

CYMS- Withdrawal Processing

Vermont Systems CYMS 3.1 Training

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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.

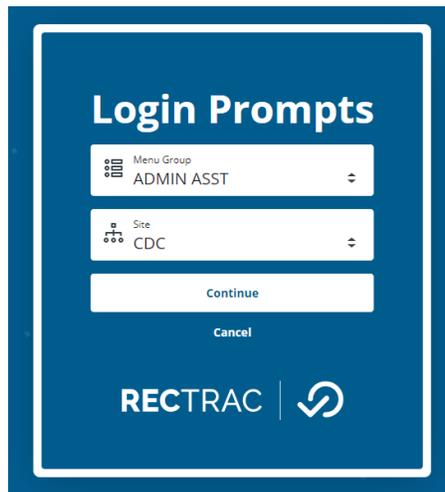
Username: Your Army email alias*

*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.*

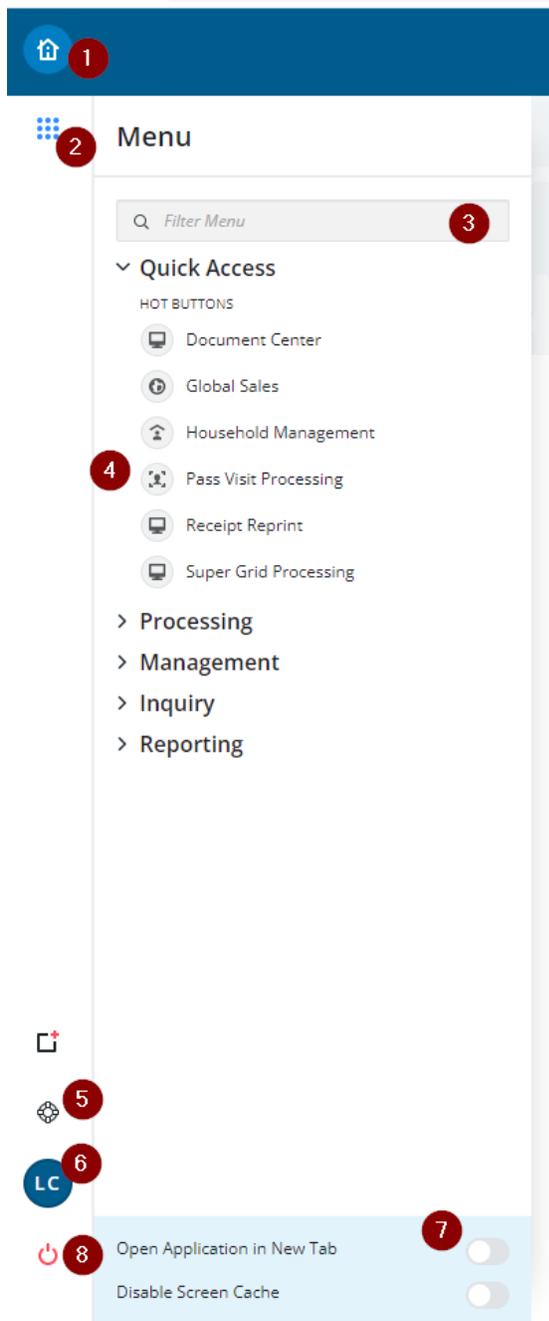
For this training, please sign in using the **Admin Asst** user group and **CDC** site.



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.

Withdrawal Processing

Withdrawal Processing

Click on **Withdrawal Processing** in the RecTrac menu. Use the Menu Search to help locate the button if desired. The Withdrawal Processing button will open the Withdrawal Processing program in a new panel. This program opens to a screen that shows activities on the left, and date ranges on the right.

Withdrawal Processing

Process Option ⓘ Last Attendance Date * ⓘ Withdrawal Reason * ⓘ

Withdrawal ⓘ

Add Option ⓘ Household * ⓘ Add

Household ⓘ

Options Templates 0 Refresh
Records to Process 1 to 0 of 0

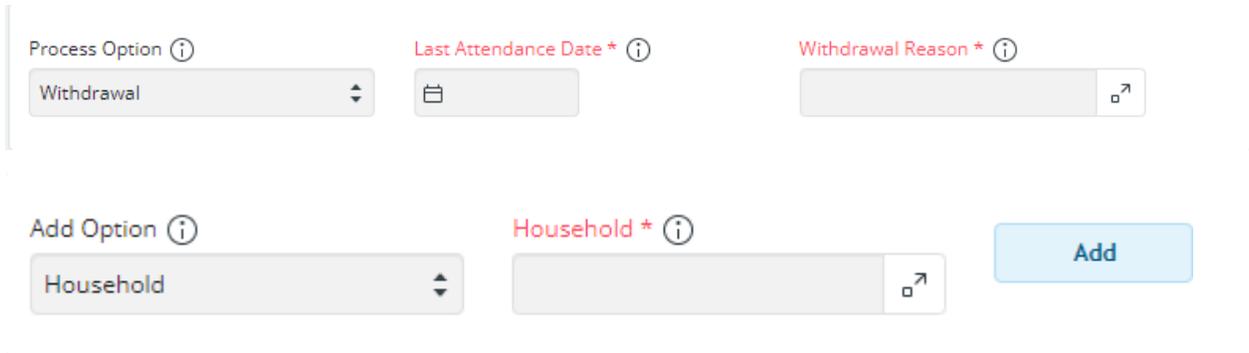
Name	Last Date	Withdrawal Reason	Section	Description	Sponsor Name	BirthDay	Details
▼	▼	▼	▼	▼	▼	▼	▼

No records were found.

Process
Remove Selected

The CYMS Withdrawal Processing program typically is used when a household notifies you that they are leaving your program, or when a child transitions from one Daycare Center to another (i.e. when a child goes from a Child Development Center to a School Age Center). When run, the program will set the enrollment status for all applicable children in the household to "Withdrawing," thus allowing you to fill the roster slots with other children as needed. In the event some or all the enrollments are linked to installment bills, then the program will prorate the installment bill during which the Last Attendance Date falls and cancel all remaining bills for the program

Running Withdrawal Processing



To Run the Before and After School Prorate Program first fill out the options across the top. Once they are filled out click the add button to add the children to the DataGrid. You will then select process in the bottom left to run the withdrawal. After you process the withdrawal the CYMS Withdrawal Processing report is auto generated, children’s enrollment status will change to “Withdrawing” until their last attendance date, when their status will change to “Withdrawn”

The On-Screen Options are:

Process Option - Withdrawal – For all applicable children, this option sets the Enrollment Status on the children to "Withdrawing." If installment bills are linked to the activities, then this option also finds the first bill with a status of "Unbilled" before or equal to the Last Attendance Date and prorates it. It then cancels all remaining bills.

Process Option - Undo – For all applicable children, this option reverses the "Withdrawal." The "Undo" process sets the enrollment status on the children back to "Enrolled." In the event you have installment bills linked to your activities, this option also reverts all bills currently labeled as "Canceled Withdrawal" and "Unbilled Adjusted" to "Unbilled" status. Lastly it runs an installment bill recalculation for the household(s) processed. When running in "Undo" mode, you will NOT have options for Last Attendance Date or Withdrawal Reason.

Last Attendance Date – This date represents the last day the child/children will be in your center. This is a mandatory field.

Withdrawal Reason – Click the pop out icon and select the Withdrawal Reason Code that most closely matches the reason this child is/these children are leaving your program.

Add Option – Select from the following Options:

- Household - This option should be used when an entire family is withdrawing from your program. For Example: The Spruance family has orders to PCS from your garrison to another garrison.
- Family Member - This option should be used when a single family member in a household is withdrawing from your program. For Example: Due to a change in employment, the Halsey household no longer needs full day care for their two-year-old daughter. However, they wish to keep their six-year-old son in Before and After School Care.

- Section - This option should be used when all (or some) of the children enrolled in a program are withdrawing because they are moving to a new Center. For Example: All of the five-year-old's in your Preschool Program will be leaving the CDC and going into Before and After Kinder Care at the SAC on 28 August.