

CYMS– Staff Management

Vermont Systems CYMS 3.1 Training

07/7/2022

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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.

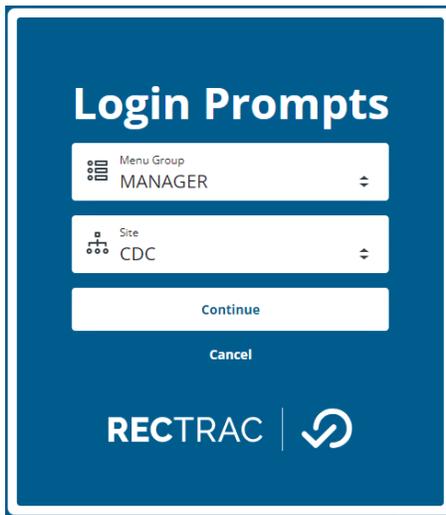
Username: Your Army email alias*

*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.*

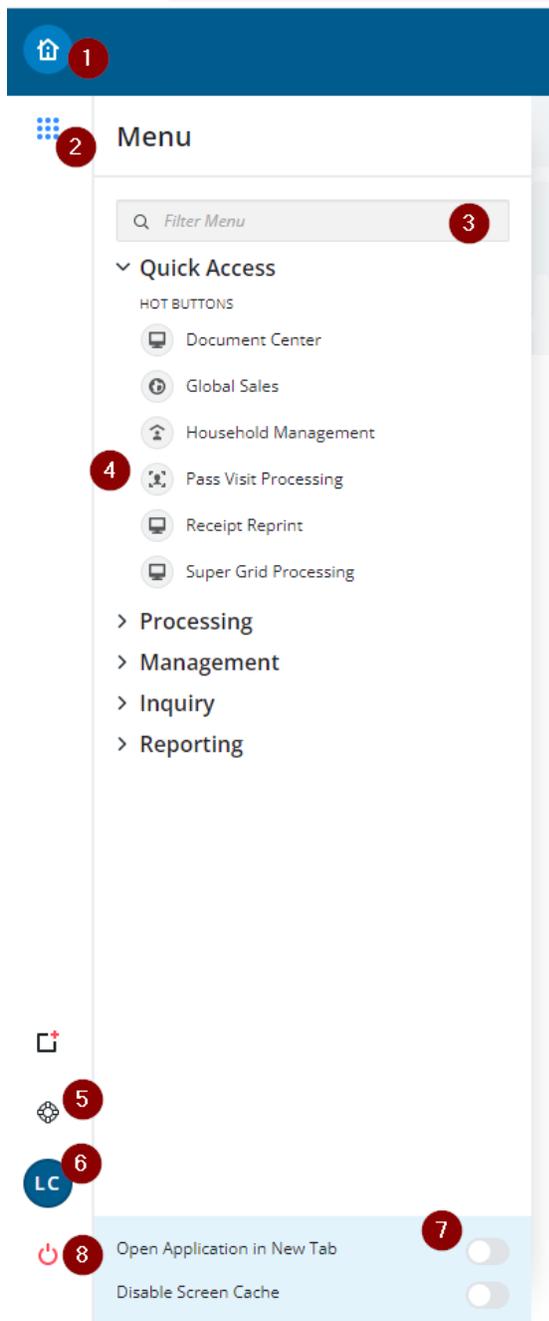
For this training, please sign in using the **Manager** user group and **CDC** site.



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.*

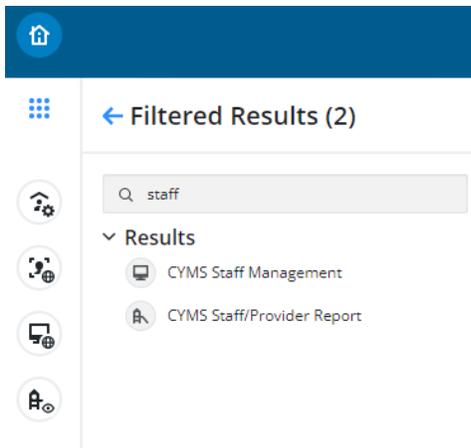
8 – **Logout Button**: Click this button to log out. When you do, the system will prompt you to close your batch.

Create a Staff Record

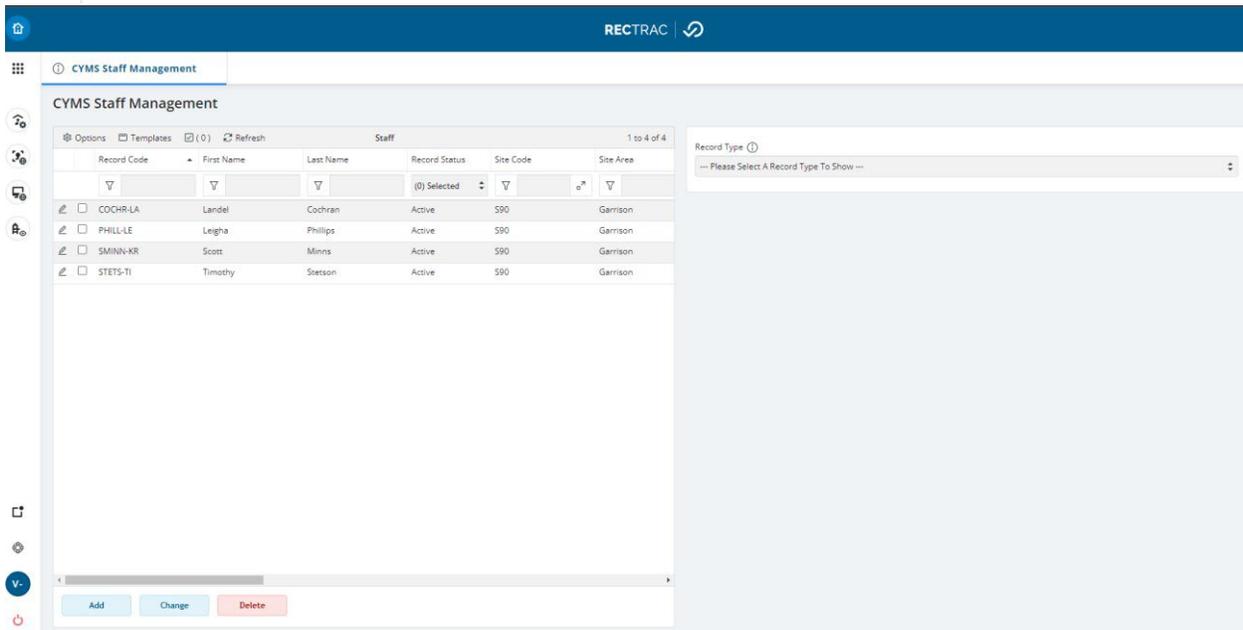
Note: For later sections to have sufficient data please complete this section 3 times.

Open CYMS Staff Management

Click on **CYMS Staff Management** in the RecTrac menu. Use the Menu Search to help locate the button if desired. This will launch the CYMS Staff Management program in a new panel. This program opens to a screen that shows staff 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 Staff 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 created for 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.



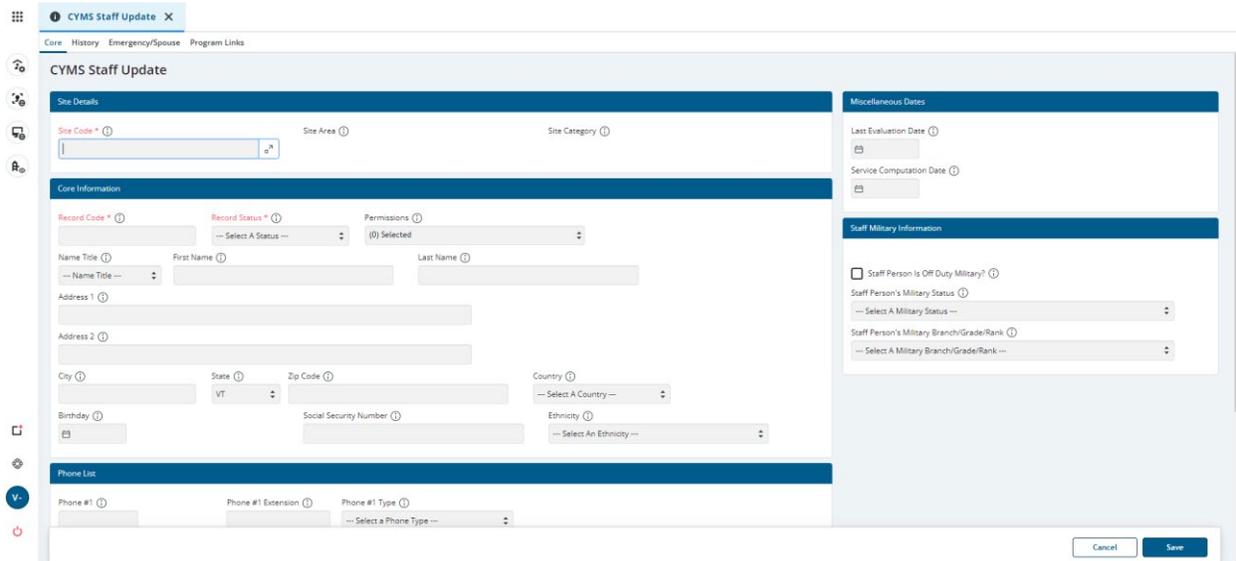
Core Page



Click the Add button

This will open the **CYMS Staff Update** panel where we can add the **Core, History, Emergency/Spouse,** and **Program Links** data.

Note: Some of the linking functionality can only be used once the new staff record has been saved



The screenshot shows the 'CYMS Staff Update' form with several sections:

- Site Details:** Site Code (picklist), Site Area, Site Category.
- Core Information:** Record Code (picklist), Record Status (picklist), Permissions (picklist), Name Title (picklist), First Name, Last Name, Address 1, Address 2, City, State (VT), Zip Code, Country (picklist), Birthday, Social Security Number, Ethnicity (picklist).
- Phone List:** Phone #1, Phone #1 Extension, Phone #1 Type (picklist).
- Miscellaneous Dates:** Last Evaluation Date, Service Computation Date.
- Staff Military Information:** Staff Person is Off Duty Military? (checkbox), Staff Person's Military Status (picklist), Staff Person's Military Branch/Grade/Rank (picklist).

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

Site Code * (i)

Site Management

Options Templates (1) Refresh

Record Code	Name
S01	Financial Management
S05	Marketing
S82	PCS/OS
S90	CDC
S91	SAC
S92	MST Youth Center
S92Y	Youth Sports
S94	FCC Office
S94H	FCC Provider Home
S95	SKIES
S99	Garrison (Tech User)

Close Select

Enter a **Record Code** for this staff person. 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 * ⓘ

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

Record Status * ⓘ

Record Status * ⓘ

--- Select A Status ---
 --- Select A Status ---
 Active
 Inactive

Set the **Permissions** for the record (i.e. check 90 CDC). Expand the combo-box to see the list. Click the X at the top of the drop down or click anywhere on the screen to close the combo-box.

Note: While selecting Multiple permission codes is possible, doing so will cause errors later on.
 Be certain **ONLY** one is selected

Permissions ⓘ

(1) 90 CDC
 Check all Uncheck all ✕

- 01 Financial Management
- 05 Marketing
- 82 PCS/OS
- 90 CDC
- 91 SAC
- 92 MST Youth Center
- 92Y Youth Sports

Complete the rest of the **Core** tab as needed (only **Site Code**, **Staff 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.

CYMS Staff Update ✕

Core **History** Emergency/Spouse Program Links

CYMS Staff Update

Miscellaneous Information

Birth City ⓘ <input type="text"/>	Birth State ⓘ --- Select ---	Birth Country ⓘ --- Select A Country ---
Home Of Record City ⓘ <input type="text"/>	Home Of Record State ⓘ --- Select ---	Home Of Record Country ⓘ --- Select A Country ---
Maiden Name ⓘ <input type="text"/>	Known Alias ⓘ <input type="text"/>	

Comments ⓘ

Plain Text Editor

0 of 30000

Schooling Level

Schooling Level ⓘ --- Select A Schooling Level ---	College Years If No Degree ⓘ <input type="text" value="0"/>
---	--

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

Emergency/Spouse Page

Select the **Emergency/Spouse** tab at the top to move to the next screen and complete as needed.

① **CYMS Staff Update**

Core History Emergency/Spouse Program Links

CYMS Staff Update

Emergency Contact Information

Options
Emergency Contacts 1 to 0 of 0

Order	First Name	Last Name	Relation	Phone Number 1 Info	Phone Number 2 Info	Phone Number 3 Info	Phone Number 4 Info
No records were found.							

Add Contact
Change Contact
Delete Contact
Add Existing Contact

Spouse Info

Spouse Is Active Duty? ⓘ
 Spouse Is Deployed? ⓘ
Spouse Deployment Begin Date ⓘ
Spouse Deployment End Date ⓘ

Options
Spouse 1 to 0 of 0

Order	First Name	Last Name	Birthday	Age	Gender	Grade	Status	Email #1
No records were found.								

Add Spouse
Change Spouse Info
Remove Spouse

Note: Add Existing Contact button will fail to work until the new Staff record has been saved.

Use the **Add Spouse** button in the Spouse Info section to pull in data from an existing family member.

Note: If employee and spouse 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

Add New Family Member

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

Click **Save**

Open the newly saved record by double clicking on it or highlighting it and clicking **Change** button

	<input checked="" type="checkbox"/>	STEWA-RO	Rose	Steward	Active	590	Garrison
--	-------------------------------------	----------	------	---------	--------	-----	----------

Select the **Emergency/Spouse** tab

Now an emergency contact can be added using the **Add Existing Contact** button

Add Existing Contact

Search for a family member previously created, highlight them and click the **Select** button or double click on their name, they will be added as a contact

Family Member Lookup

Options
 Templates
 (1)
 Refresh

Last Name	First Name	Birthday	Age
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
			0 yrs 0 mos
			0 yrs 0 mos
Apfelbaum	Karl	08/16/1985	37 yrs 3 mos
Apfelbaum	Karoline	10/05/2021	1 yr 1 mo
Bryan	David	05/12/1976	46 yrs 6 mos
Bryan	Gina	11/07/2018	4 yrs 0 mos
Bryan	Luke	01/20/2016	6 yrs 10 mos
Bryan	Trisha	11/09/1982	40 yrs 0 mos
Carterson	Andrew	11/01/2011	11 yrs 1 mo
Carterson	Cameron	07/07/2020	2 yrs 4 mos
Carterson	Daniel	01/01/1983	39 yrs 11 mos
Coli	Brandy	12/01/2022	0 yrs 0 mos
Elder	Cynthia	11/04/2020	2 yrs 0 mos
Elder	Jake	07/28/2022	0 yrs 4 mos
Elder	Jonathan	07/13/1989	33 yrs 4 mos
Garcia	Emila	07/14/2021	1 yr 4 mos
Garcia	Emma	07/16/2013	9 yrs 4 mos
Garcia	Gary	04/05/1988	34 yrs 7 mos
Garcia	Maria	08/14/2019	3 yrs 3 mos

Note: Be sure an adult is being selected

Emergency Contact Information

Options
 Templates
 (0)
 Refresh
Emergency Contact

Order	First Name	Last Name	Relation	Phone Number 1 Info
	1 David	Bryan		Cell Phone: (111)222-3455

Note: Unlike with the spouse section, this is will create a new unique record based on the **Family Member** record so any changes here will NOT impact the **Family Member** record in **Household Management**

Program Links Page

Select the **Program Links** tab

CYMS Staff Update - STEWA-RO - Rose Steward

Program Links

(0)

Program Links 1 to 0 of 0 (Filtered from 0)

Staff Link St...	Activity Code	Section	Short Description	Section Status	Staff Code	Last Name	First Name	Primary?
No records were found.								

Click the **Add Program Link** button



Note: *Add Program Link* button will fail to work until the new Staff record has been saved.

Highlight the primary section this staff person is working with and click **Select**, or double click on it

Section Lookup

(1)

Activity Sections

Activity Code	Section	Short Description	Status	Type	SubType	Category	Fac Class	Fac Loc
<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	(3) Active, L...	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value="CDC"/>
5FTC001	01	FD (Inf) Rm 5	Active	Care - Full-Time		CDC	ROOM	CDC
5FTC001	03	FD (Inf) Rm 3	Active	Care - Full-Time		CDC	ROOM	CDC
5FTC002	02	FD (PT1) Rm 3	Active	Care - Full-Time		CDC	ROOM	CDC
5FTC003	02	FD (PT2) Rm 1	Active	Care - Full-Time		CDC	ROOM	CDC
5FTC004	03	FD (Tod) Rm 1	Active	Care - Full-Time		CDC	ROOM	CDC
5FTC005	03	FD (P5) Rm 2	Active	Care - Full-Time		CDC	ROOM	CDC

Note: For this screenshot the **Fac Loc** filter has been set to **CDC**

Click on **Save**



Add a Training Record

Select a **Staff Record** created in the previous section.

	<input checked="" type="checkbox"/>	STEWA-RO	Rose	Steward	Active	S90	Garrison
---	-------------------------------------	----------	------	---------	--------	-----	----------

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

Record Type ⓘ

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

- Staff Medical Requirements
- Staff Previous Experience
- Staff Recognitions
- Staff Room Visit
- Staff Training

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

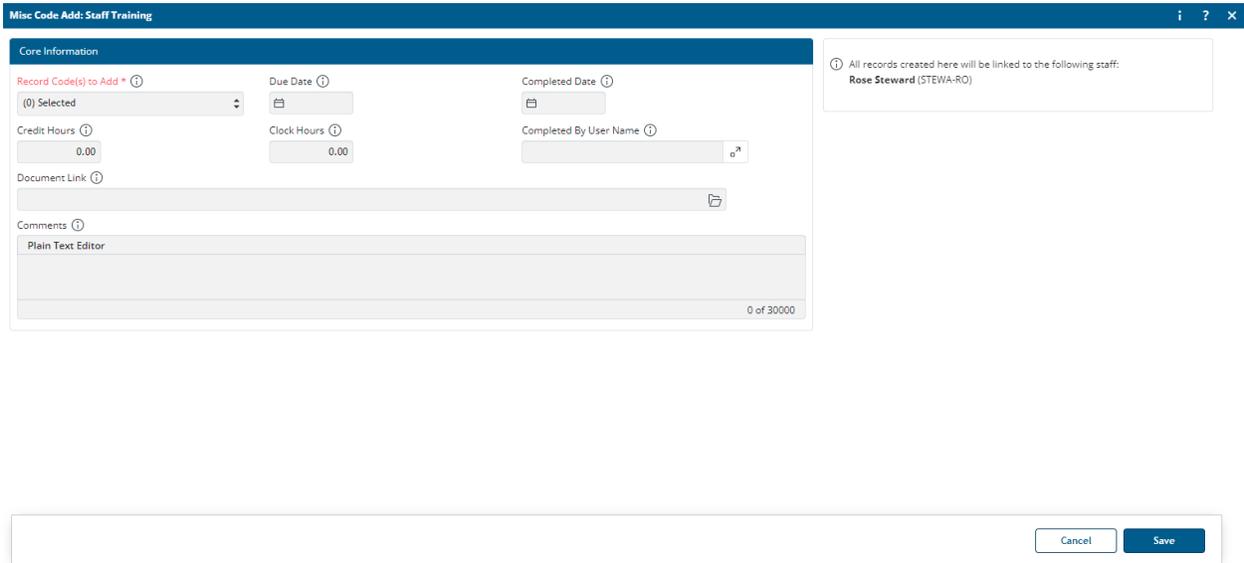
Only Show Staff Training Records If The Following Dates Are Empty ⓘ

(0) Selected

Date Option ⓘ

All Dates Missing

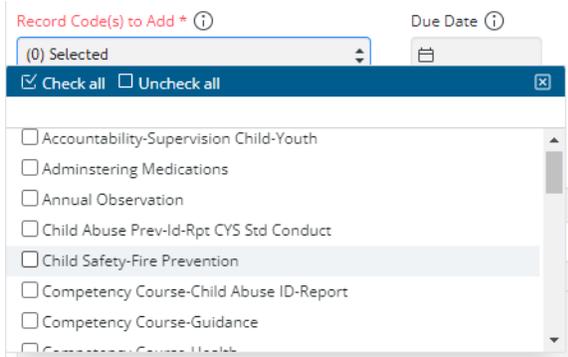
This will open the **Misc Code Add** screen:



Note: On the upper right the **Staff 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

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

Click on **Save**

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

Options							Templates		☑ (0)		Refresh		Staff Training Records			1 to 1 of 1	
Name	Record Code	Due Date	Completed Date	Credit Hours	Clo												
🔍	(0) Selected	🔍 📅	🔍 📅	🔍													
<input type="checkbox"/>	Rose Steward	A-FIRE	12/02/2022														0.00

Complete a Training Record

NOTE: As training codes are added if zero staff 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.

Record Type ⓘ
Staff Training

Options Templates (0) Refresh Staff Training Records 1 to 9 of 30

Name	Record Code	Due Date	Completed Date	Credit Hours
<input type="checkbox"/> Landel Cochran	A-CPR	12/02/2022		0.00
<input type="checkbox"/> Landel Cochran	A-CUSTM	12/02/2022	12/01/2022	0.00
<input type="checkbox"/> Landel Cochran	A-CUSTM	12/01/2023		0.00
<input type="checkbox"/> Landel Cochran	A-OTHER	12/01/2022	12/01/2022	0.00
<input type="checkbox"/> Landel Cochran	A-PREP	12/02/2022	12/01/2022	0.00
<input type="checkbox"/> Landel Cochran	A-PREP	12/01/2023		0.00
<input type="checkbox"/> Leigha Phillips	A-CPR	12/01/2023		0.00
<input type="checkbox"/> Leigha Phillips	A-CPR		12/01/2022	3.00
<input type="checkbox"/> Leigha Phillips	A-CUSTM	12/01/2023		0.00

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

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

Options Templates (0) Refresh Staff Training Records 1 to 1 of 1

Name	Record Code	Due Date	Completed Date	Credit Hours
<input type="checkbox"/> Rose Steward	A-FIRE	12/02/2022		0.00

Click on **Completed 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

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

Core Information

Record Code * ⓘ

Child Safety-Fire Prevention

Due Date ⓘ

12/02/2022

Completed Date ⓘ

12/02/2022

Credit Hours ⓘ

1.00

Clock Hours ⓘ

2.00

Completed By User Name ⓘ

Document Link ⓘ

\Misc Data Documents\825625\Test_Cert.pdf

Comments ⓘ

Plain Text Editor

This is the comments area

25 of 30000

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

Note: **Completed By User Name** is intended for use with **Room Visits** and can be ignored for now.

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 staff record:
Rose Steward (STEWA-RO)

Last Change Date ⓘ

12/04/2022

Original Date ⓘ

12/04/2022

Original Time ⓘ

17:46

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
	<input type="checkbox"/> Rose Steward	A-FIRE	12/02/2023		0.00
	<input type="checkbox"/> Rose Steward	A-FIRE	12/02/2022	12/02/2022	1.00

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

Bulk Training Record Add - for new due record

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

Select 3 of the previously created [Staff Records](#)

CYMS Staff Management - Staff Training

Options Templates (3) Refresh Staff 1 to 5 of 5

	Record Code	First Name	Last Name	Record Status	Site Code
	<input type="text"/>	<input type="text"/>	<input type="text"/>	(0) Selected	<input type="text"/>
<input checked="" type="checkbox"/>	COCHR-LA	Landel	Cochran	Active	S90
<input type="checkbox"/>	MINNS-SC	Scott	Minns	Active	S90
<input type="checkbox"/>	PHILL-LE	Leigha	Phillips	Active	S90
<input checked="" type="checkbox"/>	STETS-TI	Timothy	Stetson	Active	S90
<input checked="" type="checkbox"/>	STEWA-RO	Rose	Steward	Active	S90

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

Record Type ⓘ

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

- Staff Job Code
- Staff Medical Requirements
- Staff Previous Experience
- Staff Recognitions
- Staff Room Visit
- Staff Training

Click **Add Staff Training Record(s)** button

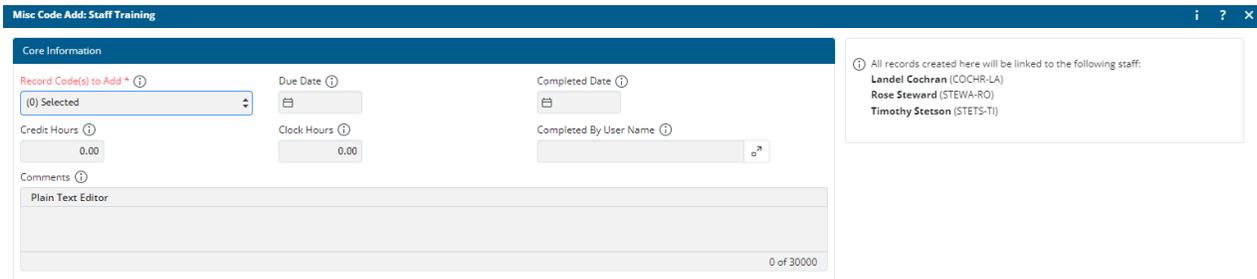
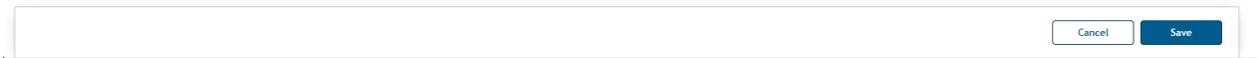
Only Show Staff Training Records If The Following Dates Are Empty ⓘ

(0) Selected

Date Option ⓘ

All Dates Missing

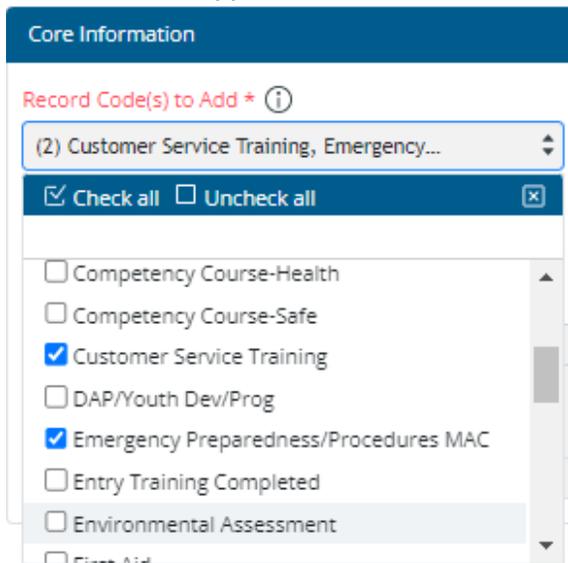
This will open the **Misc Code Add** screen:

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

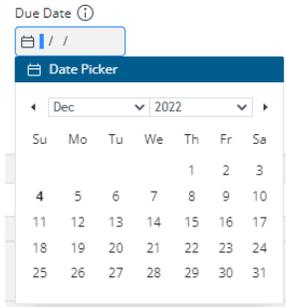


In the **Record Code(s) to Add** field click the combo-box selector



Select **Customer Service Training** and **Emergency Preparedness/Procedures MAC**, 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



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

Click on **Save**

The newly added Staff Training Codes (**A-CUSTM** and **A-PREP**) with the same **Due Dates** for each Staff person are now visible

	Name	Record Code	Due Date	Completed Date	Credit Hours	Clock Hours
	<input type="text"/>	(0) Selected	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	Landel Cochran	A-CUSTM	12/02/2022		0.00	0.00
<input type="checkbox"/>	Landel Cochran	A-PREP	12/02/2022		0.00	0.00
<input type="checkbox"/>	Rose Steward	A-CUSTM	12/02/2022		0.00	0.00
<input type="checkbox"/>	Rose Steward	A-FIRE	12/02/2023		0.00	0.00
<input type="checkbox"/>	Rose Steward	A-FIRE	12/02/2022	12/02/2022	1.00	2.00
<input type="checkbox"/>	Rose Steward	A-PREP	12/02/2022		0.00	0.00
<input type="checkbox"/>	Timothy Stetson	A-CUSTM	12/02/2022		0.00	0.00
<input type="checkbox"/>	Timothy Stetson	A-PREP	12/02/2022		0.00	0.00

Bulk Training Record Add - for completed record

NOTE: This should only be done if the Staff members 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 many staff members, but not previously due.

Select 3 previously created [Staff Records](#)

CYMS Staff Management - Staff Training

Options		Templates	☑ (3)	Refresh	Staff	1 to 5 of 5
Record Code	First Name	Last Name	Record Status	Site Code		
<input type="checkbox"/>			(0) Selected			
<input checked="" type="checkbox"/>	COCHR-LA	Landel	Cochran	Active	S90	
<input type="checkbox"/>	MINNS-SC	Scott	Minns	Active	S90	
<input type="checkbox"/>	PHILL-LE	Leigha	Phillips	Active	S90	
<input checked="" type="checkbox"/>	STETS-TI	Timothy	Stetson	Active	S90	
<input checked="" type="checkbox"/>	STEWA-RO	Rose	Steward	Active	S90	

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

Record Type ⓘ

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

- Staff Job Code
- Staff Medical Requirements
- Staff Previous Experience
- Staff Recognitions
- Staff Room Visit
- Staff Training

Click **Add Staff Training Record(s)** button

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

(0) Selected

Date Option ⓘ

All Dates Missing

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

Misc Code Add: Staff Training i ? x

Core Information		
Record Code(s) to Add * ⓘ (0) Selected	Due Date ⓘ <input type="text"/>	Completed Date ⓘ <input type="text"/>
Credit Hours ⓘ 0.00	Clock Hours ⓘ 0.00	Completed By User Name ⓘ <input type="text"/>
Comments ⓘ Plain Text Editor <div style="border: 1px solid #ccc; height: 40px; margin-top: 5px;"></div>		

ⓘ All records created here will be linked to the following staff:
Landel Cochran (COCHR-LA)
Rose Steward (STEWA-RO)
Timothy Stetson (STETS-TI)

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

ⓘ All records created here will be linked to the following staff:

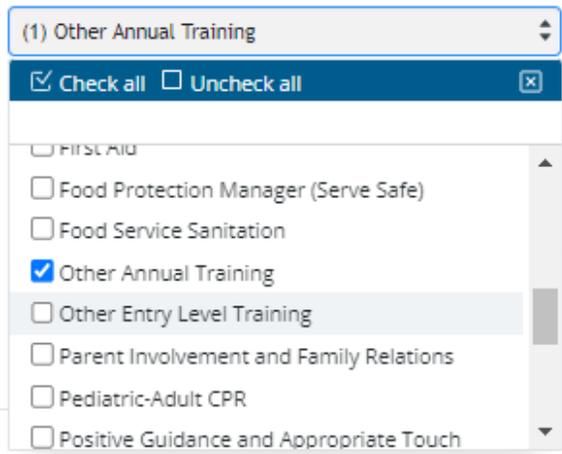
Landel Cochran (COCHR-LA)

Rose Steward (STEWA-RO)

Timothy Stetson (STETS-TI)

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

Record Code(s) to Add * ⓘ



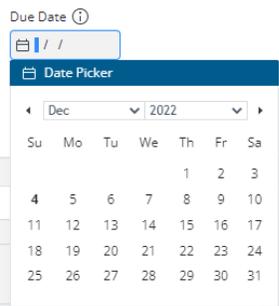
(1) Other Annual Training

Check all Uncheck all

- FIRST AID
- Food Protection Manager (Serve Safe)
- Food Service Sanitation
- Other Annual Training
- Other Entry Level Training
- Parent Involvement and Family Relations
- Pediatric-Adult CPR
- Positive Guidance and Appropriate Touch

Select **Other Annual Training**, 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



Due Date ⓘ

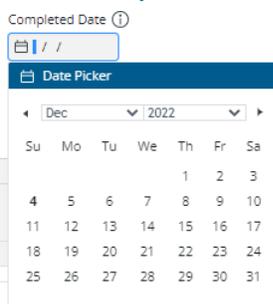
☞ / /

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

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

Enter a **Comment** about what this special training was

Misc Code Add: Staff Training

Core Information

Record Code(s) to Add *

(1) Other Annual Training

Due Date

12/05/2022

Completed Date

12/05/2022

Credit Hours

1.00

Clock Hours

1.00

Completed By User Name

a?

Comments

Plain Text Editor
 COVID-19 Sanitation Protocols

29 of 30000

ⓘ All records created here will be linked to the following staff:

- Landel Cochran** (COCHR-LA)
- Rose Steward** (STEWA-RO)
- Timothy Stetson** (STETS-TI)

Click on **Save**

Cancel

Save

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

	Name	Record Code	Due Date	Completed Date
	⌵	(1) Other Annual T...	⌵ 📅	⌵ 📅
🔗	Landel Cochran	A-OTHER	12/05/2023	
🔗	Landel Cochran	A-OTHER	12/05/2022	12/05/2022
🔗	Rose Steward	A-OTHER	12/05/2022	12/05/2022
🔗	Rose Steward	A-OTHER	12/05/2023	
🔗	Timothy Stetson	A-OTHER	12/05/2023	
🔗	Timothy Stetson	A-OTHER	12/05/2022	12/05/2022

This code is currently set to be recurring. However, the next due trainings are not needed. We will cover how to delete them in a bulk process in another section.

NOTE: To see the comments scroll to the right

	Comments
	⌵
	COVID-19 Sanitation Protocols
	COVID-19 Sanitation Protocols
	COVID-19 Sanitation Protocols

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 3 previously created **Staff Records**

CYMS Staff Management - Staff Training

Options Templates (3) Refresh Staff 1 to 5 of 5					
Record Code	First Name	Last Name	Record Status	Site Code	
<input checked="" type="checkbox"/>	COCHR-LA	Landel	Cochran	Active	S90
<input type="checkbox"/>	MINNS-SC	Scott	Minns	Active	S90
<input type="checkbox"/>	PHILL-LE	Leigha	Phillips	Active	S90
<input checked="" type="checkbox"/>	STETS-TI	Timothy	Stetson	Active	S90
<input checked="" type="checkbox"/>	STEWA-RO	Rose	Steward	Active	S90

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

Record Type ⓘ

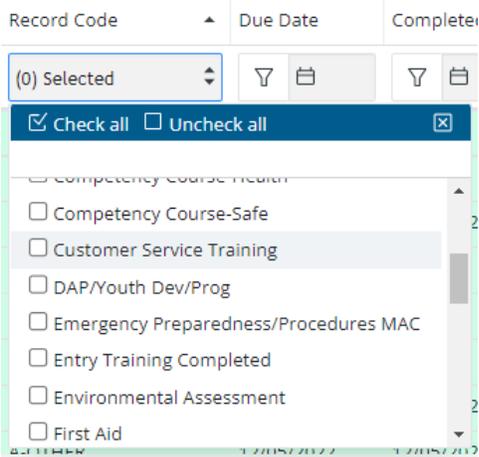
--- Please Select A Record Type To Show ---

- Staff Job Code
- Staff Medical Requirements
- Staff Previous Experience
- Staff Recognitions
- Staff Room Visit
- Staff Training

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

Staff Training Records 1 to 8 of 14					
Name	Record Code	Due Date	Completed Date	Cred	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

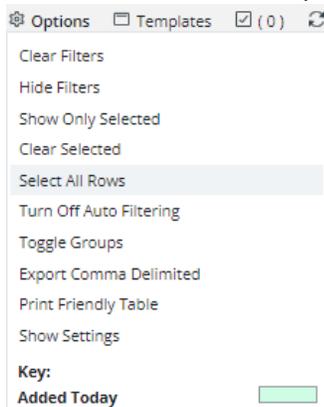
Select **Customer Service Training** and **Emergency Preparedness/Procedures MAC**, then click the X at the top of the combo box or click anywhere on the screen



Select the 6 records that should now be present 2 for each of the 3 staff members.

Options		Templates	(0)	Refresh	Staff Training Records			1 to 6 of 6 (Filtered from 6)	
Name	Record Code	Due Date	Completed Date	Credit Hours	Clock Hours				
<input type="checkbox"/> Landel Cochran	A-CUSTM	12/02/2022		0.00	0.00				
<input type="checkbox"/> Landel Cochran	A-PREP	12/02/2022		0.00	0.00				
<input type="checkbox"/> Rose Steward	A-CUSTM	12/02/2022		0.00	0.00				
<input type="checkbox"/> Rose Steward	A-PREP	12/02/2022		0.00	0.00				
<input type="checkbox"/> Timothy Stetson	A-CUSTM	12/02/2022		0.00	0.00				
<input type="checkbox"/> Timothy Stetson	A-PREP	12/02/2022		0.00	0.00				

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



Click the **Bulk Change** button

Record Type ⓘ
 Staff Training

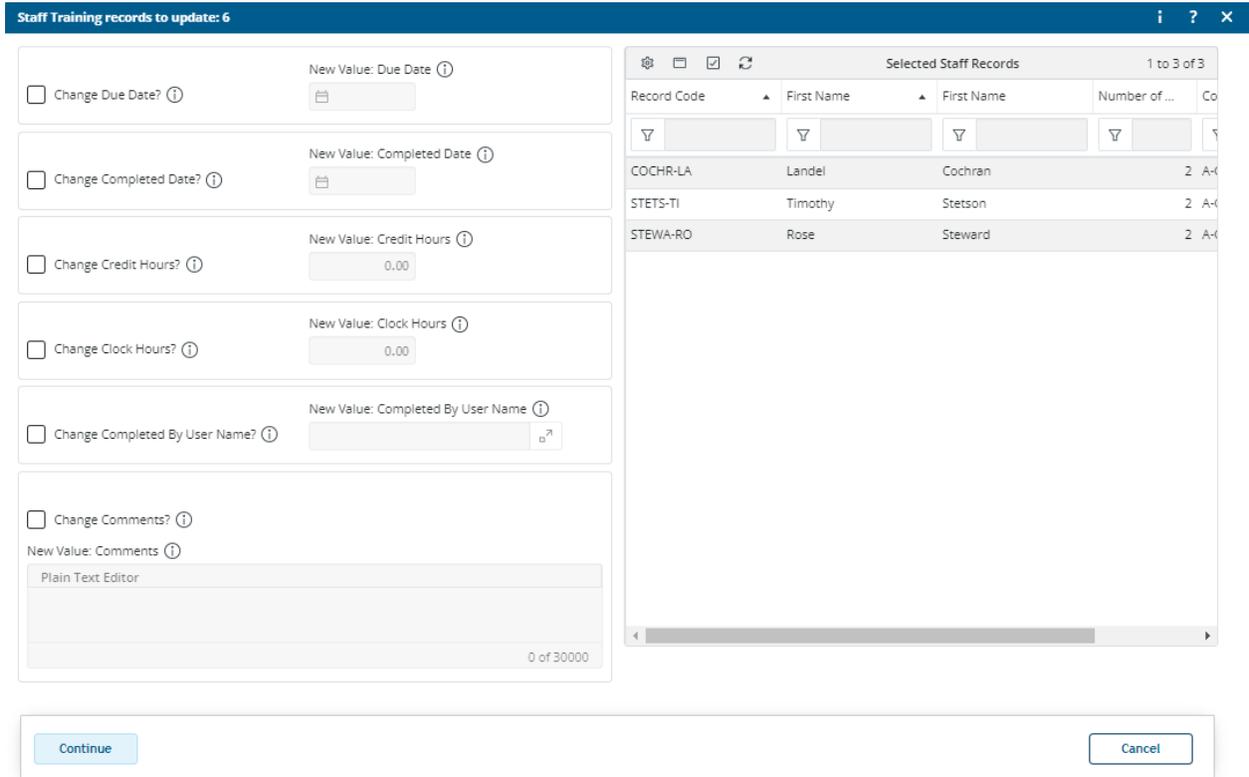
Options Templates (6) Refresh Staff Training Records 1 to 6 of 6 (Filter)

	Name ▲	Record Code ▲	Due Date	Completed Date	Credit Hours	Cloc
	<input type="text"/>	(2) Customer Serv... <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input checked="" type="checkbox"/>	Landel Cochran	A-CUSTM	12/02/2022		0.00	
<input checked="" type="checkbox"/>	Landel Cochran	A-PREP	12/02/2022		0.00	
<input checked="" type="checkbox"/>	Rose Steward	A-CUSTM	12/02/2022		0.00	
<input checked="" type="checkbox"/>	Rose Steward	A-PREP	12/02/2022		0.00	
<input checked="" type="checkbox"/>	Timothy Stetson	A-CUSTM	12/02/2022		0.00	
<input checked="" type="checkbox"/>	Timothy Stetson	A-PREP	12/02/2022		0.00	

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

Date Option ⓘ
 All Dates Missing

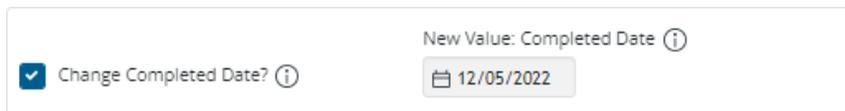
This will open the **Staff Training records to update: 6** window



Record Code	First Name	First Name	Number of ...	Co
COCHR-LA	Landel	Cochran	2	A-<
STETS-TI	Timothy	Stetson	2	A-<
STEWA-RO	Rose	Steward	2	A-<

Note: The previously selected staff 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**



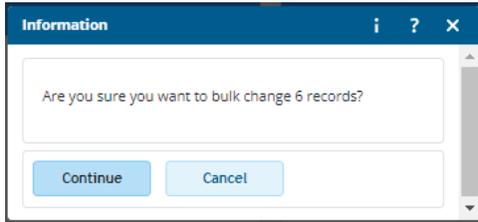
Note: Only the fields with the toggle turned on will be updated. Multiple fields could be updated at once.

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

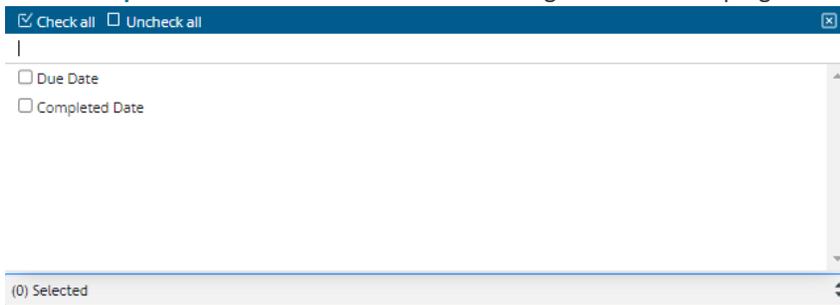
Click on the **Continue** button



An Information box will appear asking '**Are you sure you want to bulk change 6 records?**', Click **Continue**



To see only what is now due, go to the '**Only Show Staff 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.



Only these specific Training records for 2023 should be visible

Options		Templates		☑ (0)		Refresh		Staff Training Records			1 to 6 of 6 (Filtered from 6)	
Name	Record Code	Due Date	Completed Date	Credit Hours	Clock Hours							
<input type="checkbox"/>	(2) Customer Serv...											
<input type="checkbox"/>	Landel Cochran	A-CUSTM	12/05/2023	0.00	0.00							
<input type="checkbox"/>	Landel Cochran	A-PREP	12/05/2023	0.00	0.00							
<input type="checkbox"/>	Rose Steward	A-CUSTM	12/05/2023	0.00	0.00							
<input type="checkbox"/>	Rose Steward	A-PREP	12/05/2023	0.00	0.00							
<input type="checkbox"/>	Timothy Stetson	A-CUSTM	12/05/2023	0.00	0.00							
<input type="checkbox"/>	Timothy Stetson	A-PREP	12/05/2023	0.00	0.00							

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

(1) Completed Date

Date Option ⓘ

All Dates Missing

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

Options		Templates		☑ (0)		Refresh	
<ul style="list-style-type: none"> 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 							

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.

Bulk Training Record Delete

NOTE: This can be useful if a training record was created accidentally in bulk and needs to be removed. In the **Bulk Training Record Add - for completed record** section above the **A-OTHER** created a recurring record that is not needed. So we will remove it now.

Select the 3 Staff Records previously used to add the **A-OTHER** training record

CYMS Staff Management - Staff Training

Options		Templates	☑ (3)	Refresh	Staff		1 to 5 of 5
Record Code	First Name	Last Name	Record Status	Site Code			
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	(0) Selected	<input type="text"/>			
<input checked="" type="checkbox"/>	COCHR-LA	Landel	Cochran	Active	S90		
<input type="checkbox"/>	MINNS-SC	Scott	Minns	Active	S90		
<input type="checkbox"/>	PHILL-LE	Leigha	Phillips	Active	S90		
<input checked="" type="checkbox"/>	STETS-TI	Timothy	Stetson	Active	S90		
<input checked="" type="checkbox"/>	STEWA-RO	Rose	Steward	Active	S90		

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

Record Type ⓘ

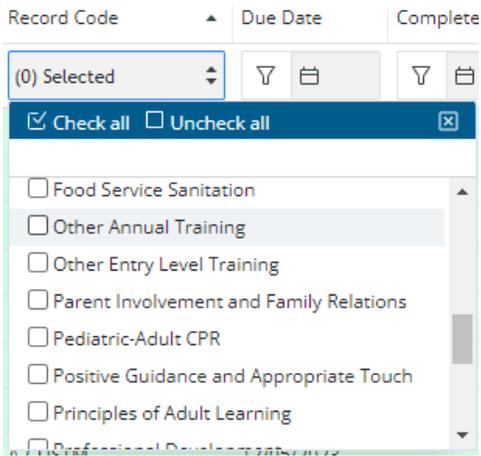
--- Please Select A Record Type To Show ---

- Staff Job Code
- Staff Medical Requirements
- Staff Previous Experience
- Staff Recognitions
- Staff Room Visit
- Staff Training

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

Options		Templates	☑	Refresh	Staff Training Records			1 to 8 of 14
Name	Record Code	Due Date	Completed Date	Cred				
<input type="text"/>	(0) Selected	<input type="text"/>	<input type="text"/>	<input type="text"/>				

Select **Other Annual Training**, then click the X button at the top of the combo box or click anywhere on the screen



Select the 3 records that should be due for 2023

Record Type ⓘ
Staff Training

Staff Training Records							1 to 6 of 6 (Filtered from 6)
	Name	Record Code	Due Date	Completed Date	Credit Hours		
<input checked="" type="checkbox"/>	Landel Cochran	A-OTHER	12/05/2023		0.00		
<input type="checkbox"/>	Landel Cochran	A-OTHER	12/05/2022	12/05/2022	1.00		
<input checked="" type="checkbox"/>	Rose Steward	A-OTHER	12/05/2023		0.00		
<input type="checkbox"/>	Rose Steward	A-OTHER	12/05/2022	12/05/2022	1.00		
<input checked="" type="checkbox"/>	Timothy Stetson	A-OTHER	12/05/2023		0.00		
<input type="checkbox"/>	Timothy Stetson	A-OTHER	12/05/2022	12/05/2022	1.00		

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

Note: If only the due or completed items are showing double check that the date options are unchecked.

Click the **Delete** button

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

(0) Selected

Date Option ⓘ

All Dates Missing

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

Information
?
×

Are you sure you want to delete the selected record(s)?

The extra **A-OTHER** trainings should now be gone

Staff Training Records						
	Name	Record Code	Due Date	Completed Date	Credit H	
	<input type="text" value=""/>	(1) Other Annual T...	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>
<input type="checkbox"/>	Landel Cochran	A-OTHER	12/05/2022	12/05/2022		
<input type="checkbox"/>	Rose Steward	A-OTHER	12/05/2022	12/05/2022		
<input type="checkbox"/>	Timothy Stetson	A-OTHER	12/05/2022	12/05/2022		

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

(0) Selected

Date Option ⓘ

All Dates Missing

Add a Background Checks Record

Select one of the **Staff Records** previously created

CYMS Staff Management

CYMS Staff Management

Options		Templates		Refresh		Staff		1 to 5 of 5	
Record Code	First Name	Last Name	Record Status	Site Code	Site Area				
<input type="text"/>	<input type="text"/>	<input type="text"/>	(0) Selected	<input type="text"/>	<input type="text"/>				
<input type="checkbox"/> COCHR-LA	Landel	Cochran	Active	S90	Garrison				
<input type="checkbox"/> MINNS-SC	Scott	Minns	Active	S90	Garrison				
<input type="checkbox"/> PHILL-LE	Leigha	Phillips	Active	S90	Garrison				
<input type="checkbox"/> STETS-TI	Timothy	Stetson	Active	S90	Garrison				
<input checked="" type="checkbox"/> STEWA-RO	Rose	Steward	Active	S90	Garrison				

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

Record Type ⓘ

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

- Please Select A Record Type To Show ---
- Staff Admin Action
- Staff Background Checks
- Staff Benefits
- Staff Comments
- Staff Eval/Evaluations

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

Only Show Staff Background Checks Records If The Following Dates Are Empty ⓘ

(0) Selected

Date Option ⓘ

All Dates Missing

Add Staff Background Checks Record(s)

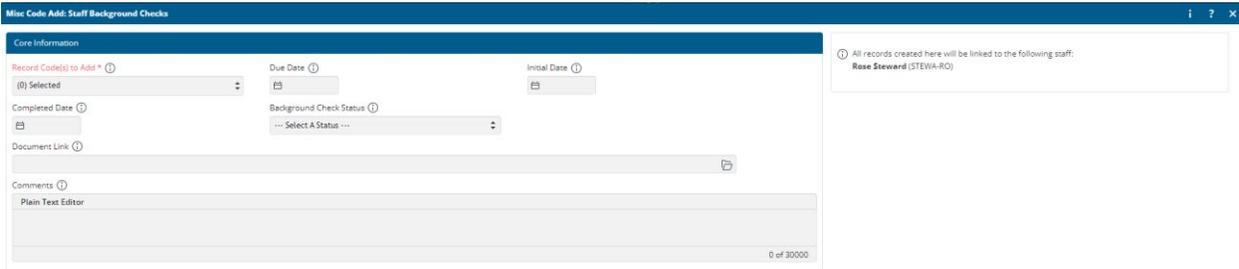
Change

Bulk Change

View Document

Delete

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



Misc Code Add: Staff Background Checks

Core Information

Record Code(s) to Add * (0) Selected

Due Date

Initial Date

Completed Date

Background Check Status --- Select A Status ---

Document Link

Comments

Plain Text Editor

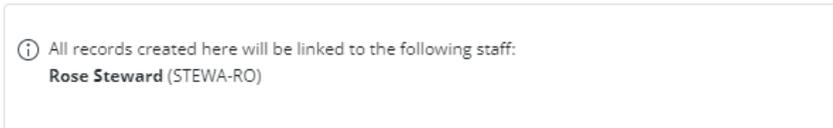
0 of 30000

All records created here will be linked to the following staff:
Rose Steward (STEWA-RO)



Cancel Save

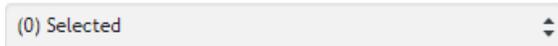
Note: On the upper right the Staff Record selected on the previous screen is visible



All records created here will be linked to the following staff:
Rose Steward (STEWA-RO)

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

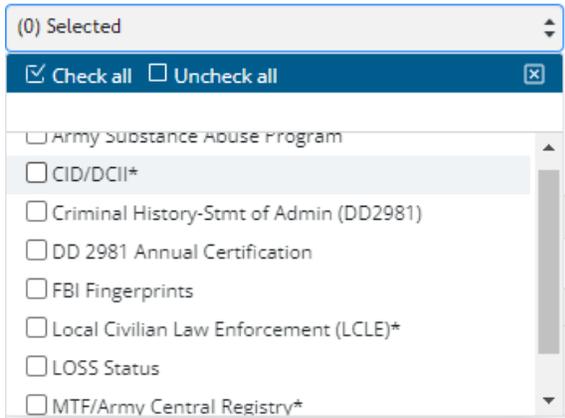
Record Code(s) to Add * (i)



(0) Selected

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

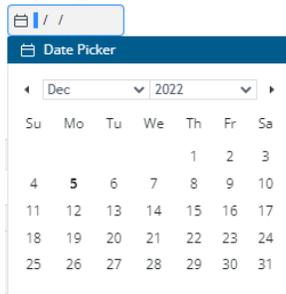
Record Code(s) to Add * ⓘ



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 ⓘ



Click on **Save**



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

Options Templates (0) Refresh Staff Background Checks Records 1 to 1 of 1						
Name	Record Code	Due Date	Initial Date	Completed Date	Background Check Status	
 <input type="checkbox"/> Rose Steward	(0) Selected	 	 	 	(0) Selected	
	CID/DCII	12/02/2022				

Initialize a Background Checks Record

Continuing on from the previous section.

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

Record Type ⓘ

Staff Background Checks

Options Templates (1) Refresh Staff Background Checks Records 1 to 1 of 1

Name	Record Code	Due Date	Initial Date	Completed Date	Background Check Status
<input type="text"/>	<input type="text"/> (0) Selected	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/> (0) Selected
<input checked="" type="checkbox"/> Rose Steward	CID/DCII	12/02/2022			

Click on **Change**

Only Show Staff Background Checks Records If The Following Dates Are Empty ⓘ

(0) Selected

Date Option ⓘ

All Dates Missing

This opens the **Misc Code Update** screen

Misc Code Update: Staff Background Checks

Core Information

Record Code * ⓘ
CID/DCII

Due Date ⓘ
12/02/2022

Initial Date ⓘ
[Calendar Icon]

Completed Date ⓘ
[Calendar Icon]

Background Check Status ⓘ
--- Select A Status ---

Document Link ⓘ
[Link Icon]

Comments ⓘ
Plain Text Editor

ⓘ This record is linked to the following staff record:
Rose Steward (STEWAR-RO)

Last Change Date ⓘ
12/05/2022

Original Date ⓘ
12/05/2022

Original Time ⓘ
09:20

Original User Name ⓘ
tims

0 of 30000

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

ⓘ This record is linked to the following staff record:
Rose Steward (STEWA-RO)

Last Change Date ⓘ
12/05/2022

Original Date ⓘ
12/05/2022

Original Time ⓘ
09:20

Original User Name ⓘ
tims

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**

Staff Background Checks Records 1 to 1 of 1						
Name	Record Code	Due Date	Initial Date	Completed Date	Background Check Status	
<input type="checkbox"/> Rose Steward	CID/DCII	12/02/2022	12/05/2022		Pending	

Complete a Background Checks Record

Continuing on from the previous section.

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

Record Type ⓘ
 Staff Background Checks

Options Templates (1) Refresh Staff Background Checks Records 1 to 1 of 1

Name	Record Code	Due Date	Initial Date	Completed Date	Background Check Status
<input type="text"/> (0) Selected	<input type="text"/> (0) Selected	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/> (0) Selected
<input checked="" type="checkbox"/> Rose Steward	CID/DCII	12/02/2022			

Click on **Change**

Only Show Staff Background Checks Records If The Following Dates Are Empty ⓘ
 (0) Selected

Date Option ⓘ
 All Dates Missing

This opens the **Misc Code Update** screen

Misc Code Update: Staff Background Checks

Core Information

Record Code * ⓘ
 CID/DCII

Due Date ⓘ
 12/02/2022

Initial Date ⓘ
 12/05/2022

Completed Date ⓘ
 [Empty]

Background Check Status ⓘ
 Pending

Document Link ⓘ
 [Empty]

Comments ⓘ
 Plain Text Editor

ⓘ This record is linked to the following staff record:
Rose Steward (STEWA-RO)

Last Change Date ⓘ
 12/05/2022

Original Date ⓘ
 12/05/2022

Original Time ⓘ
 09:20

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

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**

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

Options Templates (0) Refresh Staff Background Checks Records 1 to 2 of 2

Name	Record Code	Due Date	Initial Date	Completed Date	Background Check Status
<input type="checkbox"/> Rose Steward	CID/DCII	12/05/2027			Pending
<input type="checkbox"/> Rose Steward	CID/DCII	12/02/2022	12/05/2022	12/05/2022	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-staff, single-background add. This could alternatively be multi-staff, multi-background add or single-staff, multi-background add.

Select 3 previously created **Staff Records**

CYMS Staff Management - Staff Training

Options		Templates	☑ (3)	Refresh	Staff		1 to 5 of 5
Record Code	First Name	Last Name	Record Status	Site Code			
<input type="checkbox"/>			(0) Selected				
<input checked="" type="checkbox"/>	COCHR-LA	Landel	Cochran	Active	S90		
<input type="checkbox"/>	MINNS-SC	Scott	Minns	Active	S90		
<input type="checkbox"/>	PHILL-LE	Leigha	Phillips	Active	S90		
<input checked="" type="checkbox"/>	STETS-TI	Timothy	Stetson	Active	S90		
<input checked="" type="checkbox"/>	STEWA-RO	Rose	Steward	Active	S90		

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

Record Type ⓘ

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

- Please Select A Record Type To Show ---
- Staff Admin Action
- Staff Background Checks
- Staff Benefits
- Staff Comments
- Staff Eval/Evaluations

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

Only Show Staff Background Checks Records If The Following Dates Are Empty ⓘ

(0) Selected

Date Option ⓘ

All Dates Missing

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

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 Staff Records selected on the previous screen are visible.

ⓘ All records created here will be linked to the following staff:

- Landel Cochran** (COCHR-LA)
- Rose Steward** (STEWA-RO)
- Timothy Stetson** (STETS-TI)

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 * ⓘ

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
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**

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

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**

Click on **Save**

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

	<input type="checkbox"/>	Landel Cochran	FBI	01/06/2023	12/05/2022	Pending
	<input type="checkbox"/>	Rose Steward	FBI	01/06/2023	12/05/2022	Pending
	<input type="checkbox"/>	Timothy Stetson	FBI	01/06/2023	12/05/2022	Pending

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

Bulk Background Checks Record Add - for completed record

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

Select 3 of the previously created **Staff Records**

CYMS Staff Management - Staff Training

Options		Templates	(3)	Refresh	Staff		1 to 5 of 5
Record Code	First Name	Last Name	Record Status	Site Code			
<input checked="" type="checkbox"/>	COCHR-LA	Landel	Cochran	Active	S90		
<input type="checkbox"/>	MINNS-SC	Scott	Minns	Active	S90		
<input type="checkbox"/>	PHILL-LE	Leigha	Phillips	Active	S90		
<input checked="" type="checkbox"/>	STETS-TI	Timothy	Stetson	Active	S90		
<input checked="" type="checkbox"/>	STEWA-RO	Rose	Steward	Active	S90		

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

Record Type ⓘ

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

- Please Select A Record Type To Show ---
- Staff Admin Action
- Staff Background Checks**
- Staff Benefits
- Staff Comments
- Staff Eval/Evaluations

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

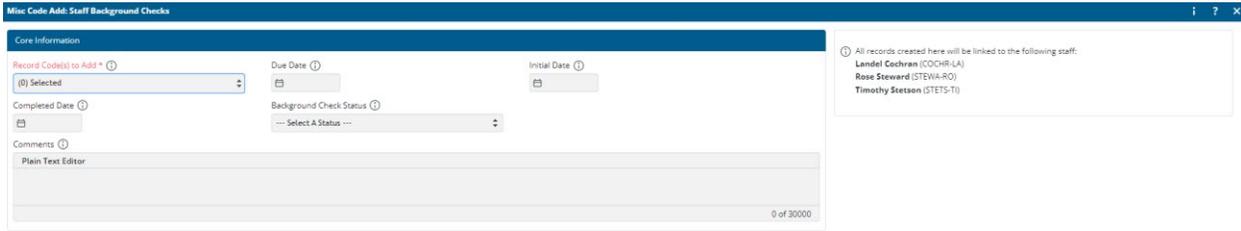
Only Show Staff Background Checks Records If The Following Dates Are Empty ⓘ

(0) Selected

Date Option ⓘ

All Dates Missing

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



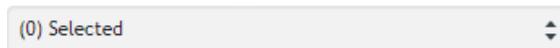
Note: When multiple records are selected the Document Link section is removed.

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

ⓘ All records created here will be linked to the following staff:
Landel Cochran (COCHR-LA)
Rose Steward (STEWA-RO)
Timothy Stetson (STETS-TI)

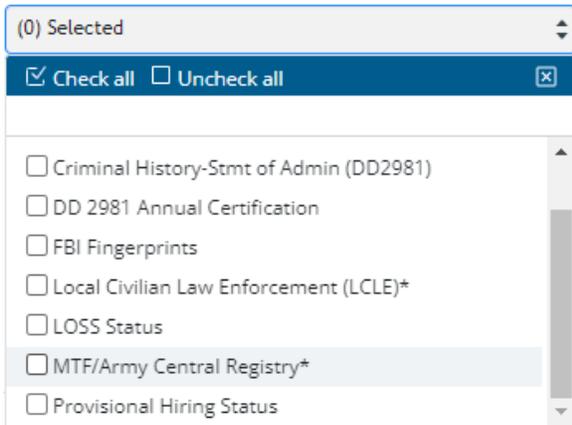
In the **Record Code(s) to Add** field click the combo-box selector

Record Code(s) to Add * ⓘ



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 * 



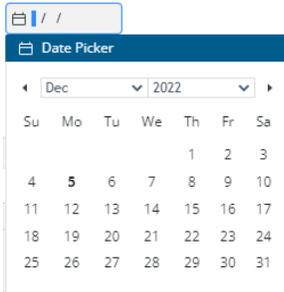
(0) Selected

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 



☰ / /

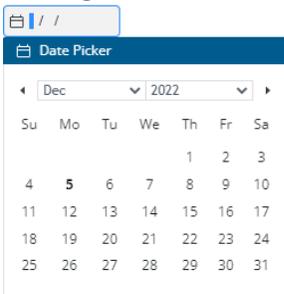
☰ Date Picker

◀ 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

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

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

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

Background Check Status ⓘ

Pending

--- Select A Status ---

Pending

Satisfactory

Derogatory

Click on **Save**

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

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

Options		Templates	<input checked="" type="checkbox"/> (0)	Refresh	Staff Background Checks Records			1 to 6 of 6 (Filtered from 13)
Name	Record Code	Due Date	Initial Date	Completed Date	Background Check Status			
<input type="checkbox"/> Landel Cochran	ACR	12/05/2022	12/05/2022	12/05/2022	(0) Selected			
<input type="checkbox"/> Landel Cochran	ACR	12/05/2027			Satisfactory			
<input type="checkbox"/> Rose Steward	ACR	12/05/2022	12/05/2022	12/05/2022	Pending			
<input type="checkbox"/> Rose Steward	ACR	12/05/2027			Satisfactory			
<input type="checkbox"/> Timothy Stetson	ACR	12/05/2022	12/05/2022	12/05/2022	Pending			
<input type="checkbox"/> Timothy Stetson	ACR	12/05/2027			Satisfactory			

Note: The **Record Code** filter is set to **ACR** 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

Bulk Background Checks Record Change

Select 3 of the previously created **Staff Records**.

CYMS Staff Management - Staff Training

Options Templates (3) Refresh Staff 1 to 5 of 5

	Record Code	First Name	Last Name	Record Status	Site Code
	<input type="text"/>	<input type="text"/>	<input type="text"/>	(0) Selected	<input type="text"/>
<input checked="" type="checkbox"/>	COCHR-LA	Landel	Cochran	Active	S90
<input type="checkbox"/>	MINNS-SC	Scott	Minns	Active	S90
<input type="checkbox"/>	PHILL-LE	Leigha	Phillips	Active	S90
<input checked="" type="checkbox"/>	STETS-TI	Timothy	Stetson	Active	S90
<input checked="" type="checkbox"/>	STEWA-RO	Rose	Steward	Active	S90

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

Record Type ⓘ

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

- Please Select A Record Type To Show ---
- Staff Admin Action
- Staff Background Checks
- Staff Benefits
- Staff Comments
- Staff Eval/Evaluation

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*
- Criminal History-Stmt of Admin (DD2981)
- DD 2981 Annual Certification
- FBI Fingerprints
- Local Civilian Law Enforcement (LCLE)*
- LOSS Status

Select **FBI Fingerprints**, then 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 - 1 for each of the 3 staff members

Options		Templates		Refresh		Staff Background Checks Records				1 to 3 of 3 (Filtered from 13)	
Name	Record Code	Due Date	Initial Date	Completed Date	Background Check Status						
<input type="checkbox"/>	Landel Cochran	FBI	01/06/2023	12/05/2022	Pending						
<input type="checkbox"/>	Rose Steward	FBI	01/06/2023	12/05/2022	Pending						
<input type="checkbox"/>	Timothy Stetson	FBI	01/06/2023	12/05/2022	Pending						

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

Options Templates (0) Refresh

- 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 Staff Background Checks Records If The Following Dates Are Empty ⓘ

(0) Selected

Date Option ⓘ

All Dates Missing

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

This will open the **Staff Background Checks** record to update screen

Staff Background Checks records to update: 3
i ? x

<div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> <input type="checkbox"/> Change Due Date? ⓘ New Value: Due Date ⓘ <input type="text"/> </div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> <input type="checkbox"/> Change Initial Date? ⓘ New Value: Initial Date ⓘ <input type="text"/> </div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> <input checked="" type="checkbox"/> Change Completed Date? ⓘ New Value: Completed Date ⓘ <input type="text"/> </div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> <input type="checkbox"/> Change Background Check Status? ⓘ New Value: Background Check Status ⓘ <div style="border: 1px solid #ccc; padding: 2px; width: 100%;"> --- Select A Status --- </div> </div> <div style="border: 1px solid #ccc; padding: 5px;"> <input type="checkbox"/> Change Comments? ⓘ New Value: Comments ⓘ <div style="border: 1px solid #ccc; padding: 2px; min-height: 40px;"> Plain Text Editor </div> <div style="text-align: right; font-size: small;">0 of 30000</div> </div>	<div style="border: 1px solid #ccc; padding: 5px;"> <div style="background-color: #f0f0f0; padding: 2px; border-bottom: 1px solid #ccc;"> Selected Staff Records 1 to 3 of 3 </div> <table border="1" style="width: 100%; border-collapse: collapse; font-size: small;"> <thead> <tr> <th style="width: 15%;">Record Code</th> <th style="width: 20%;">First Name</th> <th style="width: 20%;">First Name</th> <th style="width: 15%;">Number of ...</th> <th style="width: 10%;">Co</th> </tr> </thead> <tbody> <tr> <td>COCHR-LA</td> <td>Landel</td> <td>Cochran</td> <td>1</td> <td>FBI</td> </tr> <tr> <td>STETS-TI</td> <td>Timothy</td> <td>Stetson</td> <td>1</td> <td>FBI</td> </tr> <tr> <td>STEWA-RO</td> <td>Rose</td> <td>Steward</td> <td>1</td> <td>FBI</td> </tr> </tbody> </table> </div>	Record Code	First Name	First Name	Number of ...	Co	COCHR-LA	Landel	Cochran	1	FBI	STETS-TI	Timothy	Stetson	1	FBI	STEWA-RO	Rose	Steward	1	FBI
Record Code	First Name	First Name	Number of ...	Co																	
COCHR-LA	Landel	Cochran	1	FBI																	
STETS-TI	Timothy	Stetson	1	FBI																	
STEWA-RO	Rose	Steward	1	FBI																	

Continue
Cancel

Note: The previously selected staff 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**

Change Completed Date? ⓘ
 New Value: Completed Date ⓘ

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

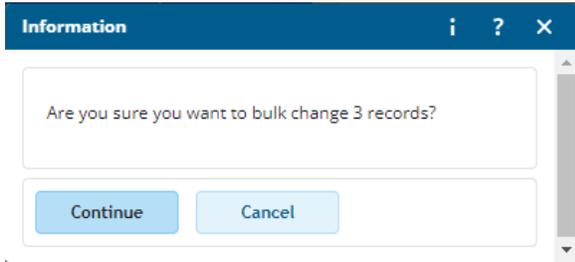
Change Background Check Status? ⓘ
 New Value: Background Check Status ⓘ

Satisfactory

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 3 records?', Click **Continue**

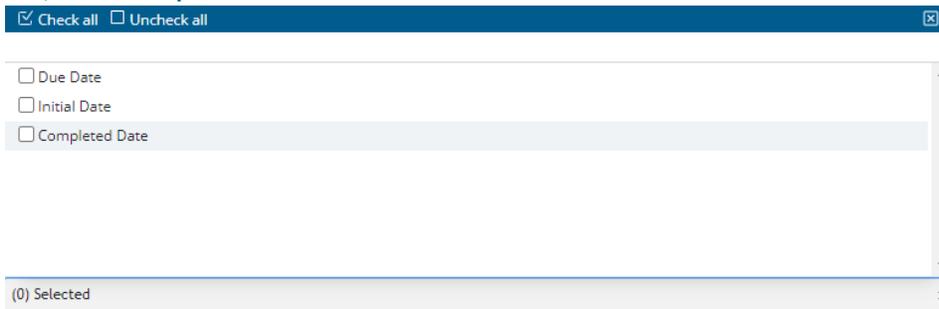


The **FBI** code is now has a **Completed Date** and **Satisfactory Background Check Status**

Options		Templates	<input checked="" type="checkbox"/> (0)	Refresh	Staff Background Checks Records			1 to 3 of 3 (Filtered from 3)
Name	Record Code	Due Date	Initial Date	Completed Date	Background Check Status			
<input type="checkbox"/>	(1) FBI Fingerprints				(0) Selected			
<input type="checkbox"/> Landel Cochran	FBI	01/06/2023	12/05/2022	12/05/2022	Satisfactory			
<input type="checkbox"/> Rose Steward	FBI	01/06/2023	12/05/2022	12/05/2022	Satisfactory			
<input type="checkbox"/> Timothy Stetson	FBI	01/06/2023	12/05/2022	12/05/2022	Satisfactory			

Note: This code is not set up to recur, so there will be no new 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** is still our **Record Code** filter, to see what is due for all background check codes click the **Options gear**, and select **Clear Filters**

Options Templates (0) Refresh

- 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

Staff Background Checks Records							1 to 5 of 5
Name	Record Code	Due Date	Initial Date	Completed Date	Background Check Status		
<input type="checkbox"/>	(0) Selected	<input type="text"/>	<input type="text"/>	<input type="text"/>	(0) Selected		
<input type="checkbox"/> Landel Cochran	ACR	12/05/2027			Pending		
<input type="checkbox"/> Rose Steward	ACR	12/05/2027			Pending		
<input type="checkbox"/> Rose Steward	CID/DCII	12/05/2027			Pending		
<input type="checkbox"/> Timothy Stetson	ACR	12/05/2027			Pending		
<input type="checkbox"/> Timothy Stetson	CID/DCII	12/02/2027			Pending		

Only Show Staff Background Checks Records If The Following Dates Are Empty ⓘ

(1) Completed Date

Date Option ⓘ

All Dates Missing

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

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 **Staff Records** created during this process

 **CYMS Staff Management**

CYMS Staff Management

Options		Templates	<input checked="" type="checkbox"/> (1)	Refresh	Staff			1 to 5 of 5
Record Code	First Name	Last Name	Record Status	Site Code	Site Area			
<input type="checkbox"/>	COCHR-LA	Landel	Cochran	Active	S90	Garrison		
<input type="checkbox"/>	MINNS-SC	Scott	Minns	Active	S90	Garrison		
<input type="checkbox"/>	PHILL-LE	Leigha	Phillips	Active	S90	Garrison		
<input type="checkbox"/>	STETS-TI	Timothy	Stetson	Active	S90	Garrison		
<input checked="" type="checkbox"/>	STEWA-RO	Rose	Steward	Active	S90	Garrison		

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

Record Type 

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

- Staff Job Code
- Staff Medical Requirements
- Staff Previous Experience
- Staff Recognitions
- Staff Room Visit
- Staff Training

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

Record Type ⓘ
 Staff Training

Options Templates (1) Refresh Staff Training Records 1 to 7 of 7

	Name	Record Code	Due Date	Completed Date	Credit Hours	Clock Hours	Completed By
		(0) Selected					
	<input type="checkbox"/> Rose Steward	A-CUSTM	12/05/2023		0.00	0.00	
	<input type="checkbox"/> Rose Steward	A-CUSTM	12/02/2022	12/05/2022	0.00	0.00	
	<input type="checkbox"/> Rose Steward	A-FIRE	12/02/2023		0.00	0.00	
	<input checked="" type="checkbox"/> Rose Steward	A-FIRE	12/02/2022	12/02/2022	1.00	2.00	
	<input type="checkbox"/> Rose Steward	A-OTHER	12/05/2022	12/05/2022	1.00	1.00	
	<input type="checkbox"/> Rose Steward	A-PREP	12/05/2023		0.00	0.00	
	<input type="checkbox"/> Rose Steward	A-PREP	12/02/2022	12/05/2022	0.00	0.00	

This opens the **Misc Code Update** screen

Misc Code Update: Staff Training

Core Information

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

Credit Hours ⓘ 1.00 Clock Hours ⓘ 2.00 Completed By User Name ⓘ

Document Link ⓘ

Comments ⓘ
 Plain Text Editor
 This is the comments area

25 of 30000

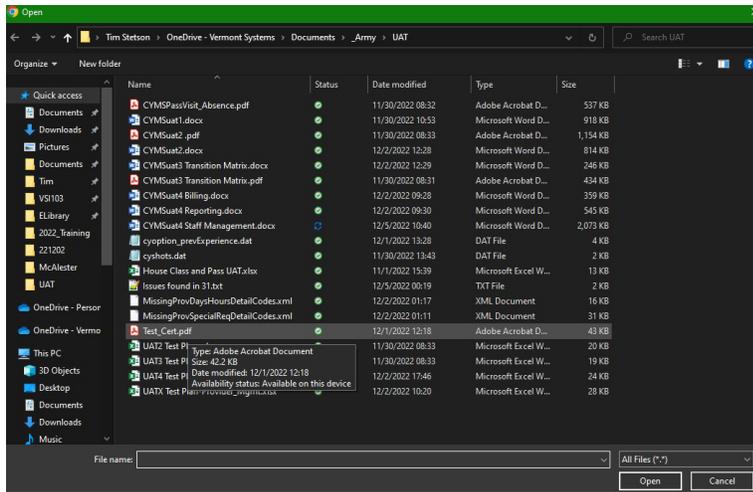
This record is linked to the following staff record:
Rose Steward (STEWA-RO)

Last Change Date ⓘ 12/04/2022
 Original Date ⓘ 12/04/2022
 Original Time ⓘ 17:46
 Original User Name ⓘ tims

Click the file folder in the Document Link Field

Document Link ⓘ 

Browse to where the **Test_Cert.pdf** file has been stored in the **Windows File Explorer** box that opens, Double-Click on it



Click on **Save** Cancel 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

12/02/2022	12/02/2022	1.00	2.00	\\Misc Data Documents\825625\Test_Cert.pdf
12/05/2022	12/05/2022	1.00	1.00	
12/05/2023		0.00	0.00	
12/02/2022	12/05/2022	0.00	0.00	

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

(0) Selected

Date Option ⓘ

All Dates Missing

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

Duplicate processes for each Record Type

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

Some things to consider:

At this point only **Staff Training** and **Staff 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 **Staff 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