

# CYMS -Admin Assistant Hourly Care

**Vermont Systems CYMS 3.1 Training**

07/07/2022

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Vermont Systems  
12 Market Place  
Essex Junction, VT 05452

[www.vermontsystems.com](http://www.vermontsystems.com)

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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.

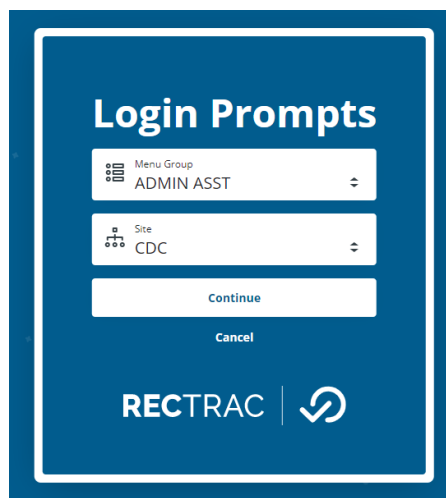
**Username:** Your Army email alias\*

\*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.*

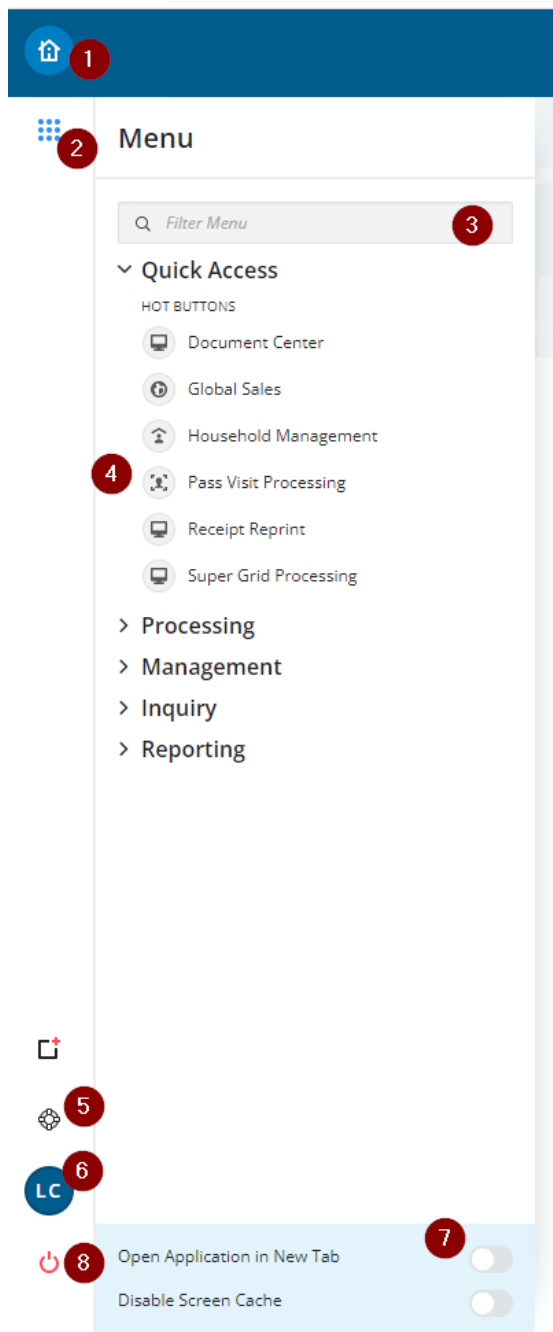
For this training, please sign in using the **Admin Asst** user group and **CDC** site.



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

## The RecTrac Menu

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



## Menu Components

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

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

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

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

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

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

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

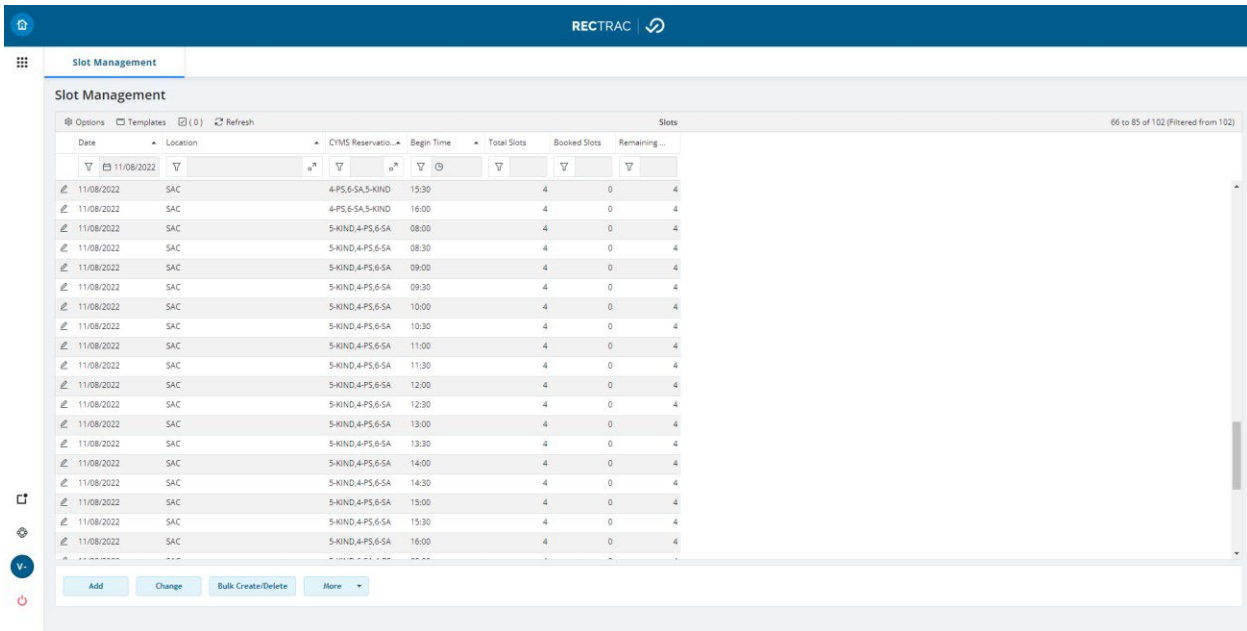
***For Example:** A user can have Household Management open, and using this slider, open a second tab of Household Management so they can work on two households at once.*

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

## Creating Time Slots

### Slot Management

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



Date	Location	CYMS Reservatio...	Begin Time	Total Slots	Booked Slots	Remaining...
11/08/2022	SAC	4-PS,6-SA,5-KIND	15:30	4	0	4
11/08/2022	SAC	4-PS,6-SA,5-KIND	16:00	4	0	4
11/08/2022	SAC	5-KIND,4-PS,6-SA	08:00	4	0	4
11/08/2022	SAC	5-KIND,4-PS,6-SA	08:30	4	0	4
11/08/2022	SAC	5-KIND,4-PS,6-SA	09:00	4	0	4
11/08/2022	SAC	5-KIND,4-PS,6-SA	09:30	4	0	4
11/08/2022	SAC	5-KIND,4-PS,6-SA	10:00	4	0	4
11/08/2022	SAC	5-KIND,4-PS,6-SA	10:30	4	0	4
11/08/2022	SAC	5-KIND,4-PS,6-SA	11:00	4	0	4
11/08/2022	SAC	5-KIND,4-PS,6-SA	11:30	4	0	4
11/08/2022	SAC	5-KIND,4-PS,6-SA	12:00	4	0	4
11/08/2022	SAC	5-KIND,4-PS,6-SA	12:30	4	0	4
11/08/2022	SAC	5-KIND,4-PS,6-SA	13:00	4	0	4
11/08/2022	SAC	5-KIND,4-PS,6-SA	13:30	4	0	4
11/08/2022	SAC	5-KIND,4-PS,6-SA	14:00	4	0	4
11/08/2022	SAC	5-KIND,4-PS,6-SA	14:30	4	0	4
11/08/2022	SAC	5-KIND,4-PS,6-SA	15:00	4	0	4
11/08/2022	SAC	5-KIND,4-PS,6-SA	15:30	4	0	4
11/08/2022	SAC	5-KIND,4-PS,6-SA	16:00	4	0	4

To add an individual additional time slot, click the **Add** button on the bottom left hand side of the screen. Fill out the onscreen fields for Date, Begin Time, End Time, Total Slots (Number of children you can provide care for during this time), and the Facility.

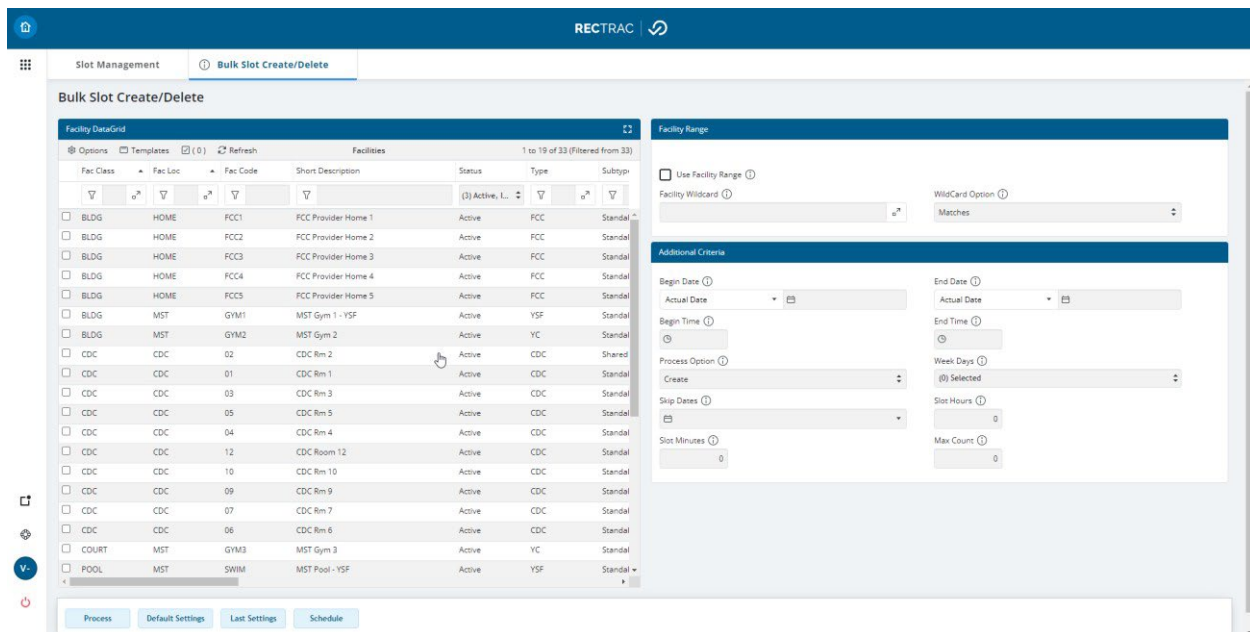
To alter the time or total slots for an existing slot, click the **Change** button and make necessary changes.

To delete an individual slot, highlight the slot you would like to delete, then select the **More** dropdown, followed by the **Delete**.

*Please Note: Slots may already be created in the test system.*

## Bulk Slot Create/Delete

The most common way to create time slots for the next 14-90 days is to use the Bulk Slot Create/Delete program. Click on **Slot Management** in the RecTrac menu. Use the Menu Search to help locate the button if desired. The Slot Management button will open the Slot Management program in a new panel. This program opens to a screen that shows current slots. Click the **Bulk Create/Delete** to open the Bulk Slot Create/Delete screen.



The **Bulk Slot Create/Delete** screen is segmented into multiple sections.

### Facility DataGrid

On the left side of the screen, you will see the facility DataGrid. Here, you will select the facilities for which you will run the bulk slot create/delete program. Note that these facilities should have the same settings for dates, times, slot time lengths, and slot children counts. To pick multiple, select them in the DataGrid, selected records will be highlighted blue.

### Facility Range

In the top right of the screen, you will see the **Use Facility Range** checkbox. If this is turned on, you can set a facility range to run the bulk slot create/delete program **instead** of selecting the facilities on the left under the Facility DataGrid.

**Please Note:** If the facility range is checked on, the system completely ignores any records selected in the Facility DataGrid.

### Additional Criteria

The Additional Criteria tab is where you will select the parameters for slot creation. In the example below, slots are being created for 14-90 days in advance, from 08:00 to 16:00 Monday-Friday. Holiday Dates are being skipped, and the slots being created are in 30-minute increments, with a maximum of 6 children allowed in each room.

These settings may differ from the way you normally create your slots. Adjust to fit your childcare needs.

Click the [Process](#) to create time slots.

**Additional Criteria**

Begin Date ⓘ Today ▼ 14	End Date ⓘ Today ▼ 90
Begin Time ⓘ ⌚ 08:00	End Time ⓘ ⌚ 16:00
Process Option ⓘ Create ⌵	Week Days ⓘ (5) Monday, Tuesday, Wednesday, Thursday, Friday ⌵
Skip Dates ⓘ 📅 11/24/2022,12/23/2022,01/02/2023 ▼	Slot Hours ⓘ 0
Slot Minutes ⓘ 30	Max Count ⓘ 6

### Deleting Time Slots

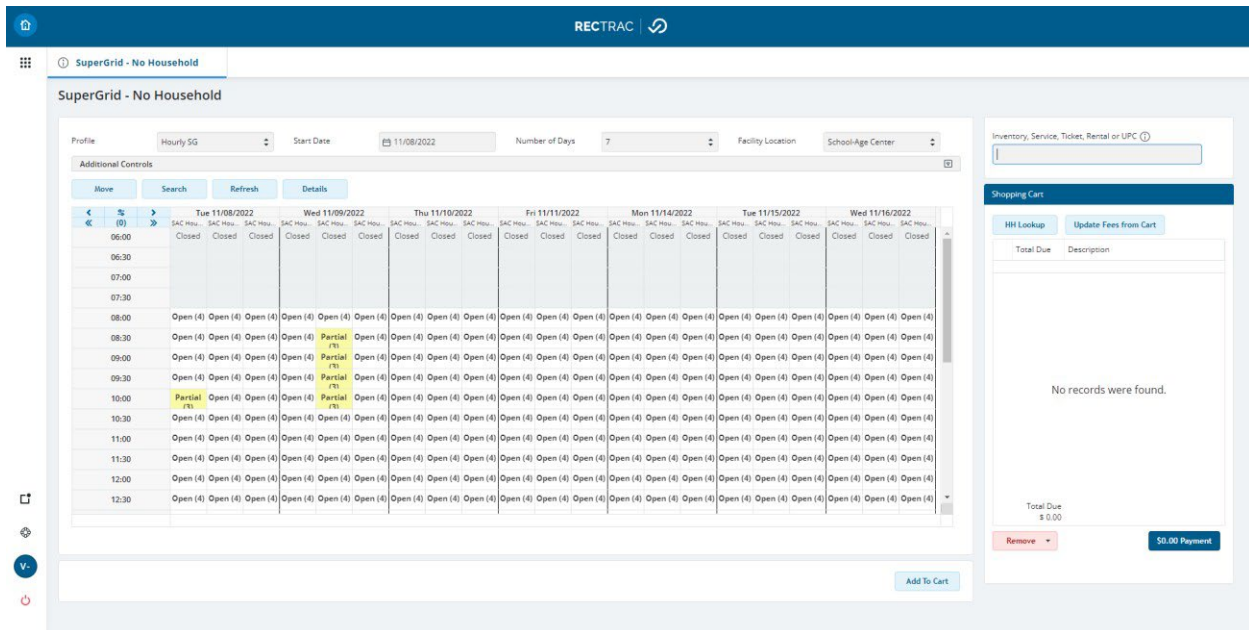
You are also able to book delete slots. This may be done if a classroom is shutting down for an extended period of a time, or slots were created incorrectly. To delete slots, change the **Process Option** under Additional Criteria to **Delete Unreserved** instead of Create.



# Hourly Care SuperGrid Enrollment

## SuperGrid Enrollment

To preregister for Hourly care, open the **SuperGrid**. Clicking on Super Grid Processing in your RecTrac menu will bring you to the Hourly SuperGrid screen:



The screenshot displays the 'SuperGrid - No Household' interface. At the top, there are filters for Profile (Hourly SG), Start Date (11/08/2022), Number of Days (7), and Facility Location (SchoolAge Center). Below these are 'Additional Controls' including Move, Search, Refresh, and Details buttons. The main area is a grid showing enrollment status for each hour from 06:00 to 12:30 across several dates. The status is 'Open (4)' for most slots, with some 'Partial (1)' slots highlighted in yellow. A shopping cart on the right side of the screen shows 'No records were found.' and a total due of \$0.00.

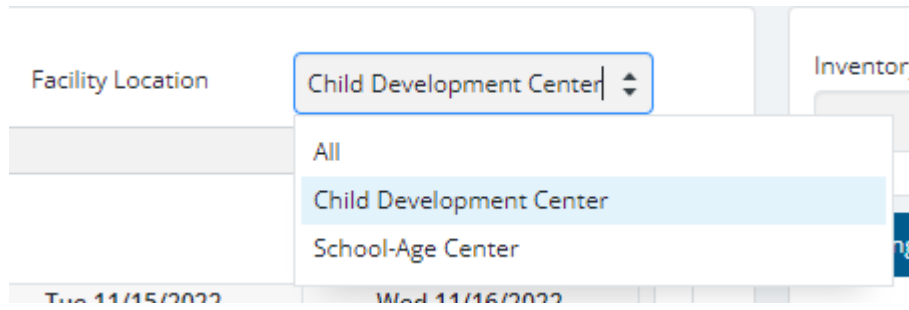
In this view, this screen be used to give you a quick overview of how busy your centers are. Using the filters at the top of the screen, you can change the date, the number of days you are viewing, and the center.

On the SuperGrid you will see white blocks, yellow blocks and red blocks. White blocks are slots that have no enrollments, Yellow blocks are slots that are partially full, and red blocks are completely full time slots.

10:00	Open (4)	Partial (3)	Full (0)
-------	----------	-------------	----------

Start by selecting the child you would like to process a transaction for. Use the **HH Lookup** button above the shopping cart to search for a child. This button will bring you to the Global Sales Lookup screen discussed in our first document. Use the search bar at the top of the screen to find the correct household.

Once you select a household, you will be brought back to the SuperGrid screen and the household name, (HH number), and HH balance will show in the panel label as well as the screen title. Please note, classrooms that were showing before you picked a household may no longer be showing. This is because once you select a child, you will only see classrooms they are able to place into. You can change the center that you are looking at by selecting the **Facility Location** in the top right hand of the screen.



RECTRAC

SuperGrid for LeBlanc (24)

Profile: Hourly SG Start Date: 11/08/2022 Number of Days: 7 Facility Location: Child Development Center

Additional Controls: Move Search Refresh Details

	Tue 11/08/2022	Wed 11/09/2022	Thu 11/10/2022	Fri 11/11/2022	Mon 11/14/2022	Tue 11/15/2022	Wed 11/16/2022
	Mathew... CDC... Beau... CDC No...	Mathew... CDC... Beau... CDC No...	Mathew... CDC... Beau... CDC No...	Mathew... CDC... Beau... CDC No...	Mathew... CDC... Beau... CDC No...	Mathew... CDC... Beau... CDC No...	Mathew... CDC... Beau... CDC No...
08:30	Open (4)	Open (4)	Open (4)	Open (4)	Open (4)	Open (4)	Open (4)
09:00	Open (4)	Open (4)	Open (4)	Open (4)	Open (4)	Open (4)	Open (4)
09:30	Open (4)	Open (4)	Open (4)	Open (4)	Open (4)	Open (4)	Open (4)
10:00	Open (4)	LeBlanc, B Partial (3)	Open (4)	Partial (3)	Open (4)	Partial (3)	Open (4)
10:30	Open (4)	Partial (3)	Open (4)	Partial (3)	Open (4)	Partial (3)	Open (4)
11:00	Open (4)	Partial (3)	Open (4)	Partial (3)	Open (4)	Partial (3)	Open (4)
11:30	Open (4)	Partial (3)	Open (4)	Partial (3)	Open (4)	Partial (3)	Open (4)
12:00	Open (4)	Partial (3)	Open (4)	Partial (3)	Open (4)	Partial (3)	Open (4)
12:30	Open (4)	Partial (3)	Open (4)	Partial (3)	Open (4)	Partial (3)	Open (4)
13:00	Open (4)	Partial (3)	Open (4)	Partial (3)	Open (4)	Partial (3)	Open (4)
13:30	Open (4)	Partial (3)	Open (4)	Partial (3)	Open (4)	Partial (3)	Open (4)
14:00	Open (4)	Partial (3)	Open (4)	Partial (3)	Open (4)	Partial (3)	Open (4)
14:30	Open (4)	Partial (3)	Open (4)	Partial (3)	Open (4)	Partial (3)	Open (4)
15:00	Open (4)	Partial (3)	Open (4)	Partial (3)	Open (4)	Partial (3)	Open (4)

Shopping Cart

HR Lookup Update Fees from Cart

Total Due Description

No records were found.

Total Due \$ 0.00

Remove \$0.00 Payment

Add To Cart

To enroll into a time slot, click an available time slot for the appropriate room and time of day. That slot will turn green when it has been selected. To enroll into more than one time slot, select consecutive time slots.

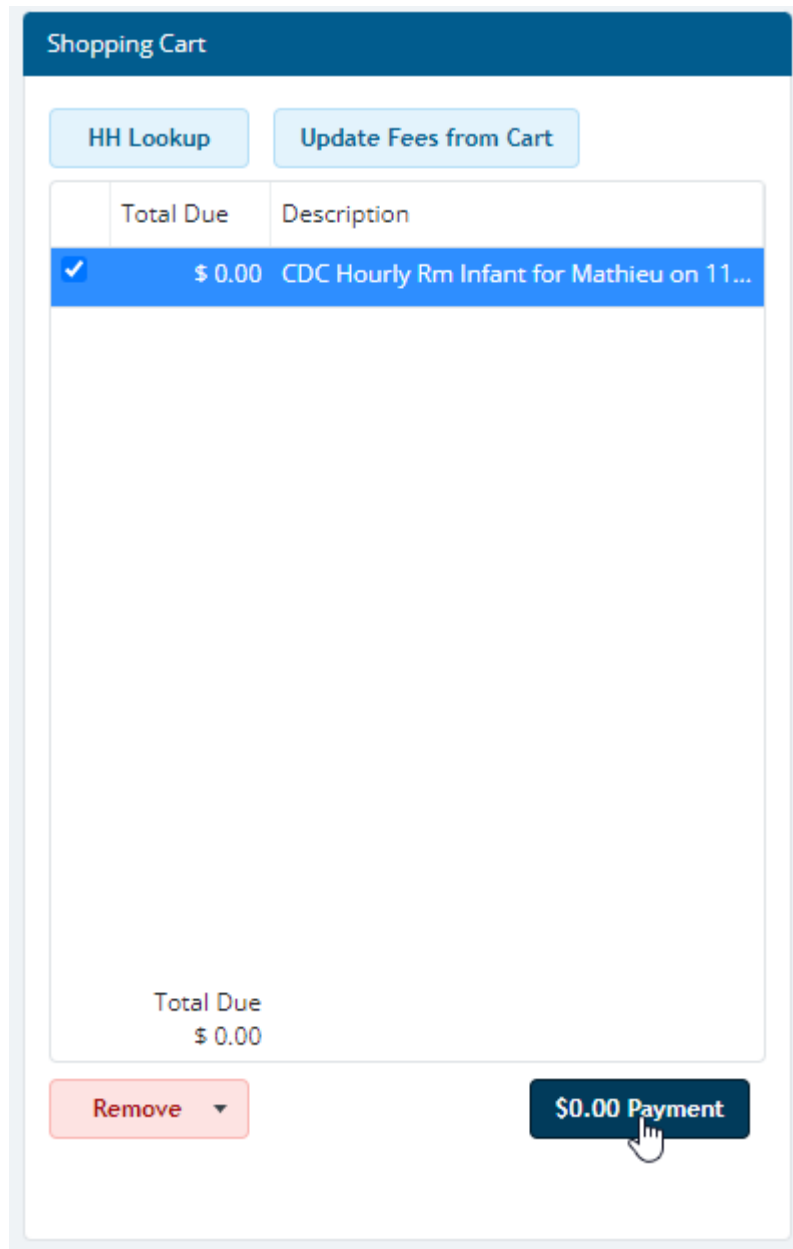
**SuperGrid for LeBlanc (24)**

Profile:  Start Date:  Number of Days:  Facility Location:

Additional Controls:

	Tue 11/08/2022		Wed 11/09/2022		Thu 11/10/2022		Fri 11/11/2022		Mon 11/14/2022		Tue 11/15/2022		Wed 11/16/2022	
	Mathieu - CDC ...	Beau - CDC Ho...	Mathieu - CDC ...	Beau - CDC Ho...	Mathieu - CDC ...	Beau - CDC Ho...	Mathieu - CDC ...	Beau - CDC Ho...	Mathieu - CDC ...	Beau - CDC Ho...	Mathieu - CDC ...	Beau - CDC Ho...	Mathieu - CDC ...	Beau - CDC Ho...
13:00	Open (4)	Partial (3)	Open (4)	Partial (3)	Open (4)	Partial (3)	Open (4)	Partial (3)	Open (4)	Open (4)	Open (4)	Open (4)	Open (4)	Open (4)
13:30	Open (4)	Partial (3)	Open (4)	Partial (3)	Open (4)	Partial (3)	Open (4)	Partial (3)	Open (4)	Open (4)	Open (4)	Open (4)	Open (4)	Open (4)
14:00	11/08/2022 14:00	Partial (3)	Open (4)	Partial (3)	Open (4)	Partial (3)	Open (4)	Partial (3)	Open (4)	Open (4)	Open (4)	Open (4)	Open (4)	Open (4)
14:30	11/08/2022 14:30	Partial (3)	Open (4)	Partial (3)	Open (4)	Partial (3)	Open (4)	Partial (3)	Open (4)	Open (4)	Open (4)	Open (4)	Open (4)	Open (4)
15:00	11/08/2022 15:00	Partial (3)	Open (4)	Partial (3)	Open (4)	Partial (3)	Open (4)	Partial (3)	Open (4)	Open (4)	Open (4)	Open (4)	Open (4)	Open (4)
15:30	Open (4)	Partial (3)	Open (4)	Partial (3)	Open (4)	Partial (3)	Open (4)	Partial (3)	Open (4)	Open (4)	Open (4)	Open (4)	Open (4)	Open (4)
16:00	Open (4)	Open (4)	Open (4)	Open (4)	Open (4)	Open (4)	Open (4)	Open (4)	Open (4)	Open (4)	Open (4)	Open (4)	Open (4)	Open (4)
16:30	Closed	Closed	Closed	Closed	Closed	Closed	Closed	Closed	Closed	Closed	Closed	Closed	Closed	Closed
17:00														
17:30														
18:00														
18:30														
19:00														
19:30														

To complete the reservation, select the **Add to Cart** in the bottom right of the screen. This will add the enrollments to the shopping cart. Even though these items are in the shopping cart, no payments will be taken at this time. To finish the transaction, select the **0.00 Payment** Button and then the green **Process** button on the next screen.



Shopping Cart

HH Lookup    Update Fees from Cart

Total Due	Description
\$ 0.00	CDC Hourly Rm Infant for Mathieu on 11...

Total Due  
\$ 0.00

Remove    \$0.00 Payment

## Extending a Reservation

To extend a preregistration for Hourly care, open the [SuperGrid](#). Clicking on Super Grid Processing in your RecTrac menu will bring you to the Hourly SuperGrid screen:

The screenshot shows the RecTrac SuperGrid interface for a household named "SuperGrid - No Household". The profile is set to "Hourly SG" and the start date is "11/08/2022". The grid displays reservation status for various time slots from 06:00 to 12:30 across several days. Most slots are marked as "Open (4)", but some are "Partial (7)" or "Closed". A shopping cart on the right is currently empty, showing "No records were found." and a total due of \$0.00.

Start by selecting the child you would like to process an extension for. Use the **HH Lookup** button above the shopping cart to search for a child. Use the search bar at the top of the screen to find the correct household.

Once you select a household, you will be brought back to the SuperGrid screen and the household name, (HH number), and HH balance will show in the panel label as well as the screen title. Reservations booked under that household will show as Orange.

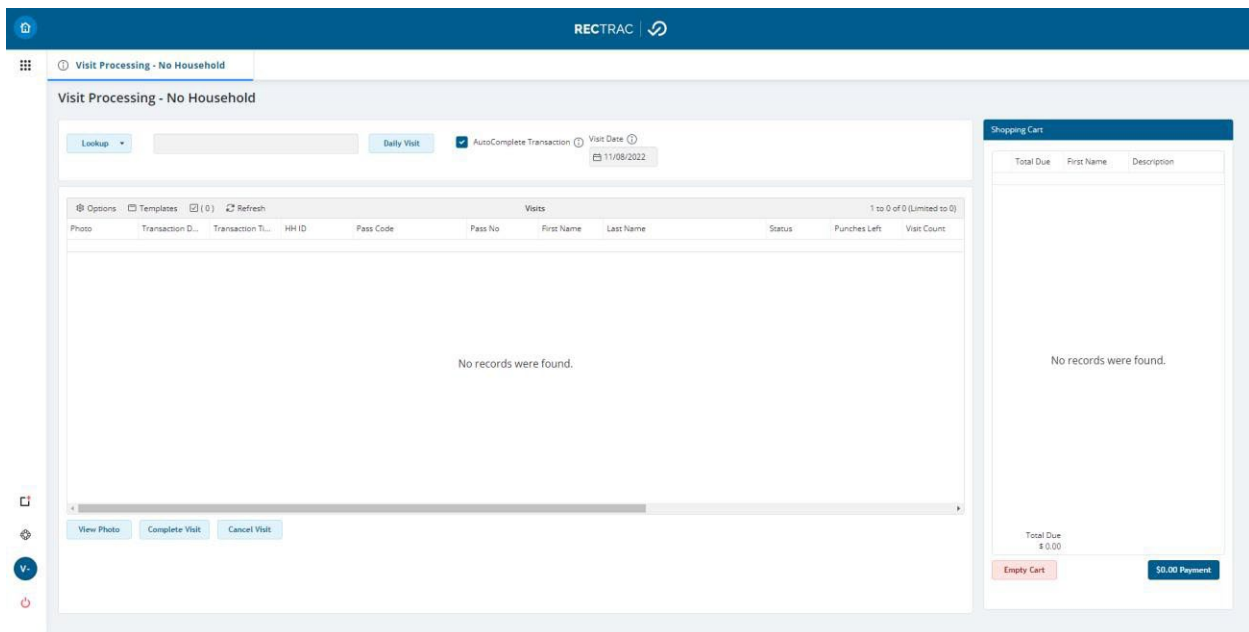
The screenshot shows the RecTrac SuperGrid interface for a household named "SuperGrid for LeBlanc (24)". The profile is set to "Hourly SG" and the start date is "11/08/2022". The grid displays reservation status for various time slots from 09:30 to 16:00 across several days. Reservations for "LeBlanc B" and "LeBlanc M" are highlighted in orange. The grid shows "Open (4)" and "Partial (3)" statuses for various time slots.

To complete the reservation extension, select the **Add to Cart** in the bottom right of the screen. This will add the enrollments to the shopping cart. Even though these items are in the shopping cart, no payments will be taken at this time. To finish the transaction, select the **0.00 Payment** Button and then the green **Process** button on the next screen.

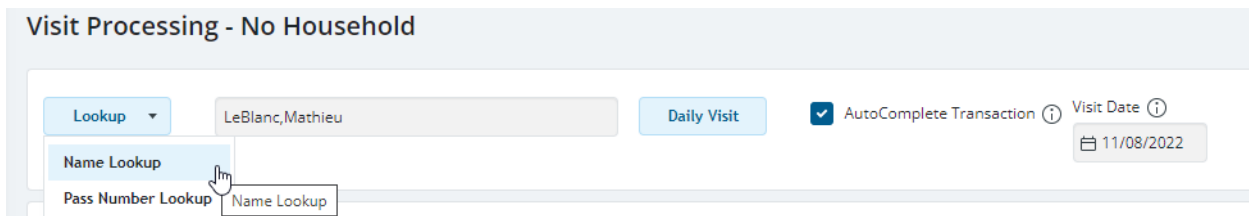
## Hourly Care Pass Visit Processing

### Checking In a Reservation

To check in a child who has preregistered for Hourly care, open **Visit Processing**. Clicking on Pass Visit Processing in your RecTrac menu will bring you to the Visit Processing screen:



To check-in a child, you will use the lookup bar at the top of the screen. You can swipe their pass, if the pass isn't present, you can also look the child up by name. To look up by name, type the child's name in the Lookup Bar, then select the **Lookup** drop down and choose **Name Lookup**.



This will bring you to the Pass Visit Person Lookup screen. Select the correct child and then click the Select button in the bottom right corner. This will prompt you with the CYMS Check In options screen. Either keep the default options or change the classroom that the child will be moved to. When the correct room is showing, click Continue in the bottom right.

Pass Visit for Child Pass on 11/08/2022 at 13:58 for Mathieu LeBlanc (Visit) i ?

**CYMS Check In**

i Mathieu LeBlanc is in the Infants (6 Wk - 12 Mo) Age Group.

Choose the class or reservation below for this visit.

**Check-In Option \*** i

Check-in at CDC Hourly Rm Infant from 14:00 to 16:00 ⌵

**Check-In Classroom \*** i

CDC Hourly Rm Infant ⌵

Cancel Continue

Now you should see that child in the Visit processing screen at the top of the DataGrid. Fees are not charged on the swipe in. Instead, fees will be calculated when the child is picked up and swiped out, which is talked about below.

## Hourly Care Drop In

To check in a child who is dropping in for Hourly care, open [Visit Processing](#). Clicking on Pass Visit Processing in your RecTrac menu will bring you to the Visit Processing screen.



To check-in a child, you will use the lookup bar at the top of the screen. You can swipe their pass, if the pass isn't present, you can also look the child up by name. To look up by name, type the child's name in the Lookup Bar, then select the **Lookup** drop down and choose **Name Lookup**.

This will bring you to the Pass Visit Person Lookup screen. Select the correct child and then click the Select button in the bottom right corner. This will prompt you with the CYMS Check In options screen. Select the correct classroom for care under Check-In Classroom. Then, select Hourly Care as the Visit Type.

Pass Visit for Child Pass on 11/08/2022 at 14:06 for Beau LeBlanc (Visit) i ?

CYMS Check In

i Beau LeBlanc is in the Toddler (2 - 3 Yrs) Age Group.

There are no upcoming reservations or classes meeting within the next hour for Beau LeBlanc today at this location.  
 If this is a drop in hourly reservation, choose the Check-In Classroom and Visit Type before you continue.

Check-In Option \* i

Drop-In Hourly Care

Check-In Classroom \* i

CDC Rm 2

Visit Type \* i

Hourly Care

Cancel

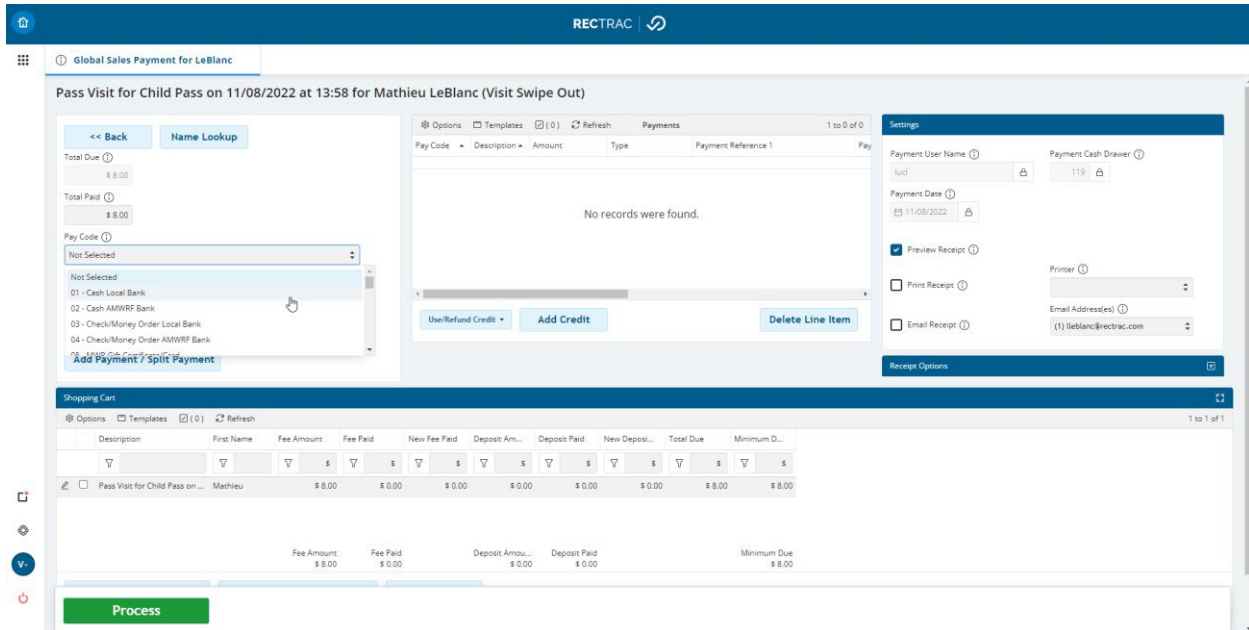
Continue

## Checking Out and Payment

To check out a child who has already been swiped in for Hourly care, open **Visit Processing**. Clicking on Pass Visit Processing in your RecTrac menu will bring you to the Visit Processing screen.

To check out a child, you will use the lookup bar at the top of the screen. You can swipe their pass, if the pass isn't present, you can also look the child up by name. To look up by name, type the child's name in the Lookup Bar, then select the **Lookup** drop down and choose **Name Lookup**.

This will bring you to the Pass Visit Person Lookup screen. Select the correct child and then click the Select button in the bottom right corner. This will bring you through to the payment screen. The system auto calculates the fees based on the amount of time the child was in hourly care.



Global Sales Payment for LeBlanc

Pass Visit for Child Pass on 11/08/2022 at 13:58 for Mathieu LeBlanc (Visit Swipe Out)

Pay Code: Not Selected

Options: Templates (0) Refresh

Payments: 1 to 0 of 0

Settings:

- Payment User Name: luel
- Payment Cash Drawer: 119
- Payment Date: 11/08/2022
- Preview Receipt:
- Print Receipt:
- Email Receipt:
- Printer: [Dropdown]
- Email Address(es): (1) lieblanc@rectrac.com

Shopping Cart:

Description	First Name	Fee Amount	Fee Paid	New Fee Paid	Deposit Am...	Deposit Paid	New Depos...	Total Due	Minimum D...
Pass Visit for Child Pass on ...	Mathieu	\$ 8.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 8.00	\$ 8.00
		Fee Amount	Fee Paid	Deposit Amou...	Deposit Paid			Minimum Due	
		\$ 8.00	\$ 0.00	\$ 0.00	\$ 0.00			\$ 8.00	

Process

When a fee is due, the Total Paid will automatically fill in the total amount due. If the Total Paid is any amount over 0, you must select the Pay Code that the transaction is tendered with. Once the Total Paid and Pay Code are set properly, click the Process button to finish the transaction.