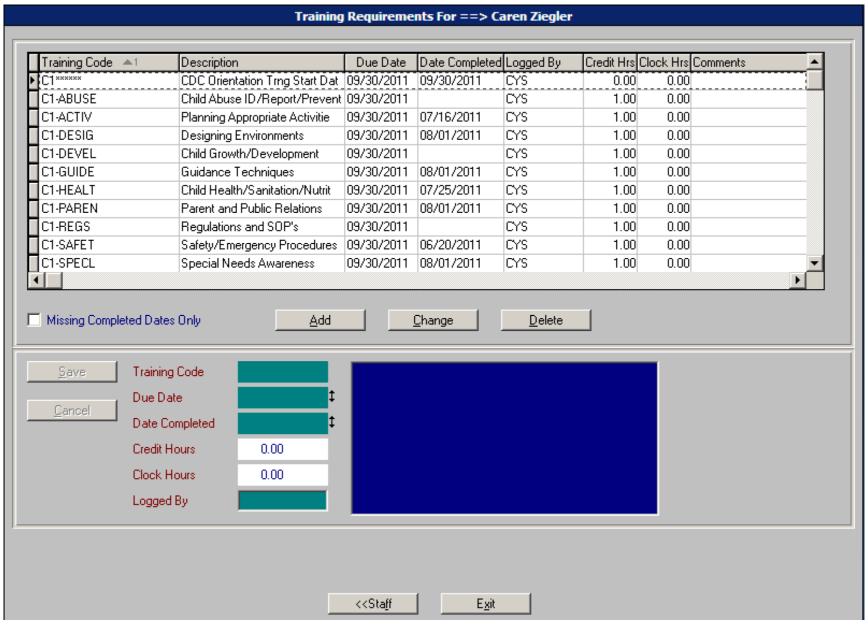


Staff Module Credentials/Evaluation screen

TRAINING BUTTON

This screen allows you to track training requirements, due dates and completion dates. Companion reports produce the equivalent of the Individual Development Plan (IDP) and give the ability to identify training that is coming due or overdue.

Note: The Bulk Training Update Program (Period End → CYS → Bulk Training Update) allows you to link one class to multiple Staff Members, link multiple classes with the same due date or completion date to one employee or link multiple employees to multiple classes. Access the program and press **F1** for field level help as needed.



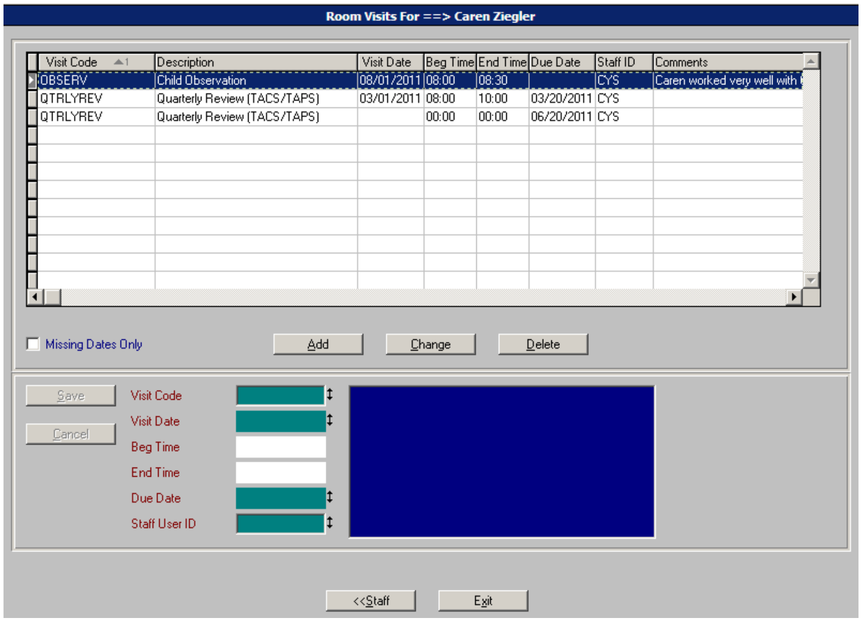
Staff Module Training Requirements screen

See the CYMS Training Guide #61 – Staff Training (Army Specific) for detailed instructions on loading/tracking Staff training through CYMS

ROOM VISIT BUTTON

This screen provides space to log dates of key room visits or discussions with the Staff Members along with general notes or summaries of the interactions. Realize that there are some Room Visits that will have due dates and some that won't.

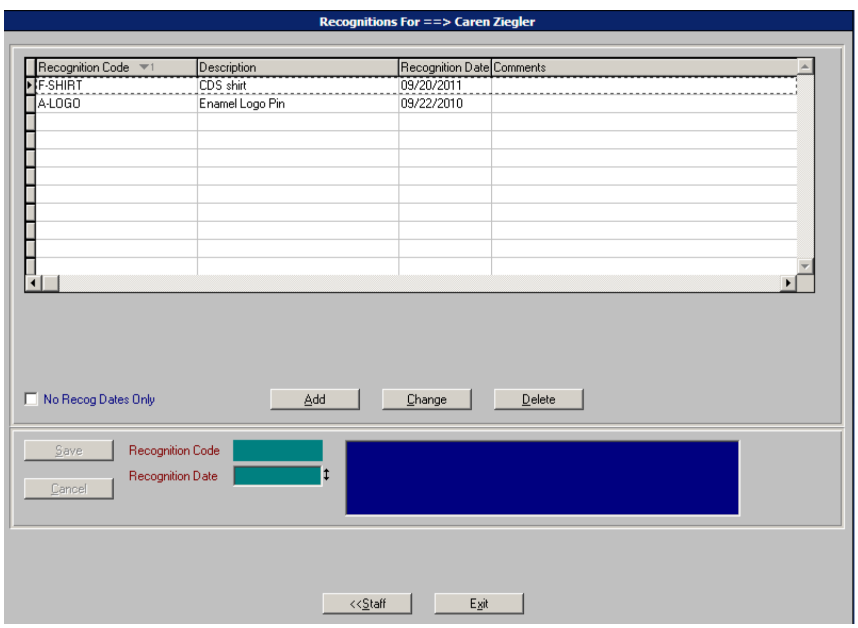
1. Click **Add.**
2. To add a room visit code, select it in the browser. To select multiple, press and hold the <**Ctrl**> key and click on the ones you want to select.
3. Enter the **Date** and **Duration** of the visit.
4. In the **Comments** field, enter any notes about the visit.
5. Click **OK.**



Staff Module Room Visit screen

RECOGNITION BUTTON – Not currently used

This screen allows you to track completion dates for service and local recognition. Your system administrator can add additional codes such as extra or "X-" codes, into the setup files if you wish to track local recognition programs.



Staff Module Recognitions screen

DATA TRANSFER BUTTON – Not to be used by the field

LOAD STANDARD CODES BUTTON

This button was discussed previously.

Please refer to CTG-62 Staff-Reports for a complete listing of all Staff Reports.