VERMONT SYSTEMS

CYMS- PCS Admin Household, Pass, and Class

Vermont Systems CYMS 3.1 Training

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Copyright Information

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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.

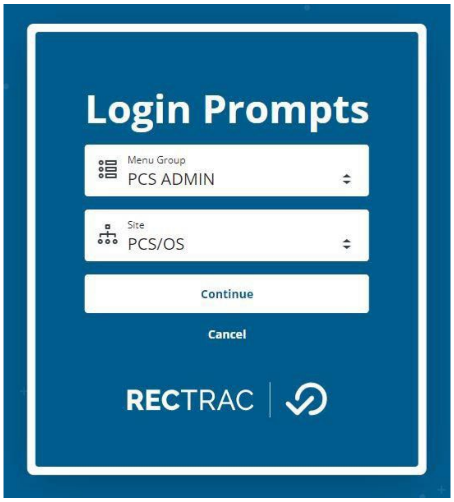
Username: Your Army email alias*

*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.*

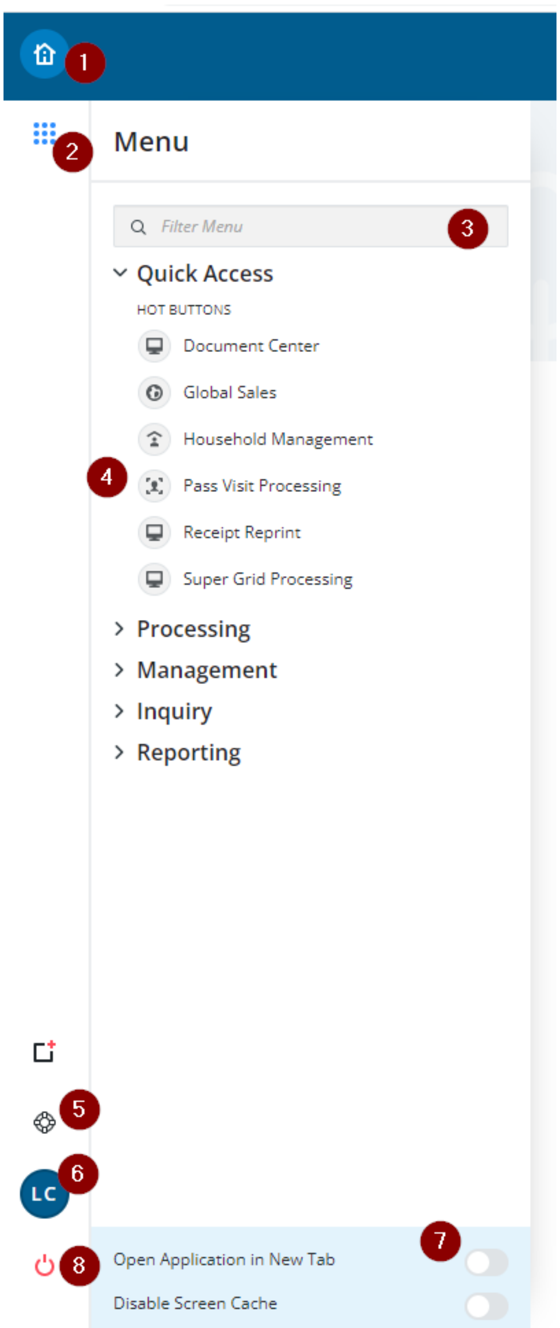
For this training, please sign in using the **PCS Admin** user group and **PCS/OS** site. PCS - or Parent Central Services - is a central registration point for all CYS programs.



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.

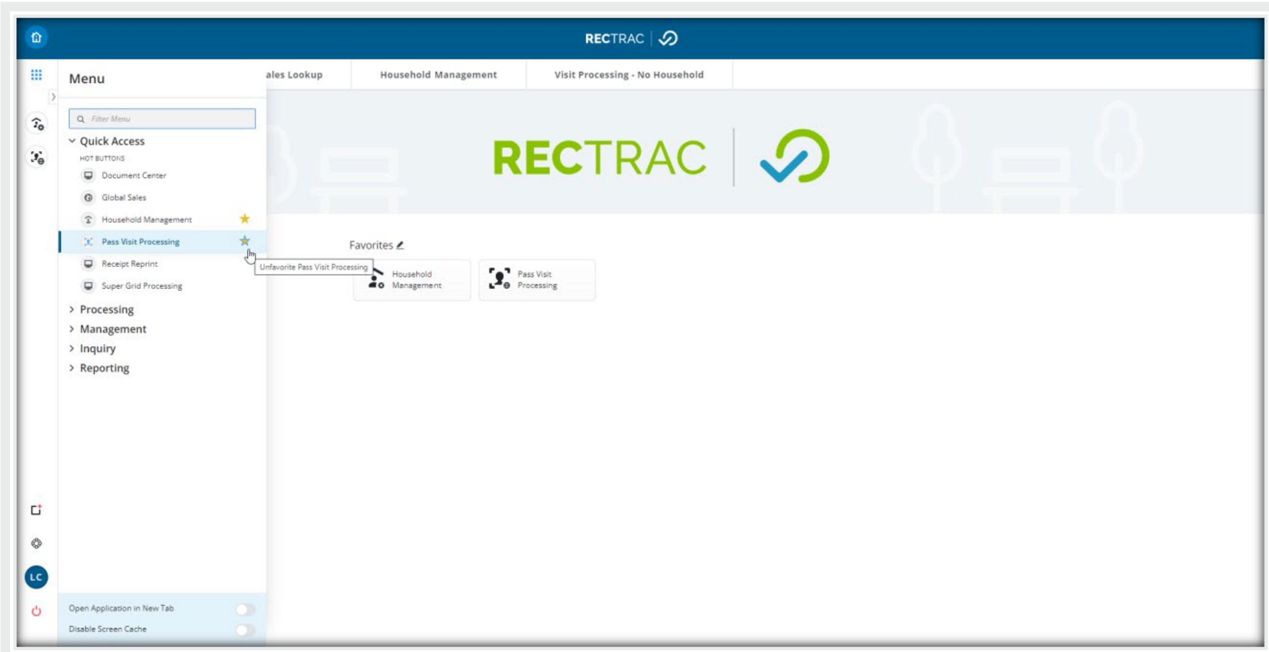
7 – **New Tab Slider**: Turn on the slider before clicking a menu button if you already have that program open and you want to open a second instance.

> ***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.

Menu Favorites

Each user has the ability to select their own **Favorites**: menu items that will also show on the user's home screen. To select a Favorite, hover over the menu item and click on the star that appears. Favorited menu items will show on the Home screen:



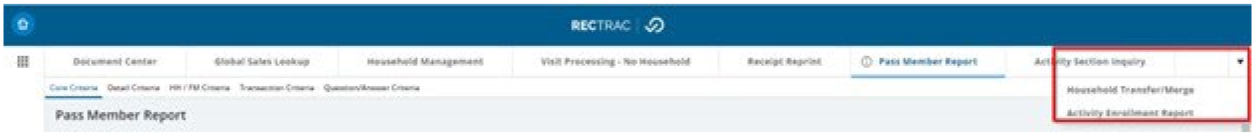
The first five Favorites selected will also show as circle buttons in the upper left of the sidebar menu, below the waffle.

Panels

When a menu item is clicked, the respective program will open in a panel across the top of the screen:

Clicking on a panel brings the corresponding program to the forefront of your main RecTrac screen. This makes it easy to switch back and forth between many different programs without losing your work.

When all of the space for panels is taken up across the top of the screen, additional open panels will show when you click the down button in the upper right:

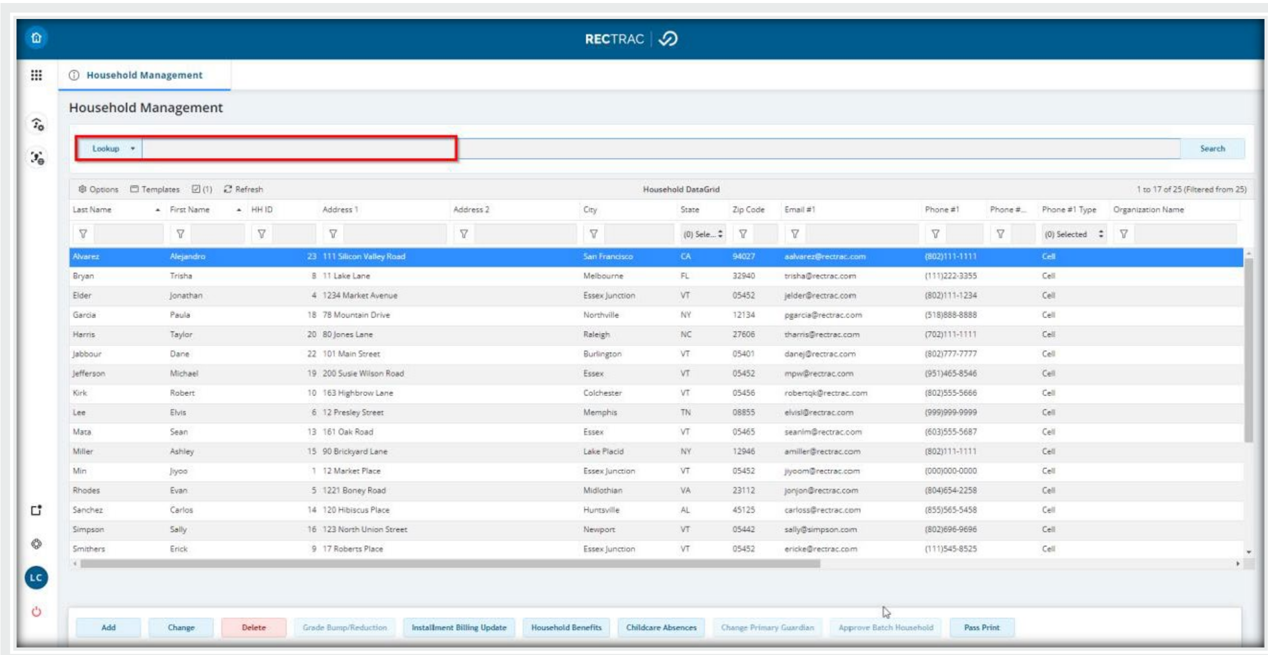


Users can have as many panels open at any given time as they want. Panels can be dragged and dropped to reorder them, and can be closed by clicking on the X that appears on hover.

Creating Households

Household Management

Click on **Household Management** in the RecTrac menu. Use the Menu Search to help locate the button if desired. The Household Management button will open the Household Management program in a new panel. This program opens to a lookup screen:



To find an existing household, type in the household sponsor's name and hit your enter key. The syntax for the name search is [last name, first name] and a partial name can be entered for either name.

To search by last name only, just type in the last name. To search by first name only, just type a comma before the first name.

The **Lookup** function can also search on additional data points. To search for a household by address, email, family member name, household number, organization name, phone, or team name, click on the Lookup button and select the appropriate search option.

Selecting a household and clicking the **Change** button will bring up the Household Update screen (described below). Clicking **Add** will bring up a blank Household Update screen for the user to enter in a new household to the database.

> ***Please Note:*** *RecTrac 3.1 has a duplicate household check. If a user does not know if a household has been entered yet, it makes sense to do a search first to see if the household exists. If a user enters a*

household and the system finds a matching email address, phone number, or name + birthday, it will prompt the user to switch to the existing household.

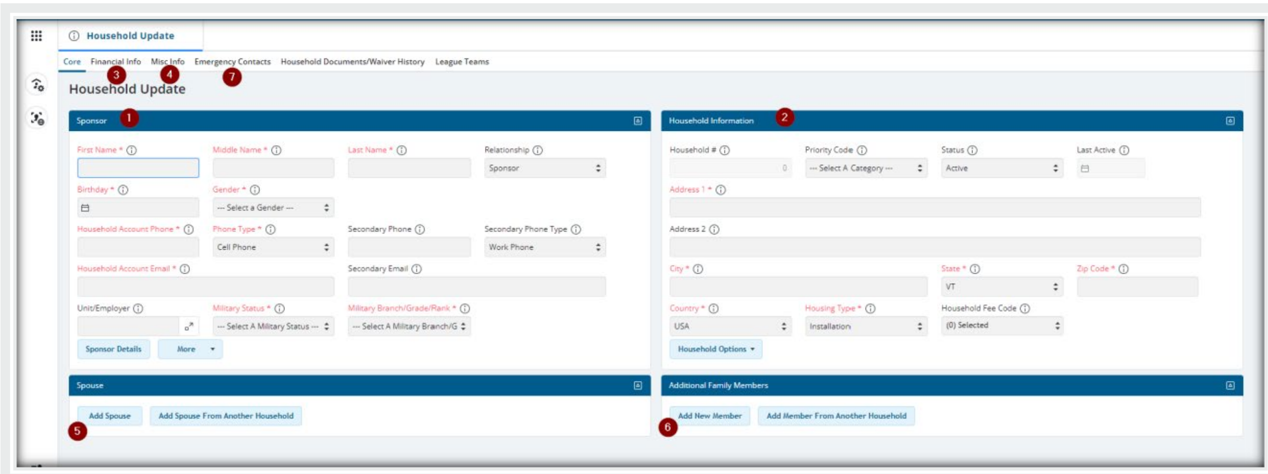
Household Update

REQUIRED FIELDS

Required fields on the Household Update screen have a red label. **You must fill in all required fields before you can save a record.**

There are quite a few different required fields on the different components on the Household Update screen so there is a specific order to follow when entering HH data.

Please read through the rest of the Household Update Section <u>before</u> continuing with these steps.



1 – Sponsor information on Core tab

2 – Household information on Core tab

3 – Required fields on Financial Info tab

4 – Required field on Misc Info tab

5 – Add Spouse and fill in spouse information (only if there is a Spouse in this HH)

6 – Add children to HH using Add New Member button under Additional Family Members on Core tab

7 – Add Emergency Contacts on Emergency Contacts tab

If you do not follow the order above, you may notice the inability to move on to a different component of the screen. The field(s) that needs to be filled in will be emphasized in red.

The **Household Update** screen is segmented into multiple tabs. Some tabs consist of multiple boxes to further separate the screen.

Sponsor Information

The first box on the **Core** tab is for Sponsor information. Each household is required to have a Sponsor. The Sponsor is also considered the household's primary member, and the household is named after the Sponsor.

> ***For example:*** *If Jack Smith is the household Sponsor, the household would show in Household Management as the 'Jack Smith' household.*

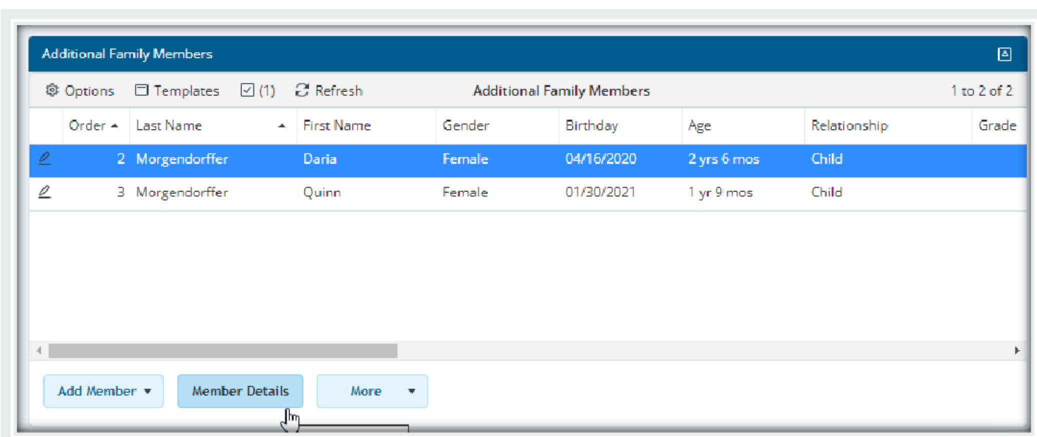
Spouse Information

In two-parent households, the second parent is referred to as the Spouse. In the new RecTrac 3.1 system, a user will only enter information for a Spouse if one exists. If there is a Spouse to add, click the **Add Spouse** button under the Spouse box. This will bring up the Spouse information to fill in. **If there is no Spouse, do *not* click Add Spouse!**

Child Information

To add a child to the household, click on the **Add New Member** button under the Additional Family Members box. This will bring up the fields to fill in the child's information.

After the household has been saved, the Core tab will look a little bit different in the Additional Family Members area. The children will be listed in a data grid. You can then select a child from the Additional Family Members box and click **Member Details** to get to medical information tabs:



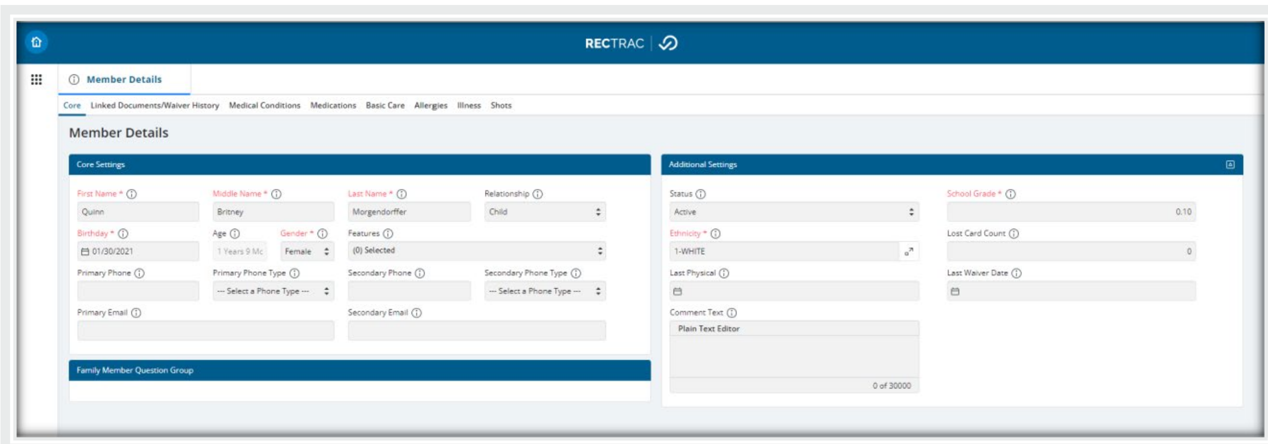
If a new child needs to be added, click **Add New Member** below the data grid. The "Add Existing" functions allow you to link a Spouse or child that *already exists in the database.* This takes the place of family member links.

Once all required data is filled in, you can save the household.

Member Details

The **Member Details** screen brings up the information specific to a single person. This is where all of the medical information tabs are located and where you would link person-specific documents.

> ***Please Note:*** *The Member Details, Spouse Details, and Sponsor Details buttons on the Household Update screen all link to the same Member Details screen. This means there may be some required fields on Sponsor or Spouse Details that are not required or even seen on the Household Core tab.*



Suggestions for Creating Example Households

Following these suggestions will allow you to create some sample data to continue training with. In a "live" scenario, the actual patron's information would be used.

Household Names

- Please give each of your Households a different last name
    - Please try your best to ensure that your Households have different last names than the Households created by other VS team members
- The current Army standard for RecTrac 3.1 is to make **Middle Name** a required field. If any of your Household members do not have middle names, please enter **NMN** into this field.

- Please avoid creating Households based on copyrighted characters or famous/recognizable public figures

Example Children

Each of your three Households should include 1-5 children.

To ensure that the demo database includes examples from every CYS age group, please create at least one child from each of the six categories below:

Infant: 1wk - 12mo

Pre-Toddler I: 12mo - 18mo

Pre-Toddler II: 18mo - 24mo

Toddler: 24mo - 36mo

Pre-School: 3yr - 4yr

School Age: 5 yr - 12.99 yr

Middle School/Teen: 13yr - 17.99 yr

Core Tab Notes

- Please give your Households unique **Household Account Phone Numbers** and **Household Account Emails**
  - Need an idea for a faux email extension? @rectrac.com is free to use!
- Please give your Households different **Military Ranks**
- You are welcome to create a Spouse (secondary guardian) if you'd like to. If the household has no spouse, we will not add one in 3.1.
- Please select a **Priority Code** (not a required field) that appropriately reflects the Military Status of your Household's Sponsor and Spouse

Additional Tab Notes

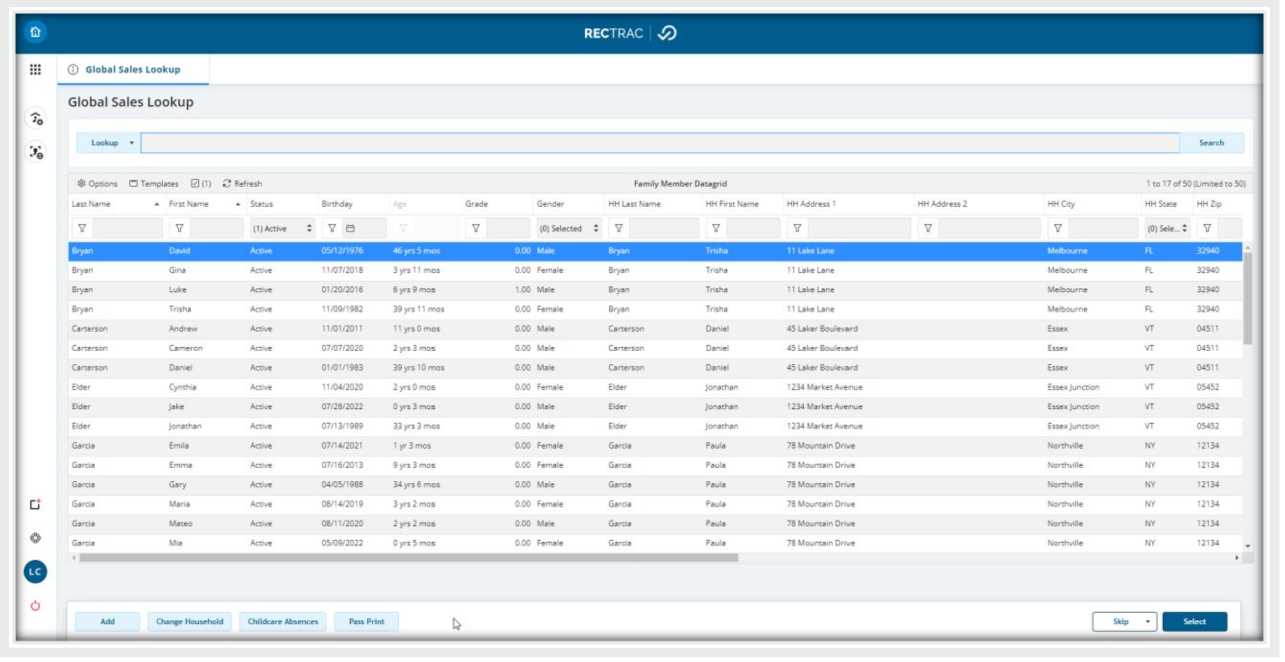
- **Financial Info:** Enter a yearly **Family Income** for each of your Households
- **Misc Info:** Select today's date as each Household's **Sponsor Consent Date**
- **Emergency Contacts:** Please add **two emergency contacts** to each of your Households. These contacts can be entirely new people or members of other Households in the CYMS demo database

- **Household Documents/Waiver History and League Teams:** Please disregard these tabs

Passes and Enrollments

Global Sales

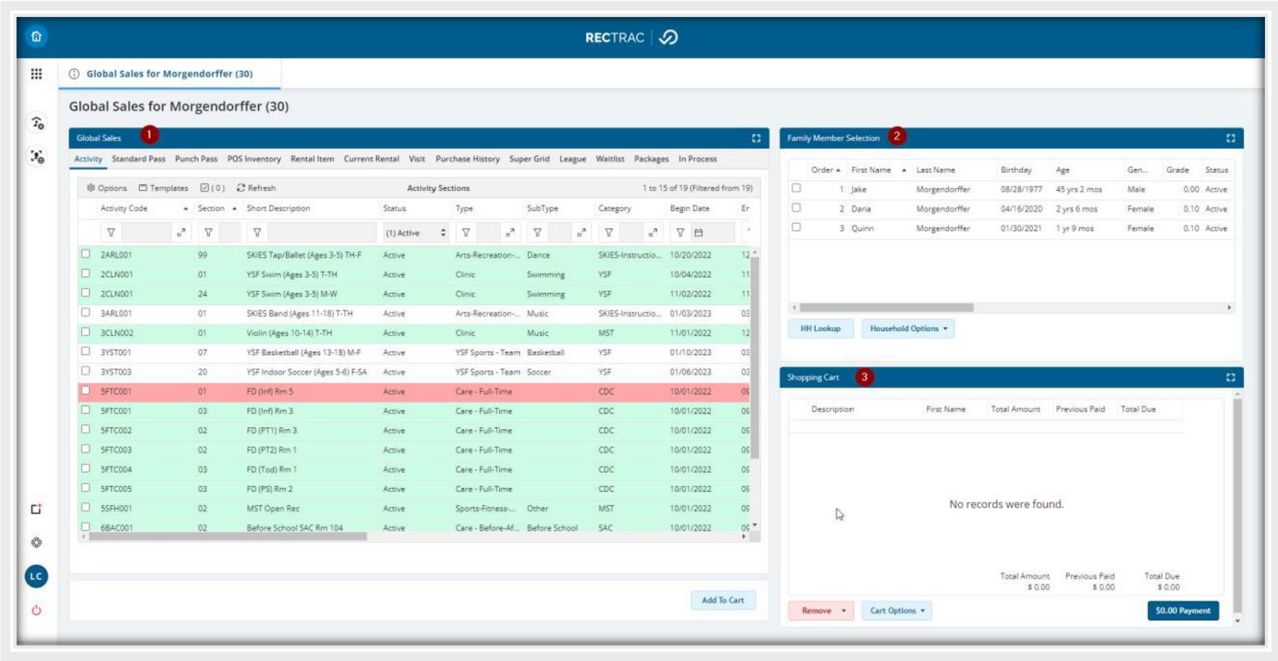
Most transactions in RecTrac 3.1 CYMS will be done in **Global Sales**. Clicking on Global Sales in your RecTrac menu will bring you to the Global Sales lookup screen:



This screen is indeed very similar to the Household Management lookup screen.

Start by selecting the household you would like to process a transaction for. Use the search function to find the household. The default search in Global Sales is a family member search, so you can search by name for anyone in any household. You can search by Sponsor, Spouse, or any child in the household you are looking for. Click on the household you are looking for and **Select** it in the lower right to proceed.

Once you select a household, the household name, (HH number), and HH balance will show in the panel label as well as the screen title.



The Global Sales screen has three main components. Area 1 on the left is the **item selection** area. Area 2 in the upper right is the **family member selection** area. Area 3 in the lower right is the **shopping cart**.

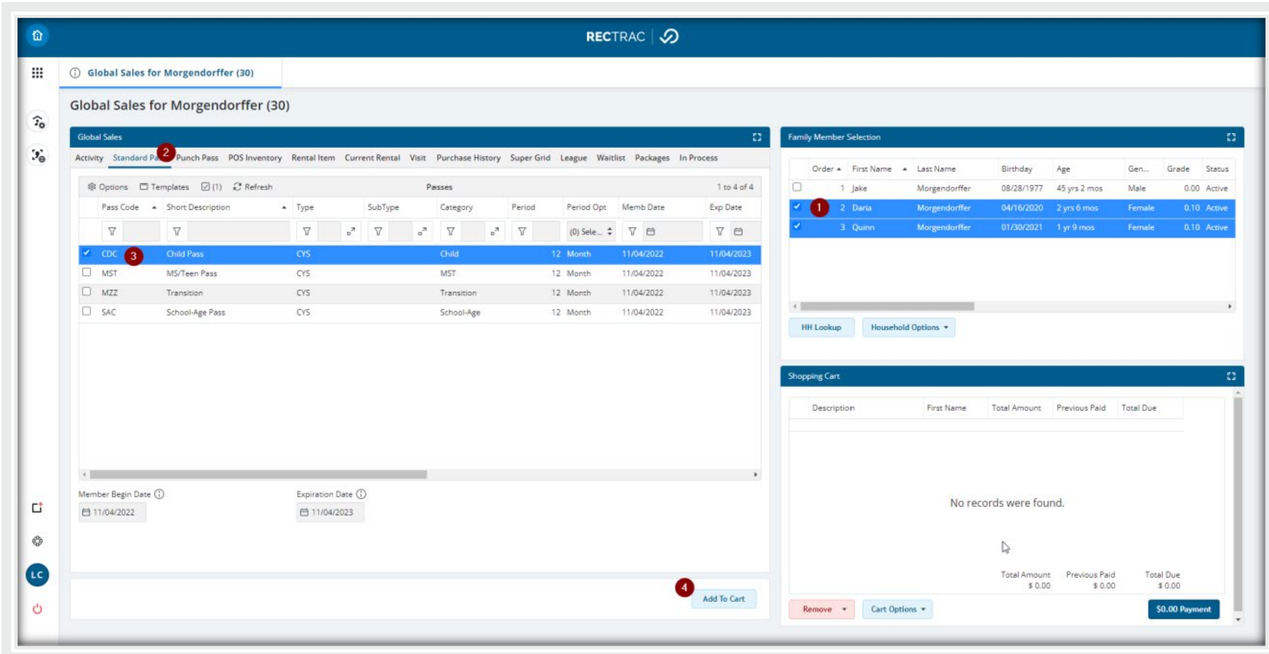
Area 1 has tabs for all of the items available, sorted out by module.

Selling Passes

To enroll in CYMS childcare activities, children need to be assigned the appropriate pass. Although CYMS Passes have no cost, we "sell" them in the same way we sell other things we do charge for. Passes are based on the following age groups:

- **CDC Pass:** Ages 1 week - 4.99 years
- **SAC Pass:** Ages 5 years - 10.99 years
- **MST Pass:** Ages 11 years - 18.99 years

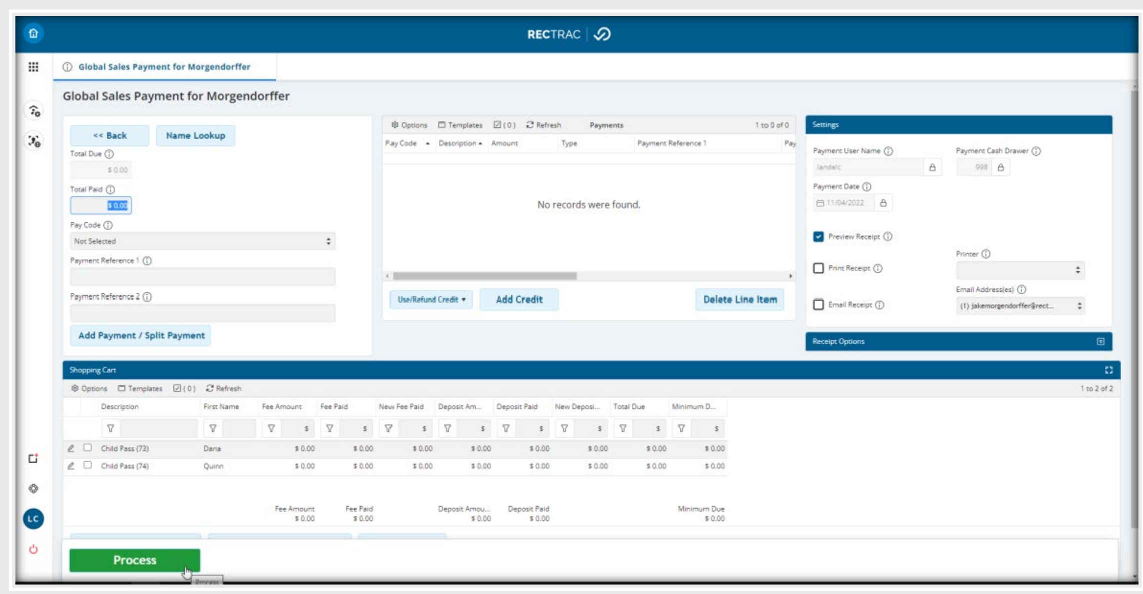
Start by selecting the household in the Global Sales Lookup screen. Select the family member(s) from Area 2, click on the Standard Pass tab in Area 1, select the appropriate pass, and then click add to cart:



Note: When you add a pass to the Shopping Cart, you will be prompted to enter a ***cross reference code****. This is where you would scan a bar code in a live scenario. For this exercise, just click continue.*

Tip: *You can select multiple family members at once if you want to process them for the same item. You can also select multiple items if you want to process them for the same family member. In the above example, both children qualify for the same pass so we selected them both.*

With the items now in the shopping cart, click the **Payment** button in Area 3 to proceed. The dollar amount next to the payment button should equal the amount of the fees being charged today. In CYMS there are no fees on passes so “$0.00 Payment” is expected.



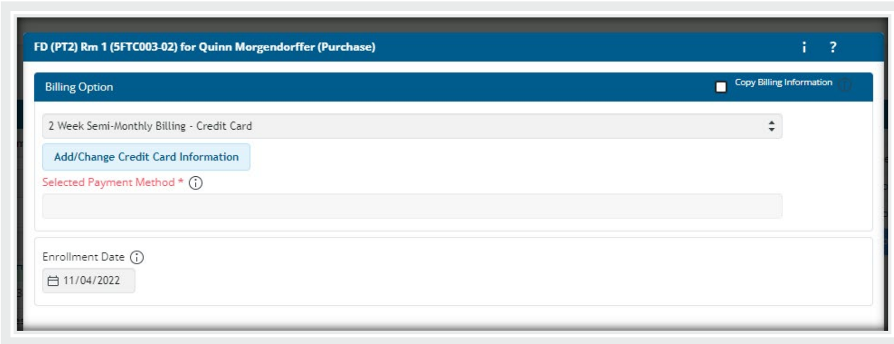
The payment button will take you to the Global Sales Payment screen, as shown above. If there is no payment to be made, just click the **Process** button to complete the transaction.

Childcare Enrollments

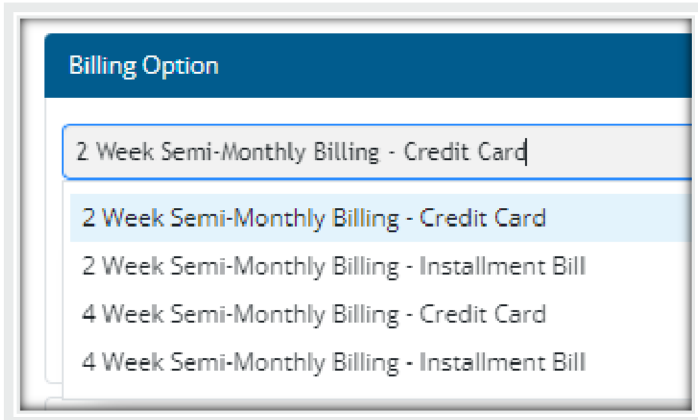
Enrolling in a childcare activity follows the same process as selling a pass. Childcare activities will be located on the Activities tab in Area 1, instead of the Standard Pass tab.

To process a childcare enrollment, look up the household and select it. Select the family member(s) in Area 2. Then click on the Activities tab in Area 1, select the childcare activity you are looking for, and click Add to Cart. The age group for each activity is in the Short Description column.

Once you click Add to Cart to enroll into a childcare activity, this prompt will appear:



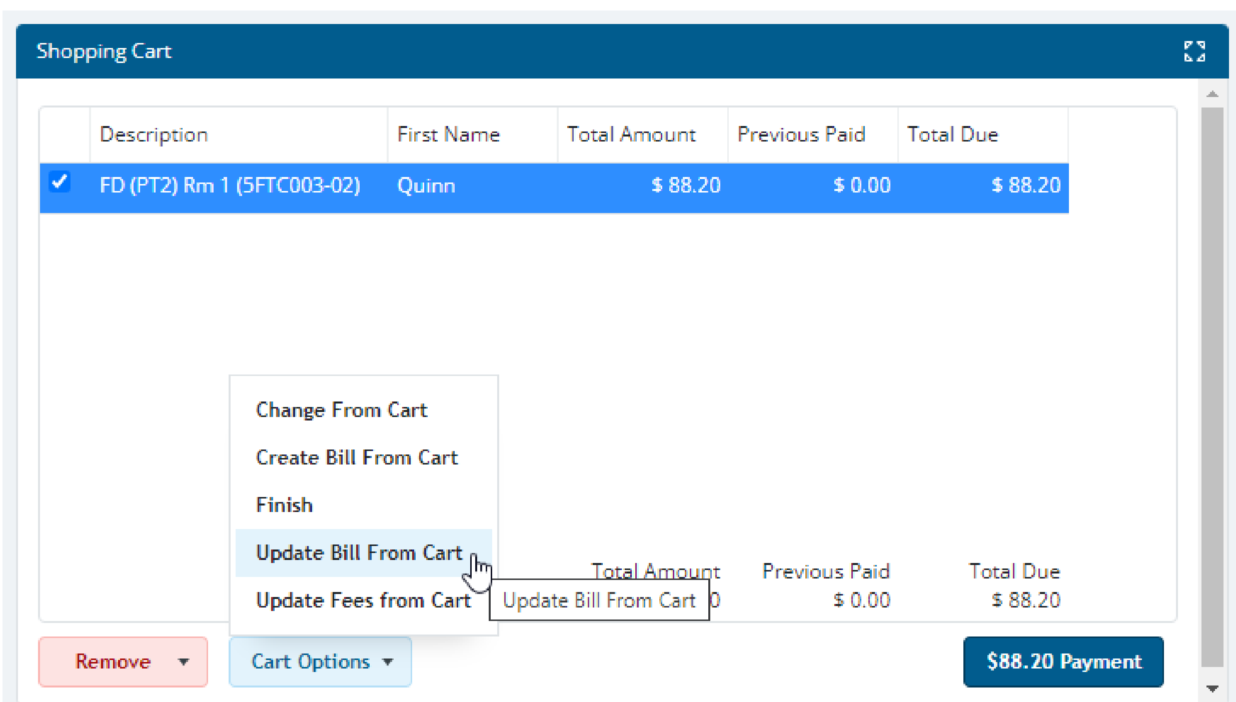
The **Billing Option** is where you select either 2-week vacation or 4-week vacation, and the auto-debit option for the enrollment. Fee amounts will be different based on the vacation option.



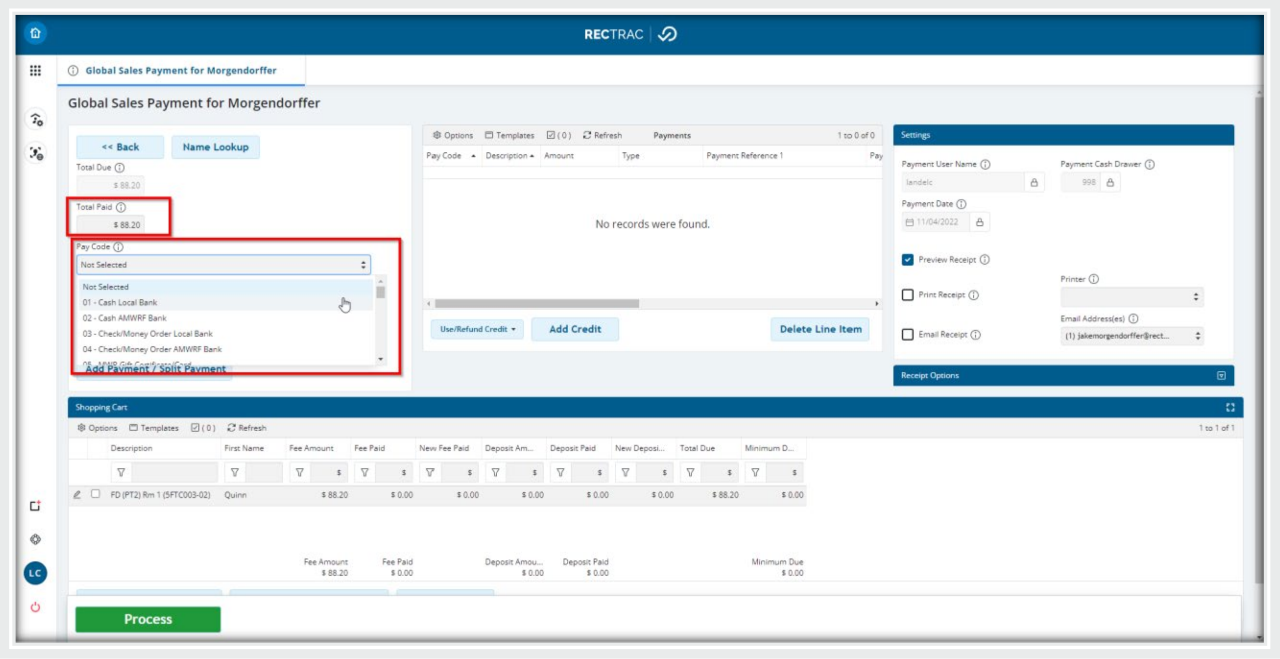
Please Note: *Credit cards are not currently enabled in the CYMS training database. Use the Installment Bill option to complete the transaction.*

In the Enrollment Date field, enter the start date for childcare. Click continue to add the enrollment to the cart. The Shopping Cart should now show the initial prorate amount due today in the Total Due column.

To check the installment billing, click on the item in the cart, click Cart Options, and then click **Update Bill from Cart**.



This will bring up the installment billing that will be implemented when the transaction is complete. X out of the installment billing update screen in the upper right to leave the billing intact. Click the Payment button to proceed to the Payment screen.



When a fee is due, the Total Paid will automatically fill in the total amount due. To pay less than the full amount due, adjust the Total Paid amount. If the Total Paid is any amount over 0, you must select the Pay Code that the transaction is tendered with. ($0 payments do not have or need a Pay Code.) Once the Total Paid and Pay Code are set properly, click the Process button to finish the transaction.