60 - CYMS Training Guide - Staff Records
(10.3 – Updated Oct 2011)

Background

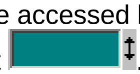
1 This module is to be used by **Managers, Admin Staff, Program Operations Staff, Training Personnel** – all individuals responsible for personnel actions, administrative actions and training and recognition for **Staff Members, Volunteers** and **Contractors.**

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 **three (3) basic information screens** (Core ID Information, Staff Background/History and Emergency Contact Information/Permissions) 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 **“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.

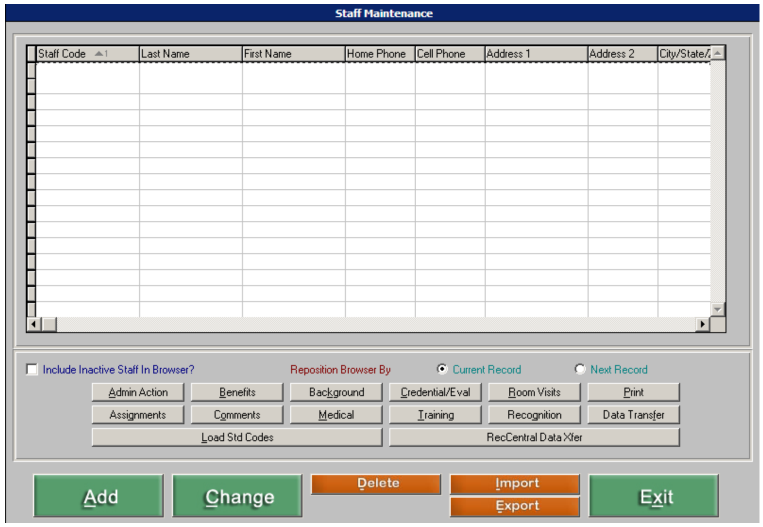
3 Use the **Tab** key to advance to the next field instead of the mouse. If you tab too far, you can use **Shift + Tab** to go to the previous field.

4 To clear the contents of a date field, use the **F8** key to start again.

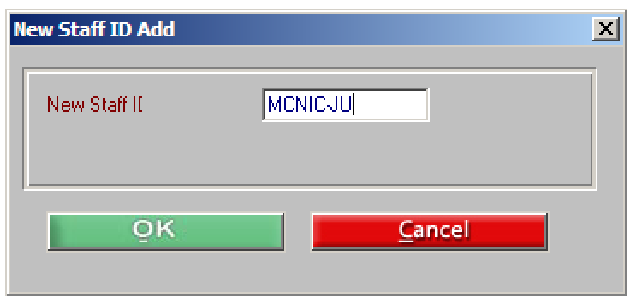
5 You can press **F1** from any screen in CYMS to obtain field-level help with the task you’re performing.

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 **Select a *Classification* from the drop-down list.** Technically it is possible to not be any of these, but the vast majority of your Staff Members should fall into one of these categories. If you are unsure which to select, refer to your annual report guidance.

5 Enter the Staff Member's **Social Security Number**. You don't need to type the dashes. Once entered, this field is not displayed on screen. Only individuals with proper security clearance will have access to this sensitive information. (Note: This is an optional field.)

6 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.

7 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.

8 The next block (at the bottom left of the screen) contains **key annual report data** and should be completed for all employees:

- Select an **employment status:**

  - **Active** = a current employee.
  - **LWOP** (Leave Without Pay) = the employee is still employed, but is on an extended absence (maternity leave, terminal leave, detailed outside your organization, etc). By clicking LWOP, the Staff Member no longer appears on your active employee listing.
  - **Resigned** = the individual is no longer employed by your organization. When you click resigned, the employee no longer appears on your active employee listing. The data can be retrieved and reactivated by clicking the *Include Inactive Staff in Browser?* toggle located beneath the Staff Member browser, in the middle of the main **Staff Module** screen.
- Select an **Appointment Type** (Full time, Part time, Flex or Seasonal). Be sure to update this information when a new Personnel Action is received. This is important Annual Report data.
- 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.

9 The top right block on the screen contains administrative data for local use. These fields are optional and are not required for Annual Report use.

- **Date Staff Hired**
- **Last Evaluation/Appraisal Date**
- **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.
- **Staff Person Date of Birth**

10 The fields located on the bottom right-hand corner of the screen are required for the Annual Report. These fields are **mandatory**. Use the picklists to choose the appropriate entries:

- **Primary Location**. This field lets you limit the number of names shown in the Main Browser. It does not necessarily mean "this is the building where this person works," but rather means "I want all of the people with this location to be seen in one grouping."
  - In addition to the Primary location, there are Permissions that can be assigned to each Staff Member on the Emergency/Perm screen. This is the primary way CYMS will limit who you see and can report on.

  Pay Plan – Choose the appropriate listing (CC, GS, WG, etc). This should always match the most current Personnel Action.
- **Pay Grade –** In conjunction with the Pay Plan, choose the appropriate pay grade (01-13).
  - Be careful with your CC employees:

    Payband I is a Grade 02 or 03 equivalent

    Payband II is a Grade 04 or 05 equivalent.
- **Pay Assignment –** What CYS program does this person work for? (CDC, SAS, etc)
- **Job Series –** Choose the appropriate listing. This should match the most current Personnel Action.

- **Job Title –** Select the title closest to the actual function.

Your Screen should look similar to the following:

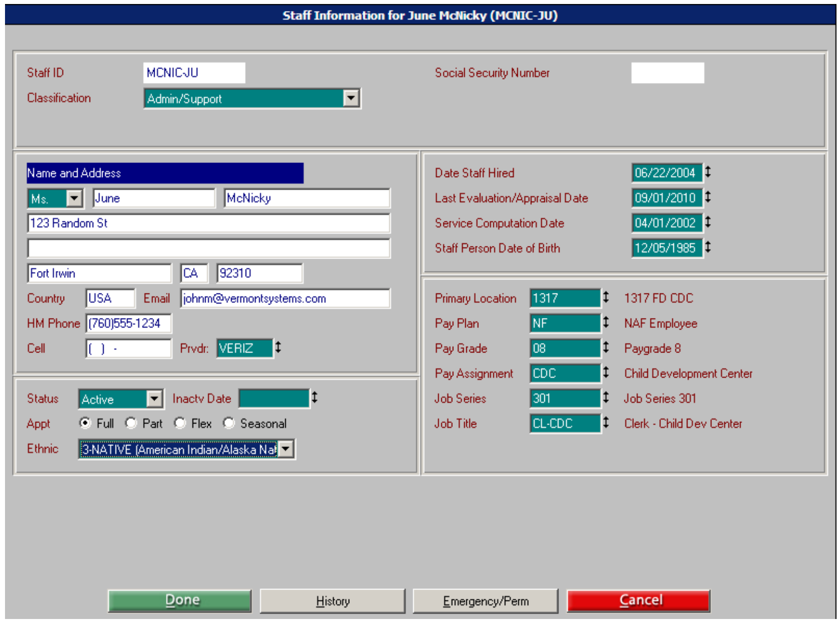


Figure 1: Staff Module Core Info screen

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.

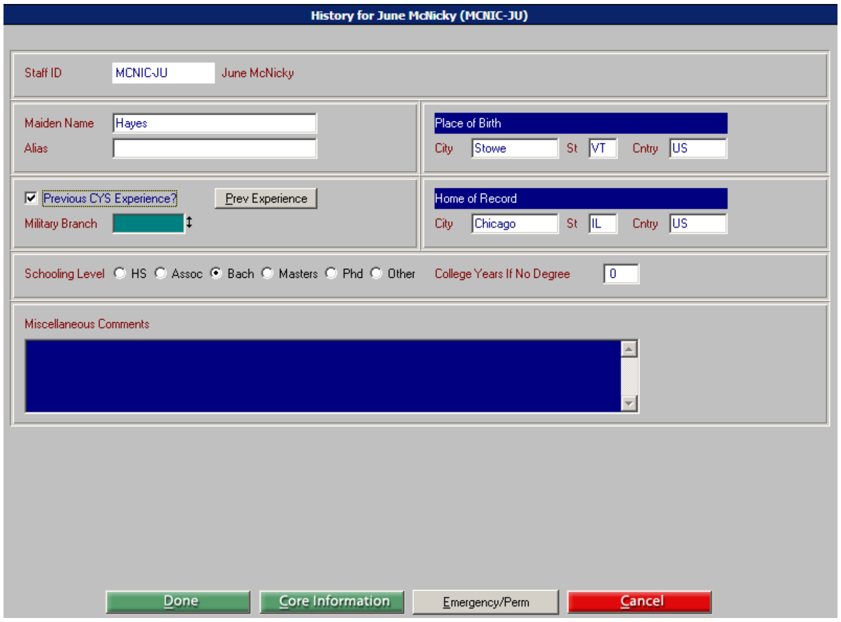


Figure 2: Staff Module History screen

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.

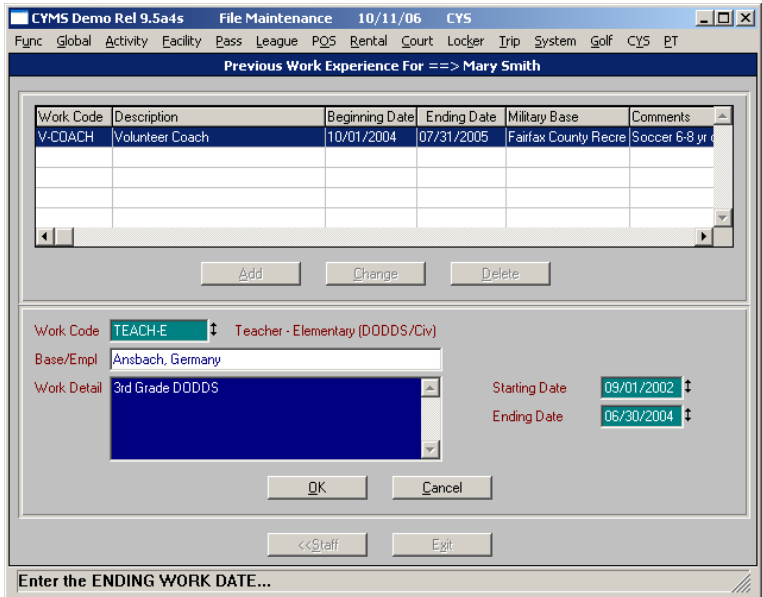


Figure 3: Staff Module Previous Work Experience screen

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/Perm** to go to the **Emergency Information/Permissions** 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 –** Enter the Spouse's SSN in this field. This is *optional*.
- **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).

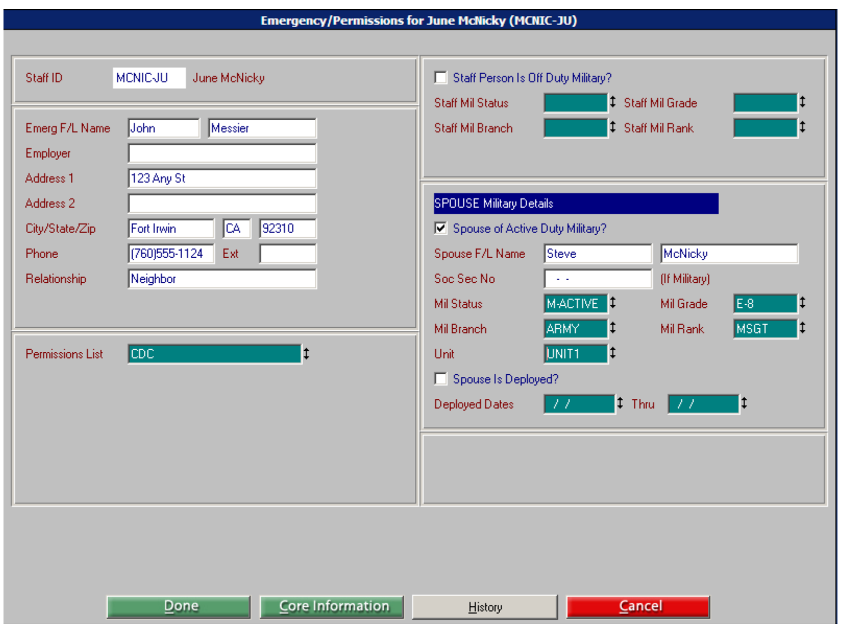


Figure 4: Staff Module Emergency/Perm screen

4 **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.

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

Maintaining Staff Member Records (Button Screens)

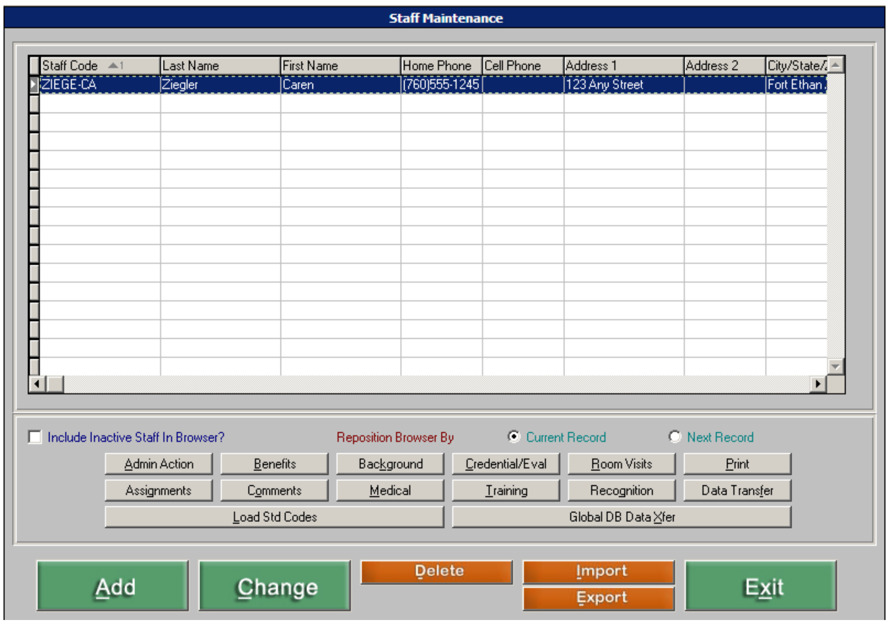


Figure 5: **Staff Module Main screen**

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.

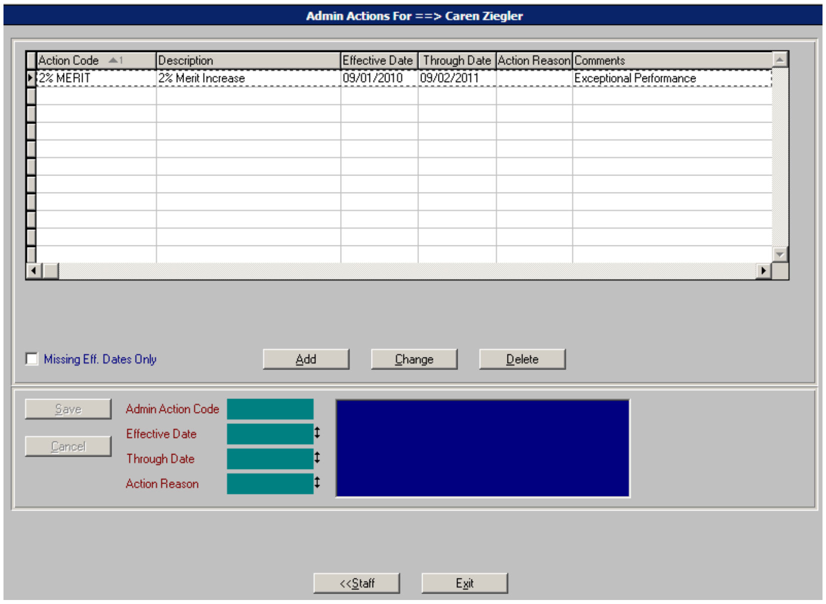


Figure 6: Staff Module Admin Actions screen

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.

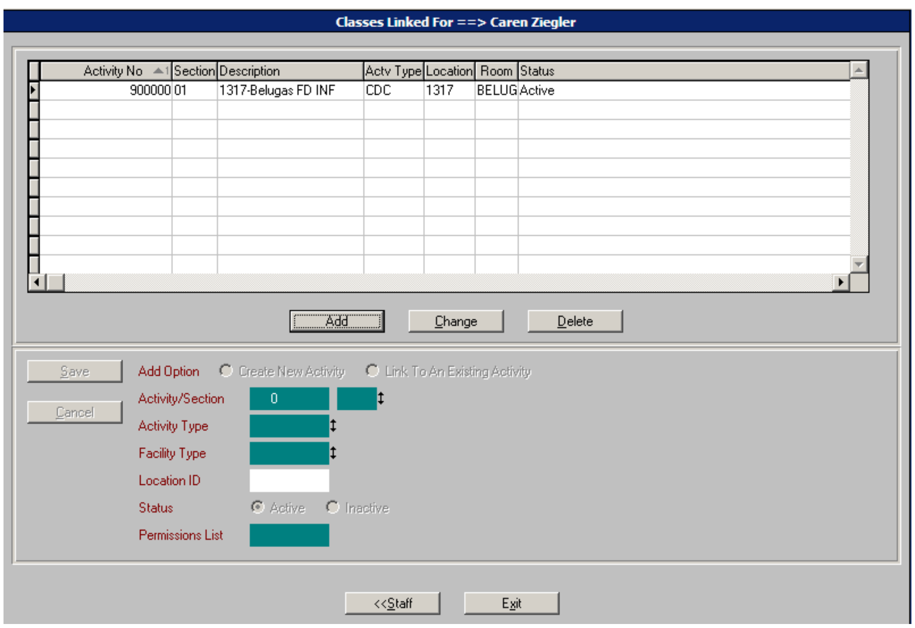


Figure 7: Staff Module Classes Linked screen

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.

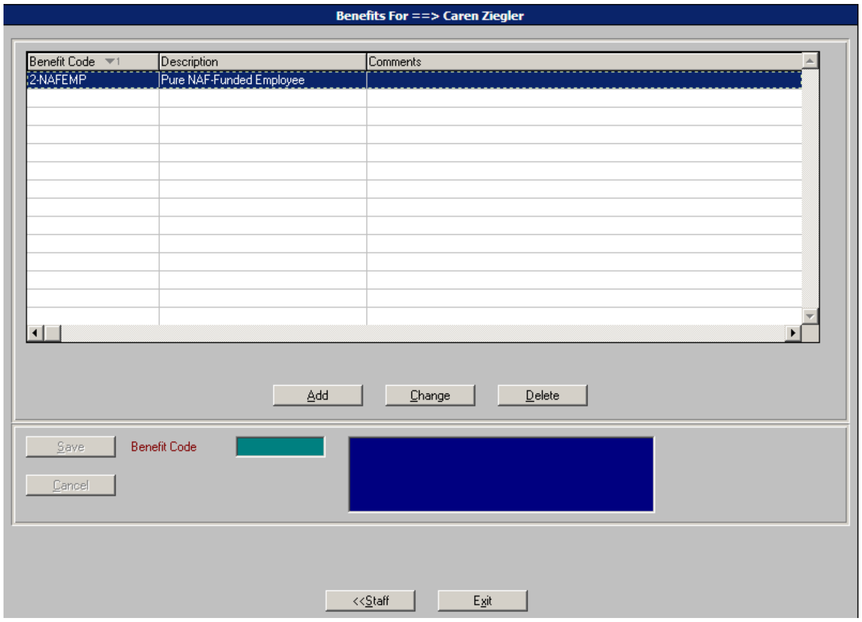


Figure 8: Staff Module Funding/Benefits screen

COMMENTS BUTTON

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

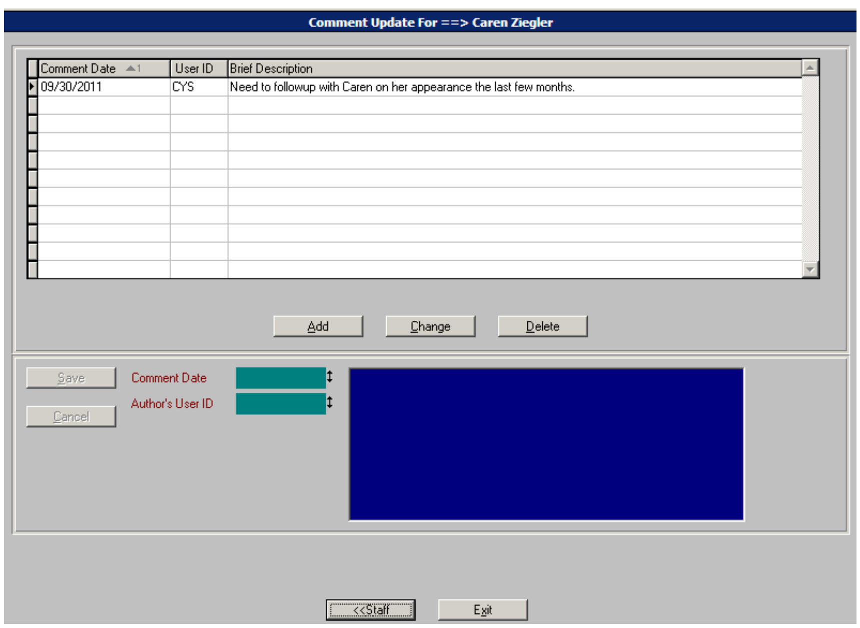


Figure 9: Staff Module Comments screen

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.

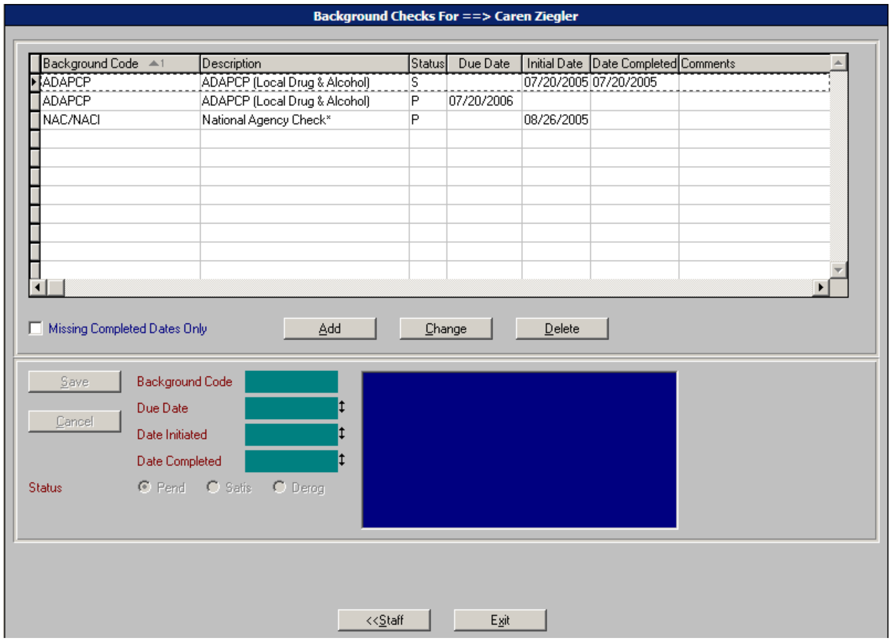


Figure 10: Staff Module Background Checks screen

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 Figure 10 for how your Background Checks should look:

MEDICAL BUTTON

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.

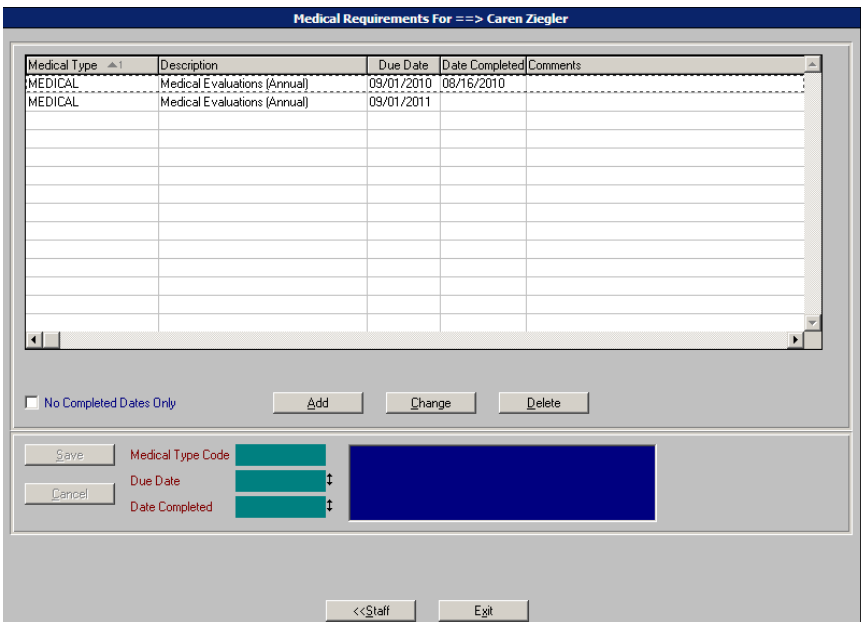


Figure 11: Staff Module Medical screen

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.).

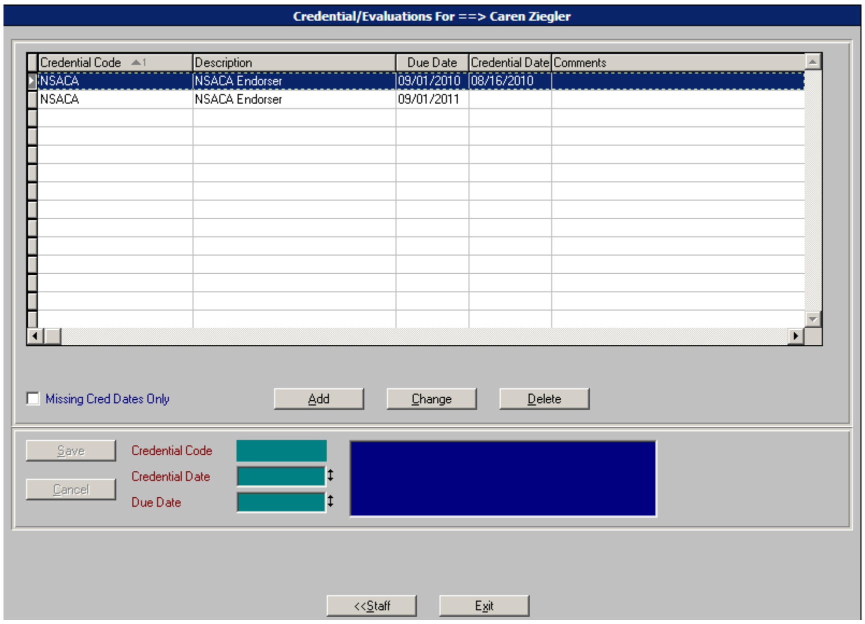


Figure 12: Staff Module Credentials/Evaluation screen

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.

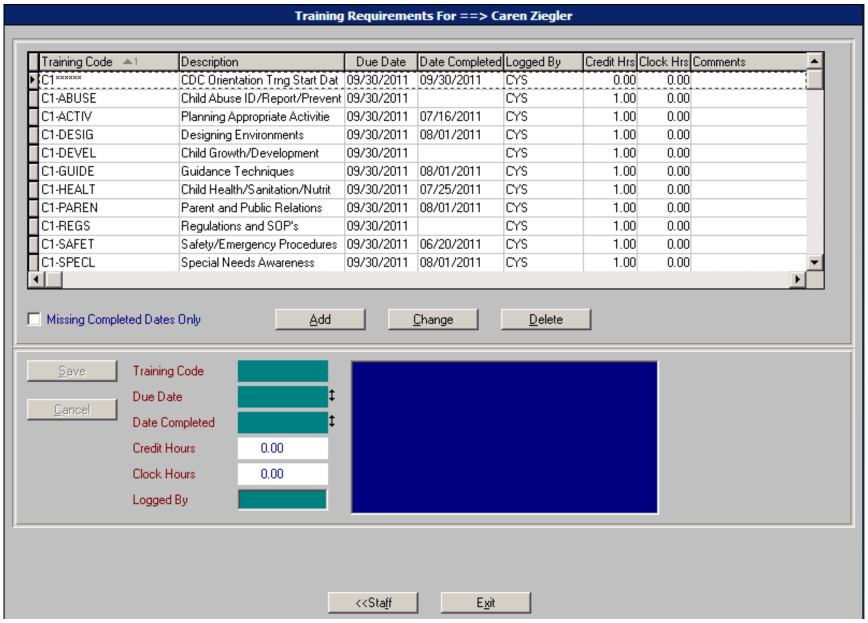


Figure 13: Staff Module Training Requirements screen

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.**

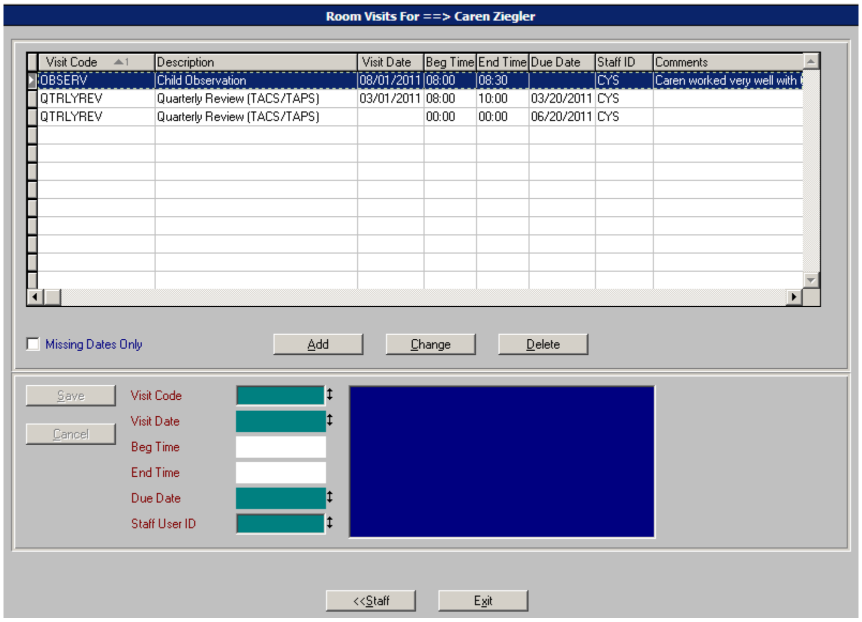


Figure 14: Staff Module Room Visit screen

RECOGNITION BUTTON

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.

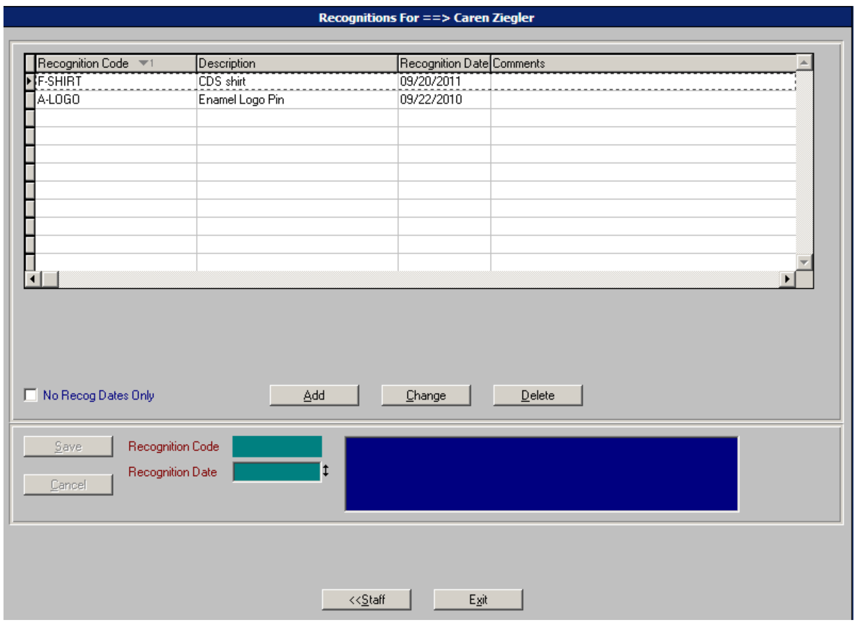


Figure 15: Staff Module Recognitions screen

DATA TRANSFER BUTTON

This screen allows you to export or import a Staff Member's file from or into your database. This program creates a .dat file in your Export directory which can be copied to disk and then imported into a new database.

NOTE: If transferring files between databases, both databases *must* be running the same version of CYMS (i.e. 10.3). You cannot export a file from CYMS 9.5a6 and import into CYMS 10.3.

Also, this is **not** the same transfer as the Army's Global Data Transfer.

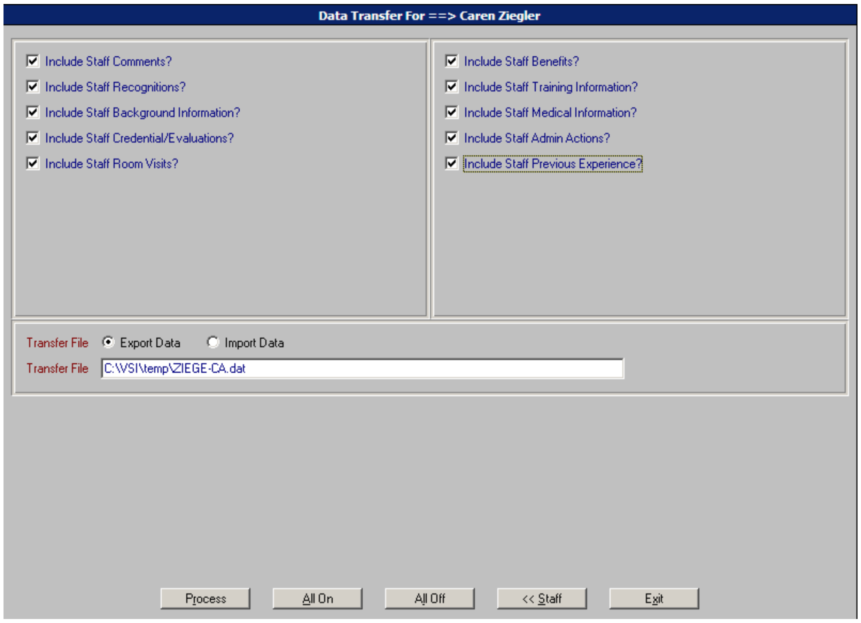


Figure 16: Staff Module Data Transfer screen

LOAD STANDARD CODES BUTTON

<u>This button was discussed previously.</u>

GLOBAL DB DATA XFER BUTTON (Army Only)

This screen allows you to transfer Staff Member files from one duty installation to another via the Global RecTrac Database regardless of CYMS version differences between installations.

See CTG-63-Staff CYMS Global Data Transfer for more detailed information.

NOTE: Refer to the CYMS Global Transfer Setup document for set up procedures and policy.

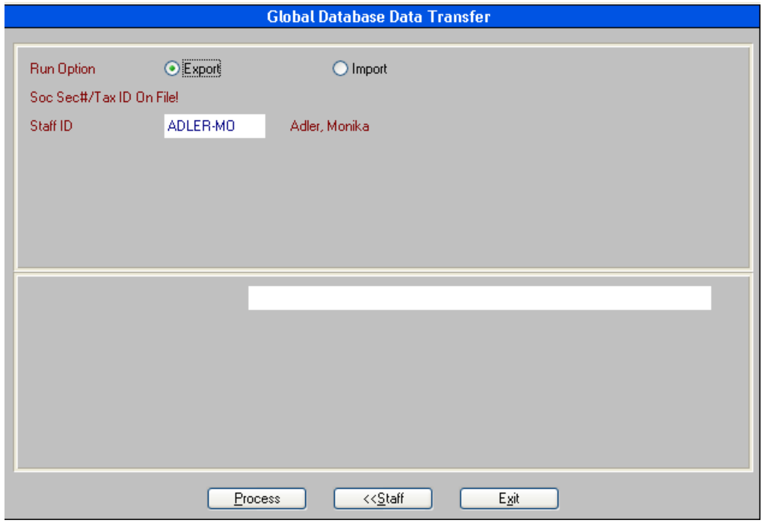


Figure 17: Staff Module Global Data Transfer screen

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