VERMONT SYSTEMS

CYMS – Provider Management

Vermont Systems CYMS 3.1 Training

07/7/2022

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Contents

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 **Manager** user group and **FCC Office** site.
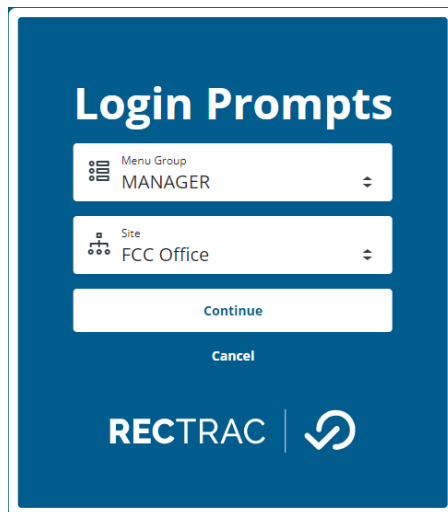
The Manager user group is configured to start a transaction batch when you log in. If prompted, please leave your starting cash at $0.00 and continue.

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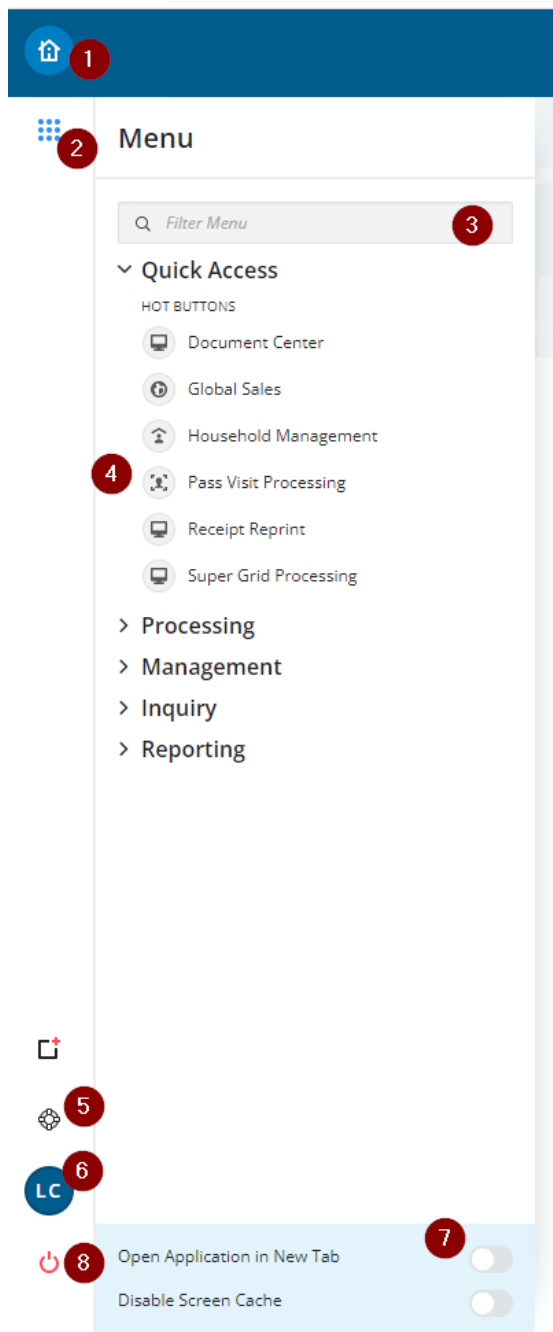
4 – **Menu Buttons**: All the components a user has access to will show as menu buttons. Click the menu button to open the target program.

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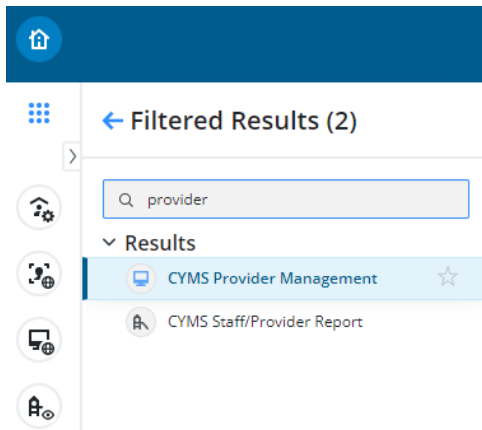
8 – **Logout Button**: Click this button to log out. When you do, the system will prompt you to close your batch.

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Create a Provider Record

Note: *For later sections to have sufficient data please complete this section 3 times.*

Open CYMS Provider Management

Click on **CYMS Provider Management** in the RecTrac menu. Use the Menu Search to help locate the button if desired. This will launch the CYMS Provider Management program in a new panel. This program opens to a screen that shows provider records sorted alphabetically by their Record Code. This sort option can be changed by choosing a different header to sort on.

Note: *Templates can be set on the CYMS Provider Management data grid to have a specific sort on the Last Name or have a preselected Record Status filter or both. These templates can be be created by each user or generic ones can be created for all users to access. Each user can then set which template they want to be their default when entering this program.*

Core Page
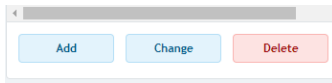
Click the Add button

This will open the **CYMS Provider Update** panel where we can add the **Core, History, Family**, and **Program Links** data.

> *Note*: *Some of the linking functionality can only be used once the new provider record has been saved or additional Provider Codes associated with this provider.*

Set the **Site Code** as appropriate by using the picklist selector. For our purposes today select the **FCC Office** code that was used during login. Do so by highlighting it and then clicking the **Select** button.

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Enter a **Record Code** for this provider. Traditionally this was the first 5 characters of their last name a hyphen and the first 2 characters of their first name (LLLLL-FF) due to previous limitations. This code can now be more descriptive and include spaces. For this current project continue with the traditional syntax until a new code standard is decided upon.

Record Code * ⓘ

TESTS-DA

Set the **Record Status** to **Active**. Tab into the field and start typing active to have come that option come up or use the dropdown selector to find the **Active** status option

Record Status * ⓘ

Active

Record Status * ⓘ

Active

--- Select A Status ---
Active
In Process
Permanently Inactive
Temporarily Inactive

Note: There are 4 possible statuses for
Providers:
***Active** – Fully Certified and operating*
***In Process** – Still in the initial training*
***Permanently Inactive** – Likely PCS'd*
***Temporarily Inactive** – Taking leave*
This is the same as we had in prior versions.

Set the **Permissions** for the record (i.e. check **94 FCC**). Expand the combo-box to see the list. Click the X at the top of the drop down or click any where on the screen to close the combo-box.

*Note: With the current site permissions we only see one code. If we leave none selected this record is visible to all users with access to **CYMS Provider Management***

Permissions ⓘ

(1) 94 FCC Office
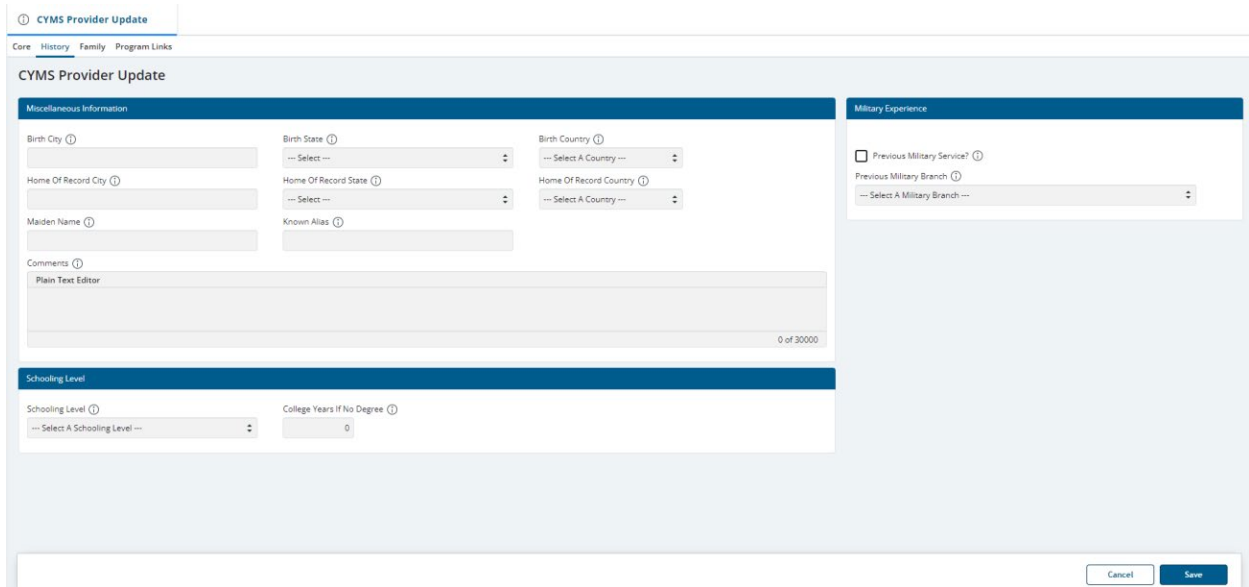
☑ Check all ☐ Uncheck all   ☒

☑ 94 FCC Office

Complete the rest of the **Core** tab as needed (only **Site Code**, **Code** and **Record Status** are required at this time).

History Page

Select the **History** tab at the top to move to the next screen, complete as needed. This majority of his page was in previous versions to assist with background checking. Decisions will need to be made about what is needed here going forward.

*Note: **Previous Experience** is now a **Record Type** vs. a button in the History tab*

Family Page
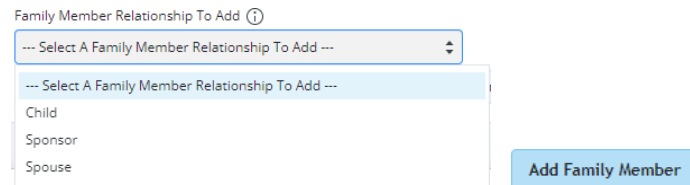
Select the **Family** tab at the top to move to the next screen with a DataGrid of **Other People Residing in Home**.

*Note: The **Other People Residing in Home** DataGrid should contain the names of everyone in the Household who is 12 years of age or older, other than the Provider.*

Expand the **Family Member Relationship To Add** Drop-down list to select the Family Member's Relationship to the Provider. Then click the **Add Family Member** button.

This will bring up the **Family Member Lookup** screen. From there you can look up the Family Member you wish to add.

Note: Select the Sponsor or Spouse first, if any, and then continue to other Family Members as needed.

Note: This is linking the actual **Family Member** record found in **Household Management**

Note: All children in the Provider's home who are 12 year of age or younger should be in the database and enrolled into the Provider's home to account for ratios. Provider's children that are under 12 should go through Parent Central Services and be enrolled just like any other children.

Note: If provider and sponsor do not have a household in the database then click the **Add New Family Member** button at the bottom of the Family Member Lookup screen

Click **Save**

Program Links Page

In order to add **Program Links** the Provider records must reflect that they have completed all of the steps for certification. This includes having an **Age Group** assigned to them in the **Provider Records Code**. Without that code linked this message will appear:
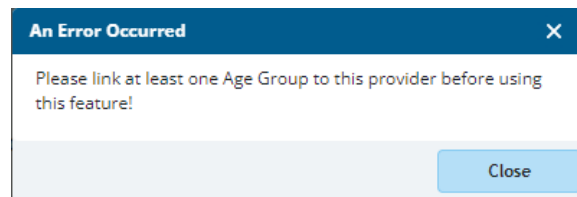
Open the newly saved record by double clicking on it or highlighting it and clicking **Change** button

Select the **Program Links** tab
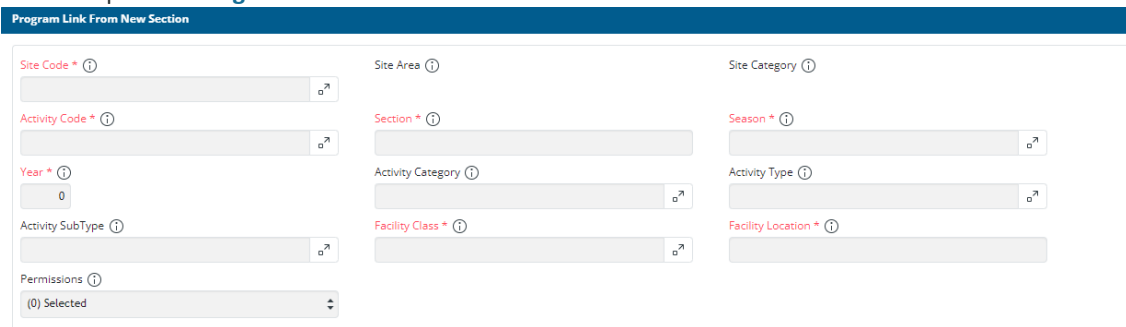
Since each Provider is unique there will be a need to create a new section for them.

Click the **Add Program Link From New Section** button to start the process of creating a new section.

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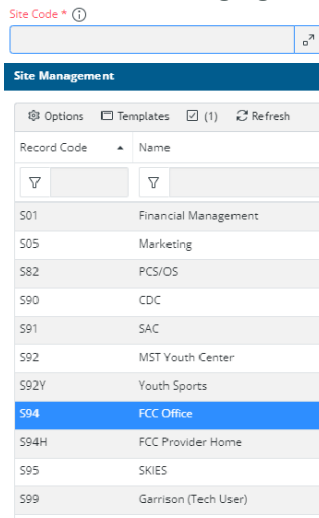
Note: *It is important to realize that the activity section created by the **Add Program Link From New Section** button will be setup with specific settings needed for proper enrollment of children into FCC home activities. If they are created manually there are components that will be missing.*

Note: *Both **Add Program Link…** buttons will unavailable until the new Provider record has been saved.*

This will open the **Program Link From New Section** window.

Set the **Site Code** as appropriate by using the picklist selector. For our purposes today select the **FCC Office** code that was used during login. Do so by highlighting it and then clicking the **Select** button.

The **Activity Code** field will be a manual entry of the next available FCC activity code.

In the past it was a number something like 940001. Now we will be able to use letters and numbers in the code. For this process we will use 5FCC### (i.e. 5FCC004).

Note: *If other Activity Codes are present; matching ones will appear below as you start typing the prefix.*

To see what code is available next:

- Click the **Picklist icon** to open the **Activity Management DataGrid**.

- Enter the first two digits of your Provider numbering scheme in the **Activity Code** field on the **DataGrid** and press the <Tab> key. The **DataGrid** should bring you to the first Provider code.
- Scroll down until you find the last Provider code, make a note of that code, then click the X on the upper right-hand corner of the **DataGrid**.

For the **Section** enter 01 since providers will always have a single section.

For the **Season** start typing the code **Year-Round** and pick the code as it appears below, or click the **Picklist icon** to open the **System Code Management - Season DataGrid**.

Highlight the **Year-Round** code and click the **Select** button ![Close Select], or double click on that code.

In the **Year** field enter the current fiscal year (2023).

For the **Activity Category** start typing the code **FCC** and pick the code as it appears below, or click the **Picklist icon** to open the **System Code Management – Activity Category DataGrid**.

Highlight the **FCC** code and click the **Select** button ![Close Select], or double click on that code.

For the **Activity Type** start typing the code **CARE – FCC** and pick the code as it appears below, or click the **Picklist icon** to open the **System Code Management – Activity Type DataGrid**.

Highlight the **Care-FCC** code and click the **Select** button , or double click on that code.

Ignore the **Activity SubType** field for now.

For the **Facility Class** start typing the code **FCC** and pick the code as it appears below, click the **Picklist icon** to open the **Facility Class Management DataGrid**.

Highlight the **FCC** code and click the **Select** button , or double click on that code.

For the **Facility Location** manually enter the **Provider Code** for this provider being created (i.e. **TESTS-DA**)

Set the **Permissions** for the record (i.e. check **94 FCC**). Expand the combo-box to see the list. Click the X at the top of the drop down or click any where on the screen to close the combo-box.

Note: With the current site permissions we only see one code. If we leave none selected this record is visible to all users with access to **CYMS Provider Management**

Click on the **Save** button

This new Activity Section will appear on the page.

The other button **Add Program Link From Exisitng Section** should only be used if, for some reason, the activity had been previously created for this provider but abandoned. Clicking that button will show a listing of all **Activity Sections** allowed to be seen by the current permissions.

If using the **Add Program Link From Exisitng Section** button click on it.

This opens the **Section Lookup DataGrid**
Double-click the desired **Section** or highlight it and then click on the **Select** button

Click **Save**

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Add an Age Group Record

Select a **Provider Record** created in the first section.

| ✎ | ✔ | TESTS-DA | Dad | Testson | 123 Any St, Columbia, |

In the **Record Type** field on the right side, expand the Drop-down list and scroll to find and select **Age Group**

Record Type ⓘ

--- Please Select A Record Type To Show --- ⬍

--- Please Select A Record Type To Show ---

Age Group

Program Type

Provider Admin Action

Provider Background Checks

Provider Backup
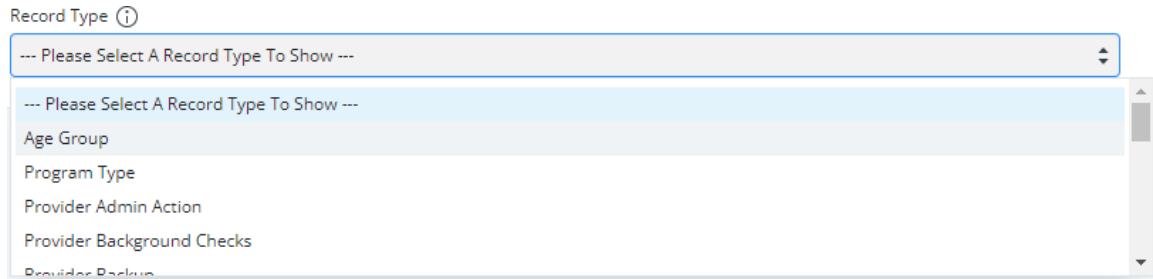
Click the **Add Age Group Record(s)** button towards the bottom of the screen
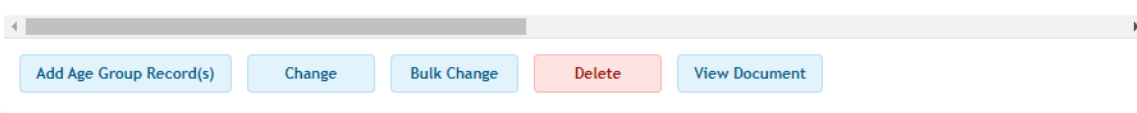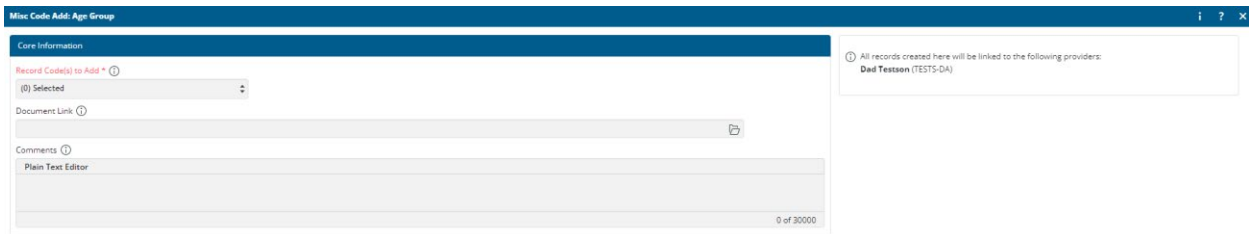
| Add Age Group Record(s) | Change | Bulk Change | Delete | View Document |

This will open the **Misc Code Add** screen:

Misc Code Add: Age Group

Core Information

All records created here will be linked to the following providers:
Dad Testson (TESTS-DA)

Record Code(s) to Add * ⓘ

(0) Selected

Document Link ⓘ

Comments ⓘ

Plain Text Editor

0 of 30000

Cancel   Save

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*Note: On the upper right the **Provider Record** selected on the previous screen is visible.*

ⓘ All records created here will be linked to the following providers:
Dad Testson (TESTS-DA)

In the **Record Code(s) to Add** field click the combo-box selector

Record Code(s) to Add * ⓘ

(0) Selected

☑ Check all ☐ Uncheck all ⊠

☐ Infants (6 Wk - 12 Mo)
☐ Kindergarten-Age (Kindergarten)
☐ Middle School (6th -7th Grade)
☐ Middle School (8th Grade)
☐ Pre-Toddler (12 Mo - 18 Mo)
☐ Pre-Toddler (18 Mo - 24 Mo)
☐ Preschool-Age (3 - 4 Yrs)

Select the ages this provider will be certified to provide care for. For a multi-Age provider multiple ages will be selected, for Infant only it would be just that selection.
For this example please select:
Infants (6 Wk – 12 Mo)
Pre-Toddler (12 Mo-18 Mo)
Pre-Toddler (18 Mo-24 Mo)
Toddler (2 – 3Yrs)
Then click X at the top of the drop down or click anywhere else on the screen

Note: When selecting multiple records look at the number in the paranthesis after closing the pick-list. This number indicates the number of records selected.

Record Code(s) to Add * ⓘ

(4) Infants (6 Wk - 12 Mo), Pre-Toddler (12 Mo -...

Click on **Save**   Cancel   **Save**

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The newly added Age Groups records are now visible.

Record Type ⓘ

Age Group ⇕

		Name ▲	Record Code ▲	Document Link	Comments
⚙ Options	☐ Templates ☑ (0) ⟳ Refresh		Age Group Records		1 to 4 of 4
		▽	(0) Selected ⇕	▽	▽
✎ ☐		Dad Testson	1-INF		
✎ ☐		Dad Testson	2-PTOD1		
✎ ☐		Dad Testson	2-PTOD2		
✎ ☐		Dad Testson	3-TOD		

Note: *Records added today will have a green highlight to them*

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Add a Training Record

Select a **Provider Record** created in the first section.

✏	✔	TESTS-DA	Dad	Testson	123 Any St, Columbia,

In the **Record Type** field on the right side, expand the Drop-down list and scroll to find and select **Provider Training**

Record Type ⓘ

--- Please Select A Record Type To Show --- ▲▼

> Provider Pet
> Provider Previous Experience
> Provider Recognitions
> Provider Special Requirements
> Provider Subsidy
> **Provider Training**

Click the **Add Provider Training Record(s)** button towards the bottom of the screen

Only Show Provider Training Records If The Following Dates Are Empty ⓘ

(0) Selected ▲▼

Date Option ⓘ

All Dates Missing ▲▼

Add Provider Training Record(s)	Change	Bulk Change	Delete	View Document

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This will open the **Misc Code Add** screen:

Note: *On the upper right the **Provider Record** selected on the previous screen is visible.*

In the **Record Code(s) to Add** field click the combo-box selector

Note: *It is possible to select multiple records here. If multiple are selected they will all have the same **Due Date, Completed Date**, etc.*

Select **Child Safety-Fire Prevention**, click X at the top of the drop down or click anywhere else on the screen

Click on **Due Date** Field and use **Date Picker** to set the due date to 12/02/2022

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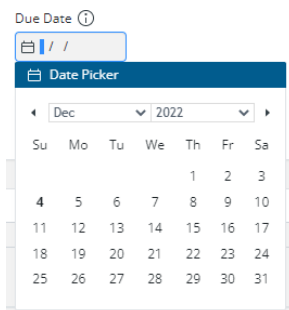
Click on **Save**   Cancel   Save

The newly added **A-FIRE** record is now visible.

		Name ▲	Record Code ▲	Due Date	Completed Date	Credit Hours	Clock Hours	Complete
⚙ Options	🗖 Templates ☑ (0) 🔄 Refresh		Provider Training Records					1 to 1 of 1
		▽	(0) Selected ⇅	▽ 🗓	▽ 🗓	▽	▽	▽
✎	☐	Dad Testson	A-FIRE	12/02/2022		0.00	0.00	

Complete a Training Record

NOTE: As training codes are added if zero provider records are selected on the left side then all of the records for the selected type (in this case Training Records) will show. It will be important to utilize filters so only the records a user needs to focus on will appear.

Select the new line that appeared for the **A-FIRE** record and click **Change** or Double-Click it

Click on **Completed Date** field and use **Date Picker** to set the date to today

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Enter **Credit Hours**, **Clock Hours**, **Completed By User Name, Link a Document** (there is a separate section to show how to link docs), and add **Comments** as needed.

Core Information

Record Code * ⓘ	Due Date ⓘ	Completed Date ⓘ
Child Safety-Fire Prevention	📅 12/02/2022	📅 12/09/2022

Credit Hours ⓘ	Clock Hours ⓘ	Completed By User Name ⓘ
3.00	4.00	tims

Document Link ⓘ

\Misc Data Documents\826809\Test_Cert.pdf   ✕

Comments ⓘ

Plain Text Editor

This is the comments area.

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> *Note*: If the *Code* was set to have default *Credit* and *Clock Hours* they will fill in automatically

> *Note*: On the right side details about when this record was last changed, originally created and by whom are visible.

ⓘ This record is linked to the following provider record:
Dad Testson (TESTS-DA)

Last Change Date ⓘ
📅 12/09/2022

Original Date ⓘ
📅 12/09/2022

Original Time ⓘ
🕐 08:13

Original User Name ⓘ
tims

Click on **Save**   Cancel   **Save**

The current record now has a **Completed Date** and a new **A-FIRE** record should appear with a **Due Date** one year from the completed date entered.

		Name	Record Code	Due Date	Completed Date	Credit Hours	Clock Hours	Complete
▽		▽	(0) Selected	▽ 📅	▽ 📅	▽	▽	▽
✎	☐	Dad Testson	A-FIRE	12/09/2023		0.00	0.00	
✎	☐	Dad Testson	A-FIRE	12/02/2022	12/09/2022	3.00	4.00	tims

> *Note*: In order to make this work the record must have the Recurring toggle turned on and the parameters set for the next renewal code and cycle

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Bulk Training Record Add - for new due record

NOTE: Here we will do a single-provider, multi-training add. This could alternatively be multi-provider, single-training add or multi-provider, multi-training add.

Select the previously created **Provider Record**

CYMS Provider Management - Provider Training

		Record Code ▲	First Name	Last Name	Phone Number 1 Info	Address
		▽	▽	▽	▽	▽
✎	☐	STETS-AM	Amy	Stetson		12 Cobble Hill Rd, Wate
✎	✔	TESTS-DA	Dad	Testson		123 Any St, Columbia, |

⚙ Options   ☐ Templates   ☑ (1)   ⟳ Refresh   Providers   1 to 2 of 2

In the **Record Type** field, expand the Drop-down list and scroll to find and select **Provider Training**

Record Type ⓘ

--- Please Select A Record Type To Show ---   ⇕

Provider Pet
Provider Previous Experience
Provider Recognitions
Provider Special Requirements
Provider Subsidy
Provider Training

Click the **Add Provider Training Record(s)** button towards the bottom of the screen

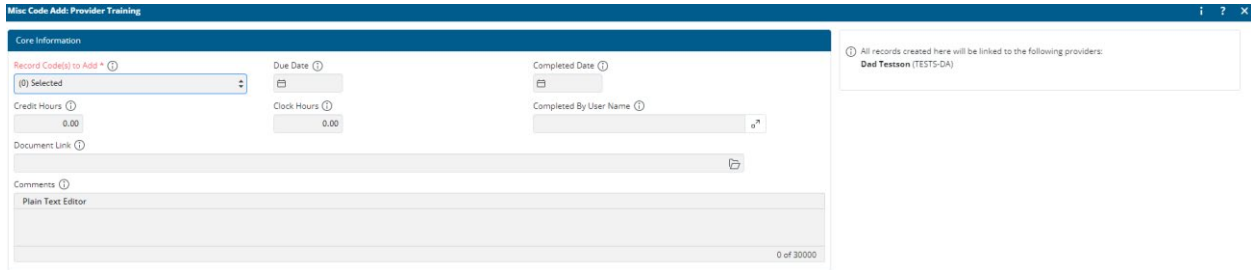Only Show Provider Training Records If The Following Dates Are Empty ⓘ
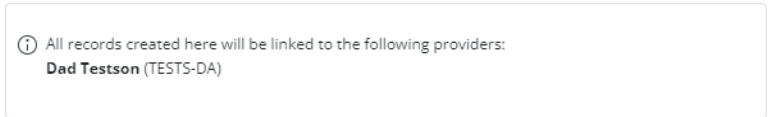
(0) Selected   ⇕

Date Option ⓘ

All Dates Missing   ⇕

[Add Provider Training Record(s)]   [Change]   [Bulk Change]   [Delete]   [View Document]

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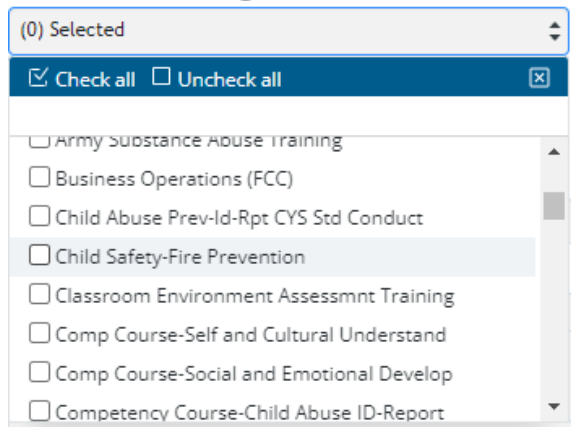This will open the **Misc Code Add** screen:

Note: On the upper right the **Provider Record** selected on the previous screen is visible.

In the **Record Code(s) to Add** field click the combo-box selector In the **Record Code(s) to Add** field click the combo-box selector

Select the entry level trainings **Competency Course-Child Abuse ID_Report**, **Competency Course-Guidance** and **Competency Course-Health**, click the X at the top of the combo box or click anywhere on the screen

Click on **Due Date Field** and use **Date Picker** to set the due date to 12/02/2022
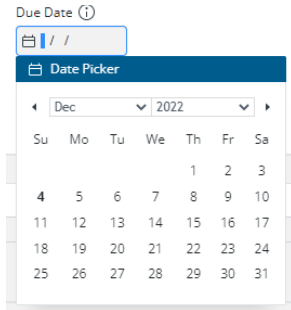
Due Date ⓘ

> **Note**: The records we are adding will all have the same due date

Click on **Save**   Cancel   Save

The newly added **Provider Training Codes** (**E-CAIR**, **E-GUIDE** and **E-HLTH**) with the same **Due Dates** for each are now visible

Record Type ⓘ

Provider Training

⚙ Options   ☐ Templates   ☑ (0)   🔄 Refresh   Provider Training Records   1 to 5 of 5

		Name ▲	Record Code ▲	Due Date	Completed Date	Credit Hours	Clock Hours	Complete
		▽	(0) Selected ⇅	▽ 🗓	▽ 🗓	▽	▽	▽
✎	☐	Dad Testson	A-FIRE	12/09/2023		0.00	0.00	
✎	☐	Dad Testson	A-FIRE	12/02/2022	12/09/2022	3.00	4.00	tims
✎	☐	Dad Testson	E-CAIR	12/02/2022		0.00	0.00	
✎	☐	Dad Testson	E-GUIDE	12/02/2022		0.00	0.00	
✎	☐	Dad Testson	E-HLTH	12/02/2022		0.00	0.00	

Bulk Training Record Add - for completed record

NOTE: This should only be done if the Providers do not have training records of that type currently due. This process will add a new entry unlike 10.3 where it would add the completed date on the due line item. The Bulk Change section will cover how to handle those types of records.

Our scenario for this process is a special training that was completed for multiple providers, but was not previously due.

Select at least 2 previously created **Provider Records**

In the **Record Type** field, expand the Drop-down list and scroll to find and select **Provider Training**

Click the **Add Provider Training Record(s)** button towards the bottom of the screen

This will open the **Misc Code Add** screen:

Note: On the upper right the Provider Records selected on the previous screen are visible.

In the **Record Code(s) to Add** field click the combo-box selector

Select **Other Installation Requirements**, then click the X at the top of the combo box or click anywhere on the screen

Click on **Due Date** field and use **Date Picker** to set the date to today

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Click on **Completed Date** field and use **Date Picker** to set the date to today
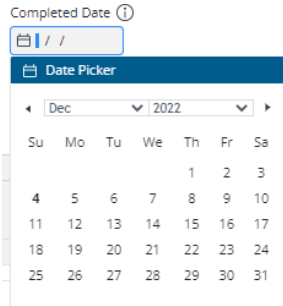
Enter a **Comment** about what this special training was
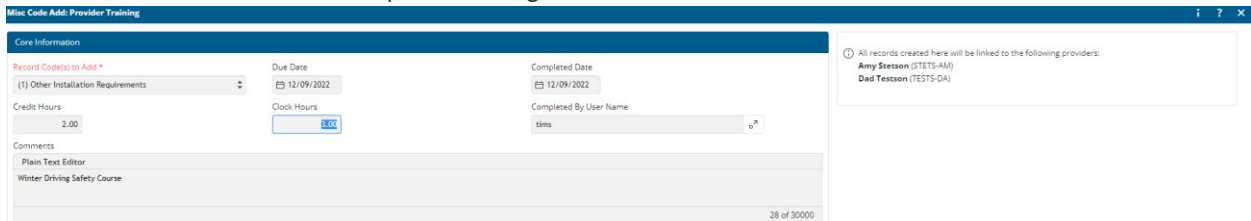
Click on **Save**

The newly added Provider Training Code with the same Due Date, Completed Date and Comments for each Provider should now be visible

		Name	▲	Record Code	▲	Due Date	Completed Date	Credit Hours	Clock Hours	Complete
		▽		(1) Other Installat... ⇕		▽ 📅	▽ 📅	▽	▽	▽
✎	☐	Amy Stetson		I-OTHER		12/09/2022	12/09/2022	2.00	3.00	tims
✎	☐	Dad Testson		I-OTHER		12/09/2022	12/09/2022	2.00	3.00	tims

Note: *For this screenshot the Record Code filter was set to **Other Installation Requirements***

NOTE: *To see the comments scroll to the right*

Comments	
▽	
Winter Driving Safety Course	
Winter Driving Safety Course	
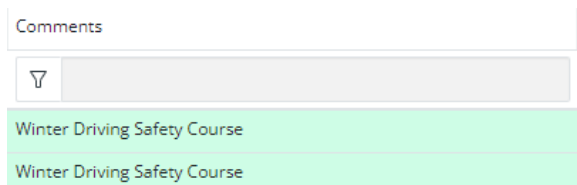
Bulk Training Record Change

This scenario is for bulk updating multiple due records at the same time with the same completed date, credit and clock hours, and comments, if applicable.

Select the **Provider Record** created in the first section that has 3 entry training codes assigned.

CYMS Provider Management

		Record Code		First Name	Last Name	Phone Number 1 Info	Address
⚙ Options	▢ Templates	☑ (1)	⟳ Refresh		Providers		1 to 2 of 2
		🔽		🔽	🔽	🔽	🔽
✎	☐	STETS-AM		Amy	Stetson		12 Cobble Hill Rd, Wate
✎	✔	TESTS-DA		Dad	Testson		123 Any St, Columbia,

In the **Record Type** field, expand the Drop-down list and scroll to find and select **Provider Training**

Record Type ⓘ

--- Please Select A Record Type To Show ---

Provider Pet
Provider Previous Experience
Provider Recognitions
Provider Special Requirements
Provider Subsidy
Provider Training

In the **Record Code** filter expand combo-box selector

		Name		Record Code		Due Date	Completed Date	Credit Hours	Clock Hours	Completed E
⚙ Options	▢ Templates	☑ (0)	⟳ Refresh	Provider Training Records						1 to 6 of 6
		🔽		(0) Selected	⇅	🔽 📅	🔽 📅	🔽	🔽	🔽

Select **Competency Course-Child Abuse ID_Report**, **Competency Course-Guidance** and **Competency Course-Health**, click the X at the top of the combo box or click anywhere on the screen

Select the 3 records that should now be present for the provider.

This can be done individually or all together using the **Options** gear dropdown and clicking on **Select All Rows**

VERMONT SYSTEMS

Click the **Bulk Change** button

		Name ▲	Record Code ▲	Due Date	Completed Date	Credit Hours	Clock Hours	Complete
		▽	(3) Competency C... ⇕	▽ 🗓	▽ 🗓	▽	▽	▽
✎	☑	Dad Testson	E-CAIR	12/02/2022		0.00	0.00	
✎	☑	Dad Testson	E-GUIDE	12/02/2022		0.00	0.00	
✎	☑	Dad Testson	E-HLTH	12/02/2022		0.00	0.00	

⚙ Options   ☐ Templates   ☑ (3)   ⟳ Refresh   **Provider Training Records**   1 to 3 of 3 (Filtered from 3)

Only Show Provider Training Records If The Following Dates Are Empty

(0) Selected ⇕

Date Option

All Dates Missing ⇕

[Add Provider Training Record(s)] [Change] [Bulk Change] [Delete] [View Document]
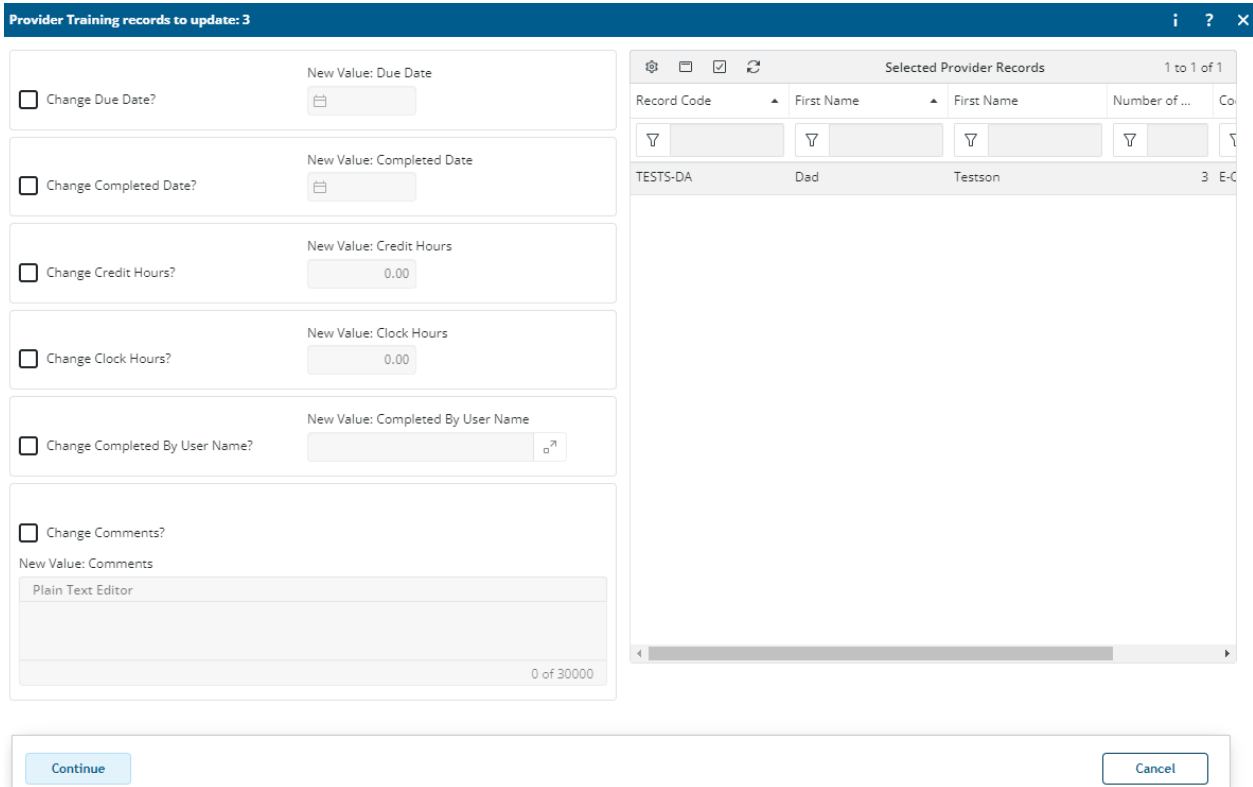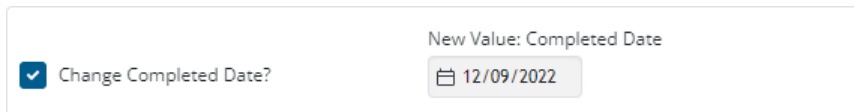
This will open the **Provider Training records to update: 3** window

Note: The previously selected provider record is visible on the right side of the window

Select the **Change Completed Date?** toggle and enter today's date using the **Date Picker**

Note: Only the fields with the toggle turned on will be updated. Multiple fields could be updated at once.

Note: If there are default hours entered in Code Management they will be inserted into the completed records.

Click on the **Continue** button

VERMONT SYSTEMS

An Information box will appear asking **'Are you sure you want to bulk change 3 records?'**, Click **Continue**

Information		i	?	X

Are you sure you want to bulk change 3 records?

Continue	Cancel
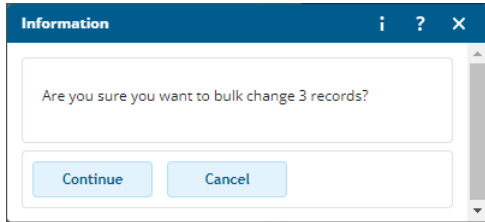
To see what is due for all training codes click the **Options** gear drop down and then **Clear Filters**

⚙ Options   ☐ Templates   ☑ (0)   ↻

Clear Filters
Hide Filters
Show Only Selected
Clear Selected
Select All Rows
Turn Off Auto Filtering
Toggle Groups
Export Comma Delimited
Print Friendly Table
Show Settings

Key:
Added Today

.
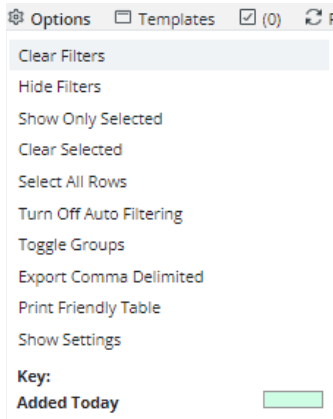
Then to see only due items go to the **'Only Show Provider Training Records..'** and expand the Drop-down box, select **Completed Date**. Close the combo-box using the X on the top right or click anywhere on the screen.

☑ Check all   ☐ Uncheck all   ☒

☐ Due Date
☐ Completed Date

(0) Selected
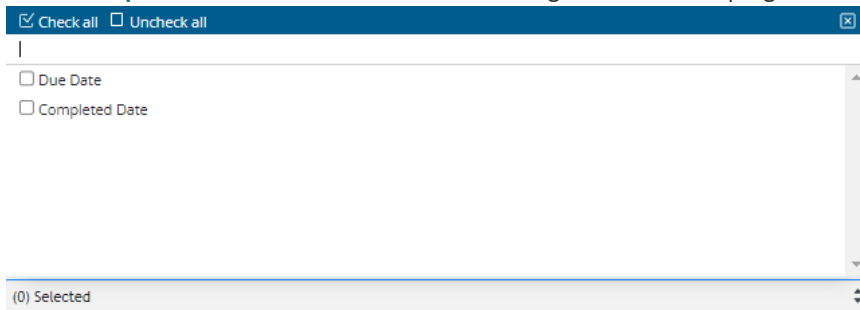
Only these specific Training records for 2023 should be visible

⚙ Options	☐ Templates	☑ (0)	↻ Refresh	**Provider Training Records**				1 to 2 of 2
	Name ▲	Record Code ▲	Due Date	Completed Date	Credit Hours	Clock Hours	Complete
	▽	(0) Selected ↕	▽ 📅	▽ 📅	▽	▽	▽
✎ ☐	Dad Testson	A-FIRE	12/09/2023		0.00	0.00	
✎ ☐	Dad Testson	S-CAPRV	03/09/2023		0.00	0.00	

Note: The **Date Option** below is useful to find records with a missing date, in this case **Due** or **Completed**, but in Background Checks that would include **Initial** as well.

Note: There is a code due for **S-CAPRV** that we did not previously add. That is because it is set as the recurring code for **Competency Course-Child Abuse ID_Report (E-CAIR)** with a due date three months after the completion of the entry level course. In order for this to work the recurring toggle and corresponding code criteria need to be set.

		Name	Record Code	Due Date	Completed Date	Credit Hours	Clock Hours	Complete
			(2) Competency C...					
✏	☐	Dad Testson	E-CAIR	12/02/2022	12/09/2022	0.00	0.00	
✏	☐	Dad Testson	S-CAPRV	03/09/2023		0.00	0.00	

⚙ Options   ▢ Templates   ☑ (0)   ⟳ Refresh   **Provider Training Records**   1 to 2 of 2 (Filtered from 2)

Training Record Delete

This can be useful if a training record was created accidentally. For this process we will pretend the **S-CAPRV** was no longer needed.

This process can also be used for multiple records at once.

Select the **Provider Record** created in the first section that has 3 entry training codes assigned.

CYMS Provider Management

		Record Code	▲	First Name	Last Name	Phone Number 1 Info	Address
		▽		▽	▽	▽	▽
✎	☐	STETS-AM		Amy	Stetson		12 Cobble Hill Rd, Wate
✎	✔	TESTS-DA		Dad	Testson		123 Any St, Columbia, \

⚙ Options   ☐ Templates   ☑ (1)   ⟳ Refresh   Providers   1 to 2 of 2

In the **Record Type** field, expand the Drop-down list and scroll to find and select **Provider Training**

Record Type ⓘ

--- Please Select A Record Type To Show ---

Provider Pet
Provider Previous Experience
Provider Recognitions
Provider Special Requirements
Provider Subsidy
Provider Training

In the **Record Code** filter expand combo-box selector

⚙ Options   ☐ Templates   ☑ (0)   ⟳ Refresh   **Provider Training Records**   1 to 6 of 6

	Name	▲	Record Code	▲	Due Date	Completed Date	Credit Hours	Clock Hours	Completed E
	▽		(0) Selected		▽ 📅	▽ 📅	▽	▽	▽

Select **Competency Course-Child Abuse Prevention**, then click the X button at the top of the combo box or click anywhere on the screen

Select the record that should be due for 2023

Note: If no items or only the completed items are showing double check that the date options are unchecked.

Click the **Delete** button

An Information box will appear asking **'Are you sure you want to delete selected records?'**, Click **Yes**

The **S-CAPRV** training should now be gone

Name ▲	Record Code ▲	Due Date	Completed Date	Credit Hours	Clock Hours	Complete
▽	(1) Competency C... ⇕	▽ 🗓	▽ 🗓	▽	▽	▽

Options ☐ Templates ☑ (0) ⟳ Refresh   **Provider Training Records**   1 to 0 of 0 (Limited to 0)

No records were found.

VERMONT SYSTEMS

Add a Background Checks Record

Select the **Provider Record** previously created

CYMS Provider Management ✕

		Record Code ▲	First Name	Last Name	Phone Number 1 Info	Address
		▽	▽	▽	▽	▽
✎	☐	STETS-AM	Amy	Stetson		12 Cobble Hill Rd, Wate
✎	✔	TESTS-DA	Dad	Testson		123 Any St, Columbia,

⚙ Options   ▭ Templates   ☑ (1)   ⟳ Refresh   Providers   1 to 2 of 2

In the **Record Type** field, expand the Drop-down list and scroll to find and select **Provider Background Checks**

Record Type

--- Please Select A Record Type To Show ---

--- Please Select A Record Type To Show ---
Age Group
Program Type
Provider Admin Action
Provider Background Checks
Provider Backup

Click **Add Provider Background Checks Record(s)** button

Only Show Provider Background Checks Records If The Following Dates Are Empty

(0) Selected

Date Option

All Dates Missing

Add Provider Background Checks Record(s)	Change	Bulk Change	Delete	View Document

This will open the **Misc Code Add** screen

Misc Code Add: Provider Background Checks

Core Information

Record Code(s) to Add *   Due Date   Initial Date
(0) Selected   📅   📅

Completed Date   Background Check Status   Family Member
📅   --- Select A Status ---   N/A - Linked to Provider

Document Link

Comments
Plain Text Editor

0 of 30000

ⓘ All records created here will be linked to the following providers:
Dad Testson (TESTS-DA)

Note: *On the upper right the Provider Record selected on the previous screen is visible*

ⓘ All records created here will be linked to the following providers:
Dad Testson (TESTS-DA)

VERMONT SYSTEMS

In the **Record Code(s) to Add** field click the combo-box selector

Record Code(s) to Add * ⓘ

(0) Selected	⇕

Select **CID/DCII***, then click the X at the top of the drop down or click anywhere on the screen

Record Code(s) to Add * ⓘ

(0) Selected	⇕

☑ Check all ☐ Uncheck all   ☒

☐ Army Substance Abuse Program
☐ CID/DCII*
☐ Criminal History-Stmt of Admin (DD2981)
☐ DD 2981 Annual Certification
☐ FBI Fingerprints
☐ Local Civilian Law Enforcement (LCLE)*
☐ LOSS Status
☐ MTF/Army Central Registry*

> *Note*: It is possible to select multiple records here. If multiple are selected they will all have the same *Due Date*, *Initial Date*, *Completed Date*, etc. if entered here

Click on **Due Date Field** and use **Date Picker** to set the due date to 12/02/2022

Due Date ⓘ

📅 | / /

📅 Date Picker

◀ | Dec ▼ | 2022 ▼ | ▶

Su	Mo	Tu	We	Th	Fr	Sa
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

The **Family Member** field allows this record to be created for the individual household members of this provider home. For our purposes today we will do just the Provider, but in theory most need to be completed for each member over the age of 12 in the household.

Family Member

N/A - Linked to Provider	⇕

N/A - Linked to Provider
Mom Testson (Spouse)
Middle Testson (Child)

Click on **Save**   [Cancel] [**Save**]

The newly added **CID/DCII** record is now visible.

	Name ▲	Record Code ▲	Due Date	Initial Date	Completed Date	Background Check Status
	▽	(0) Selected ⇅	▽ 🗓	▽ 🗓	▽ 🗓	(0) Selected
✎ ☐	Dad Testson	CID/DCII	12/02/2022			

⚙ Options ▢ Templates ☑ (0) ⟳ Refresh   Provider Background Checks Records   1 to 1 of 1

Initialize a Background Checks Record

Continuing on from the previous section.

Select the new line that has appeared for the **CID/DCII** record

		Name	▲	Record Code	▲	Due Date	Initial Date	Completed Date	Background Check Status
		▽		(0) Selected ⬍		▽ 🗓	▽ 🗓	▽ 🗓	(0) Selected
🖉	✔	Dad Testson		CID/DCII		12/02/2022			

⚙ Options　☐ Templates　☑ (1)　🔁 Refresh　　　Provider Background Checks Records　　　　1 to 1 of 1

Click on **Change**

Only Show Provider Background Checks Records If The Following Dates Are Empty

(0) Selected ⬍

Date Option

All Dates Missing ⬍

[Add Provider Background Checks Record(s)]　[Change]　[Bulk Change]　[Delete]　[View Document]

This opens the **Misc Code Update** screen

Note: *On the right side the details about when this record was last changed, originally created and by whom are visible.*

VERMONT SYSTEMS

Click on **Initial Date** field and use **Date Picker** to set the date to today

Initial Date ⓘ

Date Picker

◀ Dec ▾ 2022 ▾ ▶

Su	Mo	Tu	We	Th	Fr	Sa
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

Expand the Drop-down list in the **Background Check Status** field and select **Pending**

Background Check Status ⓘ

--- Select A Status ---

--- Select A Status ---
Pending
Satisfactory
Derogatory

Click on **Save**   Cancel   Save

The **CID/DCII** record now has an **Initial Date** and a **Pending Background Check Status**

⚙ Options ☐ Templates ☑ (0) ⟳ Refresh   Provider Background Checks Records   1 to 1 of 1

	Name ▲	Record Code ▲	Due Date	Initial Date	Completed Date	Background Check Status
	▽	(0) Selected ⇕	▽ 🗓	▽ 🗓	▽ 🗓	(0) Selected
✎ ☐	Dad Testson	CID/DCII	12/02/2022	12/09/2022		Pending

Complete a Background Checks Record

Continuing on from the previous section.

Select the line for the **CID/DCII** record

Record Type

Provider Background Checks	⇕

⚙ Options	▭ Templates	☑ (1)	⟳ Refresh	Provider Background Checks Records	1 to 1 of 1

	Name	▲	Record Code	▲	Due Date	Initial Date	Completed Date	Background Check Status
	▽		(0) Selected ⇕		▽ 🗓	▽ 🗓	▽ 🗓	(0) Selected
✎ ✔	Dad Testson		CID/DCII		12/02/2022	12/09/2022		Pending

Click on **Change**

Only Show Provider Background Checks Records If The Following Dates Are Empty

(0) Selected	⇕

Date Option

All Dates Missing	⇕

Add Provider Background Checks Record(s)	Change	Bulk Change	Delete	View Document

This opens the **Misc Code Update** screen

Misc Code Update: Provider Background Checks   i ? x

Core Information

Record Code *	Due Date	Initial Date
CID/DCII*	🗓 12/02/2022	🗓 12/09/2022

Completed Date	Background Check Status	Family Member
🗓	Pending	N/A - Linked to Provider

Document Link 📁

Comments
Plain Text Editor

0 of 30000

ⓘ This record is linked to the following provider record:
Dad Testson (TESTS-DA)

Last Change Date
🗓 12/09/2022

Original Date
🗓 12/09/2022

Original Time
🕐 12:33

Original User Name
tims

Click on **Completed Date** field and use **Date Picker** to set the date to today

Completed Date ⓘ

🗓 | / /

🗓 Date Picker

◄	Dec ▼	2022 ▼	►

Su	Mo	Tu	We	Th	Fr	Sa
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

VERMONT SYSTEMS

Expand the Drop-down list in the **Background Check Status** field and select the appropriate status (today we will use **Satisfactory**)

Background Check Status ⓘ

Pending	⬍

--- Select A Status ---
Pending
Satisfactory
Derogatory

If desired a document can be linked here and comments can be entered

Document Link ⓘ

Comments ⓘ

Plain Text Editor

These are the Comments

22 of 30000

Click on **Save**   Cancel   **Save**

The current record now has a **Completed Date** and **Background Check Status** has been updated
A new **CID/DCII** record should also appear with a **Due Date** five years from the completed date entered

		Name	▲	Record Code	▲	Due Date	Initial Date	Completed Date	Background Check Status
⚙ Options	▢ Templates	☑ (0)	↻ Refresh		Provider Background Checks Records				1 to 2 of 2
		▽		(0) Selected ⬍		▽ 🗓	▽ 🗓	▽ 🗓	(0) Selected
✎ ▢		Dad Testson		CID/DCII		12/09/2027			Pending
✎ ▢		Dad Testson		CID/DCII		12/02/2022	12/09/2022	12/09/2022	Satisfactory

Reminder: In order to make this work the record must have the Recurring toggle turned on and the parameters set for the next renewal code and cycle

Bulk Background Checks Record Add - for new due/initialized record

NOTE: Here we will do a multi-provider, single-background add. This could alternatively be multi-provider, multi-background add or single-provider, multi-background add.

Select 2 previously created **Provider Records**

In the **Record Type** field, expand the Drop-down list and scroll to find and select **Provider Background Checks**

Click **Add Provider Background Checks Record(s)** button

This will open the **Misc Code Add** screen

VERMONT SYSTEMS

Note: When multiple records are selected the Document Link section is removed.

Note: On the upper right the Provider Records selected on the previous screen are visible.

ⓘ All records created here will be linked to the following providers:
Amy Stetson (STETS-AM)
Dad Testson (TESTS-DA)

In the **Record Code(s)** to Add field click the combo-box selector

Select **FBI Fingerprints**, then click the X at the top of the combo box or click anywhere on the screen

Record Code(s) to Add * ⓘ

(0) Selected ▲▼

☑ Check all ☐ Uncheck all ☒

☐ Army Substance Abuse Program
☐ CID/DCII*
☐ Criminal History-Stmt of Admin (DD2981)
☐ DD 2981 Annual Certification
☐ FBI Fingerprints
☐ Local Civilian Law Enforcement (LCLE)*
☐ LOSS Status

Click on **Due Date** field and use **Date Picker** to set the date to 01/06/2023

Due Date ⓘ

📅 / /

📅 Date Picker

◀ Jan ▾ 2023 ▾ ▶

Su	Mo	Tu	We	Th	Fr	Sa
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

Note: The records we are adding will all have the same **Due Date**

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Click on **Initial Date** field and use **Date Picker** to set the date to today

Initial Date ⓘ

Note: The records we are adding will all have the same *Initial Date*

Expand the Drop-down list in the Background **Check Status** field and select Pending

Background Check Status ⓘ

--- Select A Status ---

--- Select A Status ---
Pending
Satisfactory
Derogatory

Note: The records we are adding will all have the same Status

Note: When multiple providers are selected the only option available in the *Family Member* drop down is *N/A – Linked to Provider*.

Click on **Save**   Cancel   Save

The newly added FBI Code with the same Due Date, Initial Date and Status for each Provider are now visible.

✎ ☐	Amy Stetson	FBI	01/06/2023	12/09/2022		Pending
✎ ☐	Dad Testson	FBI	01/06/2023	12/09/2022		Pending

Note: The *Record Code* filter is set to *FBI Fingerprints* for this screenshot

Bulk Background Checks Record Add - for completed record

NOTE : This should only be done if the Providers do not have background records of that type currently due. This process will add a new entry

Select 2 previously created **Provider Records**

		Record Code ▲	First Name	Last Name	Phone Number 1 Info	Address
⚙ Options	🗔 Templates ☑ (2) 🔃 Refresh			Providers		1 to 2 of 2
🖉 ✔		STETS-AM	Amy	Stetson		12 Cobble Hill Rd, Wate
🖉 ✔		TESTS-DA	Dad	Testson		123 Any St, Columbia,

In the **Record Type** field, expand the Drop-down list and scroll to find and select **Provider Background Checks**

Record Type

--- Please Select A Record Type To Show ---

--- Please Select A Record Type To Show ---
Age Group
Program Type
Provider Admin Action
Provider Background Checks
Provider Backup

Click **Add Provider Background Checks Record(s)** button

Only Show Provider Background Checks Records If The Following Dates Are Empty

(0) Selected

Date Option

All Dates Missing

Add Provider Background Checks Record(s)	Change	Bulk Change	Delete	View Document

This will open the **Misc Code Add** screen

Note: When multiple records are selected the Document Link section is removed.
Note: On the upper right the Provider Records selected on the previous screen are visible.

> ⓘ All records created here will be linked to the following providers:
> **Amy Stetson** (STETS-AM)
> **Dad Testson** (TESTS-DA)

In the **Record Code(s)** to Add field click the combo-box selector

Record Code(s) to Add * ⓘ

(0) Selected ⬍

Select **MTF/Army Central Registry**, then click the X at the top of the combo box or click anywhere on the screen

Record Code(s) to Add * ⓘ

(0) Selected ⬍

☑ Check all ☐ Uncheck all   ⊠

☐ Criminal History-Stmt of Admin (DD2981)
☐ DD 2981 Annual Certification
☐ FBI Fingerprints
☐ Local Civilian Law Enforcement (LCLE)*
☐ LOSS Status
☐ MTF/Army Central Registry*
☐ Provisional Hiring Status

Click on **Due Date** field and use **Date Picker** to set the date to today

Due Date ⓘ

📅 / /

📅 Date Picker

◀ | Dec ⌄ | 2022 ⌄ | ▶

Su	Mo	Tu	We	Th	Fr	Sa
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

VERMONT SYSTEMS

Click on **Initial Date** field and use **Date Picker** to set the date to today

Initial Date ⓘ

Click on Completed **Date** field and use **Date Picker** to set the date to today

Completed Date ⓘ

Expand the Drop-down list in the **Background Check Status** field and select Satisfactory

Background Check Status ⓘ

Pending

--- Select A Status ---
Pending
Satisfactory
Derogatory

> *Note: When multiple providers are selected the only option available in the **Family Member** drop down is **N/A – Linked to Provider**.*

Click on **Save**   Cancel   Save

VERMONT SYSTEMS

The newly added **ACR** Code with the same **Due Date**, **Initial Date**, **Completed Date** and **Status** for each Provider are now visible.

A new **ACR** record should also appear with a **Due Date** five years from the completed date entered for each Provider

		Name	Record Code	Due Date	Initial Date	Completed Date	Background Check Status
⚙ Options	☐ Templates	☑ (0)	⟳ Refresh	Provider Background Checks Records			1 to 4 of 4 (Filtered from 8)
		▽	(1) MTF/Army Cen... ⇅	▽ 🗓	▽ 🗓	▽ 🗓	(0) Selected
✎	☐	Amy Stetson	ACR	12/09/2027			Pending
✎	☐	Amy Stetson	ACR	12/09/2022	12/09/2022	12/09/2022	Satisfactory
✎	☐	Dad Testson	ACR	12/09/2027			Pending
✎	☐	Dad Testson	ACR	12/09/2022	12/09/2022	12/09/2022	Satisfactory

Note: The **Record Code** filter is set to **MTF/Army Central Registry** for this screenshot
Reminder: In order to make this work the record must have the Recurring toggle turned on and the parameters set for the next renewal code and cycle

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Bulk Background Checks Record Change

Select 2 of the previously created **Provider Records**.

		Record Code ▲	First Name	Last Name	Phone Number 1 Info	Address
✏️	✔	STETS-AM	Amy	Stetson		12 Cobble Hill Rd, Wate
✏️	✔	TESTS-DA	Dad	Testson		123 Any St, Columbia, \

In the **Record Type** field, expand the Drop-down list and scroll to find and select **Provider Background Checks**

Record Type

--- Please Select A Record Type To Show ---

--- Please Select A Record Type To Show ---
Age Group
Program Type
Provider Admin Action
Provider Background Checks
Provider Backup

In the **Record Code** filter expand combo-box selector

Record Code ▲   Due Date   Initial Date

(0) Selected

☑ Check all   ☐ Uncheck all   ☒

☐ Army Substance Abuse Program
☐ CID/DCII*
☐ Civilian Law Enforcement (If Available)
☐ Criminal History-Stmt of Admin (2981)
☐ DD 2981 Annual Certification
☐ Family Housing/Building Coordinator*
☐ FBI Fingerprints

Select **FBI Fingerprints**, then click the X at the top of the combo box or click anywhere on the screen.

VERMONT SYSTEMS

Select the 2 records that should now be present - 1 for each of the providers

		Name	▲	Record Code	▲	Due Date	Initial Date	Completed Date	Background Check Status
⚙ Options	☐ Templates	☑ (0)	⟳ Refresh	**Provider Background Checks Records**					1 to 2 of 2 (Filtered from 8)
	▽		(1) FBI Fingerprints ⬍	▽ 🗓	▽ 🗓	▽ 🗓	(0) Selected
✎ ☐	Amy Stetson	FBI	01/06/2023	12/09/2022		Pending
✎ ☐	Dad Testson	FBI	01/06/2023	12/09/2022		Pending

This can be done individually or all together using the **Options** gear dropdown and clicking on **Select All Rows**

⚙ Options   ☐ Templates   ☑ (0)   ⟳

Clear Filters
Hide Filters
Show Only Selected
Clear Selected
Select All Rows
Turn Off Auto Filtering
Toggle Groups
Export Comma Delimited
Print Friendly Table
Show Settings

Key:
Added Today

Click the **Bulk Change** button

Only Show Provider Background Checks Records If The Following Dates Are Empty

(0) Selected ⬍

Date Option

All Dates Missing ⬍

Add Provider Background Checks Record(s)	Change	Bulk Change	Delete	View Document

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This will open the **Provider Background Checks records to update** screen

Note: *The previously selected provider records are visible on the right side of the window*

Select the **Change Completed Date?** toggle and enter today's date using the **Date Picker**

Select **Change Background Check Status?** and select **Satisfactory** from the Combo-box for **New Value: Background Check Status**

Note: *Only the fields with the toggle turned on will be updated.*

Click on **Continue**   Continue

An Information box will appear asking **'Are you sure you want to bulk change 2 records?'**, Click **Continue**

The **FBI** code is now has a **Completed Date** and **Satisfactory Background Check Status**

		Name		Record Code		Due Date	Initial Date	Completed Date	Background Check Status
⚙ ☐ ☑ ⟳					Provider Background Checks Records				1 to 2 of 2 (Filtered from 2)
		▽		(1) FBI Fingerprints	⇕	▽ 🗓	▽ 🗓	▽ 🗓	(0) Selected
✎ ☐		Amy Stetson		FBI		01/06/2023	12/09/2022	12/09/2022	Satisfactory
✎ ☐		Dad Testson		FBI		01/06/2023	12/09/2022	12/09/2022	Satisfactory

> **Note:** *This code is not set up to recur, so there will be no new due records*

To see only what is now due, go to the **'Only Show Background Checks Records..'** and expand the Drop-down box, select **Completed Date**

There should now be no codes visible as **FBI Fingerprints** is still our **Record Code** filter, to see what is due for all background check codes click the **Options gear**, and select **Clear Filters**

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⚙ Options   ▢ Templates   ☑ (0)   ⟳ F

Clear Filters	
Hide Filters	
Show Only Selected	
Clear Selected	
Select All Rows	
Turn Off Auto Filtering	
Toggle Groups	
Export Comma Delimited	
Print Friendly Table	
Show Settings	
Key:	
Added Today	

⚙ Options   ▢ Templates   ☑ (0)   ⟳ Refresh   Provider Background Checks Records   1 to 3 of 3

		Name ▲	Record Code ▲	Due Date	Initial Date	Completed Date	Background Check Status
		▽	(0) Selected ▲▼	▽ 📅	▽ 📅	▽ 📅	(0) Selected
✎	☐	Amy Stetson	ACR	12/09/2027			Pending
✎	☐	Dad Testson	ACR	12/09/2027			Pending
✎	☐	Dad Testson	CID/DCII	12/09/2027			Pending

Only Show Provider Background Checks Records If The Following Dates Are Empty

(1) Completed Date ▲▼

Date Option

All Dates Missing ▲▼

[Add Provider Background Checks Record(s)]   [Change]   [Bulk Change]   [Delete]   [View Document]

Note: The Date Option below is useful to find records with a missing date, whether it be a due, initial or completed date or a combination of dates

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Link a Document to a Record

Note: For this test use the provided Test_Cert.pdf by storing it to a local hard drive before starting

Select one of the **Provider Records** created during this process

CYMS Provider Management

		Record Code	▲	First Name	Last Name	Phone Number 1 Info	Address
		▽		▽	▽	▽	▽
✏	☐	STETS-AM		Amy	Stetson		12 Cobble Hill Rd, Wate
✏	✔	TESTS-DA		Dad	Testson		123 Any St, Columbia,

⚙ Options   ☐ Templates   ☑ (1)   ⟳ Refresh   Providers   1 to 2 of 2

Choose a **Record Type** (i.e. **Provider Training** or **Provider Background Checks**)

Record Type

Provider Training ▲▼

Provider Pet
Provider Previous Experience
Provider Recognitions
Provider Special Requirements
Provider Subsidy
Provider Training

Choose a completed record and click **Change** or Double-Click it

Record Type

Provider Training ▲▼

⚙ Options   ☐ Templates   ☑ (1)   ⟳ Refresh   Provider Training Records   1 to 6 of 6

|		Name	▲	Record Code	▲	Due Date	Completed Date	Credit Hours	Clock Hours	Complete
		▽		(0) Selected ▼		▽ 🗓	▽ 🗓	▽	▽	▽
✏	☐	Dad Testson		A-FIRE		12/09/2023		0.00	0.00	
✏	☐	Dad Testson		A-FIRE		12/02/2022	12/09/2022	3.00	4.00	tims
✏	☐	Dad Testson		E-CAIR		12/02/2022	12/09/2022	0.00	0.00	
✏	☐	Dad Testson		E-GUIDE		12/02/2022	12/09/2022	0.00	0.00	
✏	☐	Dad Testson		E-HLTH		12/02/2022	12/09/2022	0.00	0.00	
✏	✔	Dad Testson		I-OTHER		12/09/2022	12/09/2022	2.00	3.00	tims

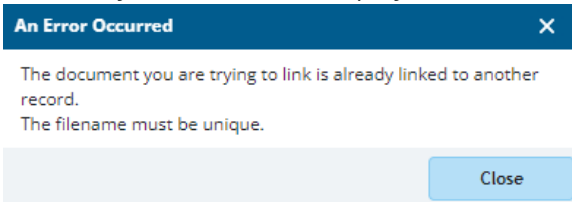This opens the **Misc Code Update** screen for that record.
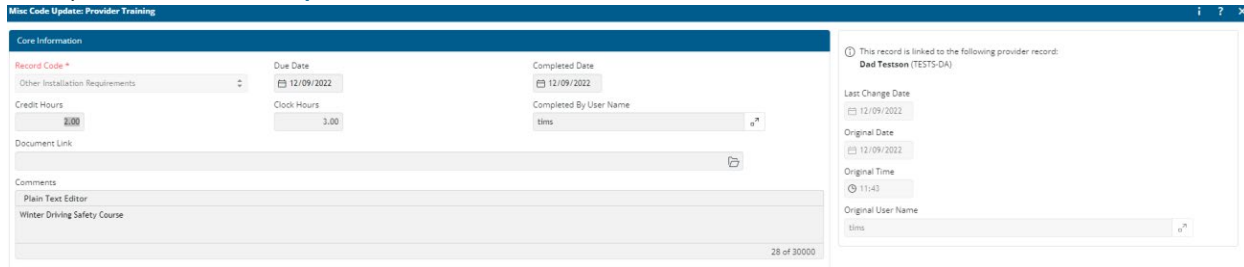
Click the file folder in the Document Link Field
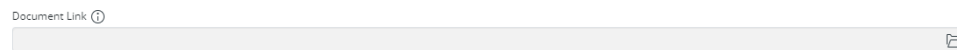
Browse to where the **Test_Cert.pdf** file has been stored in the **Windows File Explorer** box that opens, Double-Click on it
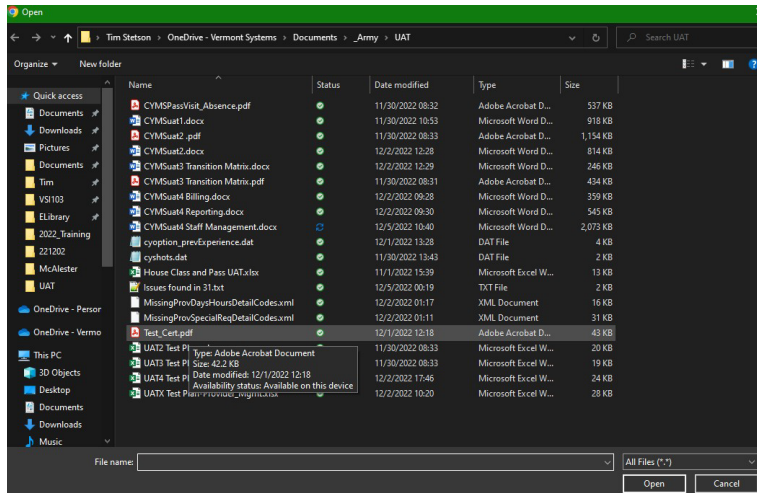
Note: *The file name must be unique for this Provider record. If it is not you will get this message*

Click on **Save**

Scroll the **Record Type** data grid over to the right and find the **Document Link** column, the linked document will be visible on the line item now

---

To view the document highlight the row and click on the **View Document** button

Document Link
⏚
\Misc Data Documents\826809\Test_Cert.pdf

Duplicate processes for each Record Type

The processes outlined for **Provider Training** and **Provider Background Checks** can be used to link each of the other **Record Types** to a Provider Record in mostly the same manner. The biggest difference will be if there are due dates (only **Provider Background Checks** will have the **Initial Date**).

Some things to consider:

At this point only **Provider Training** and **Provider Background Checks** will have recurring functionality data present. Any item with a due date could potentially be programmed to have a recurring code status.

When adding a **Provider Comments** record the only **Record Code** set currently is **Not Applicable** at this time. Use this to create a comment. A list of comment types can be created later

Comments can still be modified by other users. However, now we will see if there is a difference between the Last Change Date and the Original Date