

# #93 – CYMS Training Guide – Household Transfer/Merge and Sponsor/Spouse Switch Utility

(10.3 - Updated Sept 2013)

## Background

- Numerous situations may create a need to change a CYMS household (HH) – for example:
  - Family Member (FM) #2 (spouse or NO SPOUSE) has been deleted (**Transfer/Merge**)
  - During initial data entry child placed in FM#2 position (reserved for spouse/NO SPOUSE). (**Transfer/Merge**)
  - Spouse in a dual military HH promoted and becomes the higher ranked parent (**Sponsor/Spouse Switch**).
  - Divorce causes the spouse to become the sponsor. (**Sponsor/Spouse Switch**)
  - Marriage/remarriage causes two households to become one HH (**Transfer/Merge**)
  - Child put in wrong household/moving to different HH based on custody arrangement, etc (**Transfer/Merge**)
- When one of these situations occurs, it should be corrected immediately using the Household Transfer/Merge or Sponsor/Spouse Switch utility.
- When household status changes, it is critical that these changes are correctly made in CYMS. Failure to capture these changes in CYMS can adversely affect your Annual Report data.

**CAUTION:** Carefully follow the approved steps. If you need to use Full Merge or Partial Merge, it is highly recommended that you call VSI for assistance until you are comfortable with the process.

**NOTE #1:** After you transfer/merge households – if the household number changes or a child that held a pass in HH 1 is now part of HH 2, you will need to print new swipe card. The household id is part of the barcode so if that changes the card will not find the household or the child and fail to swipe them in. If you are using key fobs you do NOT need to reissue as the key fob is not related to household numbers in your database.

**NOTE #2:** A Credit balance WILL move from one household to another as a result of a full merge or HH Transfer as long as the TO household does not have a DEBIT BALANCE. If this situation exists the system will pop a message and not allow the transfer/merge to continue. If the TO household has a zero balance or credit balance the transfer/merge will be allowed and the credit will move as it should.

## SCENARIO 1 – Family Member #2 Has Been Deleted

1. If Family Member #2 gets deleted and you are linked to a **Household Device** that is configured properly (**Auto Create F/M 2 is selected**), simply go back into **HH & Member Update**, go to the family member screen and the system will automatically re-create FM #2.

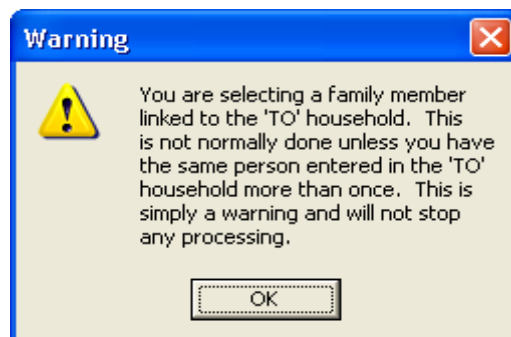
## SCENARIO 2 – Family Members In Wrong Positions – Child Is In Family Member Position #2 and Spouse Is In Family Member Position #3, #4, etc.

1. Click the **Household & Member Maintenance** button.
2. Make sure the data on the **Spouse Info** screen is correct (at the Household level). Update this information if appropriate.
3. Go to: **Utilities → System → Household Utilities → Household Transfer/Merge**
4. Locate your Household in both the **From Household** browser and the **To Household** browser.
5. **Double click** your selection so the **Household Num** and correct **Name** display on the screen.

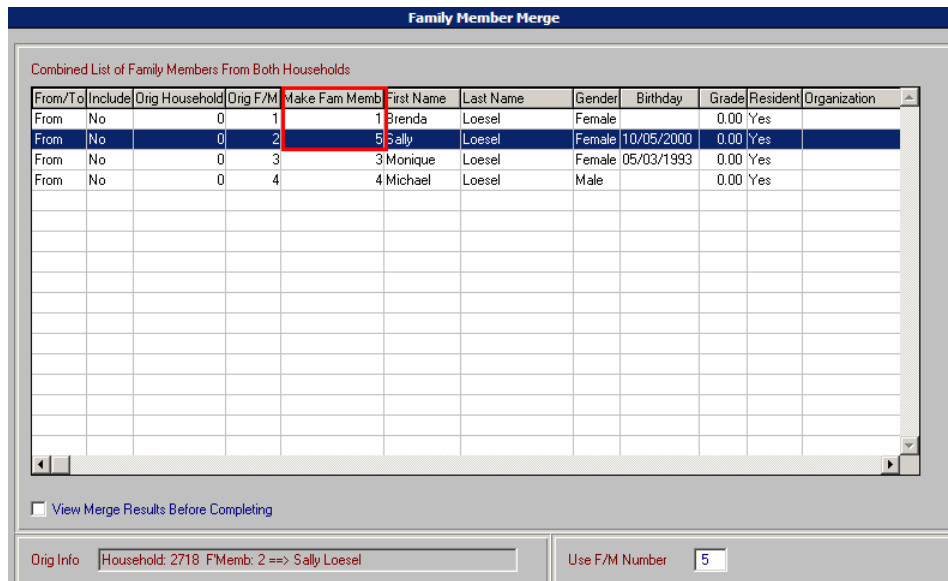
6. Next click **Partial Merge**. You will be taken to the following screen.

From/To	Include	Orig Household	Orig F/M	Make Fam Memb	First Name	Last Name	Gender	Birthday	Grade	Resident	Organization
From	No	0	1		1 Brenda	Loesel	Female		0.00	Yes	
From	No	0	2		2 Sally	Loesel	Female	10/05/2000	0.00	Yes	
From	No	0	3		3 Monique	Loesel	Female	05/03/1993	0.00	Yes	
From	No	0	4		4 Michael	Loesel	Male		0.00	Yes	

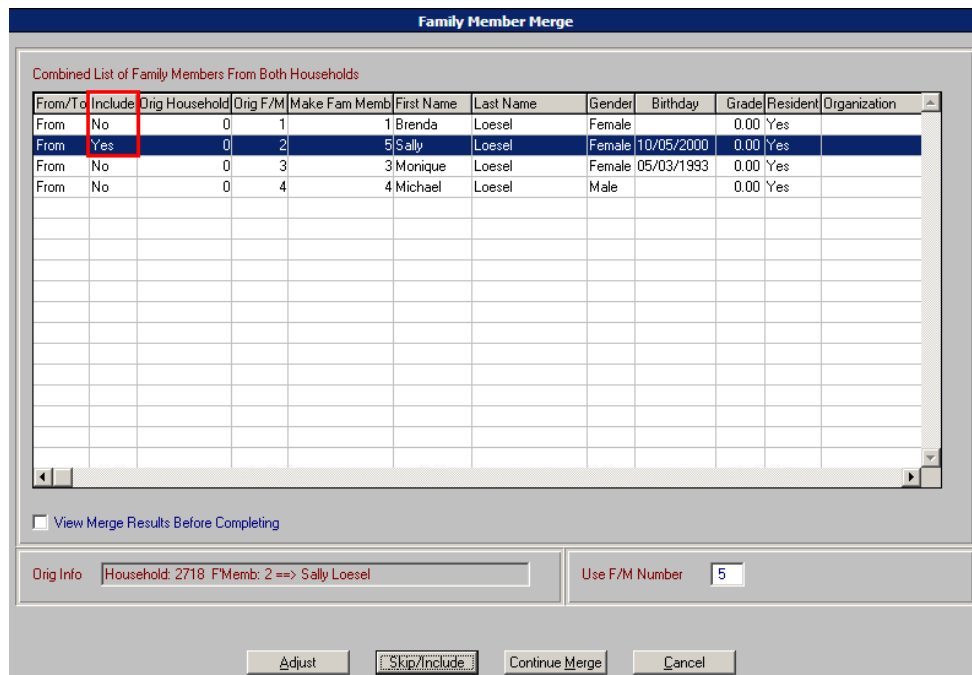
7. Notice in our example that Brenda (sponsor) is correctly FM#1, Sally (child) is incorrectly FM#2, and Michael (spouse) is incorrectly FM#4. It is **NECESSARY** to process one family member into their new position at a time – repeating the partial merge as needed. In this example – we will work with Sally (FM#2) first.
8. Upon selecting Sally you will see the following warning. Click **OK**.



9. While Sally (FM#2) is highlighted, go to the bottom right corner of screen. In the **Use F/M Number** box, change to the position number you need this member to be (in this example – we'll make Sally the next available member number - #5).
10. Then click **Adjust**. This will make Sally family member #5



11. Then, select Sally again. You will see the warning you saw in step 8 – click **OK**. Then click **Skip/Include** – this will change the **Include** column from **No** to **Yes**. To make Sally move to the Family Member #5 slot this column needs to say Yes.



12. If your selections are correct, click **Continue Merge**. **Note:** We will not move Michael to FM #2 in this step. If you receive a GolfTrac Tee Time message click **Yes** to bypass. Click Ok at the Partial **Merge Complete** message.
13. Now let's move Michael into position #2. Repeat steps 1-6.
14. Highlight Michael (the Spouse who is incorrectly in position #4) and click **OK** through the warning. Remember it's best to process one family member at a time – you may need to process multiple Partial Merges to correct the household.
15. Go to the bottom right corner of screen. In the **Use F/M Number** box, change to the position number you need this member to be (in this example – we'll make Michael #2).

16. Click **Adjust**. This will make Michael family member #2.
17. Then **Highlight** Michael again. You will see the warning you saw in step 8 – click **OK**. Then click **Skip/Include**. **This will change the Include column from No to Yes.** Your screen should look like this:

From/To	Include	Orig Household	Orig F/M	Make Fam Memb	First Name	Last Name	Gender	Birthday	Grade	Resident	Organization
From	No	0	1	1	Brenda	Loesel	Female		0.00	Yes	
From	No	0	3	3	Monique	Loesel	Female	05/03/1993	0.00	Yes	
From	Yes	0	4	2	Michael	Loesel	Male		0.00	Yes	
From	No	0	5	5	Sally	Loesel	Female	10/05/2000	0.00	Yes	

View Merge Results Before Completing

Orig Info: Household: 2718 F'Memb: 4 ==> Michael Loesel      Use F/M Number: 2

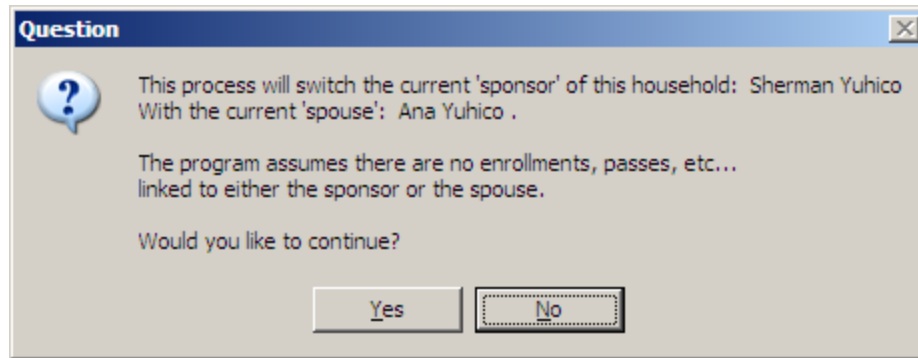
Adjust    Skip/Include    Continue Merge    Cancel

18. Check your selections – if they are correct – click **Continue Merge**. (If you receive a GolfTrac Tee Time message click **Yes** to bypass.)
19. Finally, you will need to repeat the above steps to move Sally into the Family Member #4 position.
20. When you've finished moving family members into the correct positions, you can proof your work by going into **HH & Member Update**. Review Household and Family Member screens as appropriate.

### SCENARIO 3 – Sponsor Changes – Promotion/Retirement/Job Change Makes Spouse Higher Rank Parent or Divorce/Marriage/Remarriage

#### Sponsor Switch

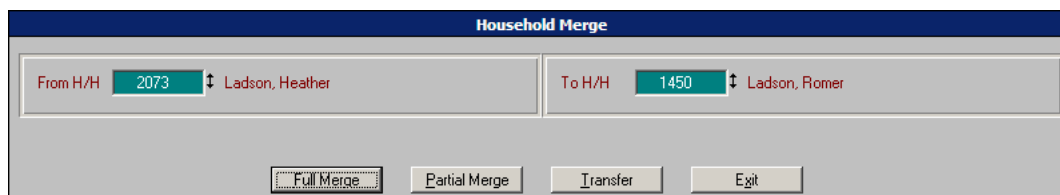
1. To make the sponsor the spouse and vice versa, go to **Utilities→CYS→Sponsor Spouse Switch**
2. Find and select the Household. You will receive the following message:



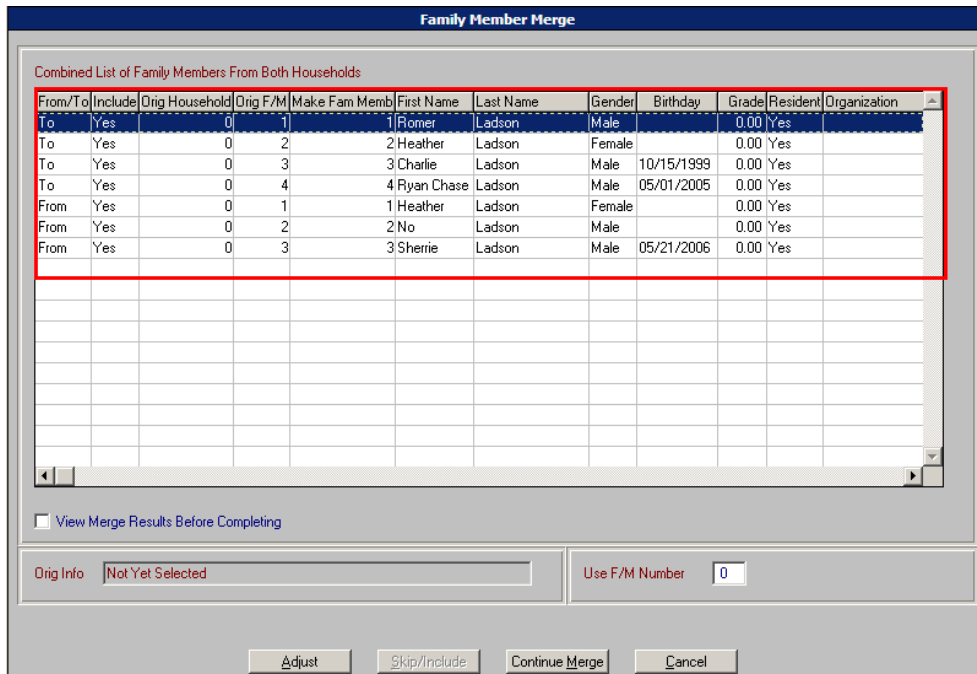
3. Click **Yes** to continue as long as your sponsor and spouse are not enrolled in anything.
4. This process changes the Household Sponsor and Spouse information as well as the Family Member 1 and 2 information on the Member screens.

**SCENARIO 4 – Marriage or Duplicate Households – Need to Combine Households**  
**Full Merge**

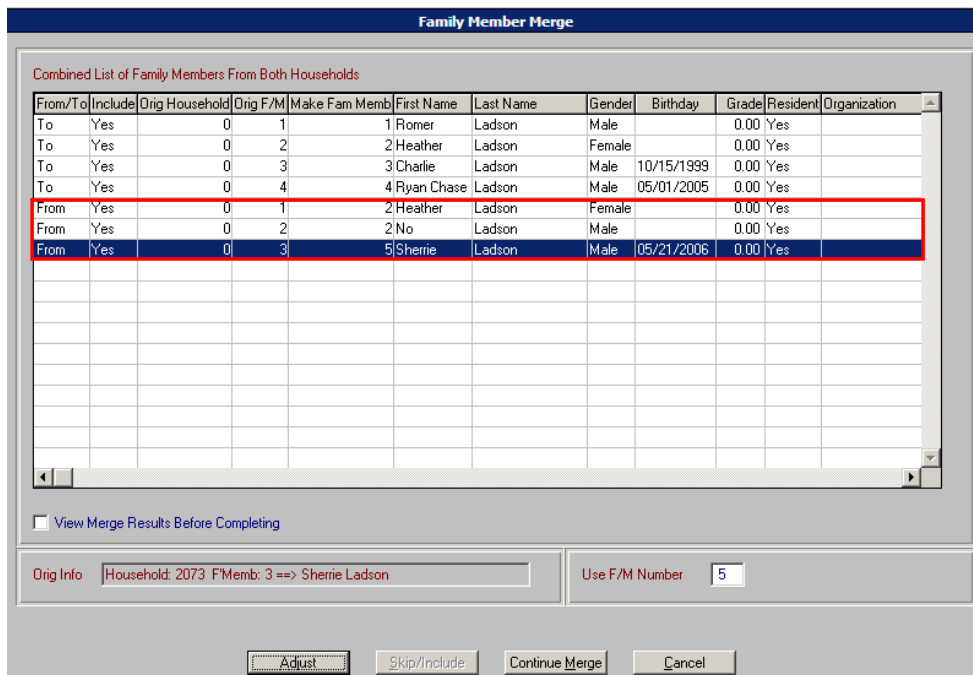
1. Determine which parent is to be Sponsor following approved rank considerations. This will determine which HH will remain after the merge is complete (the **To** household).
2. Go to **Utilities**→**System**→**Household Utilities**→HH Transfer Merge
3. Find and select the **FROM** Household. Make sure the correct household's information shows on the screen.
4. Find and select the **TO** Household. Make sure the correct household's information shows on the screen. This is the household that will be left once the merge is complete.



5. Click **Full Merge**. **Note:** The Skip/Include button is no longer available. All family members are marked as “Yes” in the Include column. When a Full Merge is processed, the FROM household will be combined into the TO household and the FROM household will no longer be accessible.



- In the **From HH**, Heather is FM #1. In the **To HH**, Heather is FM 2 – we need to double click Heather's **From HH** entry and change the **Use F/M Number** to 2. Then click **Adjust**.
- Sherrie is FM 3 in the **From HH** and has no equal in the To HH. So, we will need to make her a Family Member Number. Double click Sherrie and change the Use F/M number to 5. Then click **Adjust**.
- All the other family members can stay as is. The key is you want to make sure all the family members in the **FROM** household are being merged into the right person on the TO side. Or, as is the case with Sherrie, not merged into anyone on the TO side at all. Your screen should look similar to this.



- Once you are comfortable that everyone in the FROM household is assigned properly, click **Continue Merge**.

- If you get the Golf Tee Time message, click Yes to continue. :
- If you print cards from CYMS a new **ID Card must be printed** for Sherrie. Her old card will no longer work. If you use key fobs you do NOT need to reissue.

## SCENARIO 5 – Child Needs To Be Moved To Different Household – Was In Wrong Household or a Custody Change Situation

### Partial Merge

- Go to **Utilities**→**System**→**Household Utilities**→**HH Transfer Merge**
- Find and select the **From HH** in question. Make sure the correct household's information shows on the screen.
- Find and select the **To HH** in question. Make sure the correct household's information shows on the screen.

**Household Merge**

From H/H: 2587 Kahmann, Virginia N.      To H/H: 3577 Winston, Arnold

- In a partial merge, the FROM HH will still exist when the process is complete. We are simply moving someone from one household to another. Click **Partial Merge**

**Family Member Merge**

Combined List of Family Members From Both Households

From/To	Include	Orig Household	Orig F/M	Make Fam Memb	First Name	Last Name	Gender	Birthdate	Grade	Resident	Organization
From	No	0	1		1 Virginia N.	Kahmann	Male		0.00	Yes	
From	No	0	2		2 Sandra	Kahmann	Female		0.00	Yes	
From	No	0	3		3 Kursten	Kahmann	Female	04/28/1999	4.00	Yes	
From	No	0	4		4 Shelly	Winston	Female	07/11/2002	0.00	Yes	
To	No	0	1		1 Arnold	Winston	Male		0.00	Yes	
To	No	0	2		2 Chrissy	Lacy	Female		0.00	Yes	
To	No	0	3		3 Megan	Lacy	Male	09/20/1995	10.00	Yes	
To	No	0	4		4 William	Lacy	Male	08/28/1998	6.00	Yes	

View Merge Results Before Completing

Orig Info: Not Yet Selected      Use F/M Number: 0

- Double click **Shelly Winston** (FM #4 in the From HH) and enter **5** in the **Use F/M Number** field – this is the Family Member Number she will be assigned in the **To** household. Then click **Adjust**.

