

CYMS – Transition Matrix

Vermont Systems CYMS 3.1 Training

7/7/2022

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Contents

Logging In and Navigation	4
Signing in to the RecTrac 3.1 CYMS	4
The RecTrac Menu	5
Navigating the Transition Matrix.....	6
Transition Matrix.....	6
Child Status Colors	7
Tile Definitions	8
Transition Matrix Buttons	9
Processing a Transition.....	10
Opening the Transition Matrix	10
Create Pending Transfer.....	10
Finalizing Transfers.....	11

Logging In and Navigation

Signing in to the RecTrac 3.1 CYMS

The newest version of CYMS is a module within the web-based RecTrac 3.1 platform. Vermont Systems recommends using the Chrome or Firefox browser to access RecTrac 3.1.

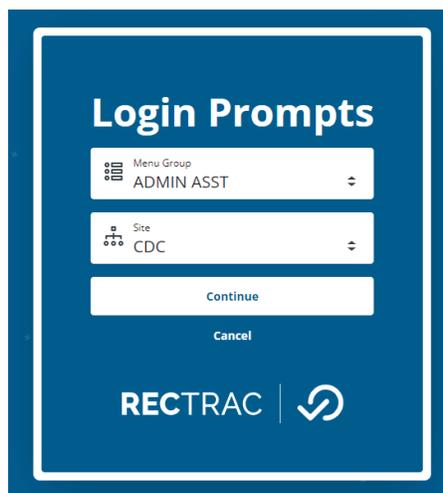
Username: Your Army email alias*

*The alias is everything before the @army.mil

Password: password

***Please Note:** You're welcome to change your password. You'll be able to do this by clicking on the User Details section of the sidebar menu.*

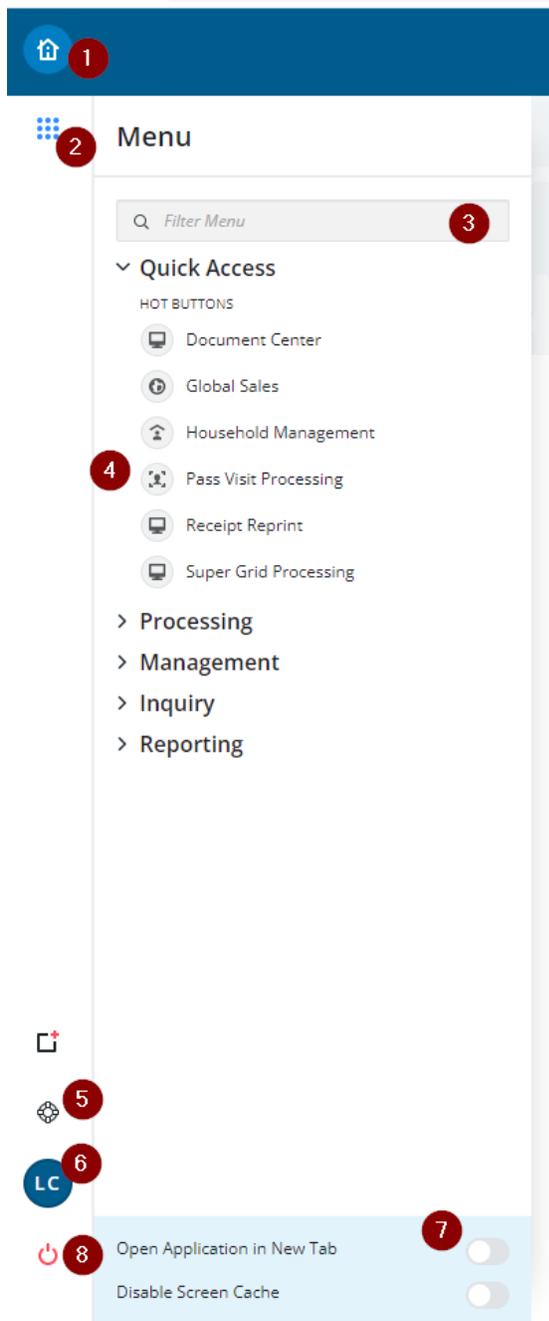
For this training, please sign in using the **Admin Asst** user group and **CDC** site.



When prompted, please leave your starting cash at \$0.00 and continue. The PCS Admin user group is configured to start a transaction batch when you log in.

The RecTrac Menu

Access to all RecTrac 3.1 programs and components is done through the menu on the left side of the screen. To open your RecTrac menu, click on the waffle (2) in the upper left.



Menu Components

1 – **Home Button:** Use this button to take you back to the home screen where you can see all of your favorites.

2 – **Waffle:** Use this button to expand the menu and see the menu buttons.

3 – **Menu Search:** Type in the name, or partial name, of any menu button and it will pop up below.

4 – **Menu Buttons:** All the components a user has access to will show as menu buttons. Click the menu button to open the target program.

5 – **Support Button:** Access the in-application help from here.

6 – **Session Information Button:** This button should show your own initials. Click on it to see the Username, User Group, Site, Drawer Number, and Batch you are currently logged into. This is also where you change your password.

7 – **New Tab Slider:** Turn on the slider before clicking a menu button if you already have that program open and you want to open a second instance.

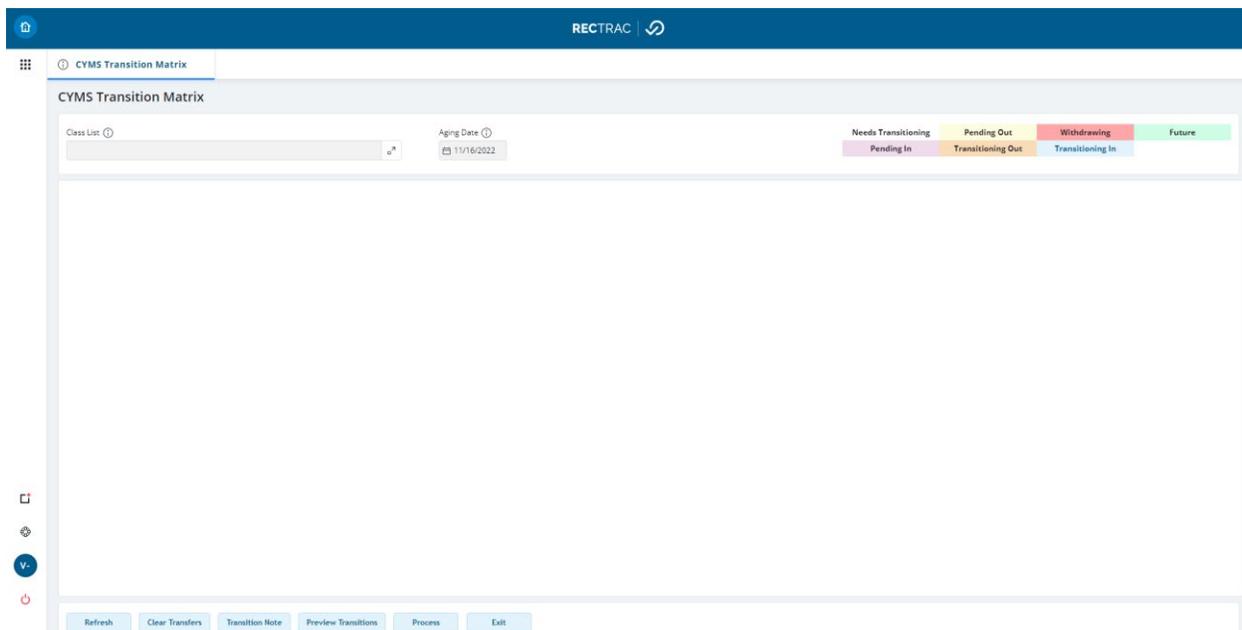
***For Example:** A user can have Household Management open, and using this slider, open a second tab of Household Management so they can work on two households at once.*

8 – **Logout Button:** Click this button to log out. When you do, the system will prompt you to close your batch.

Navigating the Transition Matrix

Transition Matrix

Click on **Transition Matrix** in the RecTrac menu. Use the Menu Search to help locate the button if desired. The Transition Matrix button will open the CYMS Transition Matrix program in a new panel. This program opens to a screen that shows current slots:



If opening for the first time, the screen will open blank as seen above. To add classes, click the pop out button underneath the **Class List** field in the top left of the screen. Multi-select all the classes you would like to transfer out of OR into. After you select the proper classes, then you will need to select the correct aging date. For Aging Date, either accept the default of today or put in a future date.

Please Note: The Aging Date field determines a child's age as of the date entered. For Example: "Today" is July 01 20xx. You enter "August 01 20xx" in this field. This adds one (1) month to every child's age. So an Infant who is 11 months old on July 01 will show as 12 months old on the Matrix and thus appear ready for transition to a Pre-Toddler room as of August 1s

After selecting these options, you should see the classes down below sorted by age.

Infants (6 Wk - 12 Mo)	Pre-Toddler (12 Mo - 18 Mo)	Pre-Toddler (18 Mo - 24 Mo)	Toddler (2 - 3 Yrs)	Preschool-Age (3 - 4 Yrs)
FD (Inf) Rm 5 (SFTC001-01) Space: 0 Little Testson Date: 11/07/2022 Reference: DD: 0	FD (PT1) Rm 3 (SFTC002-02) Space: 1 John Sabah Date: 11/20/2022 Reference: DD: 505 Jane Jabbour Date: 03/03/2021 Reference: DD: 78	FD (PT2) Rm 1 (SFTC003-03) Space: 1 Insta Perez Date: 11/04/2022 Reference: DD: 0	FD (Tod) Rm 1 (SFTC004-03) Space: 10 Erin Simpson Date: 09/01/2019 Reference: DD: 76	FD (PS) Rm 2 (SFTC005-03) Space: 17
FD (Inf) Rm 3 (SFTC001-03) Space: 2 Tik Perez Date: 08/01/2021 Reference: DD: 107				

Child Status Colors

In your matrix, you may see children highlighted a variety of different colors. Below are the explanations for each color code:

Needs Transitioning	Pending Out	Withdrawing	Future
Pending In	Transitioning Out	Transitioning In	

Needs Transitioning – White – Is past his/her due date for transition.

Pending Out – Yellow – A child highlighted in yellow will be transferred out of (from) the room where the highlighted child's name appears when you Process your transitions

Withdrawing – Red – A Withdrawn status child is one who is scheduled to leave your Center at a given date.

Future – Green – A Future Status child is one who is enrolled into a room but whose enrollment date in the room has not been reached.

Pending In – Lavender – Will be transferred into the room where the highlighted child's name appears when you process your transitions.

Transitioning Out – Orange – When you Process the transitions, a yellow Pending Out status will convert to an Orange Transitioning Out status.

Transitioning In – Blue – When you Process the transitions, a purple Pending In status will convert to an Blue Transitioning In status.

Tile Definitions

Infants (6 Wk - 12 Mo)		Pre-Toddler (12 Mo - 18 Mo)	
FD (Inf) Rm 5 (5FTC001-01) Space: 0		FD (PT1) Rm 3 (5FTC002-02) Space: 1	
Little Testson Reference:	Date: 11/07/2022 DO: 0	John Sabah Reference:	Date: 11/20/2022 DO: 505
		Jane Jabbour Reference:	Date: 03/03/2021 DO: 78

On your screen, you will see a tile for each one of your rooms separated by age column headers across the top. These tiles will have children listed below them with the status colors discussed above. Below we will break down the different aspects of the room tiles.

Room Title Bar

The title bar for each room displays the Room Name (and Activity Code) as well as the space available. Rooms are color-coded by current space availability. A red title bar means that the room is either full or over enrolled. A blue title bar means that there is still space available in that room.

Underneath the room title bar, you are only seeing a subset of the children that are in that class. To see a full roster, along with roster notes and other child information, click the title bar. Then click on the title bar again to close the pop up.

FD (Inf) Rm 5 (5FTC001-01)		Space: 0	
Little Testson	Withdrawn:		
Birthdate: 03/17/2022	Enrolled:	11/03/2022	
Age: 0 Year 8 Months	Status:	Future	
Notes:	Spec Needs:	false	
Larry Smithington	Withdrawn:		
Birthdate: 01/11/2022	Enrolled:	11/03/2022	
Age: 0 Year 10 Months	Status:	Enrolled	
Notes:	Spec Needs:	false	
Billy Jefferson	Withdrawn:		
Birthdate: 05/04/2022	Enrolled:	11/03/2022	
Age: 0 Year 6 Months	Status:	Enrolled	
Notes:	Spec Needs:	false	
Ada White	Withdrawn:		
Birthdate: 06/01/2022	Enrolled:	11/01/2022	
Age: 0 Year 5 Months	Status:	Enrolled	
Notes:	Spec Needs:	false	

Child Tiles

Underneath each Room Title Bar you will see the children who are ready to be transitioned. In the top left you have the child’s name. In the top right there is a date field, this date field will show the child’s birthday if they have a **Needs Transitioning** status. If they have a Pending **Out, Withdrawing, Future, Pending In, Transitioning Out, or Transitioning In** status, the date field will show the corresponding date for that action. In the bottom left is the Reference Field, which shows the room or activity that the child is transitioning or moving to. Lastly, in the bottom right corner of the Child Tile you will see a DO: field. This field is the number of “Days Over” that child is. For example, if the DO: value is “30”, then the child was old enough to transfer out of that room 30 days ago.

If the child tile has a solid red border with a box in the top left corner, that signifies that there is a transition note tied to that child. To view this note, either click the child and select the **Transition Note** button at the bottom of the screen or click on the Room Title Bar above the child.

FD (Inf) Rm 3 (5FTC001-03)		Space: 2
Tik Perez	Date:	08/01/2021
Reference:	DO:	107

Transition Matrix Buttons



On your screen, you will see a row of buttons along the bottom of the screen. Below is a description of each button’s functions.

Refresh – Click Refresh to reload the Transition Matrix. No changes will be made..

Clear Transfers – Click Clear Transfers to reset the Transition Matrix. Any proposed changes you have made to this point will be initialized/cleared. This allows you to start again.

Transition Note – Highlight/select a child in the Matrix and click Transition Note to add notes, if needed. A red box will be placed around the child's name to indicate a Note is linked.

Preview Transitions – Click Preview Transitions to have the system generate a Transition Preview Report. The report details the children who will be transitioning and also displays room information and availability.

Process – Click Process to commit your changes and process the transitions. The process runs on the AppServer. The Notification Center will alert when the transitions are complete.

Exit – Click Exit to leave the program. Your proposed changes will remain intact for the next time you load into the Transition Matrix.

Processing a Transition

Opening the Transition Matrix

Click on **Transition Matrix** in the RecTrac menu. Use the Menu Search to help locate the button if desired. The Transition Matrix button will open the CYMS Transition Matrix program in a new panel. This program opens to a screen that shows current slots:

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After selecting these options, you should see the classes down below sorted by age.

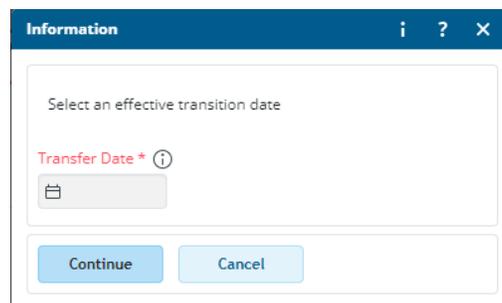
Create Pending Transfer

To initiate a transfer, you will need to select a child from one of the room tiles. After selected, the child will highlight with a red dashed border.

Jane Jabbour	Date: 03/03/2021
Reference:	DO: 78

After the child is selected, click the room that you would like to move the child to. This will prompt a transfer date popup. Enter in the anticipated transfer date for this child.

***Please Note:** It is common to select a date outside of the current billing cycle.*



The image shows a software window titled "Information" with a close button (X) and a help icon (?). Inside the window, the text "Select an effective transition date" is displayed. Below this is a label "Transfer Date *" with an information icon (i). A date picker field is shown with a calendar icon. At the bottom of the window are two buttons: "Continue" and "Cancel".

Completing this action should show the child in BOTH the original class that they are transitioning out of and the new class they will be transitioning into.

Before You Process

While these pending changes are in place, you can use the different function buttons at the bottom of the screen.

The **Preview Transitions** button will generate a Transition Preview Report. The report details the children who will be transitioning and displays room information and availability

If you would like to prepare the transitions but are not yet ready to finalize the changes, you can select the **Exit** button at the bottom of the screen. This will close the CYMS Transition Matrix, but all your work will be saved.

If you made a mistake, you could use the **Clear Transfers** button to reset all the pending status children back to their original rooms.

Finalizing Transfers

If the pending transitions have all been approved and you are ready to finalize those changes, select the **Process** button at the bottom of the screen. This will product a Transition Journal Report, it will also change your Pending In/Out records to Transitioning In/Out.