

#95d - CYMS Training Guide – New Patron Web Registration (Updated April 2013)

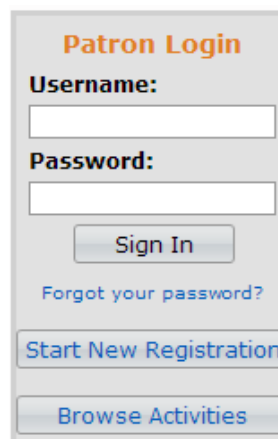
One of the new web features allows a customer to initiate a CYSS **pre- or advance registration** on the web.

- This service is designed primarily for Families who are **not yet in any CYSS CYMS database**.
- Families relocating from another Army Garrison are encouraged to take advantage of the **Global Data Transfer process**.
 - The 'losing Garrison' posts the file of the departing family.
 - The 'gaining Garrison' imports that file into their database – names, birthdates, child health and shot information, etc. are transmitted.
 - During the initial Central Registration appointment, only new and changed information needs to be entered into the computer.
- If a family completes the on line new registration, the data goes into a "**holding file**" to be reviewed by Central Registration staff each day.
 - The clerk reviews the data, contacts the family for questions and/or to set up a registration appointment.
 - The clerk decides whether to accept the new household into the database.

The procedures for Parent Web Registration and for the Clerk to process the registration are outlined below.

Parent Process - Initiating a New Registration On Line

- 1 On the WebTrac Home Page, patrons who are not able to log onto your database are able to **Start a New Registration** or **Browse Activities**.



The image shows a 'Patron Login' form. It has a title 'Patron Login' in orange. Below the title are two input fields: 'Username:' and 'Password:'. Below the password field is a 'Sign In' button. Below the 'Sign In' button is a link 'Forgot your password?'. Below that is a 'Start New Registration' button, and at the bottom is a 'Browse Activities' button.

- 2 Clicking the **Start a New Registration** button takes them to the following screen.

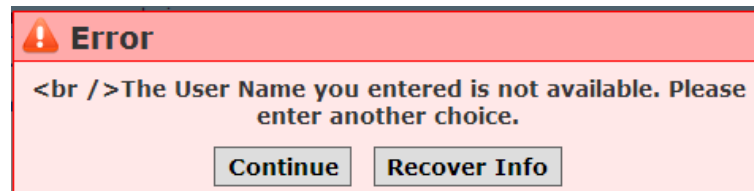
Please complete the following information about your household



The image shows a registration form with the following fields and labels:

- * REQUIRED DATA
- User Name (up to 50 chars) [vsitest]
- Password (up to 50 chars) [.....]
- Re-Type to Confirm [.....]

- The first section requires the patron to create their own User Name and Password for web access
 - The system will verify that the desired User Name is unique prior to allowing the user to proceed
 - If the User Name is not unique you will see this message



- Clicking **Continue** will bring you back to the registration screen
- Clicking **Recover Info** will bring you to a user name retrieval screen

- The next section captures the Sponsor Information
 - All fields in blue are required
 - The **Branch** and **Grade/Rank** fields are N/A unless a **Military Status** is selected

| Sponsor Information | |
|---|--|
| Who is the Sponsor? <ul style="list-style-type: none"> ▪ If dual military, sponsor = highest ranking ▪ If military + civilian, sponsor = military ▪ If dual civilian, sponsor = your choice | |
| Name of Sponsor (First) | <input type="text" value="Unique"/> |
| Name of Primary Guardian (Last) | <input type="text" value="Test"/> |
| Gender | <input type="text" value="Male"/> |
| Mailing Address | <input type="text" value="12 Marketplace"/> |
| Apt # | <input type="text"/> |
| City | <input type="text"/> |
| State | <input type="text" value="VA"/> |
| Postal/Zip Code | <input type="text" value="12."/> |
| Housing | <input type="text" value="Off-Post"/> |
| Home Phone (xxx)xxx-xxxx | <input type="text" value="(802)555-3333"/> |
| Cell Phone (xxx)xxx-xxxx | <input type="text" value="(703)555-1234"/> |
| Work Phone (xxx)xxx-xxxx | <input type="text" value="(877)883-8757"/> |
| Work Extension | <input type="text" value="3365"/> |
| Sponsor Email Address (AKO Preferred) | <input type="text" value="utest.civ@mail.mil"/> |
| Re-type to Confirm Email Address | <input type="text" value="utest.civ@mail.mil"/> |
| Military/Civilian Status | <input type="text" value="DOD Civ (APF/NAF/AAFES/DODDS)"/> |
| If Military, Branch | <input type="text" value="N/A"/> |
| If Military, Grade/Rank | <input type="text" value="N/A"/> |

NOTE:- Duplicate checking occurs when the phone number is entered. If the number entered is already in the database this message appears



- The next sections capture the **Spouse Information** and **Emergency Contact Information**

Spouse Information

Check Here if No Spouse

Name of Spouse (First)

Name of Spouse (Last)

Gender

Cell Phone (xxx)xxx-xxxx

Work Phone (xxx)xxx-xxxx

Work Extension

Spouse Email Address

Military/Civilian Status

If Military, Branch

If Military, Grade/Rank

Emergency Contact Information

What are Emergency Contacts?
Two people (other than parents) we can contact and/or release your child to in case of an emergency.

| | Name of Emergency Contact (First) | Name of Emergency Contact (Last) | Contact Home Phone w/ area code | Contact Work Phone w/ area code | Contact Cell Phone w/ area code | Relationship |
|-----|--|-----------------------------------|--|---------------------------------|---------------------------------|----------------------|
| # 1 | <input type="text" value="Emergency"/> | <input type="text" value="Test"/> | <input type="text" value="(703)555-3336"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| # 2 | <input type="text" value="Siren"/> | <input type="text" value="Test"/> | <input type="text" value="(703)555-3337"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |

*** REQUIRED DATA**

- When all **REQUIRED DATA** is complete, they can click the **Finish** button. The following screen will appear

Please complete the following information for every family member that will use our services

All information is treated confidentially and used only for placement purposes.

| # | First Name | Last Name | Nickname | Gender | Relationship | Ethnicity | Date of Birth | School Grade |
|---|------------|-----------|----------|--------|--------------|-----------|---------------|--------------|
| 1 | Unique | Test | | Male | | | Unspecified | Unspecified |
| 2 | Mom | Test | | Female | | | Unspecified | Unspecified |

- Click **Add Family Member** to add children to the Household

- This takes them to the **Family Member** Information screen.

Family Member # 3

First Name
Last Name
Nickname
Gender
Relationship
Ethnicity
Date of Birth (mm/dd/yyyy)
School Grade or highest grade completed

What is a Special Need?
Any medical conditions and/or allergies identified by a doctor

Does this child have any special needs?

*** REQUIRED DATA**

- This screen appears for each Family Member being added. It starts with #3 as 1 and 2 are the parents
- Completion of all blue fields required
- Click **Finish**

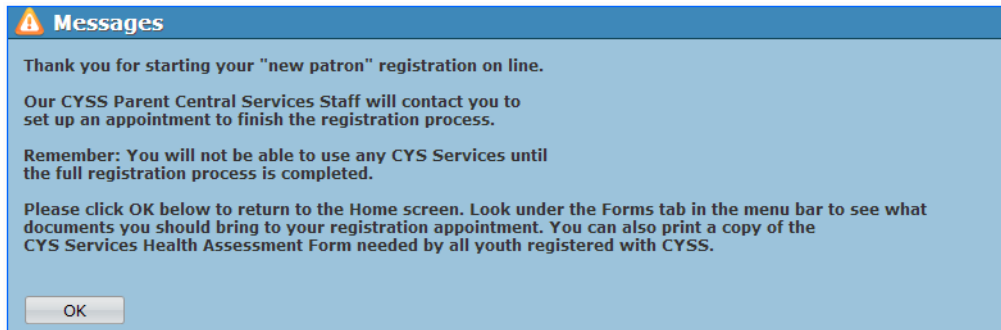
- They return to the family member listing

Please complete the following information for every family member that will use our services

All information is treated confidentially and used only for placement purposes.

| # | First Name | Last Name | Nickname | Gender | Relationship | Ethnicity | Date of Birth | School Grade |
|---|------------|-----------|----------|--------|--------------|------------------|---------------|--------------|
| 1 | Unique | Test | | Male | | | Unspecified | Unspecified |
| 2 | Mom | Test | | Female | | | Unspecified | Unspecified |
| 3 | Infant | Test | | Male | Son | White, Caucasian | 11/25/2012 | Unspecified |

- If there are more Family Members to add click on **Add Family Member** and repeat Step 3
- If all Family Member are entered click **Done** to arrive at the following **Messages** screen



- This message lets the user know they will be contacted by a CYSS Parent Central Services representative to set up an appointment
 - They are also directed to click OK and find the Forms tab from the Home page where they can locate the documents needed to complete their registration.
- 5 Clicking **OK** takes them back to the **Home Page**.
- If they hover over the **Forms** tab in the menu bar, they will be able to click and download some key registration documents.



Clerk Process - Importing New Household Registrations From the Web

On a daily basis, a designated Central Registration staff member (with backups) will check for new households entered via the web. This process is outlined below.

- 1 Click on the WebTrac Batch Import button   or, if a button is not available,
- 2 Go to **Daily** → **System** → **WebTrac Batch HH Import**

NOTE: When a household is added on the web, VSI does a simple home phone check to look for duplicate households before adding the household to this listing. For this reason, VSI recommends that the clerk use the **H/H Inquiry** button at the bottom of the screen to do a more thorough search (Family Member Search, Sponsor Search, etc). This should be done before completing the following steps and importing the household into the database. VSI also recommends that you contact the household **PRIOR** to importing their information to determine if the household has PCS'ed from another garrison. If they have, you should import their record from the Global Database and update that record with the new address and phone information from the web registration. Finally, if you feel you want to import the data anyway (prior to talking to the parents), you should at least check to see if the file exists on the Global Database with the email addresses provided on the new registration

WebTrac Household & Family Member Import

| Households to Import | | | | | | | |
|----------------------|------------|--------|------------------|--------------------|-----|----------------|-----------|
| Date Added | Time Added | HH ID# | Primary Guardian | Secondary Guardian | Res | Address 1 | Address 2 |
| 04/18/2013 | 11:50 | 12698 | Unique Test | Mom Test | Yes | 12 Marketplace | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |

| Family Members to Import | | | | | | | | | | | |
|--------------------------|-----|---------|------|-----|--------|---------------|-------|----------|-----------|----------------|-------------------|
| HH ID# | FM# | First | Last | Res | Gender | Date of Birth | Grade | Relation | Ethnicity | Special Needs? | Needs Care? Ext F |
| 12698 | 1 | Unique | Test | Yes | M | ? | 0.0 | | ? | ? | ? |
| 12698 | 2 | Mom | Test | Yes | F | ? | 0.0 | | ? | ? | ? |
| 12698 | 3 | Infant | Test | Yes | M | 11/25/2012 | 0.0 | SON | 1-WHITE | N | N |
| 12698 | 4 | Toddler | Test | Yes | F | 05/28/2010 | 0.0 | DAUGHTER | 1-WHITE | N | N |
| | | | | | | | | | | | |
| | | | | | | | | | | | |

How To Confirm: By Email Manually Both options give a report of the HH/FMs imported

- Highlight the first household you wish to work with at the **top** of the screen (**Households to Import**) and click the **Edit HH** button at the bottom of the screen

NOTE: If you find an **obviously bogus household** (Mickey Mouse, test data, etc), highlight the family and click the **Delete HH button** at the bottom of the screen. This will remove the household and **all** linked family members from the import program

WebTrac Household Update

H/H ID Residency Resident Non-Resident Housing Installation Off-Installation Undeclared

Primary Guardian

Unique

T2 Marketplace

Fort Anywhere

Home Phone

Cell Phone

Beeper Number

Work Phone

Military Status

Military Branch

Military Grade

Military Rank

E-Mail Address

Secondary Guardian

Mom

Home Phone

Cell Phone

Beeper Number

Work Phone

Military Status

Military Branch

Military Grade

Military Rank

Household Features

| Order | First Name | Last Name | Relation | Home Phone |
|-------|------------|-----------|----------|---------------|
| 1 | Emergency | Test | | (703)555-3336 |
| 2 | Siren | Test | | (703)555-3337 |

Emergency Contacts

4 Review all data for spelling, accuracy, proper capitalization, etc. and update if necessary.

- Any changes you make on this screen **will be saved** when you import the household
- You can send an **Email** directly to this new Household by using the button at the bottom of the screen
- When done, click **OK**.

5 To proceed, highlight **Family Member 1 (Sponsor)** at the **bottom** of the screen (**Family Members to Import**) for the household you wish to work with and click the **Edit FM** button at the bottom of the screen.

NOTE: If you find an **obviously bogus family member** (Bugs Bunny) select them and click **Delete FM**. This **will not** delete the household – **just the family member**

- Review the **Name** for spelling, accuracy, proper capitalization, etc. and update if necessary
 - Look at the Name, Gender and Relationship for continuity
 - There will be no birthday for the Sponsor/Spouse
 - Any changes you make on this screen **will be saved** when you import the household
 - When done, click **OK**
- 6** Repeat process for **Family Member 2 (Spouse)** if there is a spouse
- 7** Highlight **Family Member 3** (the first child listed) for the household and click **Edit FM**
- Review all data fields for spelling, accuracy, proper capitalization, continuity, etc. and update if necessary
 - Any changes you make on this screen **will be saved** when you import the household
 - When done, click **OK**
- 8** Repeat the process for all remaining family members
- 9** Once you have reviewed the Household data and all linked Family Member data, highlight the **Household** at the top of the screen (**Households to Import**) and click **Import HH**
- A confirmation email will be sent to all email addresses that the household entered on the web
 - The email text for this email is controlled by a comment code in **Web Parameters/HH & FM screen – New HH Email Code**
 - If a child was flagged as needing full day, part day or before/after school care by the parent, an email will be sent to the email address linked to the Facility Location on the Location Device of the user logged in doing the import
 - The email text for this email is controlled by comment code **CYSWL**