

62 - CYMS Training Guide – Staff Reports (10.3 – Updated Nov 2011)

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Basic Concepts

All reports in CYMS can be run multiple ways. Selection criteria include different locations, dates, times, sorts, detail/summary, ages/grades etc. The best way to “learn” about reports is to jump in and experiment with them. You can’t hurt anything in the database by running a report. Start with a small selection of data where you can validate the results – try different settings and views until you find the look you need for the task at hand!

You can press **F1** from any screen in CYMS to obtain field level help.

Before running a report it is extremely important to understand the concept of **Range and Browser vs. Browser Only**. Refer to CTG-15-CORE-Reports Range and Browser for more information.

Important Notes:

- Many of the reports in the Staff and Provider modules work the same. In this guide the Staff Reports have been used for screen shots.
- **ALL** Provider and Staff reports include **RecConnect** functionality. This allows you to send mailings or emails or even text messages to Staff and/or Providers who are coming due for items, such as Background Checks, Immunizations, Trainings, etc. You can also create subject-specific letters for the recipients and insert data fields into the letter template, such as <First Name>, <Last Name>, <Address>, etc and allow CYMS to populate them with the information for each Provider or Staff Member pulled on the report.

One such field is <Report Detail.>. When inserted into the body of a letter, it will list the detail of the report that was run. For example: If you run the Completed-Due report and have <Report Detail> in the body of your letter template, any training code pulled by the report for a specific Provider or Staff Member will be included in that Provider or Staff Member’s letter.
- **Location Range:** The Staff reports have an additional report parameter, **Location Range**, which is not available on Provider reports. The Location Range can be used to isolate your Staff Members from those of other Managers. The **Location** gets linked to a Staff Member in Files → CYS → Staff Module.
- **Statuses:** You can manipulate the list in the Provider/Staff browser by the selections you make in the **Include the Following Statuses** field. If you select **Active** only, the picklist will contain *only* the names/IDs of Staff Members or Providers who are active. If you select **Active** and **Resigned** (or **Perm Inactive** if on the Provider version of the report), then the picklist will contain names/IDs of all Staff or Providers who are *either* Active and/or Resigned/Permanently Inactive.
- You can press the **F1** key from any screen in CYMS to obtain field level help.

Staff Completed-Due Report

Provider Path: Go to Reports → CYS → Provider Reports

Staff Path: Go to Reports → CYS → Staff Reports

This report is used to:

- Identify Staff who are coming due or are overdue for any combination of the following items:
Credentials/Evaluations
Medical
Background Checks
Training
Room Visits
- View any combination of the above items – whether completed or due.
- Determine which Staff Members/Providers are missing certain codes.
- Identify background checks that have been initiated but not completed.
- Can be exported to Excel
- **Note:** This report can print a complete training record, but it does not count, show or tally credit and clock hours. To get this information, use the traditional Training Record IDP report under Reports, CYS, Staff or Provider Reports.

The screenshot shows the 'Staff Completed-Due Report' application window. It features a table on the left for staff entries with columns for Staff Code, Last Name, and First Name. On the right, there are various filters and options: 'Beg Staff' and 'End Staff' with wildcard selection; 'Date Range' set to 10/15/2011 thru 11/14/2011; 'Status' with checkboxes for Active, Resigned, In Process, and LWOP; 'Comment' field; 'Loc Range' set to 1317; 'Report Opt' for Provider/Staff ID or Type/Code; 'Name Opt' for Last, First or First Last; 'Include' checkboxes for Cred/Eval, Medical, Background, Training, and Visit; and 'Run Option' with several radio button choices. At the bottom, there are buttons for Print, Details >>, Last Settings, Default Settings, Templates, and Exit.

Key Fields

- **Date Range:** Depending on the **Run Option** you choose the date range may be ignored.
- **Statuses:** Which statuses do you wish to target?
- **Comment:** You can link a **Comment Code** that will print on the report.
 - The Comment Code can be created in Files→System→Other Maintenance→Comment Code Maintenance.
 - Click **Add**, make the **Comment Type** “CYS” and give your **Comment Code** an ID and Description.
 - Then type in the text you wish to appear on the report. You can even make signature lines and date lines, etc.

- **Location Range:** The Location Range can be used to target your Staff Members from those of other Managers. The **Location** gets linked to a Staff Member in Files → CYS → Staff Module.
- **Report Option:** Sort by Provider/Staff Id or by Type/Code. Essentially, do you want to see all the things due for Staff A, then all the things due for Staff B, or do you want to see all the people due for CPR vs Food Handling, etc?
- **Include:** Select which items you wish to target: Credentials/Evaluations, Medical, Background Checks, Training, or Room Visits.
- **Run Option:**

All Records Due in the Date Range: When this option is selected the Date Range is in play. If running for people who are **overdue**, it is a good idea to use a beginning date of 7/1/1985 thru the end of last month. If running proactively (for **future** items coming due) you would probably just run for a specific month or two.

Codes with **Completed Dates** will not print when running this option.

All Records Due Prior to Today: Date Range is **ignored**.

Codes with **Completed Dates** will not print when running this option.

All Records Regardless of Due Date: Date Range is **ignored**.

This option acts as way to print an entire history of all codes linked (due and complete).

Typically you would sort this by Provider/Staff Id.

All Records Completed Within the Entered Date Range: Date Range is in play.

Looks only at codes with Completed Dates.

Include if Staff/Provider is Missing Any One of the Selected Codes: Date Range is **ignored**.

This is a good way to find people who don't have certain codes linked.

To constitute a hit, the staff/provider must literally be missing the code(s).

Include when Background Check Has Been Initiated But Not Completed: Date Range is in play.

If the Initiated Date on the Background Check falls within the date range on the report and the record has a blank Completed Date, it will print and show the number of days it has been initiated.

Run RecConnect: Determine whether you want to run in Reconnect mode which allows you to email, text, etc. This is a very powerful tool that should be utilized.

- On the **Details** screen, you can Skip or Include specific codes
If the Include Column is blank, by default, the system will give you information on **all** codes.
If the Include Column has 3 codes in it, you will get information on those 3 codes.
- You may also elect to print **Notes or Comments** that you have linked to the code.
- The **Wildcard Option** allows you to target similar codes due for multiple people.

The following example is based on Army coding:

If you want to find all Staff Members who have any **Abuse** code due, type the following in the **Wildcard** field: ***-abuse**

This will search and find all Staff Members coming due for **A-Abuse, C1-Abuse,**

S2-Abuse, F5-Abuse, etc.

You can also search for all codes of a specific type. To find search and find any **S1** code, for example, type the following into the **Wildcard** field: **S1***

The screenshot shows the 'CYMS Completed-Due Report - Details' window. It features five main sections for selecting record types:

- Cred/Eval:** Skip list includes ASA, CDA, CDAR, CDACH, MHA, MSA, NAEYC. Includes 'Add >>', '<< Del', and 'Include' buttons. A checkbox for 'Print Cred/Eval Records Notes?' and a 'Wildcard' field are present.
- Med Code:** Skip list includes MEDICAL, SHOTS, TB-TEST. Includes 'Add >>', '<< Del', and 'Include' buttons. A checkbox for 'Print Medical Records Notes?' and a 'Wildcard' field are present.
- Backgrnd:** Skip list includes ACR, ADAPCP, ADCC, CID/DCII, CIVLAW, CDACH, FAP. Includes 'Add >>', '<< Del', and 'Include' buttons. A checkbox for 'Print Background Record Notes?' and a 'Wildcard' field are present.
- Training:** Skip list includes A-Annual Training, A-ABUSE, A-CPR, A-FIRST, A-FOOD, A1-WKSHP, A1-Z. Includes 'Add >>', '<< Del', and 'Include' buttons. A checkbox for 'Print Training Due Notes?' and a 'Wildcard' field are present.
- Visit Code:** Skip list includes C2Q, CARAT, CDA, ECERS, ICYET. Includes 'Add >>', '<< Del', and 'Include' buttons. A checkbox for 'Print Visit Notes?' and a 'Wildcard' field are present.

At the bottom of the window are buttons for 'Print', 'Advanced', '<< Back', 'Templates', and 'Exit'.

Training Record (IDP)

Provider Path: Go to Reports → CY5 → Provider Reports → Provider Training Record (IDP)

Staff Path: Go to Reports → CY5 → Staff Reports → Staff Training Record (IDP)

This report is used to:

- Print Staff/Provider's complete training records (completed and due).
- Print a list of training sessions **completed** by a Staff Member or Provider within a particular date range.

The report also prints Credit and Clock Hour totals and training comments.

- The Date Range uses the **Date Completed** fields on Staff Member's/Provider's **Training Requirements** screen.

If **Skip Training Date Range Restriction** is enabled, the report will print ALL training records linked to a Staff Member or Provider.

If it is NOT enabled, the report will print only training records that have been *completed* within the date range selected.

- **Run RecConnect:** Determine whether you want to run in Reconnect mode which allows you to email, text, etc. This is a very powerful tool that should be utilized.

- **Click Details** and you can Skip or Include specific codes
If the Include Column is blank, by default, the system will give you information on **all** codes.
If the Include Column has 3 codes in it, you will get information on those 3 codes.
- The **Wildcard Option** allows you to target similar codes due for multiple people.
The following example is based on Army coding:
 - If you want to find all Staff Members who have any **Abuse** code due, type the following in the **Wildcard** field: ***-abuse**
 - This will search and find all Staff Members coming due for **A-Abuse, C1-Abuse, S2-Abuse, F5-Abuse**, etc.
 - You can also search for all codes of a specific type. To find search and find any **S1** code, for example, type the following into the **Wildcard** field: **S1***
- When the **Print Sub-Totals Based On Prefix In Training ID Code** option is selected, the system will tally and group certain codes together. **Examples below based on Army Coding:**
 - For **Foundation Training**, you normally want to put a **“2”** in the **Number of Characters in Prefix** field. The system will group codes by the first two digits and give you a sub-total of Credit Hours and Clock Hours for this grouping.
 - Example: For your CDC plan: your Orientation (C1), Work Experience (C2), Entry Level (C3), Skill Level (C4) and Target Level (C5) will all be sub-totaled.
 - For your **Annual Training**, you normally want to put a **“1”** in the **Number of Characters in Prefix** field. All of the annual (A) codes for the staff member will be totaled together.
- You may separate each staff/provider’s training requirements by selecting the **Print Each Person On A New Page** option.
- You can link a **Comment Code** to your Staff/Provider’s training schedules on the **Details** screen.
 - The Comment Code can be created in Files→System→Other Maintenance→Comment Code Maintenance.

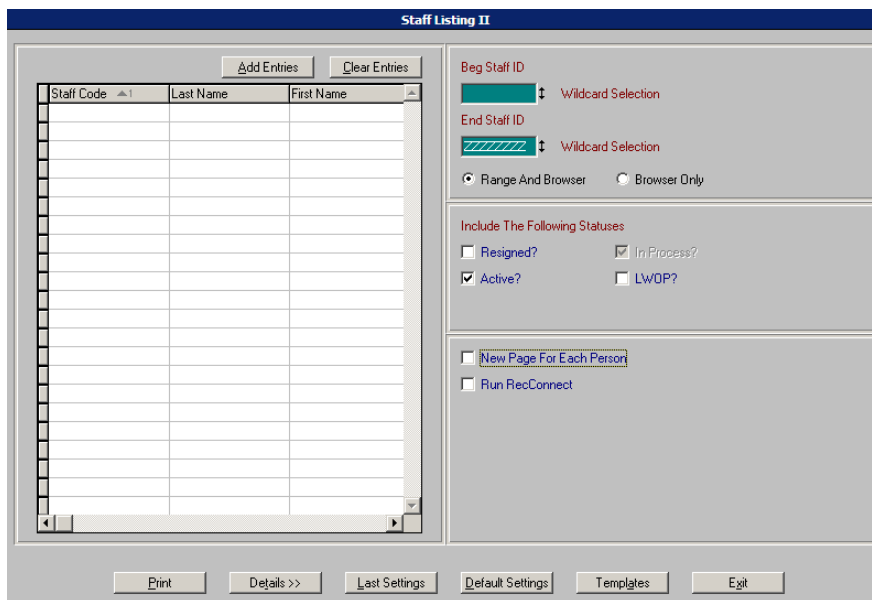
- Click **Add**, make the **Comment Type** “CYS” and give your **Comment Code** an ID and Description.
- Then type in the text you wish to print out on the Training Record IDP Report. You can even make signature and date lines, etc.

Staff/Provider Listing II Report

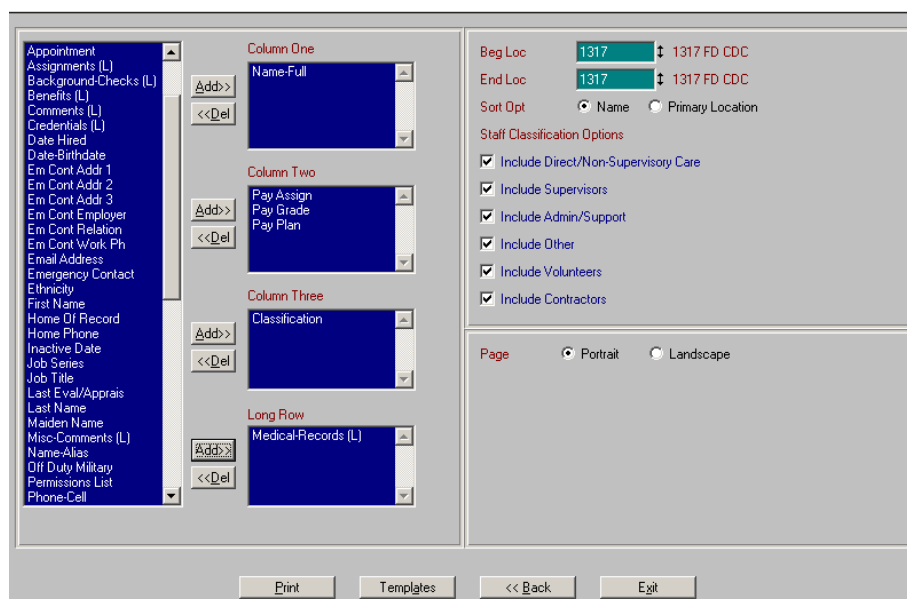
Provider Path: Go to Reports → CYS → Provider Reports → Provider Listing II

Staff Path: Go to Reports → CYS → Staff Reports → Staff Listing II

- This report gives you complete flexibility when determining which information you want printed for your Staff and Providers and where you want it printed.
Logic is based on the Roster Report Details screen.
This report is also available in Excel.
Allows for **EVERY** field on **ANY** tab in the Provider/Staff Module to be printed **except** the Provider's USDA Meal Times/Rates.



- On the **Details** screen you may target specific staff linked to specific locations or classifications.
 - A Staff Member’s classification is determined on the **Core Info** screen for the Staff Member (Files → CYS → Staff Module → Select a Staff Member and click ‘Change’)
- Use the items in the Selection List to “custom design” the report.
 - Add or remove print fields from the left selection list that you want to appear in the **first, second, and third column of your report**. Print fields that end in (L) can only be added to the **Long Row**.
 - The more items you add, the “busier” the report becomes.
 - Test different combinations to “design” easy-to-read reports that meet your specific purposes.



Staff Last Evaluation Report

Staff Path: Go to Reports → CY5 → Staff Reports → Staff Last Evaluation Report

This is a Staff specific report that will:

- List Staff Members whose last evaluation was *on* or *before* the cutoff date entered.
- List Staff Members who have never had an evaluation recorded in CYMS.
- The **Last Evaluation Cutoff Date** field is what drives this report.
 - The report will list all Staff Members whose last evaluation was *on* or *before* the date you enter.
 - **Example:**
Staff Member A's last evaluation date is **29 June 2011**.
Staff Member B's last evaluation date is **01 July 2011**. You run the report with a cutoff date of **30 June 2011**. Staff Member A will appear on the report, but Staff Member B will not.
 - The report will also list all Staff Members who have never had an evaluation recorded in CYMS. This is done by default, and those records cannot be suppressed.
 - A Staff Member's classification is determined on the **Core Info** screen for the Staff Member (Files → CY5 → Staff Module → Select a Staff Member and click 'Change')

The screenshot shows the 'Staff Last Evaluation Report' application window. It features a central table with columns for 'Staff Code', 'Last Name', and 'First Name'. To the right of the table are several configuration panels. The top panel includes 'Beg Staff ID' and 'End Staff ID' fields with 'Wildcard Selection' options, and radio buttons for 'Range And Browser' (selected) and 'Browser Only'. The middle panel has 'Location Range' fields set to '1317' through '1317', a checked 'Print Email Address?' box, an unchecked 'Skip Line Between Staff?' box, and 'Sort Option' radio buttons for 'Name', 'Location', and 'Evaluation Date' (selected). The bottom panel, titled 'Include Options', has checkboxes for 'Active?' (checked), 'Resigned?' (unchecked), and 'LWOP?' (unchecked). Below these are 'Last Evaluation Cutoff Date' (11/15/2011) and several checked options: 'Include Direct/Non-Supervisory Care', 'Include Admin/Support', 'Include Other', 'Include Supervisors', 'Include Volunteers', and 'Include Contractors'. An unchecked 'Run RecConnect' option is at the bottom. At the very bottom of the window are buttons for 'Print', 'Details >>', 'Last Settings', 'Default Settings', 'Templates', and 'Exit'.

Staff Sponsor Unit Report

Staff Path: Go to Reports → CY5 → Staff Reports → Staff Sponsor Unit Report

This report will:

- List Staff Members by the Military Unit to which their spouses/emergency contacts are linked
- List Staff Members along with their spouse's/emergency contacts.

Sponsor and Unit data for this report is pulled from the **Staff Module/Emergency/Perm** screen: *Emerg F/L Name* and *Unit/Employer* fields.

All other data on this report, such as Phone Numbers, Email addresses, Locations, etc is pulled from the **Staff Member Core Info** screen.

- Picklist items for the Unit/Employer field are maintained in **Unit Maintenance**. (Files → CY5 → CY5 HH/Program Maintenance → CY5 Unit Maintenance)
- For optimal results on this report, insure that ALL Sponsors/Spouses/Emergency Contacts are associated with a Unit selected from the **Unit Code Picklist**, if applicable.
- A Sponsor who is linked to Unit/Employer that is NOT associated with a **Unit Code Picklist** item (meaning the Unit was entered as free form text in the field) will be displayed ONLY under select circumstances and may be listed more than once. See below for further guidance.
- Use the dual selection list to **Include** which units you wish to report on.

If you want to report on all Units, you can Include all of them OR Skip all of them.

- **Note:** If you want your report to include Staff Members with Sponsors/Spouses that are NOT linked to a Unit code you MUST leave ALL units in the **Skip** column. This is the ONLY way to get those names to appear on the report.
 - Sponsors/Spouses linked to a Unit NOT associated with a **Unit Code Picklist** item will appear multiple times if:
 - The entry on their *Unit/Employer* field includes a comma
 - You sort the Report by Unit.
- **Note:** If you want your report to include Staff Members who do not have Sponsors/Spouses or whose Sponsors/Spouses are NOT linked to a Unit (either from the **Unit Code Picklist** or from a free form text Unit, i.e.: the *Unit/Employer* field is blank), then you MUST sort the report by Name or Location. You cannot sort the report by Sponsor Unit.
- A Staff Member's classification is determined on the **Core Info** screen for the Staff Member (Files → CY5 → Staff Module → Select a Staff Member and click 'Change')

The screenshot shows the 'Staff Sponsor Unit Report' application window. On the left is a table with columns for Staff Code, Last Name, and First Name. On the right is a control panel with various filters and options. The 'Location Range' is set to 1317. The 'Sort Option' is set to 'Sponsor Unit'. The 'Include Options' section has several checkboxes checked, including 'Active?', 'Include Direct/Non-Supervisory Care', 'Include Admin/Support', 'Include Other', 'Include Supervisors', 'Include Volunteers', and 'Include Contractors'. At the bottom, there is a dual selection list for 'Skip' and 'Include' units, with 'UNIT1' and 'UNIT2' currently in the 'Skip' column.