

## # 33 - CYMS Quick Guide – Search for Care / Add to Waitlist (10.3 - Updated May 2011)

When to Use: *Search for Care is a versatile program with multiple functions. Use this process to:*

- Add a child to the waitlist
- Change waitlist status (Active, Inactive or Placed)
- Change any waitlist criteria on an existing entry (priority, dates, location, etc.)
- Update the last renewal date
- Remove a waitlist entry
- Add notes to a waitlist entry

*This guide will cover searching and adding a child to the waitlist.*

### Search for Care:



1. Click the **Search for Care** button.
2. Select the household.
  - If the family is new, click **New Household** and enter the household/family member information.
3. Highlight the child you wish to work with.
  - Notice the age group fills itself in. If this is different than the type of care you want to search for, you can right click in the field and change it (example – child’s age shows as PS, but the child has already started school and needs Kindergarten care).
  - If doing Projected Care for an unborn, Infant will default in the **Age Group** field.
4. Include **Center** and **Providers in the** search.
5. Highlight and **Add>>** specific **Locations** to the “Include” column (if appropriate) or leave the Include side blank to waitlist the child for an opening at any center.
6. Select a **Prog Type(s)** and click **Add** to add to the **Include** column. Example: Fullday or Bef-Sch and Aft-Sch
7. Click **Search**.
8. You will go to the first of two screens where you can add specific requirements to narrow your **Provider** search and create viable options for this parent. Click **More Opt** for the second screen where you can narrow your search further and enter **Times** care is needed for this child; then click **Search again**.
9. **Center Based** matches at the top of the screen should not be offered to the parent unless you know they are true openings (no one is already waiting on the waitlist for those slots and the center is not transitioning children right at that moment).
10. A list of **Providers** who show as “Yes” in the OK column can be printed and referrals posted by using **Print Results** and the **Post Referrals** options.
11. To add the child to the “appropriate” waitlist choose the **Waitlist Category** and click **Add to W’List**. Enter the **Priority Code** and any **Misc Comments** (these stay with the waitlist record). If adding to the **Projected Care** list, also enter the **Need Date**:
  - **Excess Demand** means your search generated no “viable” options for this parent. No providers popped as Ok ‘yes’. This list sorts by priority by initial date/time.
  - **Preference for Care** means your search generated viable options for this parent and you have given them a list of providers who can help them. Whether the parent contracts with the provider or not the child can be added to the Preference for Care list. This list sorts **only** by the “Preference Date/Time” (the date they were given options for care). We do not use the customer’s waitlist priority to sort by, however we still recommend that you enter it for statistical tracking.
  - **Projected Care** means they need care in the future. When their “Need Date” arrives, they can be moved to the Excess Demand or Preference list.