

## CQG#02 – CYMS Quick Guide – Passes (10.3 – Updated May 2011)

**Daily Processing Device Assumption: Global Sales Default = Pass Registration**  
(For guidance on *Daily Processing Device Assumption*, See CQG #01c – Daily Processing Device)

### When to Use:


- **Pass Registration** is only used for *NEW* registrations.
- **Pass Renewal** is used when a person re-registers. Re-registration usually coincides with parents re-signing and/or verifying certain information, such as *Income, Emergency Contacts, Telephone Numbers, etc...*
- **Pass Transfer** will rarely be used since we added the Bulk Pass Transfer program in 10.3 (cy0461), but could be used if you have a situation where a single child is transitioning from CDC to SA or from SA to Youth. You transfer the time left on the old pass to the new one. The Bulk Pass Transfer program lets you pick a program and perform the transfers en mass.
- **Registered Member Update** is used to Expire passes when a household PCS'es, to shorten or extend expiration dates and/or to Suspend passes for a set time period.

### Pass Registration:



1. Click on the **Global Sales** button.
2. Select the household
3. Highlight the child to whom you will issue the pass
4. Right Click in the **Type** field and select the pass type(s) to issue. You can multi-select in the browser by holding the <Ctrl> key.
5. The **Member Date** will default to “today.” The **Expiration Date** will be one year from “today.”
6. The fees due for this pass should appear in the Std Fees field. If the fees are correct, click **Select**. If the fee amount needs to be adjusted, click the **Fees** button, enter the correct amount and click **OK**.
7. Click **Payment**.
8. Enter the amount you are collecting in the **New Amt Paid** column of the **Pass Mgt** Row and click **OK**.
9. Enter the **Pay Code** to reflect how the customer is paying.
10. Click **Process**.

### Pass Renewal:

1. Click on the **Global Sales** button.
  2. Select the child or household.
  3. Click the **Pass Renewal** button.
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4. Highlight the child/pass you wish to renew.
  5. If the Pass was expired, the **Member Date** will default to “today” and the **Expiration Date** will be one year from today. If the Pass has not expired yet (actual expiration is still several days in the future), the **Expiration Date** will default 365 days from that date.
  6. The fees due for this pass should appear in the **Std Fees** field. If the fees are correct, click **Select**. If this amount needs to be adjusted, click the **Fees** button, enter the correct amount and click **OK**.
  7. If the original pass has not yet expired – you will be asked if you still want to renew – click **Yes**.
  8. Click **Payment**.

9. Enter the amount you are collecting in the **New Amt Paid** column, in the **Pass Mgt Row** and click **OK**.
10. Enter the **Pay Code** to reflect how the customer is paying.
11. Click **Process**.

### **Pass Transfer: Note: For information on the Bulk Pass Transfer see CTG-04 Core-Transitioning**

1. Click the **Global Sales Button**.
2. Select the child or household.



3. Click the **Pass Transfer button**.
4. Highlight the child and the pass you wish to transfer.
5. Right click in the **Pass Type** field, and select the new pass type into which the child is transferring.
6. The **Member Date** will default to "today." Backdate the **Member Date** on the new pass to match that of the old pass (The **Expiration Date** of the old pass appears in the browser on the left-hand side of the screen. This will help you determine that date).
7. Change the **Expiration Date** on the new pass so it EXACTLY MATCHES the expiration date on the old pass you have highlighted in the box on the left. (Remember: You are transferring the time left on the old pass to the new pass).
8. The **NET FEES** for this transaction should be zero. If there is a net credit: go to the fees screen and enter a fee amount equal to the credit amount. If there is a net debit, go to the fees screen and zero out the fee amount.
9. Click **Select**.
10. Click **Payment**.
11. Click **OK**
12. Click **Process**.

### **Pass Expiration / Suspension:**

These are the steps required to Expire a Child's Pass Due to the household PCS'ing



1. Click the **Registered Mbr Update Button**.
2. Select the child
3. Highlight the Pass you wish to expire and click **Select**.
4. Change the **Current Expiration Date** to the day the family is PCS'ing.
5. Change the **Current Pass Status** to *Expired* using the drop-down list located on the upper right-hand corner of the screen.
6. Optional: Put a note in the **Comment** field that the child PCS'd.
7. Repeat the entire process for the Youth Privilege (MZZ) Pass, if necessary.

**Note:** To Suspend a pass – complete the **Beginning** and **Ending Suspension Dates**, located on the middle section of the screen, change the **Current Pass Status** field to *Suspended* and make any appropriate **Comments**.

### **General Pass Rules:**

Following are some general rules regarding pass distribution. This may not be applicable to all bases/branches.

- CDC-age children should have a Child Pass.
- SA children should have a SA pass
- Youth-age (generally those children who are 13 years old and up) should only have an MST Pass.

These rules **should** apply to all bases/branches:

- A child should **never** have an active Child *and* an active SA pass. Use **Bulk Pass Transfer** when the child transitions from the CDC to School Age.
- A child should **never** have an active Child *and* active MST Pass, or an active SA *and* an active MST Pass.
- A child should **never** have two (2) or more active passes of the *same kind*.

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