VERMONT SYSTEMS

CYMS– Staff Management

Vermont Systems CYMS 3.1 Training

07/7/2022

Contents

VERMONT SYSTEMS

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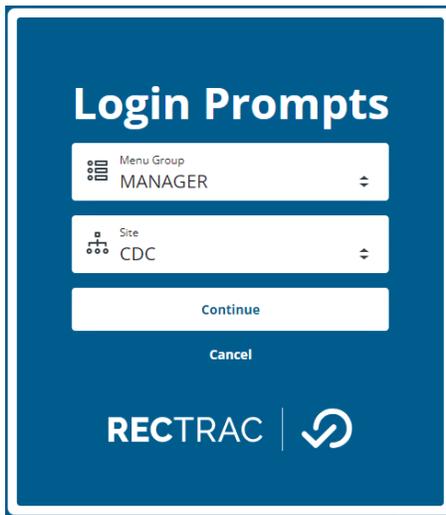
The Manager user group is configured to start a transaction batch when you log in. If prompted, please leave your starting cash at $0.00 and continue.

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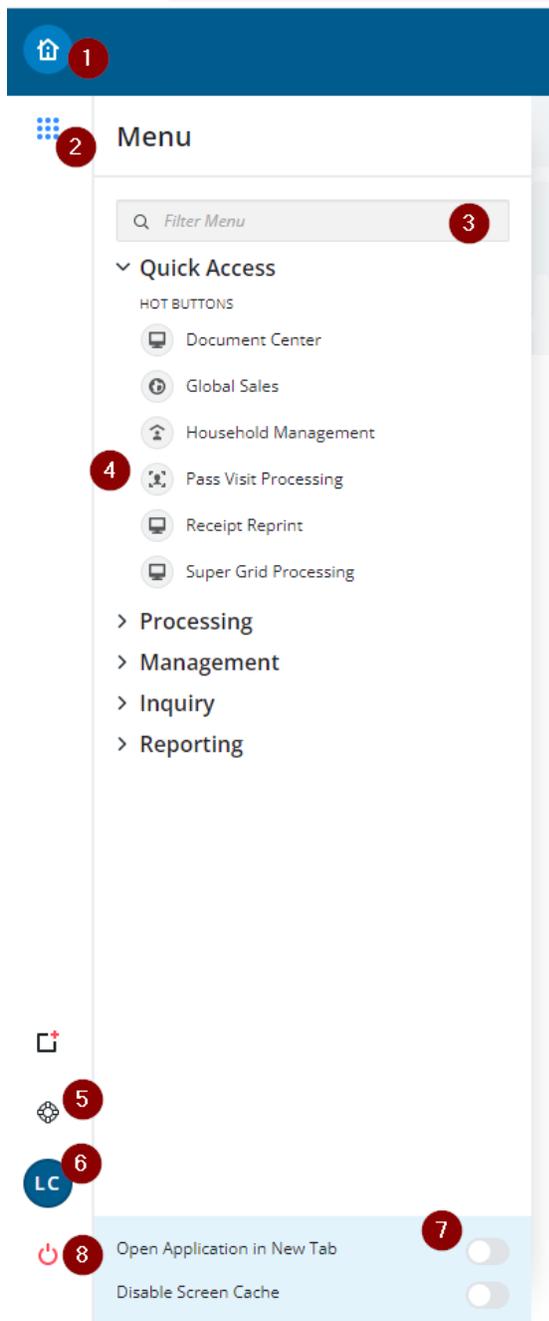
2 – **Waffle**: Use this button to expand the menu and see the menu buttons.

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.

VERMONT SYSTEMS

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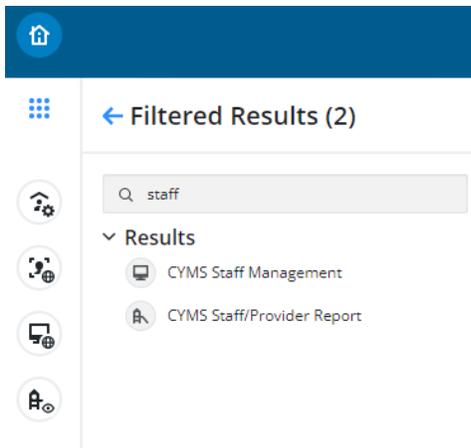
Note: *Templates can be set on the CYMS Staff Management data grid to have a specific sort on the Last Name or have a preselected Record Status filter or both. These templates can be be created by each user or generic ones can be created for all users to access. Each user can then set which template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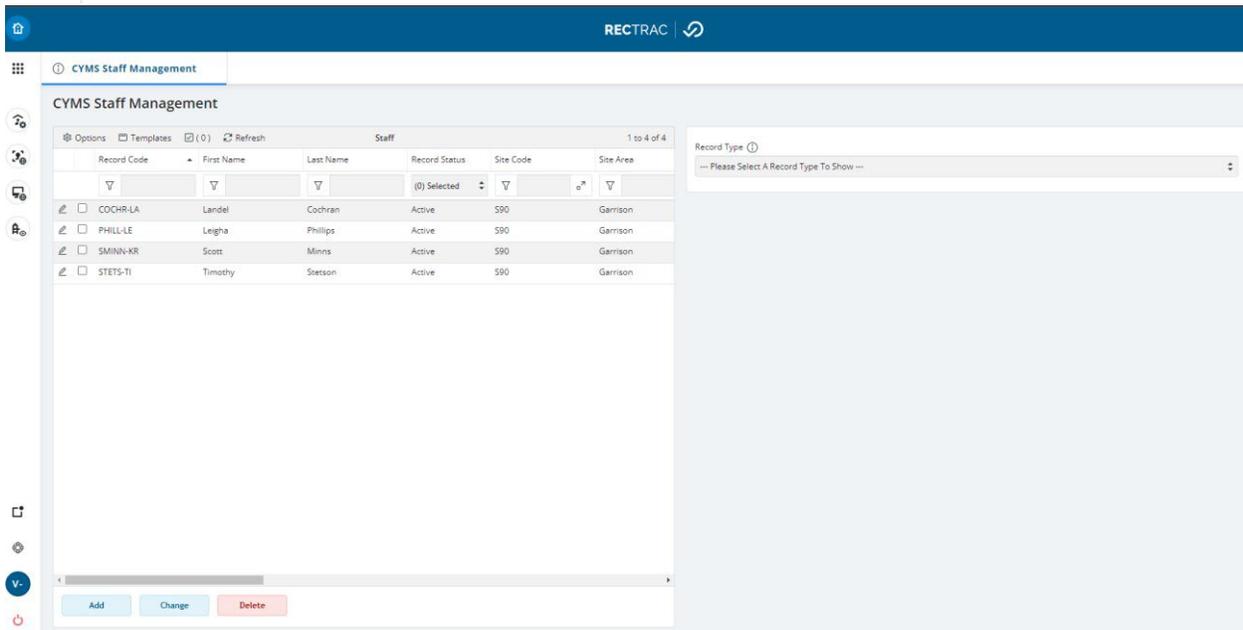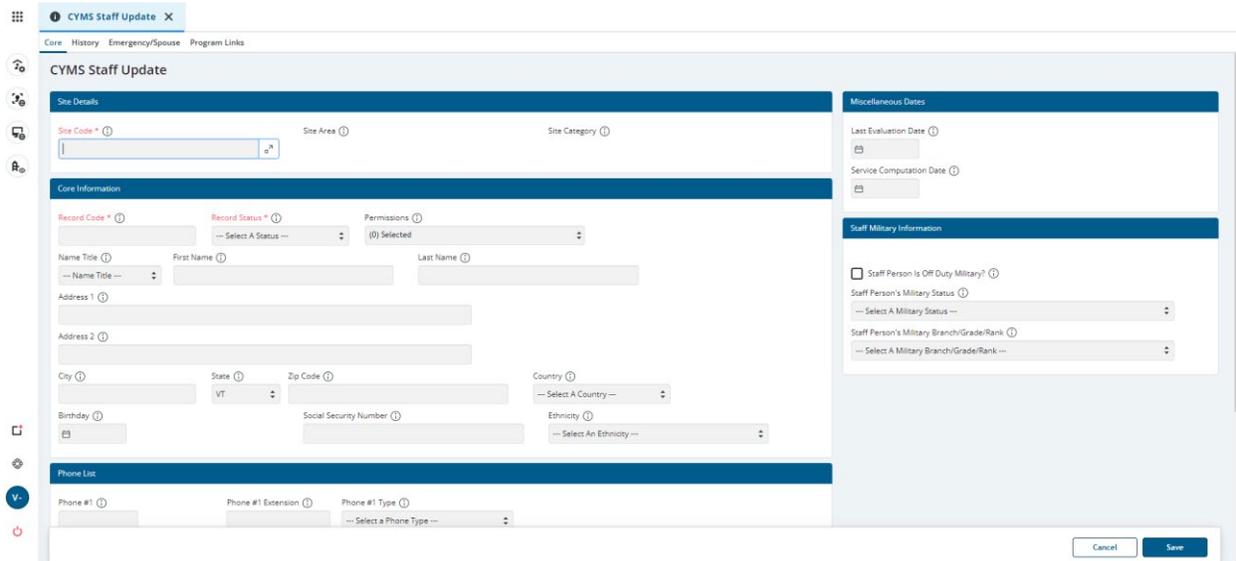
Core Page

Click the Add button

This will open the **CYMS 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*

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.

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.

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

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 any where 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

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.

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

VERMONT SYSTEMS

Emergency/Spouse Page

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

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*

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

Click **Save**

VERMONT SYSTEMS

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

	✓	STEWA-RO	Rose	Steward	Active	S90	Garrison

Select the **Emergency/Spouse** tab

| Add Existing Contact |

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

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
▽		▽		▽ 📅	▽
					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

| Select |

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

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

> *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.

✎ ✔ 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 Job Code
Staff Medical Requirements
Staff Previous Experience
Staff Recognitions
Staff Room Visit
Staff Training

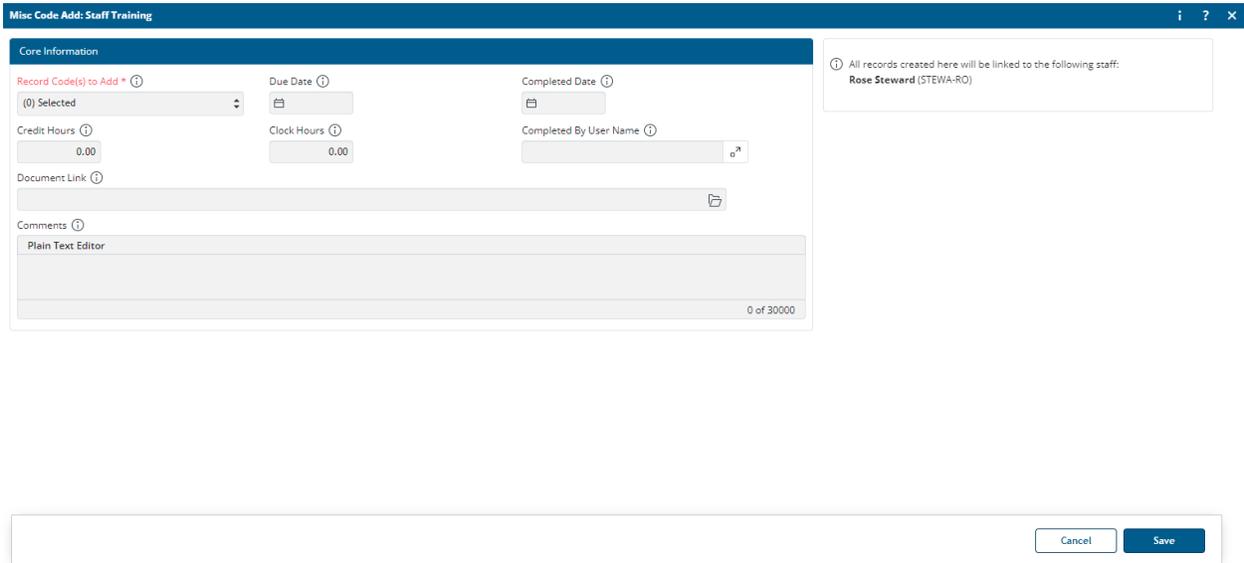Click the **Add Staff Training Record(s)** button towards the bottom of the screen

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

(0) Selected

Date Option ⓘ

All Dates Missing

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

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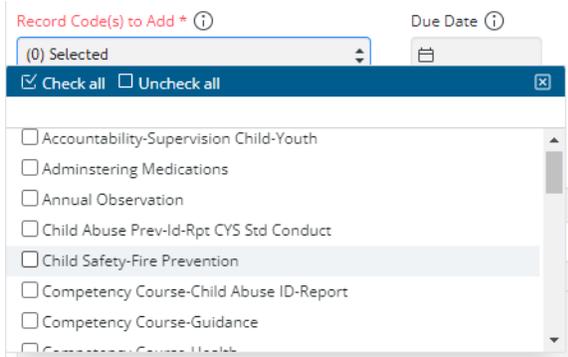
Note: It is possible to select multiple records here. If multiple are selected they will all have the same **Due Date**, **Completed Date**, etc.

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

VERMONT SYSTEMS

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**   Cancel   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 ↕	▽ 🗓	▽ 🗓	▽	▽
✎	☐	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.

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*

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

VERMONT SYSTEMS

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

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 R**oom 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.*

Click on **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
✎	☐	Rose Steward	A-FIRE	12/02/2023		0.00
✎	☐	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**

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

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

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

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

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

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

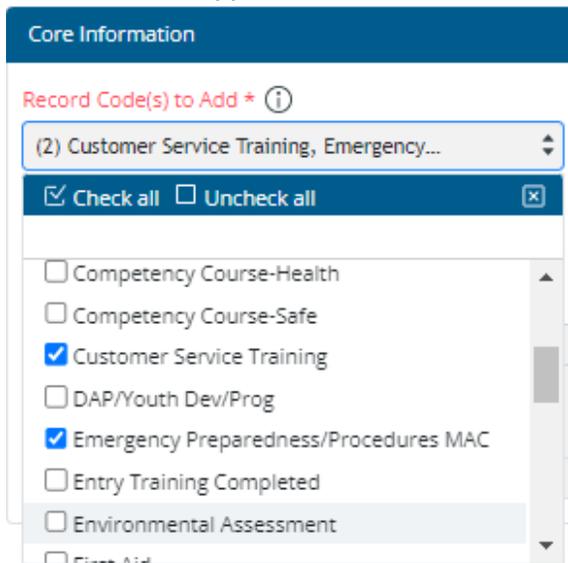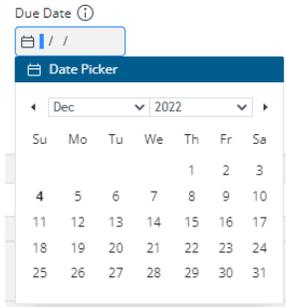The newly added **Staff Training Codes** (**A-CUSTM** and **A-PREP**) with the same **Due Dates** for each Staff person are now visible

		Name ▲	Record Code ▲	Due Date	Completed Date	Credit Hours	Clock Hours
		▽	(0) Selected ⇕	▽ 🗓	▽ 🗓	▽	▽
✎	☐	Landel Cochran	A-CUSTM	12/02/2022		0.00	0.00
✎	☐	Landel Cochran	A-PREP	12/02/2022		0.00	0.00
✎	☐	Rose Steward	A-CUSTM	12/02/2022		0.00	0.00
✎	☐	Rose Steward	A-FIRE	12/02/2023		0.00	0.00
✎	☐	Rose Steward	A-FIRE	12/02/2022	12/02/2022	1.00	2.00
✎	☐	Rose Steward	A-PREP	12/02/2022		0.00	0.00
✎	☐	Timothy Stetson	A-CUSTM	12/02/2022		0.00	0.00
✎	☐	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**

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

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

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

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

VERMONT SYSTEMS

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

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

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 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

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**

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

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

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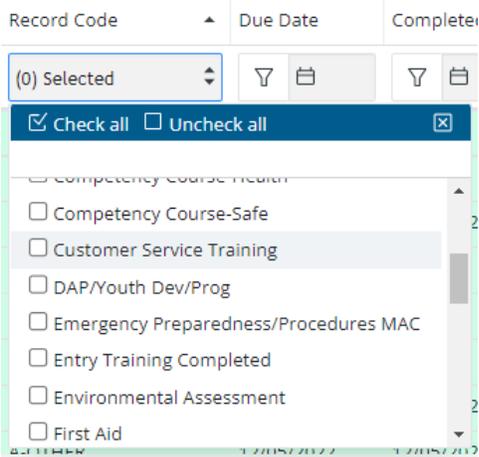
Select the 6 records that should now be present 2 for each of the 3 staff members.

		Name		Record Code		Due Date	Completed Date	Credit Hours	Clock Hours	
				(2) Customer Serv...						
✎	☐	Landel Cochran		A-CUSTM		12/02/2022		0.00	0.00	
✎	☐	Landel Cochran		A-PREP		12/02/2022		0.00	0.00	
✎	☐	Rose Steward		A-CUSTM		12/02/2022		0.00	0.00	
✎	☐	Rose Steward		A-PREP		12/02/2022		0.00	0.00	
✎	☐	Timothy Stetson		A-CUSTM		12/02/2022		0.00	0.00	
✎	☐	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**

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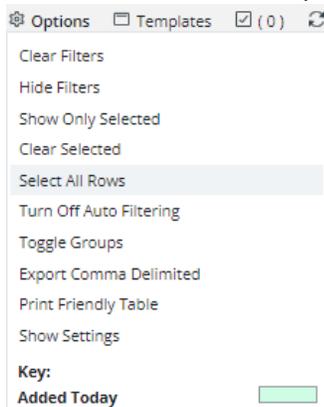
Click the **Bulk Change** button

Record Type ⓘ

| Staff Training | ⬍ |

⚙ Options	⊡ Templates	☑ (6)	⟳ Refresh		Staff Training Records			1 to 6 of 6 (Filt

		Name	▲	Record Code	▲	Due Date	Completed Date	Credit Hours	Cloc
		▽		(2) Customer Serv... ⬍		▽ 🗓	▽ 🗓	▽	▽
✎	✔	Landel Cochran		A-CUSTM		12/02/2022		0.00	
✎	✔	Landel Cochran		A-PREP		12/02/2022		0.00	
✎	✔	Rose Steward		A-CUSTM		12/02/2022		0.00	
✎	✔	Rose Steward		A-PREP		12/02/2022		0.00	
✎	✔	Timothy Stetson		A-CUSTM		12/02/2022		0.00	
✎	✔	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 | ⬍ |

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

VERMONT SYSTEMS

This will open the **Staff Training records to update: 6** window
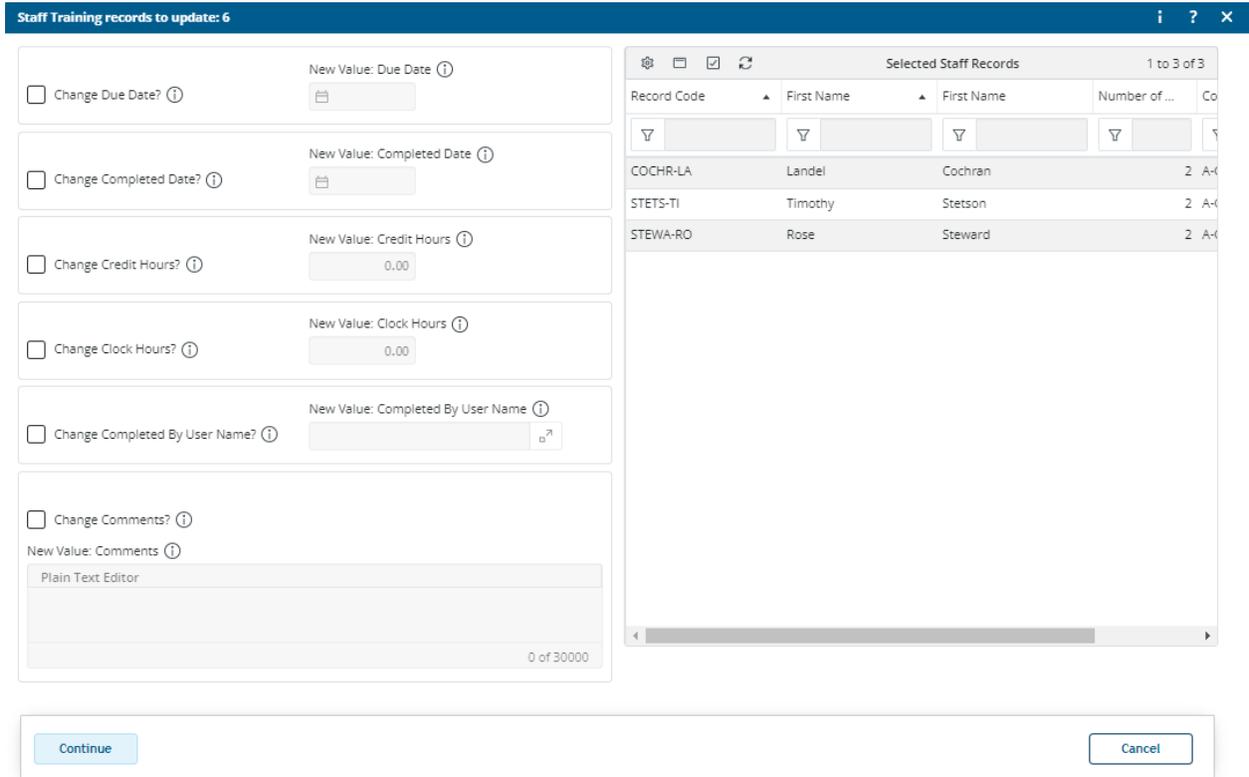
Note: The previously selected staff records are visible on the right side of the window

Select the **Change Completed Date?** toggle and enter today's date using the **Date Picker**
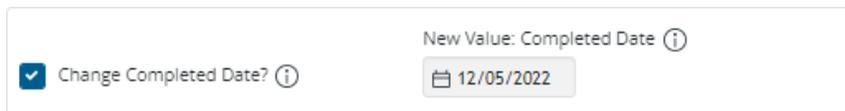
Note: Only the fields with the toggle turned on will be updated. Multiple fields could be updated at once.

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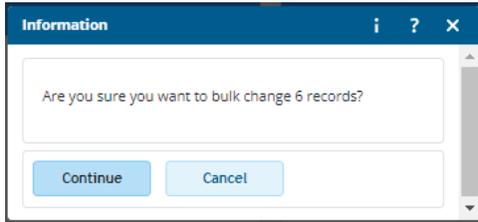
To see only what is now due, go to the **'Only Show Staff Training Records..'** and expand the Drop-down box, select **Completed Date**. Close the combo-box using the X on the top right or click anywhere on the screen.

VERMONT SYSTEMS
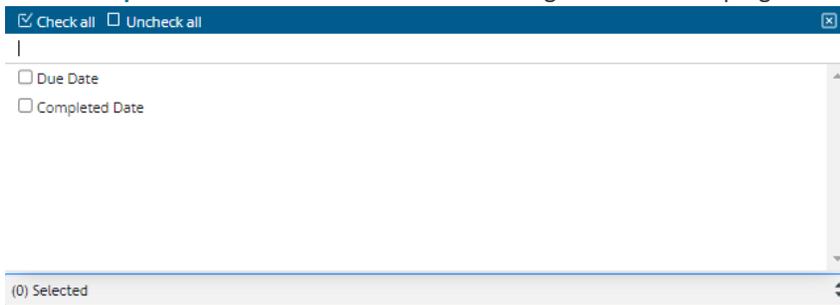
Only these specific Training records for 2023 should be visible

		Name	▲	Record Code	▲	Due Date	Completed Date	Credit Hours	Clock Hours	
		▽		(2) Customer Serv... ⇕		▽ 🗓	▽ 🗓	▽	▽	
✎	☐	Landel Cochran		A-CUSTM		12/05/2023		0.00	0.00	
✎	☐	Landel Cochran		A-PREP		12/05/2023		0.00	0.00	
✎	☐	Rose Steward		A-CUSTM		12/05/2023		0.00	0.00	
✎	☐	Rose Steward		A-PREP		12/05/2023		0.00	0.00	
✎	☐	Timothy Stetson		A-CUSTM		12/05/2023		0.00	0.00	
✎	☐	Timothy Stetson		A-PREP		12/05/2023		0.00	0.00	

Options | **Templates** | ☑ (0) | ⟳ Refresh   **Staff Training Records**   1 to 6 of 6 (Filtered from 6)

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

(1) Completed Date ⇕

Date Option ⓘ

All Dates Missing ⇕

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

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

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

*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

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

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

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

Record Code	▲	Due Date		Complete
(0) Selected	⇕	▽	🗓	▽ 🗓

☑ Check all ☐ Uncheck all   ⊠

☐ Food Service Sanitation
☐ Other Annual Training
☐ Other Entry Level Training
☐ Parent Involvement and Family Relations
☐ Pediatric-Adult CPR
☐ Positive Guidance and Appropriate Touch
☐ Principles of Adult Learning
☐ Professional Development
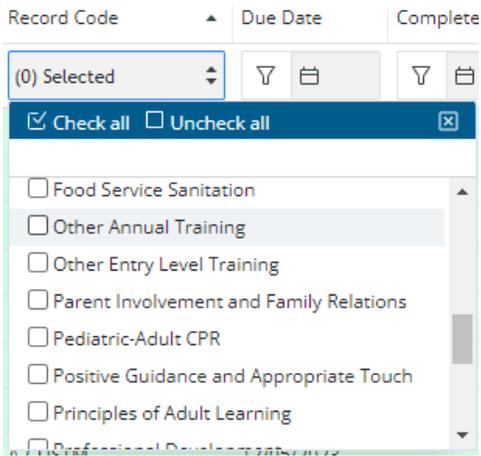
Select the 3 records that should be due for 2023

Record Type ⓘ

Staff Training   ⇕

⚙ ☐ ☑ ⟳		Staff Training Records			1 to 6 of 6 (Filtered from 6)	
	Name ▲	Record Code ▲	Due Date	Completed Date	Credit Hours	Cl
	▽	(1) Other Annual T... ⇕	▽ 🗓	▽ 🗓	▽	
✎ ☑	Landel Cochran	A-OTHER	12/05/2023		0.00	
✎ ☐	Landel Cochran	A-OTHER	12/05/2022	12/05/2022	1.00	
✎ ☑	Rose Steward	A-OTHER	12/05/2023		0.00	
✎ ☐	Rose Steward	A-OTHER	12/05/2022	12/05/2022	1.00	
✎ ☑	Timothy Stetson	A-OTHER	12/05/2023		0.00	
✎ ☐	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	⬍

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

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

Information	i	?	✕

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

Yes	No

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

⚙ ▢ ☑ ↻   Staff Training Records   1 to 3 of 3 (Filtere

		Name ▲	Record Code ▲	Due Date	Completed Date	Credit H
		▽	(1) Other Annual T... ⬍	▽ 🗓	▽ 🗓	▽
✎	☐	Landel Cochran	A-OTHER	12/05/2022	12/05/2022	
✎	☐	Rose Steward	A-OTHER	12/05/2022	12/05/2022	
✎	☐	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 Staff Training Record(s)	Change	Bulk Change	View Document	Delete

VERMONT SYSTEMS

Add a Background Checks Record

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

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

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

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

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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 ▼ ►

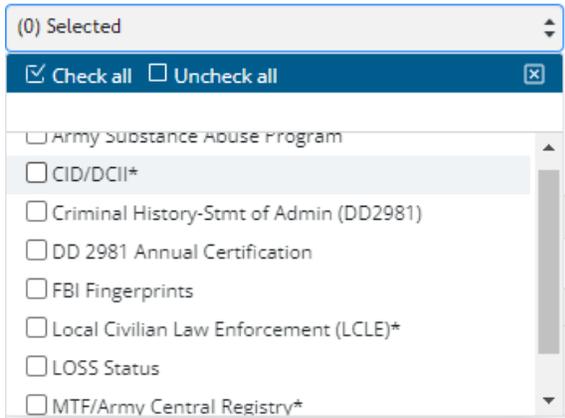| Su	Mo	Tu	We	Th	Fr	Sa
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31
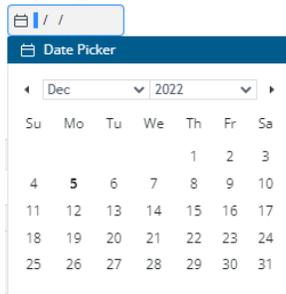
Click on **Save**   [Cancel] [Save]

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
	▽	(0) Selected ▲▼	▽ 📅	▽ 📅	▽ 📅	(0) Selected
✏ ☐	Rose Steward	CID/DCII	12/02/2022			

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Initialize a Background Checks Record

Continuing on from the previous section.

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

Click on **Change**

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.

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

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

Click on **Save**

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

	Name	▲	Record Code	▲	Due Date	Initial Date	Completed Date	Background Check Status
	▽		(0) Selected		▽ 🗓	▽ 🗓	▽ 🗓	(0) Selected
✎ ☐	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		
	▽	(0) Selected ⬍	▽ 📅	▽ 📅	▽ 📅	(0) Selected		
✎ ✔	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 ⬍

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

This opens the **Misc Code Update** screen

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

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

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

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

		Name	Record Code	Due Date	Initial Date	Completed Date	Background Check Status
			(0) Selected				(0) Selected
✎	☐	Rose Steward	CID/DCII	12/05/2027			Pending
✎	☐	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**

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

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

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.

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

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

Due Date ⓘ

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 ⓘ

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 ⓘ

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.

✏ ☐	Landel Cochran	FBI	01/06/2023	12/05/2022		Pending
✏ ☐	Rose Steward	FBI	01/06/2023	12/05/2022		Pending
✏ ☐	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

		Record Code	First Name	Last Name ▲	Record Status	Site Code
		▽	▽	▽	(0) Selected ⬍	▽
✎	✔	COCHR-LA	Landel	Cochran	Active	S90
✎	☐	MINNS-SC	Scott	Minns	Active	S90
✎	☐	PHILL-LE	Leigha	Phillips	Active	S90
✎	✔	STETS-TI	Timothy	Stetson	Active	S90
✎	✔	STEWA-RO	Rose	Steward	Active	S90

⚙ Options   ▭ Templates   ☑ (3)   ⟳ Refresh   Staff   1 to 5 of 5

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 Cred/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.

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

VERMONT SYSTEMS

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)*
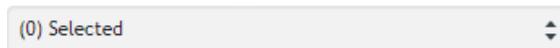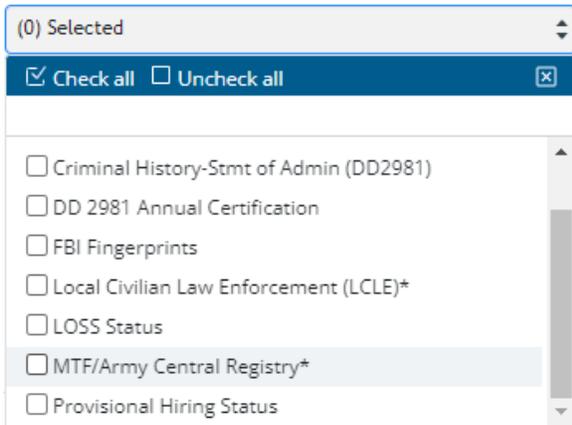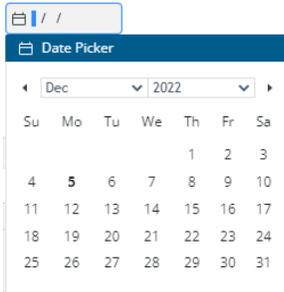☐ LOSS Status
☐ MTF/Army Central Registry*
☐ Provisional Hiring Status

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
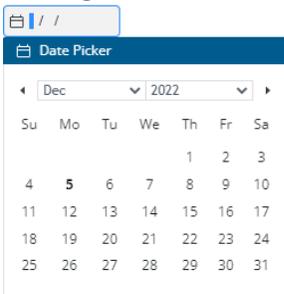
Initial Date ⓘ

| 📅 | / / |

📅 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

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

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

	Name	Record Code	Due Date	Initial Date	Completed Date	Background Check Status
✎ ☐	Landel Cochran	ACR	12/05/2022	12/05/2022	12/05/2022	Satisfactory
✎ ☐	Landel Cochran	ACR	12/05/2027			Pending
✎ ☐	Rose Steward	ACR	12/05/2022	12/05/2022	12/05/2022	Satisfactory
✎ ☐	Rose Steward	ACR	12/05/2027			Pending
✎ ☐	Timothy Stetson	ACR	12/05/2022	12/05/2022	12/05/2022	Satisfactory
✎ ☐	Timothy Stetson	ACR	12/05/2027			Pending

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**.

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		Record Code	First Name	Last Name ▲	Record Status	Site Code
⚙ Options	☐ Templates ☑ (3) ⟳ Refresh			Staff		1 to 5 of 5
		▽	▽	▽	(0) Selected ⇕	▽
✎	☑	COCHR-LA	Landel	Cochran	Active	S90
✎	☐	MINNS-SC	Scott	Minns	Active	S90
✎	☐	PHILL-LE	Leigha	Phillips	Active	S90
✎	☑	STETS-TI	Timothy	Stetson	Active	S90
✎	☑	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 Cred/Evaluations

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

		Name ▲	Record Code ▲	Due Date	Initial Date	Completed Date	Background Check Status
		▽	(1) FBI Fingerprints ↕	▽ 🗓	▽ 🗓	▽ 🗓	(0) Selected
✎	☐	Landel Cochran	FBI	01/06/2023	12/05/2022		Pending
✎	☐	Rose Steward	FBI	01/06/2023	12/05/2022		Pending
✎	☐	Timothy Stetson	FBI	01/06/2023	12/05/2022		Pending

⚙ Options   ▭ Templates   ☑ (0)   ⟳ Refresh   Staff Background Checks Records   1 to 3 of 3 (Filtered from 13)

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 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

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**

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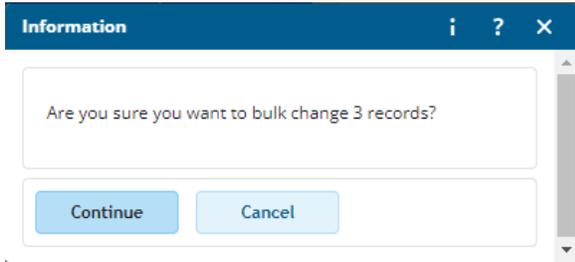

Note: Only the fields with the toggle turned on will be updated.

Click on **Continue**

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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

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

⚙ Options	▢ Templates	☑ (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
		▽	(1) FBI Fingerprints ⇅	▽ 🗓	▽ 🗓	▽ 🗓	(0) Selected
✎	☐	Landel Cochran	FBI	01/06/2023	12/05/2022	12/05/2022	Satisfactory
✎	☐	Rose Steward	FBI	01/06/2023	12/05/2022	12/05/2022	Satisfactory
✎	☐	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**

☑ Check all ☐ Uncheck all	⊠

☐ Due Date
☐ Initial Date
☐ Completed Date

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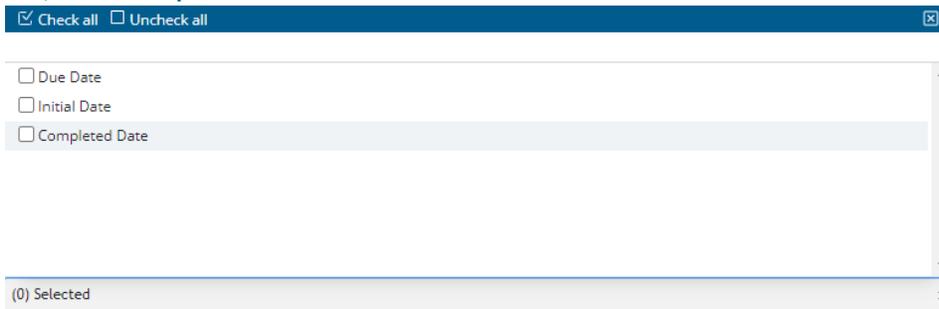
There should now be no codes visible as **FBI** is still our **Record Code** filter, to see what is due for all background check codes click the **Options gear**, and select **Clear Filters**

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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		Staff Background Checks Records			1 to 5 of 5
		Name ▲	Record Code ▲	Due Date	Initial Date	Completed Date	Background Check Status	
		▽	(0) Selected ⇕	▽ 📅	▽ 📅	▽ 📅	(0) Selected	
✎	☐	Landel Cochran	ACR	12/05/2027			Pending	
✎	☐	Rose Steward	ACR	12/05/2027			Pending	
✎	☐	Rose Steward	CID/DCII	12/05/2027			Pending	
✎	☐	Timothy Stetson	ACR	12/05/2027			Pending	
✎	☐	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 ⇕

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

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

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

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

Record Type ⓘ

| Staff Training | | | | | | |

		Name ▲	Record Code ▲	Due Date	Completed Date	Credit Hours	Clock Hours	Completed By
		▽	(0) Selected ⇕	▽ 🗓	▽ 🗓	▽	▽	▽
✎	☐	Rose Steward	A-CUSTM	12/05/2023		0.00	0.00	
✎	☐	Rose Steward	A-CUSTM	12/02/2022	12/05/2022	0.00	0.00	
✎	☐	Rose Steward	A-FIRE	12/02/2023		0.00	0.00	
✎	☑	Rose Steward	A-FIRE	12/02/2022	12/02/2022	1.00	2.00	
✎	☐	Rose Steward	A-OTHER	12/05/2022	12/05/2022	1.00	1.00	
✎	☐	Rose Steward	A-PREP	12/05/2023		0.00	0.00	
✎	☐	Rose Steward	A-PREP	12/02/2022	12/05/2022	0.00	0.00	

⚙ Options   ▢ Templates   ☑ (1)   ⟳ Refresh   Staff Training Records   1 to 7 of 7

This opens the **Misc Code Update** screen

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
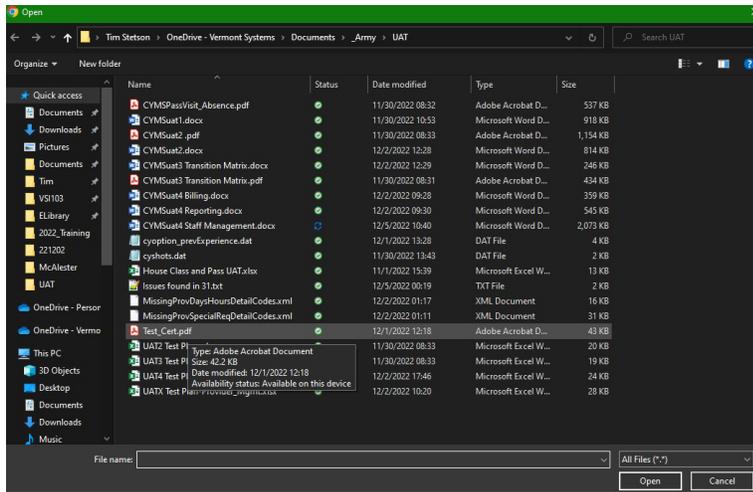
Click on **Save**

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

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