

CYMS – Admin Assistant Visit Processing & Absence Tracking

Vermont Systems CYMS 3.1 Training

07/07/2022

Copyright Information

© 2023 by Vermont Systems

This document is the property of Vermont Systems and is provided in conjunction with an agreement between the customer and Vermont Systems for Licensed Software or Software as a Service (SaaS). The document(s) and software referred to in this publication may not be copied, distributed, electronically transmitted, posted on the web or altered in any way without the express written consent of Vermont Systems. The information contained in this document is subject to change without notice.

Vermont Systems
12 Market Place
Essex Junction, VT 05452

www.vermontsystems.com

Contents

Logging In and Navigation	4
Signing in to the RecTrac 3.1 CYMS.....	4
The RecTrac Menu.....	5
Pass Visit Processing.....	6
Processing a Visit.....	6
Cancelling Visits.....	8
Completing Visits.....	8
CYMS Miscellaneous Visit Processing.....	9
Bulk Visit Sign In/Out.....	9
Temp Visit Sign In/Out	9
CYMS Location Dashboard	10
CYMS Location Dashboard	10
Absence Entries in Household Management.....	12
Adding an Absence Entry	12
Deleting an Absence Entry	13

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.

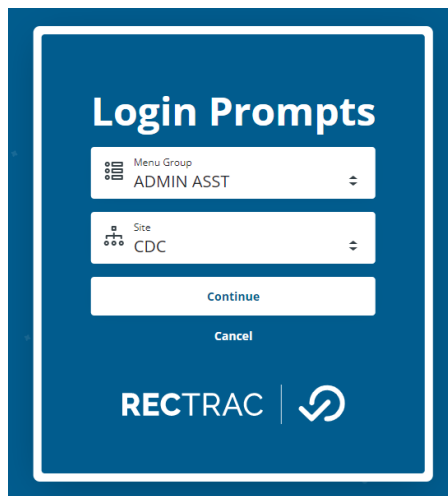
Username: Your Army email alias*

*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.*

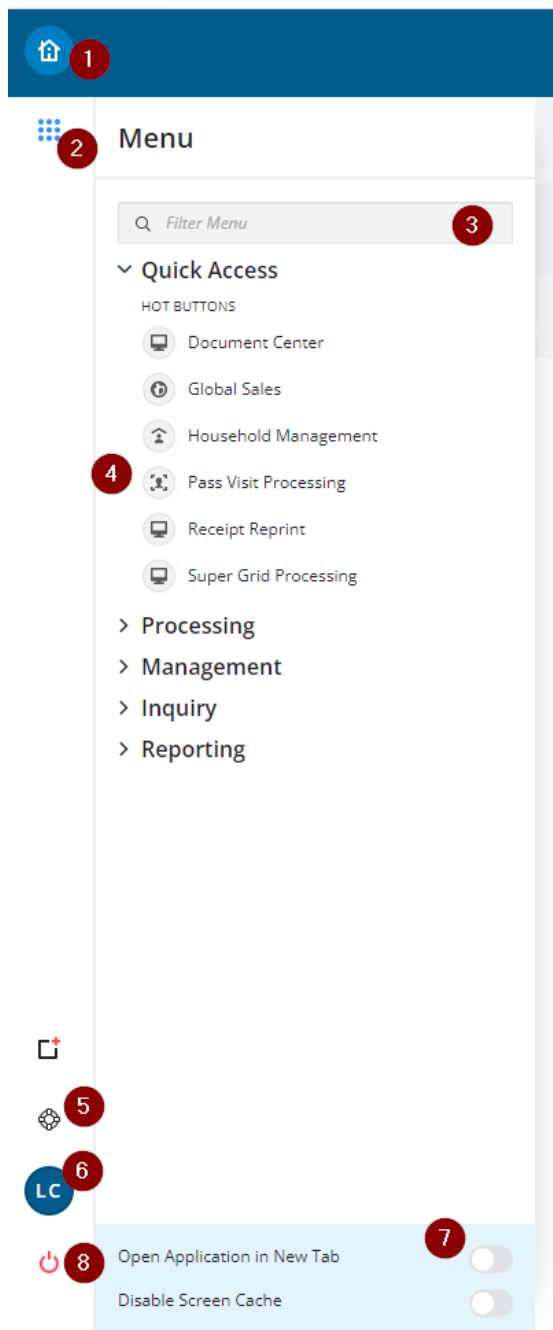
For this training, please sign in using the **Admin Asst** user group and **CDC** site.



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.

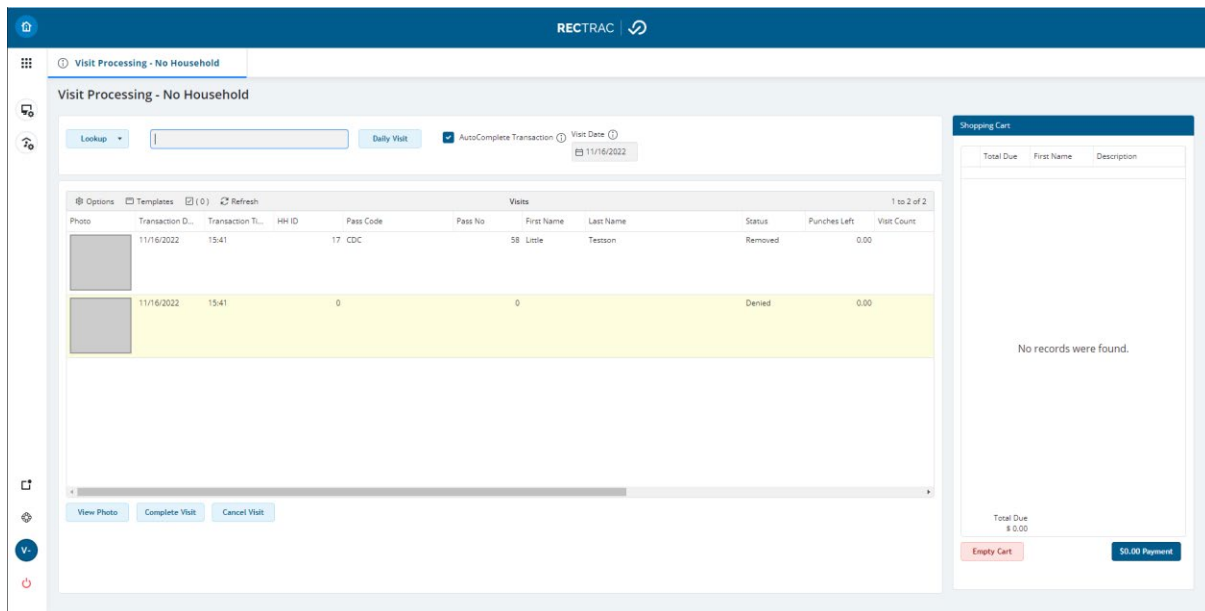
***For Example:** A user can have Household Management open, and using this slider, open a second tab of Household Management so they can work on two households at once.*

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

Pass Visit Processing

Processing a Visit

Click on **Pass Visit Processing** in the RecTrac menu. Use the Menu Search to help locate the button if desired. The Pass Visit Processing button will open the Pass Visit Processing program in a new panel. This program opens to a screen that shows visits at that location.



The full Pass Visit Screen for reference

There are multiple ways to process a visit. Click the **Lookup** button in the top left of the screen. This will prompt for a Household Datagrid. Use the Datagrid filters in the top of the screen to refine the search. Select the desired member and click **Continue**.

The visit will complete with a status of “Swiped In” if there are no additional prompts. If there is an additional prompt, it may look like the prompt on the next page. Answer all the questions and click **Continue** to complete the visit.

Additionally, if there are any fees associated with the Visit after all questions are answered, there will be a balance in the cart. The Balance needs to be paid for by going to the payment screen using the Payment button

in the bottom right-hand corner on the screen.

\$0.00 Payment

Use the appropriate payment amount and type to complete the transaction.

Pass Visit for Child Pass on 11/16/2022 at 15:47 for Little Testson (Visit) i ?

CYMS Check In

i Little Testson 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 FD (Inf) Rm 5 from 05:45 to 18:00

Check-In Classroom * i

--- Select a Classroom for Check-In ---


--- Select a Classroom for Check-In ---

- CDC Rm 1
- CDC Rm 2
- CDC Rm 3
- CDC Rm 4

Cancel
Continue

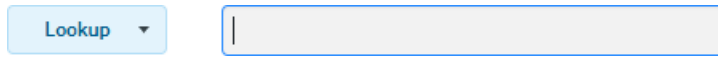
An example of additional pass visit options.

Once all prompts are completed the visit will display as “Swiped In” in the Visit Datagrid. The next child can be swiped in.

Options				Visits					
Photo	Transaction D...	Transaction Ti...	HH ID	Pass Code	Pass No	First Name	Last Name	Status	
	11/17/2022	12:43	17	CDC	58	Little	Testson	Swiped In	

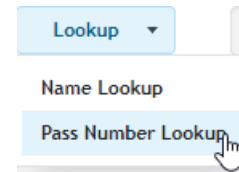
A successful swipe in Result.

To swipe in a pass, make sure that the cursor is blinking in the field to the right of Name lookup.

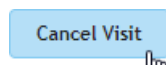


This field has several functions that assist with swiping in a child. If there is a scanner at the workstation, A pass can be scanned while the cursor is in this field. It will bring up the child assigned to the pass that was scanned. If there is trouble reading a pass, the cross reference number on the pass can be manually typed in. Hit the **Enter Key** after typing in the pass number to start the search.

A unique numbered pass can also typed in the field and then searched with the down arrow option on lookup. Type in the pass number and left click on the Lookup arrow. Click Pass Number Lookup to begin that search.

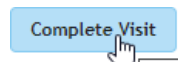


Cancelling Visits



To cancel a visit, highlight a “swiped in” visit record in the Pass Visit Processing Datagrid. Select the **Cancel Visit** button and follow any questions or prompts.

Completing Visits

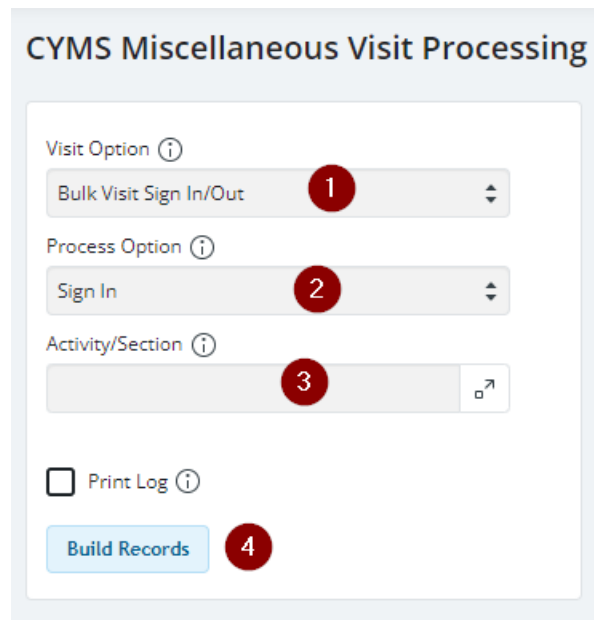


To complete a visit, locate an incomplete record in the Datagrid. It will have a status of incomplete. Highlight the record and select **Complete visit** button. Any prompts or questions will need to be answered and the visit will be completed as a “Swiped In” record.

CYMS Miscellaneous Visit Processing

Bulk Visit Sign In/Out

Use the menu to locate “CYMS Miscellaneous Visit Processing”. This program allows for multiple children to be signed in or out at one time. The options below are very flexible and drive all the actions in the Process step.



Settings Options for Bulk Visit Sign In/Out

Bulk Visit Sign In/Out Options

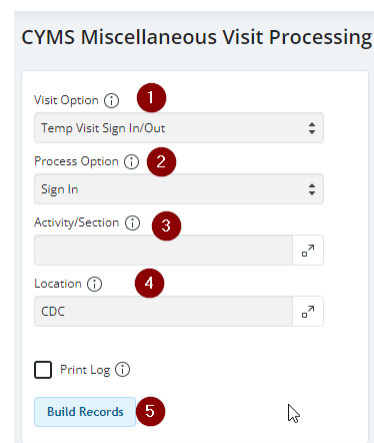
- 1 – **Visit Option:** Select Bulk or Temp to control which Visit option is used.
- 2 – **Process Option:** Select Sign in or out based on the desired action
- 3 – **Activity/Section:** Use the picklist to select the activities that involve children that need visits processed.
- 4 – **Build Records:** Finally Select this button to build out the Datagrid results based on your selections of the previous options.

Once the selected settings have been built, Select the children in the Datagrid that will be signed in or out based on the settings. Click **Process** to run this action for all the selected children.

Temp Visit Sign In/Out

Use the menu to locate “CYMS Miscellaneous Visit Processing” again. It is important to note that changing the Visit Option drives the use of Temp Visit Sign In/Out. The only Option change is the location field labeled 4 in the diagram on the right. Select the appropriate location.

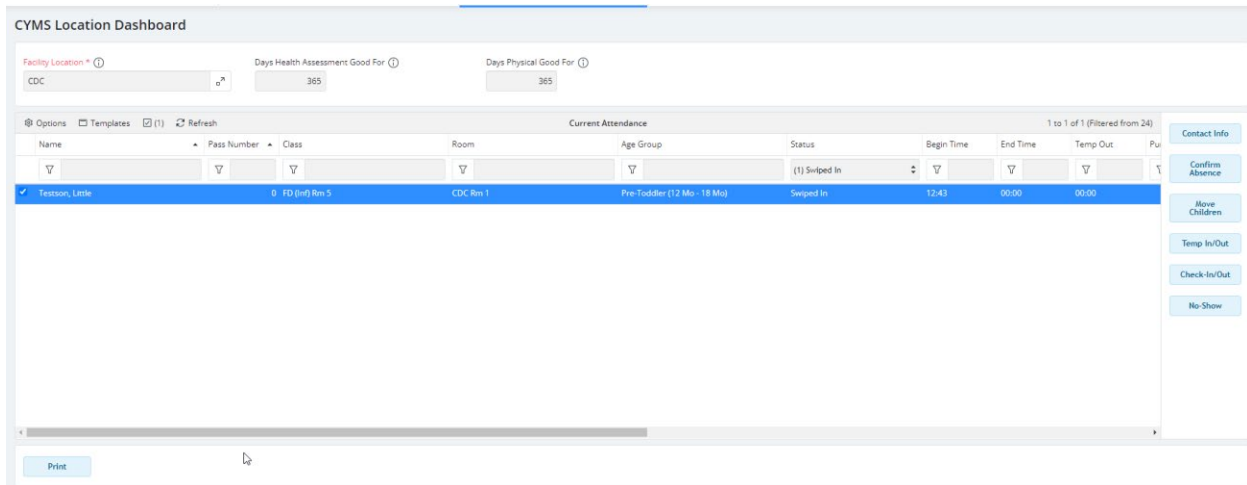
Once the selected settings have been built, Select the children in the Datagrid that will be signed in or out based on the settings. Click **Process** to run this action for all the selected children.



CYMS Location Dashboard

CYMS Location Dashboard

Search the menu for “CYMS Location Dashboard” This is a tool that allows staff to move children, view contact information, maintain attendance and so much more.



Full location dashboard. The options on the right show when a child is selected.

To use the location dashboard, verify that the correct location is selected in the Facility Location field.

Facility Location * ⓘ

Then select a child or multiple children and use the options that populate on the right-hand side of the screen. Each of these options have some cross over from other parts of RecTrac and are all brought together to allow for multiple actions in one place.


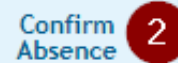
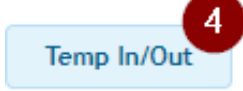

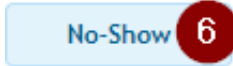
It is important to mention that all of the features require a child to be selected and then simply pick the desired option.

The final option to mention at the bottom left of the screen, is the Print option. This will create a list of children in the data grid which is useful for attendance and contact information if desired.



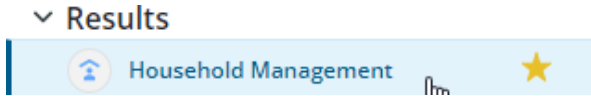
Selected Options

- 1 – **Contact Info:** Select the child and click Contact Info to show any details or emergency contact information for the selected child.
- 2 – **Confirm Absence:** Select the child or multiple children and click Confirm Absence. This will prompt for notes and update the status of the children.
- 3 – **Move Children:** Select the child and click Move Children. This will prompt to move the child out of the current room and into a new room of choice.
- 4 – **Temp In/Out:** This option provides a singular Temp In/Out option. Select the child and Click Temp In/Out. Any additional questions will need to be answered.
- 5 – **Check In/Out:** This option provides a singular Swipe in/out option. Select the child and Click Sign In/Out. Any fees will present the sales screen and need to be paid to return to the Location Dashboard.
- 6 – **No Show:** Select a child and Click No Show, this will add any fees to the household and will need to be completed to return to the Location Dashboard.

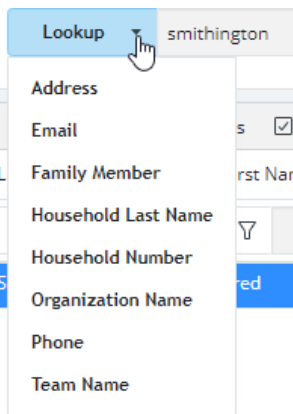
Contact Info 1Confirm Absence 2Move Children 3Temp In/Out 4Check-In/Out 5No-Show 6

Absence Entries in Household Management

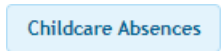
Adding an Absence Entry



Absences are used to track when children will be out for periods of time during their enrollments. Use the menu to locate Household Management. Search for the desired household using a last name or other form of contact information. Lookup will default to last name, but any other search method can be used by typing in the information in the lookup tab and changing to the matching type like email for example. Here is a list of all the available options.



Once a result is located Click on the Childcare Absences button on the bottom of the screen.



This will load up childcare absences Datagrid. Click Add Absence to create an absence record. There are a handful of fields that need to be filled out.

Fred Smithington (Household # 27) - Childcare Absences

Options Templates (0) Refresh Childcare Absence History

Date	Name	Description	Reason For Absence	Additional Absence Information
<input type="checkbox"/> 11/15/2022	Larry Smithington	FD (Inf) Rm 5	Family Emergency	Getting a pet. Do not tell them :)

Childcare Absences DataGrid Example

Fill out the required information and click Save in the bottom right of the screen. This will create a trackable record for the child. Here is an example of the fields.

Childcare Absence

Add a Planned Absence

Program / Child * ⓘ

(1) Larry Smithington - FD (Inf) Rm 5

Absence Start Date * ⓘ

📅 12/05/2022

Absence End Date * ⓘ

📅 12/05/2022

Reason For Absence * ⓘ

Other

Additional Absence Information ⓘ

Plain Text Editor

Getting a dog. Do not tell them. :)

Childcare Absence Fields

Deleting an Absence Entry

Highlight the Childcare Absences Record in the DataGrid and Click the Delete Absence button.

Fred Smithington (Household # 27) - Childcare Absences

Options Templates (2) Refresh					Childcare Absence History	
Date	Name	Description	Reason For Absence	Additional Absence Information		
12/05/2022	Larry Smithington	FD (Inf) Rm 5	Other	Getting a dog. Do not tell them. :)		

Childcare Absence record Example

Delete Absence

The record is immediately removed and no longer available.